knowledge14®

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Lab Guide

Mobile Administration: Any App, Anywhere, Anytime

Tyler Jones & Scott Hadaway

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

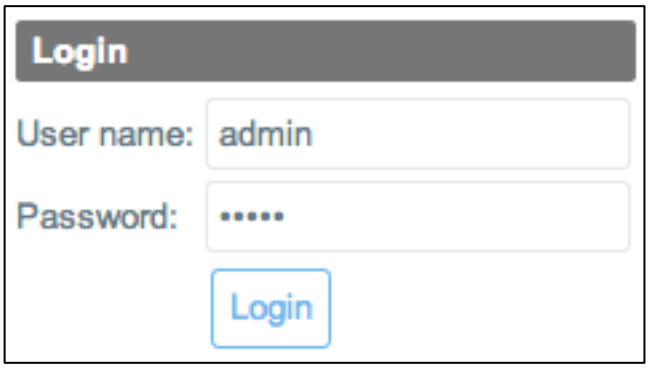
This lab familiarizes users with the new mobile UI released in Dublin, and explains how to configure it in numerous possible ways.

Lab 1
User Interface Administration

Log on to Your Training Instance

1. Your instance URL is on the cover page.

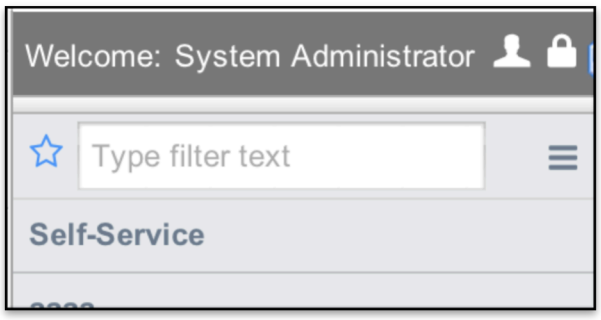
2. Login using the **admin** credentials provided.



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Install the Mobile Plugin

1. Inside of the Navigator on the left, find the input that says **Type Filter Text**



2. Type **plugin**.

3. Locate the **Plugins** link under the application **System Definition**.



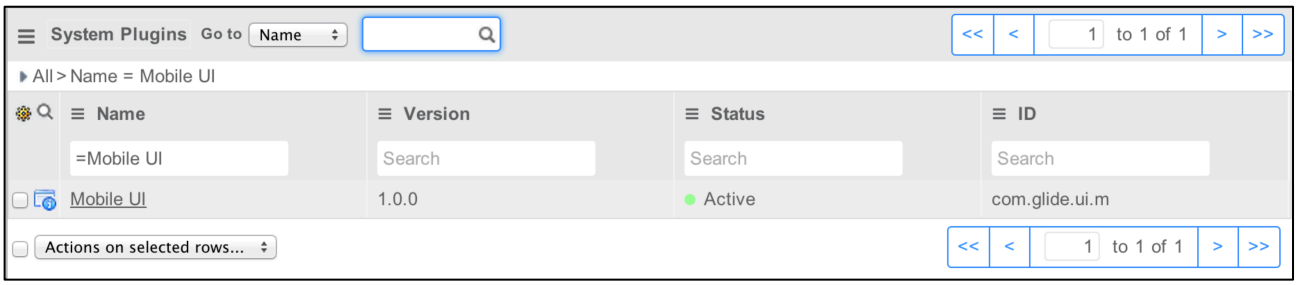
NOTE: In subsequent labs, these steps will be abbreviated to **Application Name > Module Name**.

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4. Search for the **Mobile UI** plugin by entering the name in the **Search** field.



5. Open the **Mobile UI** plugin by clicking its link.



6. Click **Activate/Upgrade** if the plugin **Status** field is not set to **Active**



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Open the Mobile UI

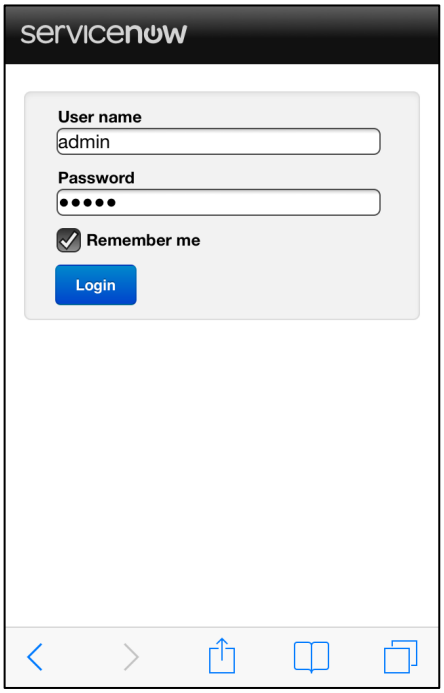
Lab 2
Using the
Mobile UI

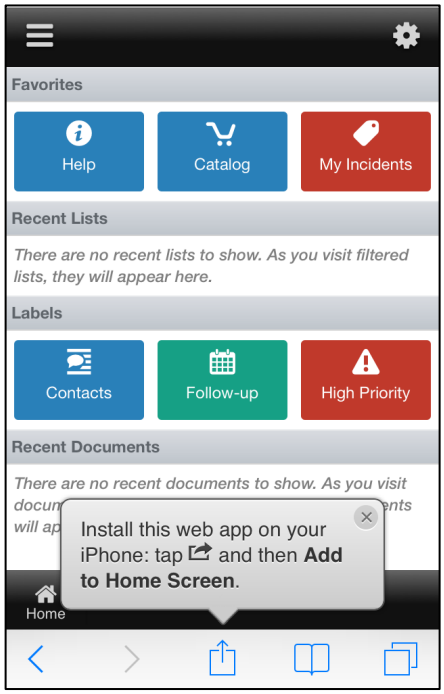
1. Using your iPhone or Android phone, navigate to your ServiceNow instance using the URL provided to you.

NOTE: If you are using a desktop browser such as Google Chrome, Apple Safari or Mozilla Firefox, you can navigate to your mobile interface with the URL: http://<instance>/$m.do

2. Login using the credentials provided.

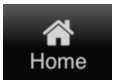
3. Your home page should appear.

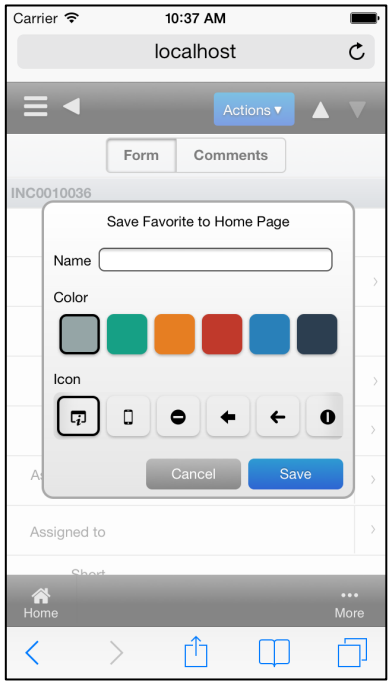


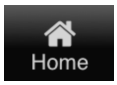


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Adding Favorites

1. Using your mobile interface, tap the **Home** icon to go to the home page.
2. Tap the  icon to open the navigator.
3. Open **Incidents -> Active**.
4. Tap the  icon to create a new incident.
5. Press and hold the  **Home** button until a dialog pops up to configure your home page favorite.
6. Assign the name **New Incident**, and tap a color and icon to assign it to the favorite.



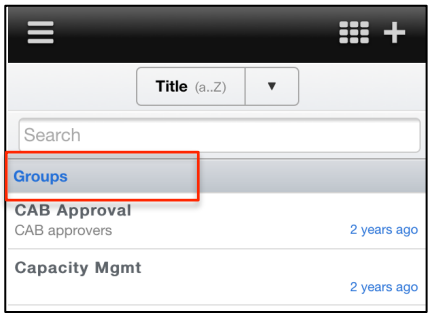
7. Tap the  **Home** button to go to your home screen. The favorite now appears. If you tap the favorite, it opens the new incident page you bookmarked.
8. If you wish to modify the favorite, press and hold the favorite itself. This action opens the same popup that you saw when creating the favorite.

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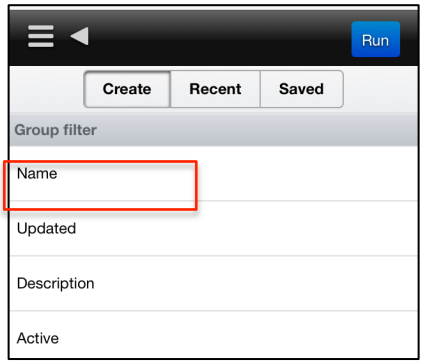
Using Filters and Recent Lists

1. Using your mobile interface, go to **User Administration > Groups**.

2. Tap in the blue header row that says **Groups**.

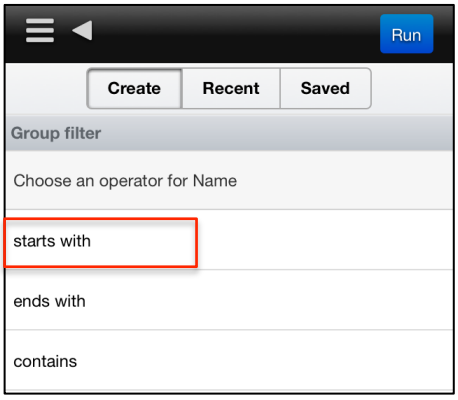


3. Tap **Name**

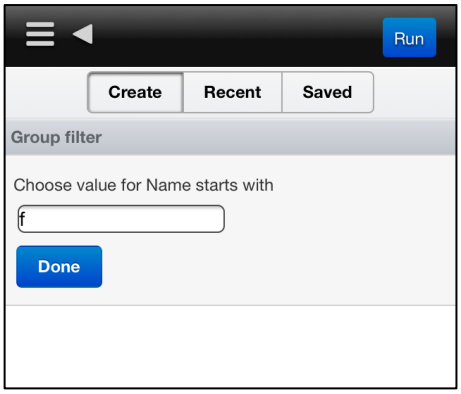


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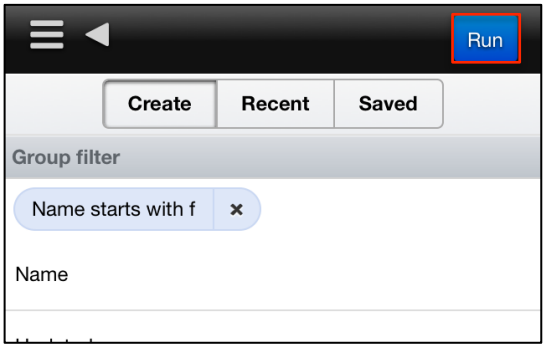
4. Tap **Starts With**



5. In the **Name starts with field**, enter **f**.



6. Tap **Run**.



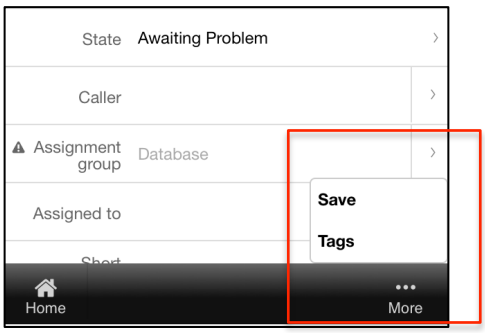
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Using Tags

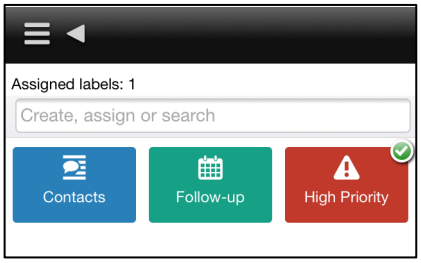
1. Using your mobile interface, go to **Incident > Active**.

2. Open the first incident record on the list.

3. Tap the **More** menu at the bottom of the screen, and select **Tags**.

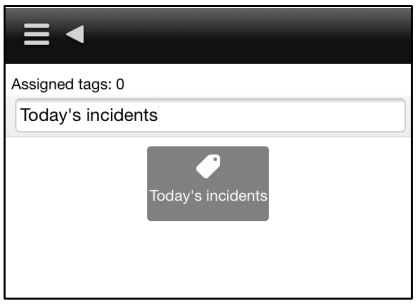


4. Tap the existing tag called **High Priority**. A check appears on that tag.

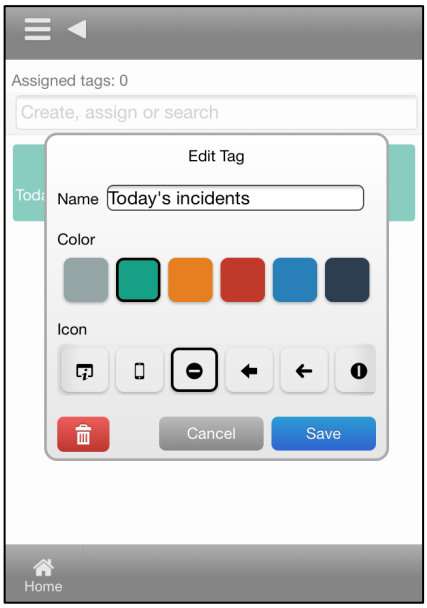


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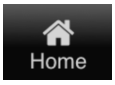
5. In the Assigned tags field, enter **Today's Incidents**. A gray tag appears with the name as you type it. Tap **Return** when you are done typing.



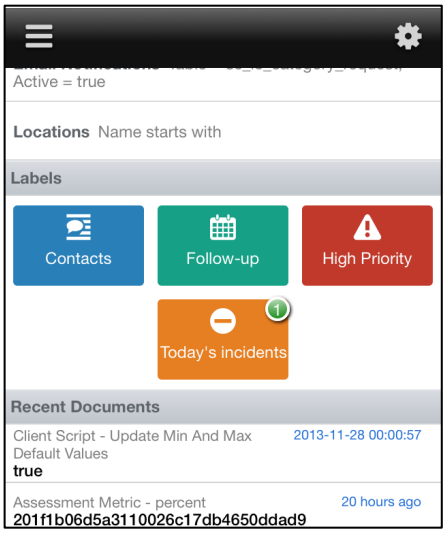
6. Fill in a label, color, and icon for your tag.



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7. Return to the 

Home screen and see your tag in the third section.

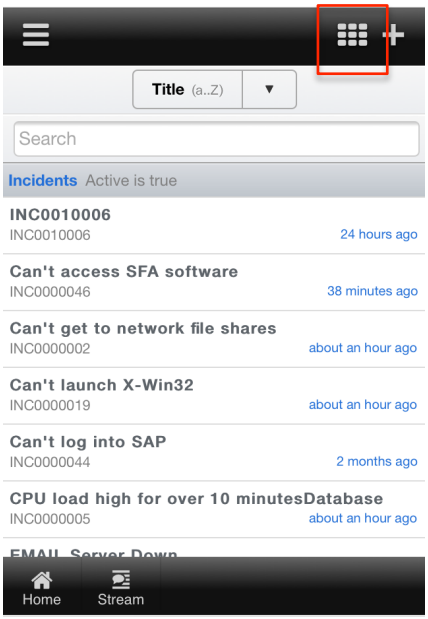


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Using Lists and Streams

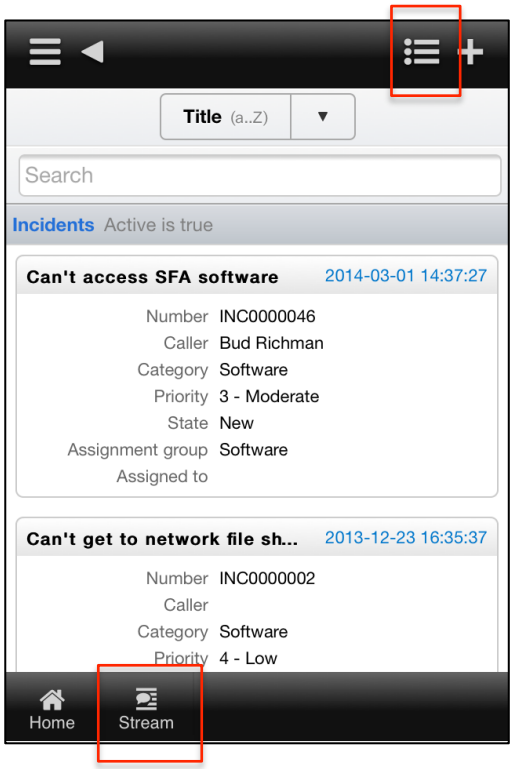
1. In the mobile interface, go to **Incidents > Active**.

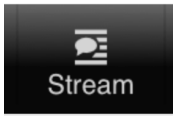
2. Tap on the  **Card** icon at the top of the screen. You will see that the list changes to cards.



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3. Tap the  **List**. The list will return to list view.



4. On this list, tap the 

Stream button at the bottom.

5. This is the stream page. Journal entries from records will appear here in real time as they are entered. Tap any of the entries to go to the activity stream for that specific record.

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Configuring the look and feel of the Mobile UI

Lab 3
Configuring the Mobile UI

1. From a desktop browser, go to **System Properties > Mobile UI Properties**.

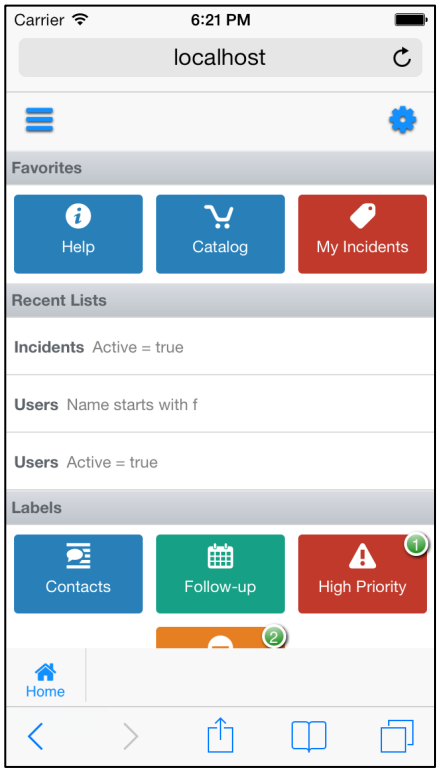
2. Change the following properties to make a flat UI that looks more like iOS7:

   Brief page title for tablet and mobile interfaces**: ServiceNow Mobile**
   Start color of gradient for the tablet and mobile UI Header: **#f8f8f8**
   End color of gradient for the tablet and mobile UI Header: **#f8f8f8**
   Color for text in the header and footer for tablet and mobile devices: **#1390ff**



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3. Refresh the smartphone UI. The new colors appear on the UI.



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Adding new Navigator Apps

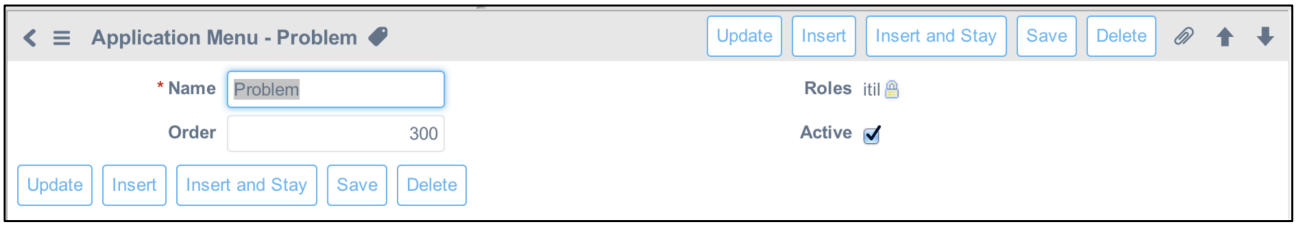
Adding other applications to the mobile experience allows users to take advantage of the additional tools. In this example, we add **Problem Management** to the mobile system.

1. Open **System Mobile UI > Navigator Apps**.

2. Click **New**.

3. Create an application with the following:

   Name: **Problem**
   Order: **300**
   Roles: **itil**



4. Press **Save**.

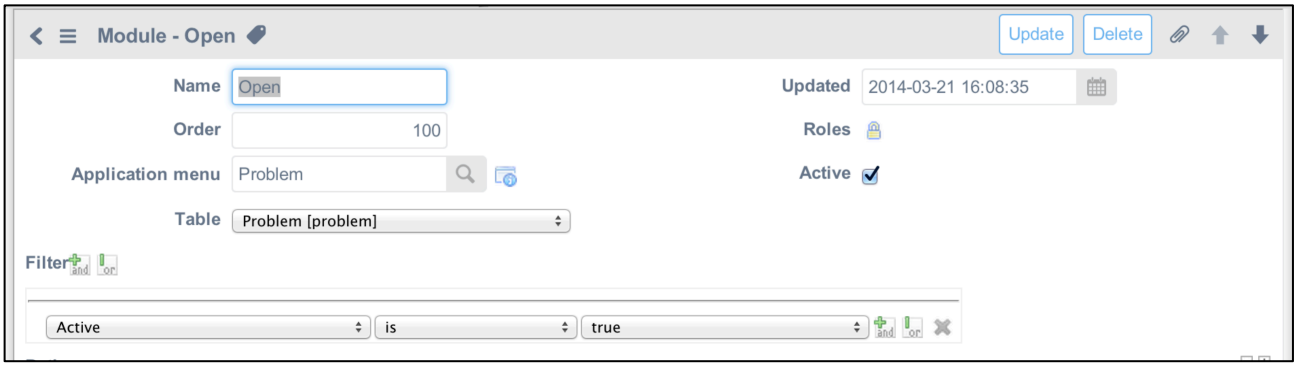
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5. In the resulting list, select **Problem**.

6. Press **New** under the **Modules** list.

7. Create a module with the following:

   Name: **Open**
   Order: **100**
   Table: **Problem**
   Filter: **Active is true**



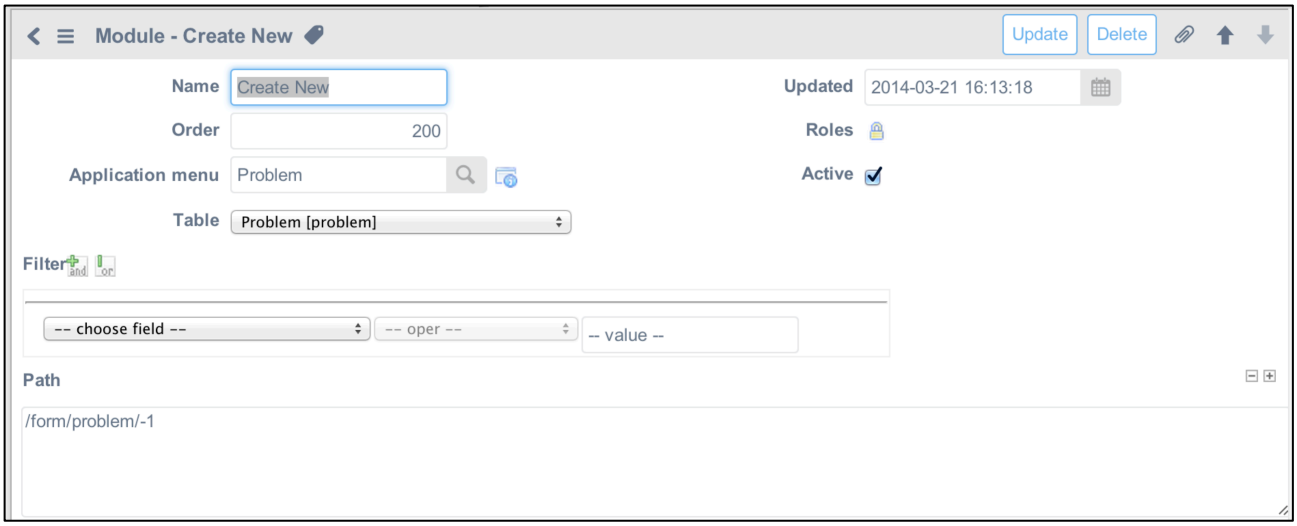
8. Press **Update**.

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9. Create another module with the following:

   Name: **Create New**
   Order: **200**
   Table: **Problem**
   Path: **/form/problem/-1**

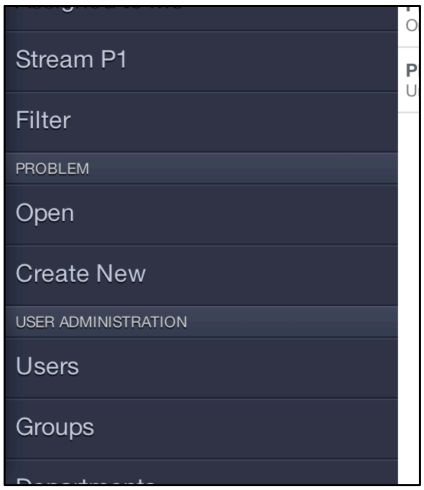
   Note: The path has three parts:
   1. The view type
   2. The table
   3. The sys_id



10. Press **Update**.

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11. Go the mobile interface. You should see the new Application, **Problem**, and Modules, **Open** and **Create New**.



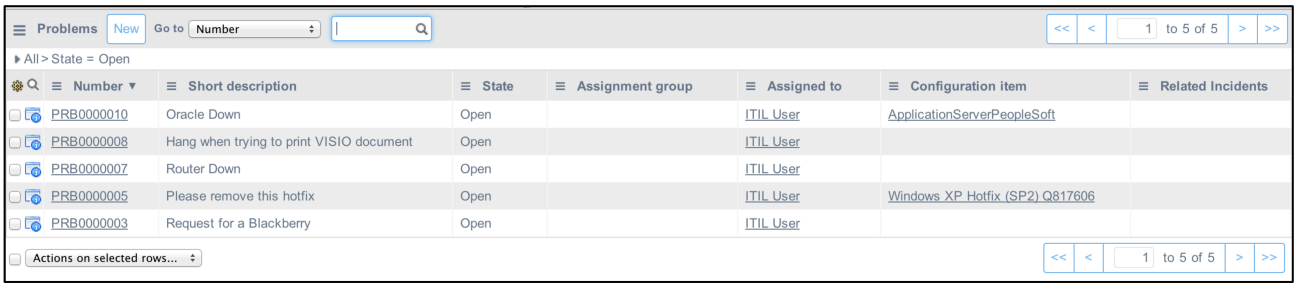
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Configuring List and Form Layouts

This exercise, adds a list and form layout for our list of Business Services.

1. From the desktop browser, go to **Problem -> Open**.

2. Notice the fields that are showing: an out-of-box instance Number, Short Description, State, Assignment group, Assigned to, Configuration Item, Related Incidents.

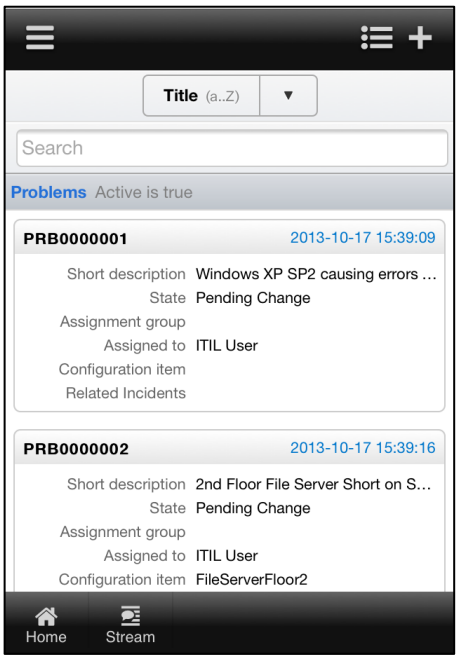


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3. Open the mobile interface and open **Problem -> Active**.

   Note the fields that show on the list.

   - You'll notice that there are columns that you can sort on. These fields are chosen from the **Default** list layout.
   - If you change to card view, the fields that show on the card are also driven from the **Default** list layout.



4. Open a record.

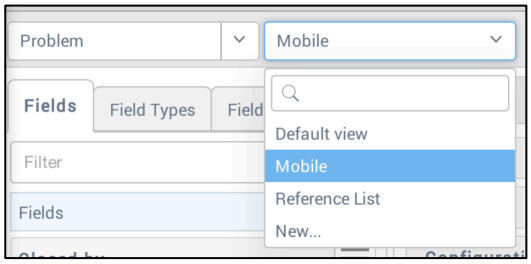
   - This form layout looks first for a view called **Mobile**, and if that does not exist, it looks for the **Default** view.

5. Open a **Problem** record from your desktop browser.

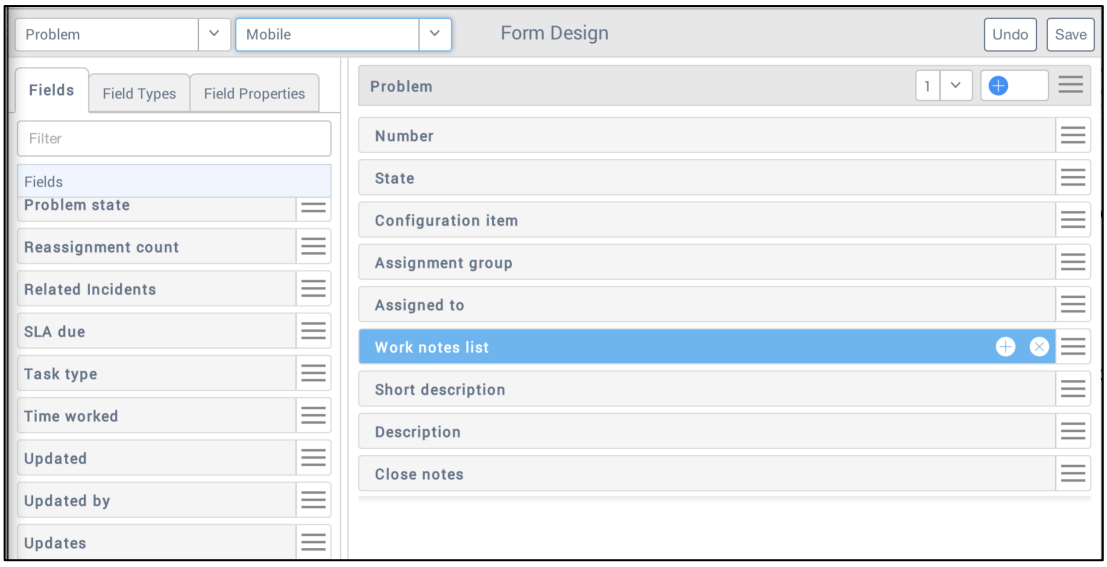
6. Right click in the header, select **Personalize > Form Design**.

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7. From the second dropdown, select **Mobile**.



8. Drag the **Work notes list** field from the left pane into the form design.



9. Go to a **Problem** record in the mobile interface.

   Notice the layout and features.

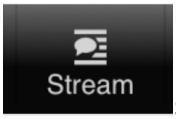
   - Some fields display differently on the mobile interface.
   - There is no idea of 2 column layouts. Everything is compacted to one column.
   - By default, journal fields are hidden and showed on the “Comments” tab.

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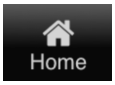
Setting up default home page favorites

This exercise sets up a stream as a default home page favorite.

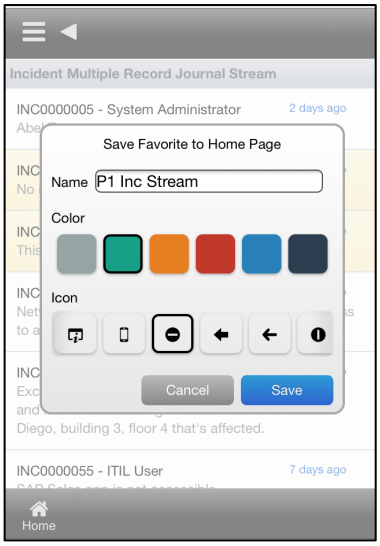
1. From your mobile browser, go to **Incident -> Active P1**.

2. Click on the 

stream icon at the bottom left.

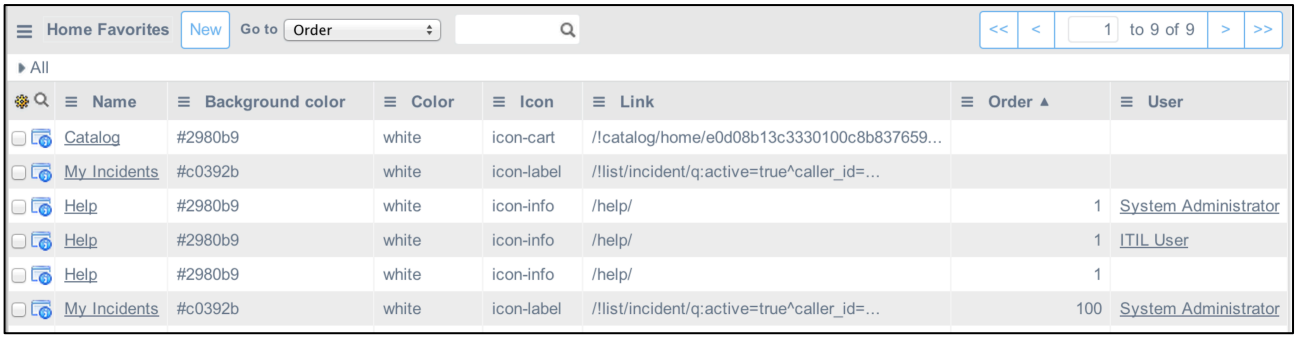
3. Hold down the 

Home button to save a new Home Page Favorite. Fill in a name of **P1 Inc Stream** and give it a color and icon.



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4. In a desktop browser navigate to **System Mobile UI > Home Favorites**. Note that same records have a value for the field **User** and some do not. The entries that do not have a user defined are the defaults whenever a new user uses Mobile.



Home Favorites | New | Go to Order | << < 1 to 9 of 9 > >>

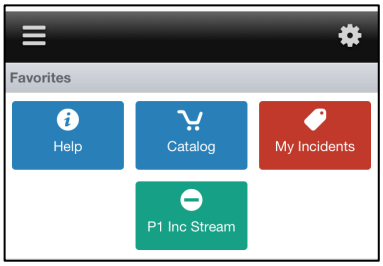
All

Name	Background color	Color	Icon	Link	Order ▲	User
Catalog	#2980b9	white	icon-cart	/!catalog/home/e0d08b13c3330100c8b837659...		
My Incidents	#c0392b	white	icon-label	/!list/incident/q:active=true^caller_id=...		
Help	#2980b9	white	icon-info	/help/	1	System Administrator
Help	#2980b9	white	icon-info	/help/	1	ITIL User
Help	#2980b9	white	icon-info	/help/	1	
My Incidents	#c0392b	white	icon-label	/!list/incident/q:active=true^caller_id=...	100	System Administrator

Note: You can create a new default **Home** page **Favorite** with no User filled in; however, it is much easier to create a Home Favorite as yourself and empty the **User** field.

5. Find the **Favorite** that you just created in mobile and empty the **User** field.

6. Log out of mobile, and log back in as a new user (try employee/Knowledge14).



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Configuring UI Actions

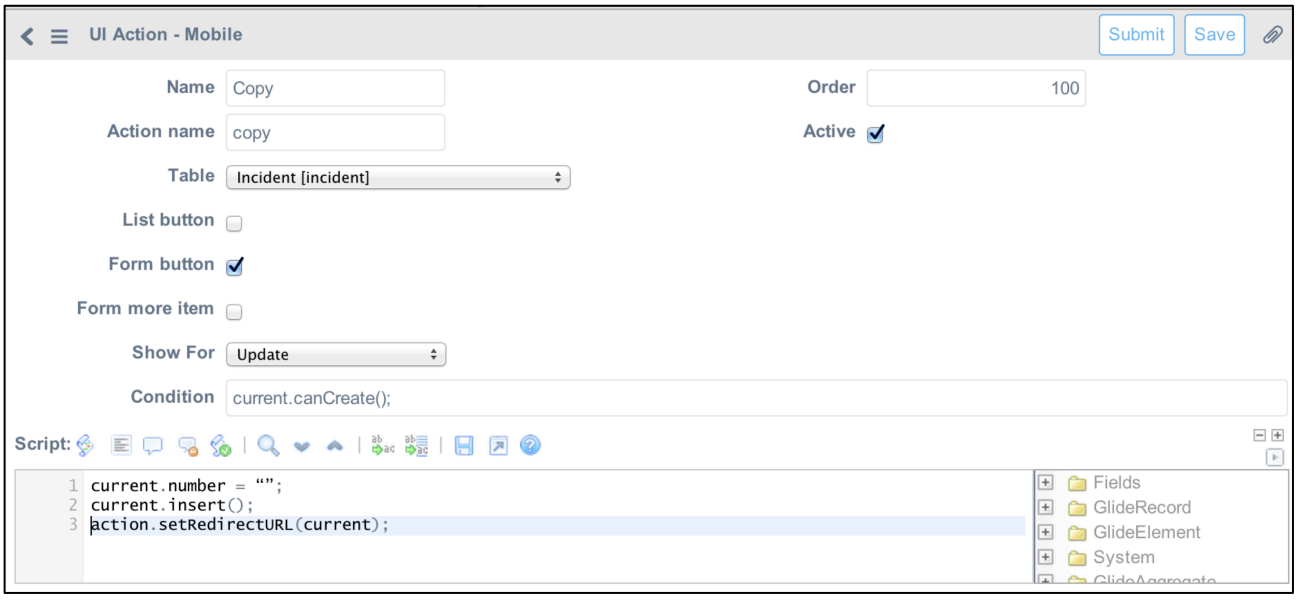
This exercise creates a “Copy” UI Action that can copy an incident. Copying **a UI Action** lets you copy data to new records, thereby reducing manual.

1. In your desktop browser, go to **System Mobile UI -> UI Actions – Mobile**.

2. Click **New**.

3. Create a UI action with the following values:

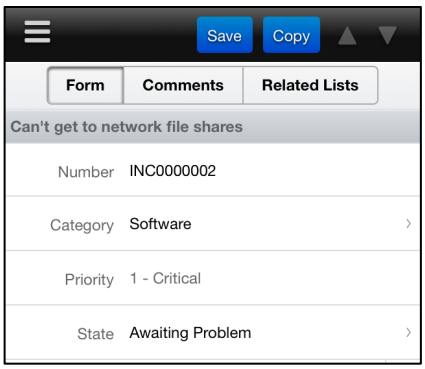
   Name: **Copy**
   Action name: **Copy**
   Table: **incident**
   Form button: **true**
   Show for: **Update**
   Condition: **current.canCreate()**
   Script: **current.number = “”; current.insert(); action.setRedirectURL(current);**



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4. Go to your mobile interface and see an incident record.

5. Select **Copy**.



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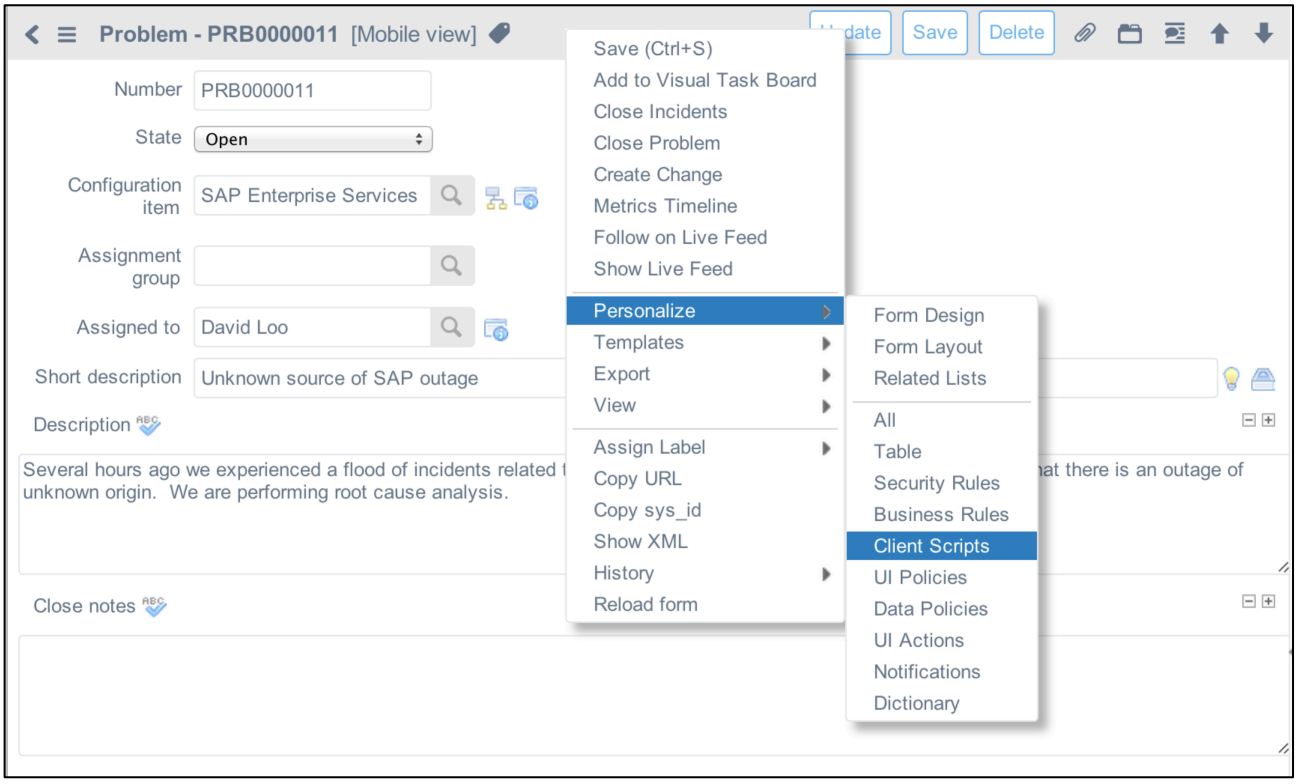
Writing a Mobile Client Script

Review the **Problem** module and its records. If you set the **State** to **Pending Change**, we want to change the label of the **Change Request** field to **Pending Request**

1. In your desktop browser, go to **Problem -> Open**.

2. View any open problem ticket.

3. Right click in the header, select **Personalize -> Client Scripts**.

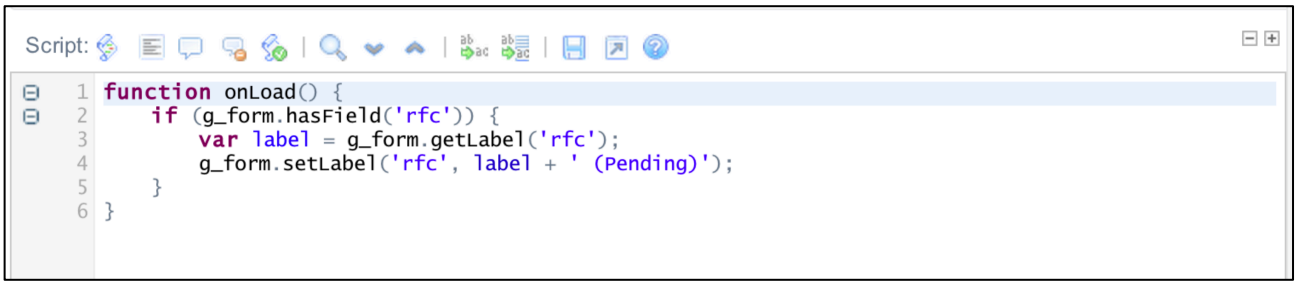


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4. Click  **to** create a new Client Script.

Name: **Set Charge Request Label**
Table: **Problem**
Type: **onLoad**
UI Type: **Mobile**
Script:

```
function onLoad() {
   if (g_form.hasField('rfc')) {
      var label = g_form.getLabel('rfc');
      g_form.setlabel('rfc', label + ' (Pending)');
   }
}
```



5. Go to the mobile interface and open a problem record.

6. Note whether the label has changed.

   If the label did not change, check to see if the field **Change Request** has been added to the **Mobile** view of the form.

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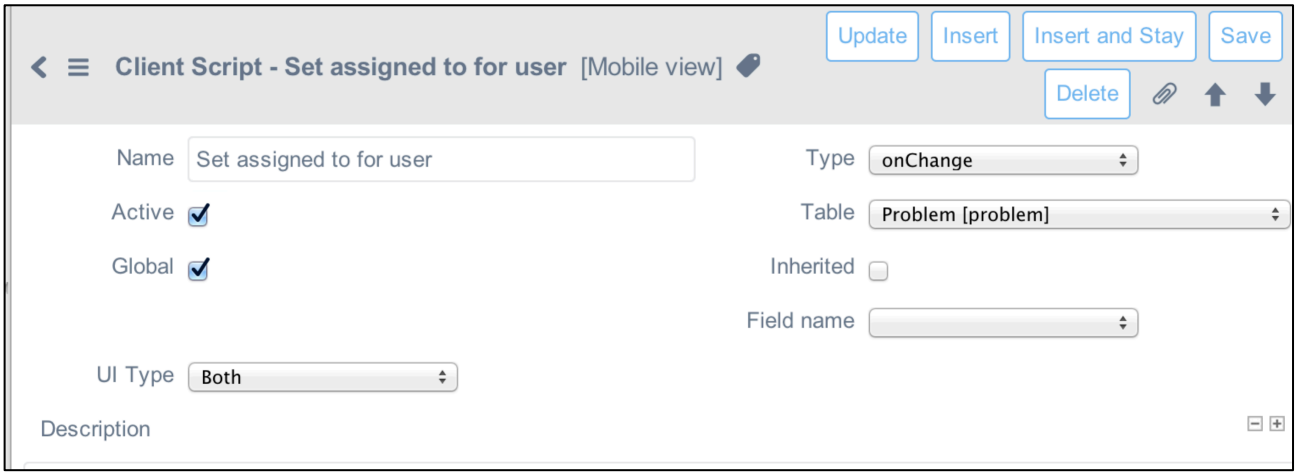
Migrate an old Client Script

1. In your desktop browser, navigate to **Problem > Open**.

2. Right-click in the header and select **Personalize > Client Scripts**.

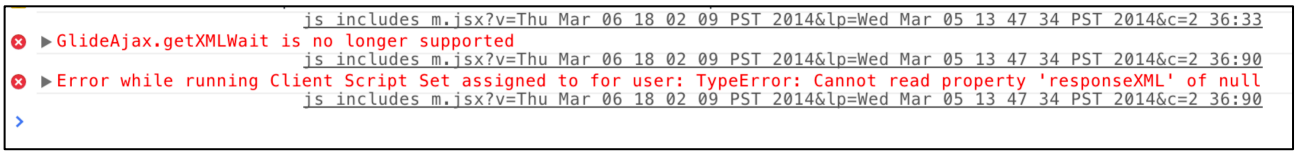
3. Open the script titled **Set Assigned To for Group**.

4. The following script appears, which is configured for the Desktop. Change the **UI Type** to **Both** so that it will run on both Mobile and Desktop.



5. To see the script in action, create a new problem (**Problem -> Create New** in Desktop). Change the **Assignment group** to **Network**. See if a value fills in for the **Assigned to** field.

6. Next, go to the mobile interface and try the same steps. Go to **Problem -> Create New** and change the **Assignment group** to **Network**. (Spoiler alert: it probably does not work). You should see errors in the log.



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7. In your desktop browser, go back to the **Client Script** titled **Set assigned to for user**. Update the script to remove the synchronous AJAX call.

Remove the following code:

```
ga.getXMLWait();
var answer = ga.getAnswer();
var answerParts = answer.split('^');
g_form.setValue('assigned_to', answerParts[0], answerParts[1]);
```

And add the following in its place:

```
ga.getXMLAnswer(function(answer) {
	var answerParts = answer.split('^');
	g_form.setValue('assigned_to', answerParts[0], answerParts[1]);
});
```

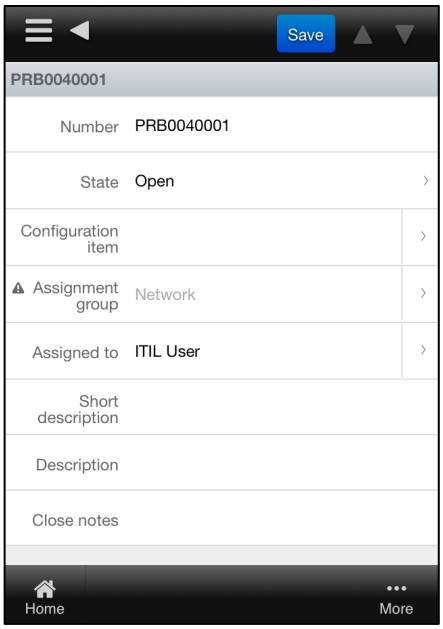
When you are done, the script should look like the following:

Script:

```
1  function onChange(control, oldValue, newValue, isLoading, isTemplate) {
2     if (isLoading || newValue == '') {
3        return;
4     }
5
6      // don't execute if there is an assigned_to person already
7      if (g_form.getValue('assigned_to').length > 0)
8          return;
9
10     var ga = new GlideAjax('AssignmentGroupUtils');
11     ga.addParam('sysparm_name', 'getPersonForGroup');
12     ga.addParam('sysparm_group', newValue);
13     ga.getXMLAnswer(function(answer) {
14         var answerParts = answer.split('^');
15         g_form.setValue('assigned_to', answerParts[0], answerParts[1]);
16     });
17
18 }
```

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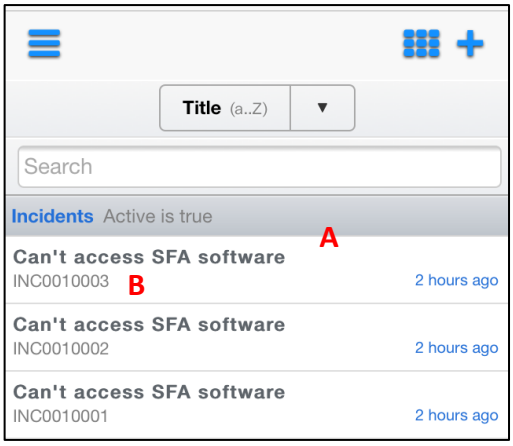
8. In the mobile browser, test the new problem form again. Filling in the **assignment_group** should update the **assigned_to** field.



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Configuring Table Titles

Problem records may not be easy to read in a list. It may be clearer to display something else on the mobile pages. Table titles are made to have an alternate display value in Mobile.



A – Table Title, or if there is no table title, table display value

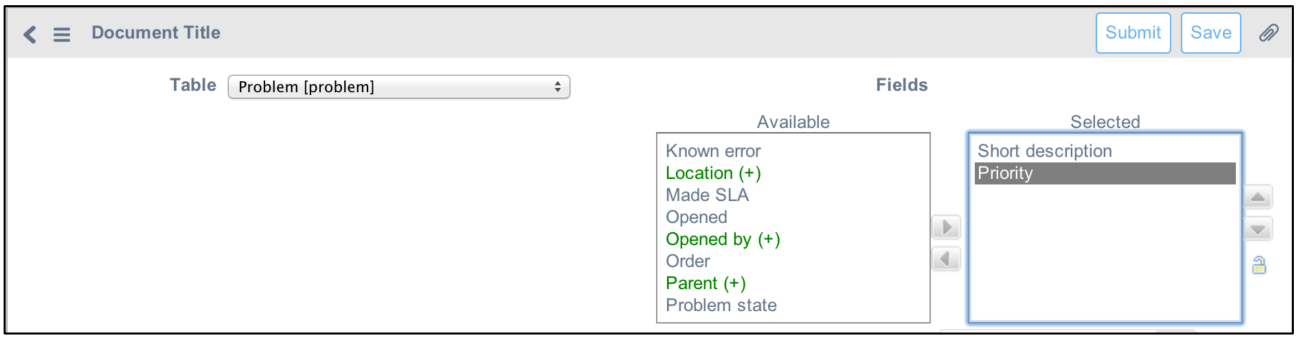
B – Table display value, or if there was no table title, short_description

1. From your desktop browser, go to **System Mobile UI > Table Titles**.

2. Click **New**.

3. Create a table title with the following values:

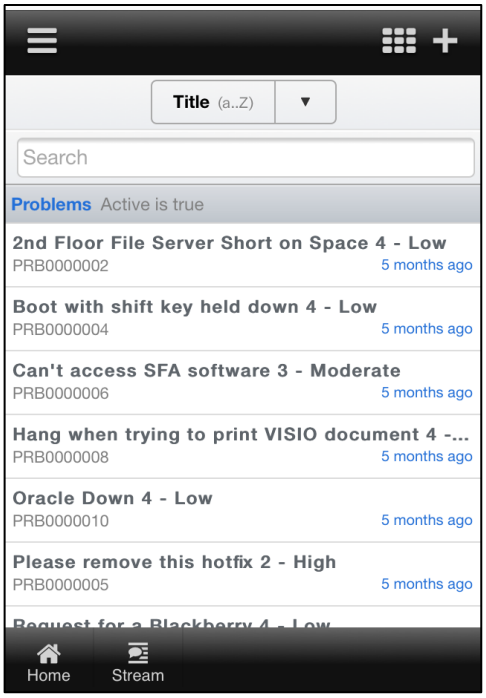
   Table: **Problem [problem]**
   Fields: **Short Description**, **Priority**



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4. Go to **Problem > Active**.

5. Note the new table titles.



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Creating Help Pages

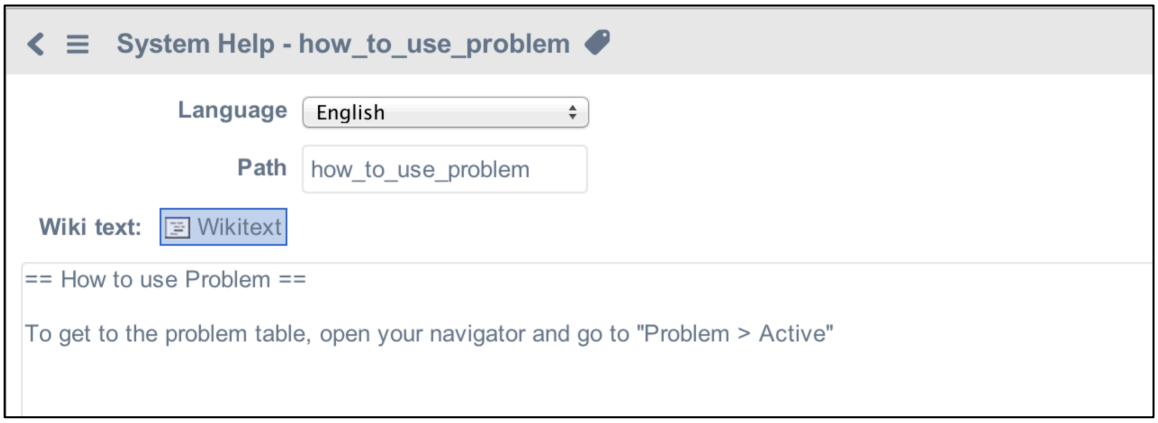
Help pages provide assistance to mobile interface users. These pages are embedded; users do not need to access information at an external site. This exercise explains how to create an internal Help page for the mobile device.

1. Go to **System Mobile UI > Mobile Help**

2. Click **New.**

3. Create a new mobile help page with the following:

   Path: **how_to_use_problem**
   Wikitext: **Write some directions on how to get to the Problem Application**

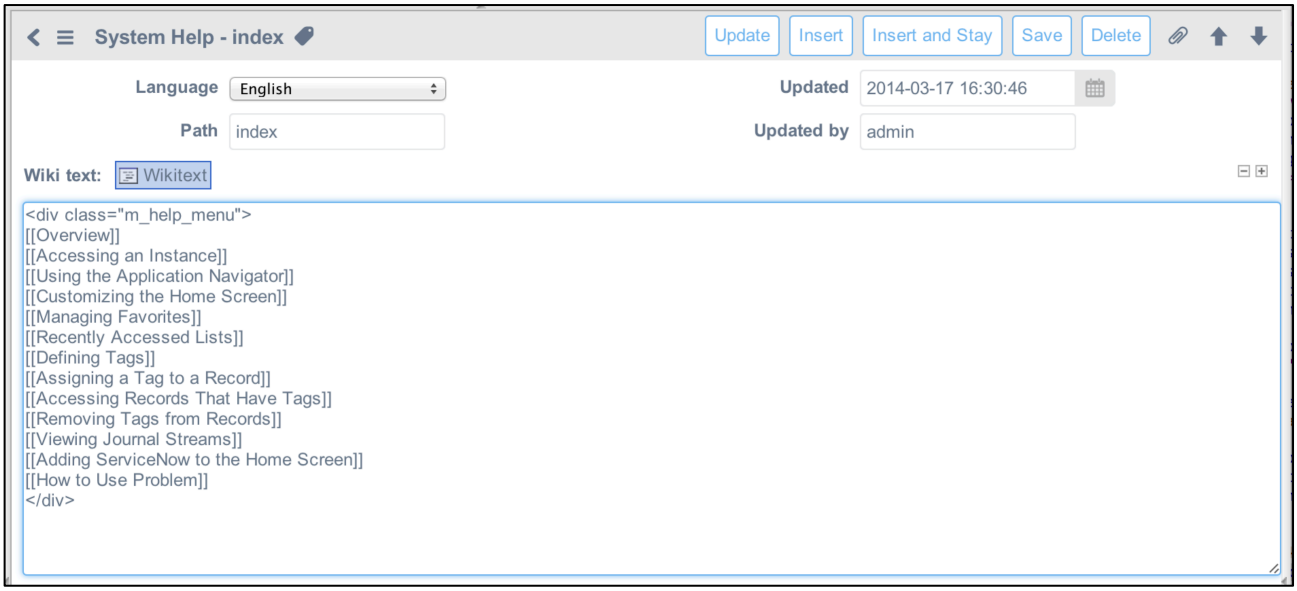


Note: a more comprehensive list of Wiki text help can be found at the following wiki location: http://wiki.servicenow.com/index.php?title=Help:Wikitext_quick_reference

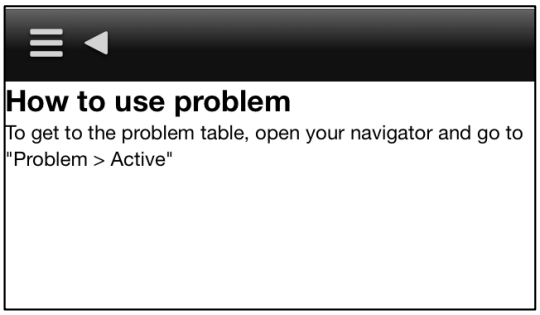
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4. Go back to **Mobile Help** and open the page titled **index.**

5. At the bottom of the page, add a link to the new page with the wiki text ([How to Use Problem]).



6. Using the mobile browser, navigator to **Help > How to Use Problem**. You should see your document.



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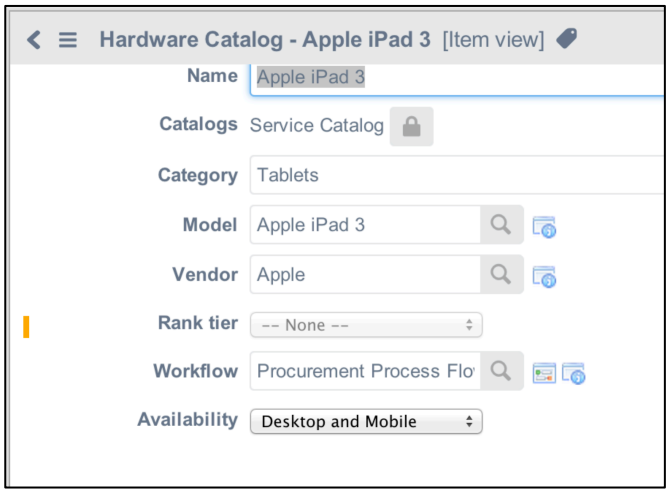
Configuring your Mobile Service Catalog

If you are upgrading to Dublin or beyond, the service catalog app will have nothing in it. This is because your Service Catalog defaults to Desktop Availability.

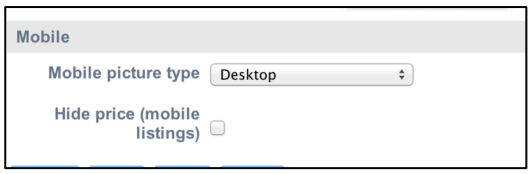
1. From your desktop browser, go to **Service Catalog -> Maintain Items**.

2. Open **Apple iPad3**.

3. Change **Availability** to **Desktop and Mobile**.



4. Lower on the form, you have the option to change the picture or hide the price on mobile.



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5. From your mobile browser, navigate to **Self-service > Catalog**.



6. Go to **Hardware.**

7. Open the **Tablets** category.

8. Choose **Apple iPad3**.

9. Tap **Add** in the corner to add the item to your cart.

10. From the checkout page, you can select **Order** to confirm your order.

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Additional Resources

Smartphone Interface:

http://wiki.servicenow.com/index.php?title=Smartphone_Interface

Configuring the Smartphone interface:

http://wiki.servicenow.com/index.php?title=Configuring_the_Smartphone_Interface

Using the Smartphone Interface:

http://wiki.servicenow.com/index.php?title=Using_the_Smartphone_Interface

Mobile Client GlideForm (g_form) Scripting

http://wiki.servicenow.com/index.php?title=Mobile_Client_GlideForm_(g_form)_Scripting

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