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Technical Best Practices 101: Plan for Success

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Agenda

Requirements best practices

Tables best practices

Fields best practices

Forms best practices (time permitting)

Lists best practices (time permitting)



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Chuck Tomasi



Sr. Services Enablement Program Manager

- 30 years IT experience
- ServiceNow customer 2008-10
- First Innovation of the Year Award @ K10
- ServiceNow since 2010
- Lots of deployments, custom apps, and special projects
- Technical Best Practices owner
- Co-host of ServiceNow web series *TechNow*
- Other stuff:
  - Author, Podcaster, golfer, downhill skier, photographer, sci-fi geek, martial artist

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Dave Slusher

Sr. Technical Consultant, Expert Services



- 20 years of software development
- Developed core infrastructure for Dell Secureworks, Intel factory automation, GuardedNet
- Developed UI/Web Apps for Orbitz, Intertrust, WebMD
- ServiceNow since 2013
- Other stuff
  - 4th podcaster in the world, radio host and producer, author, co-founder of CREATE South conference

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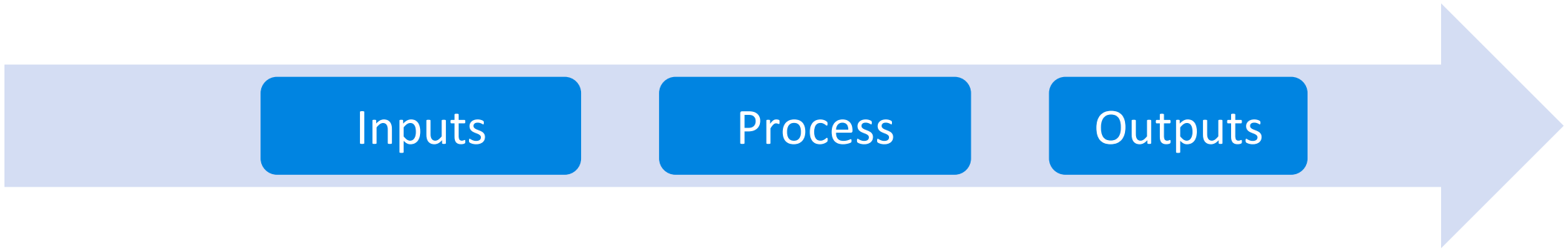
Requirements Best Practices

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Requirements

Clarify the functional requirements

- What problem are we trying to solve?
  - Keep asking until you get to the root problem
- What is the business driver behind this requirement?
- What are the inputs and outputs?
- Can we go through a use case or scenario?
  - This often turns up additional questions



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Requirements

Clarify the technical requirements

- Is there already a technical solution to this requirement?
- Is this solution scalable?
- How does this solution affect other developers?
- Is this solution easily maintainable?
- Does this solution require additional licenses?

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Requirements Scenario

Keep asking questions!

Requirement: *The Approver field shall be populated with a name from the user table. This will be filled in by the submitter when the request is created.*

- What questions should you ask to understand this requirement better?
  - Q: Can the submitter pick ANYONE in the list or is there a subset?
  - Q: Is that subset dependent on some attribute (active=true)/grouping?
  - Q: How is that attribute/grouping maintained?
  - Q: Can the submitter pick themself as an approver?

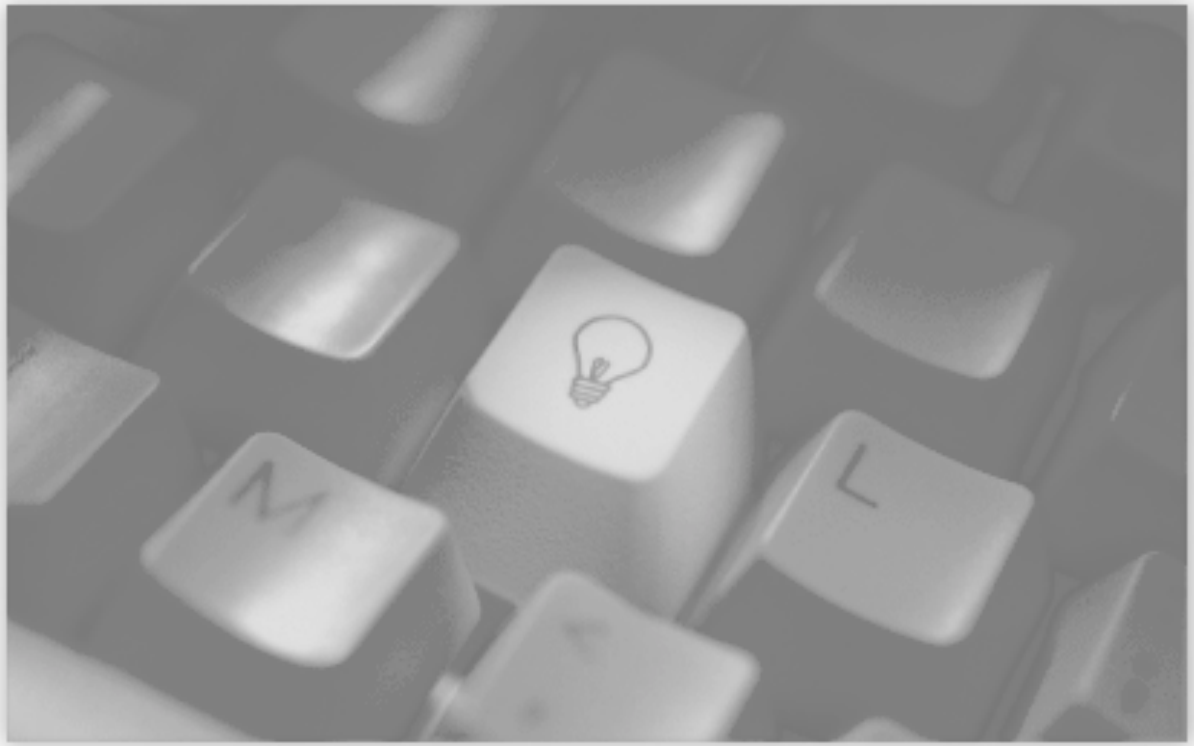
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Validate Inputs and Outputs

- Create good and bad test scenarios
  - Unit test!
  - Ex: What happens if you put a string in a number field?
  - Ex: What happens if you enter a start date in the past?
- What should the system do when it encounters this?
- If more than one solution exists, present them and offer your recommendation and justification.

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Lab 1



1.1 Access Request Requirements

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Table Best Practices

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New or Extended?

- Does a table exist with fields similar to what you need?
- Are the existing scripts for the parent table useful for your application?
- Know your base tables
  - task, cmdb_ci, sys_*, cmn_*
  - Extend an existing table if there are many common fields/attributes
    - Ex: Task or CI based?
- Is it ‘primary’ or ‘supporting’ information
  - Generally, supporting information is a new table

Note: When you create a new table, set a Display field

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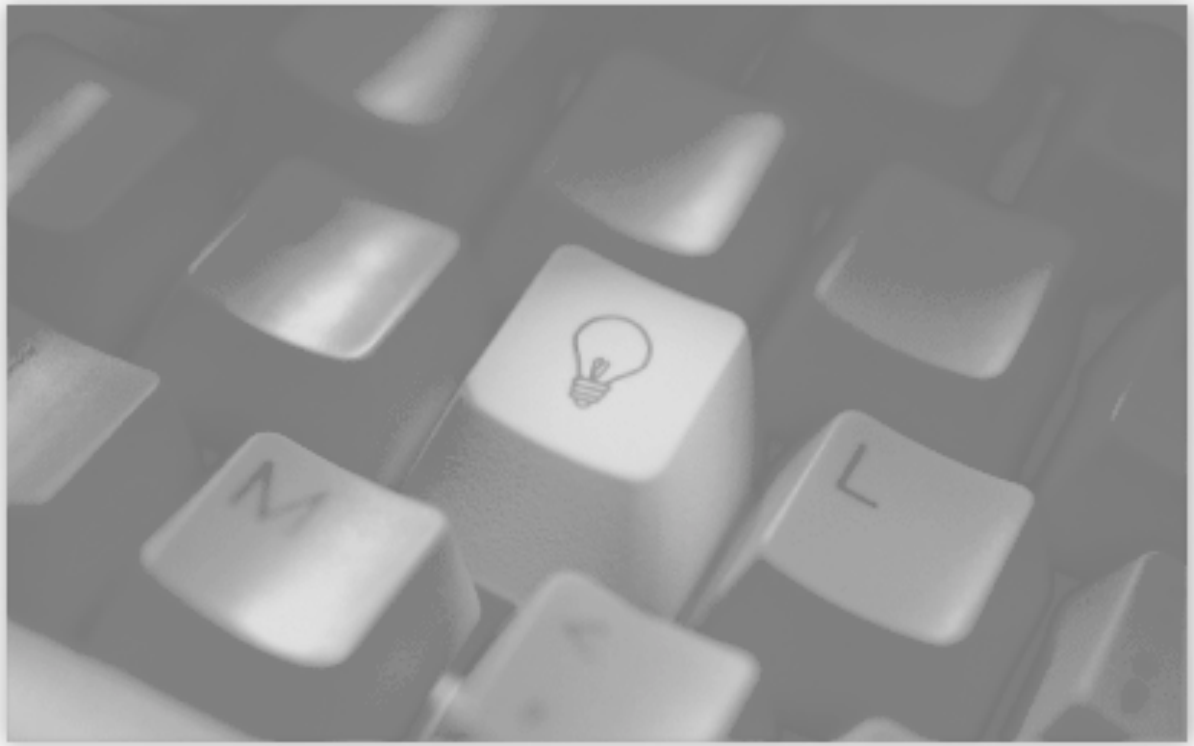
Table Naming

- Make table names meaningful
  - E.g. Mobile Phone → u_cmdb_ci_mobile_phone
- Use singular suffixes
  - Table name: u_answer, not u_answers
  - The system will automatically add an “s” to the label for lists
  - When scripting, it makes more sense to create an object like:

```
var answer = new GlideRecord('u_answer');
```

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Lab 2



2.1 Access Request Tables

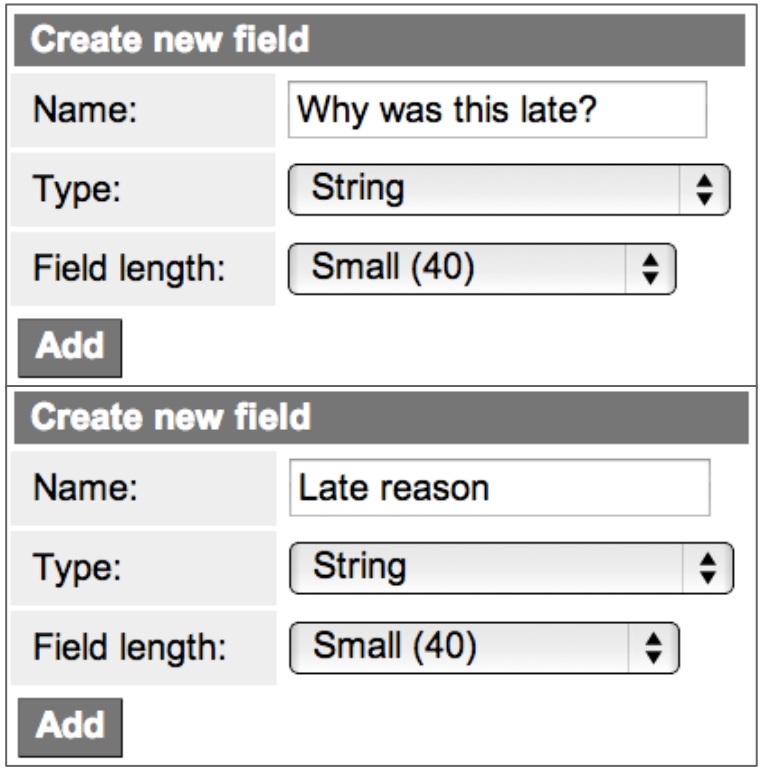
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Field Best Practices

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Name Fields Correctly

- Use the desired field name, not label



FIELD NAME

u_why_was_this_late_

u_late_reason

Re-label the field

Why was this late?

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Re-use/Consolidate Fields Where Possible

- Scenario 1: Retitle a field
  - Requirement: Text field called “Title”
  - Your table has an unused “Short Description”
  - Solution: Create a new label for that field on your table
- Scenario 2: Recognize mutually exclusive data
  - Requirement: Date field ‘Acceptance date’ and ‘Rejection date’
  - Solution: Create a single field called ‘Decision date’



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Create Fields in Appropriate Classes

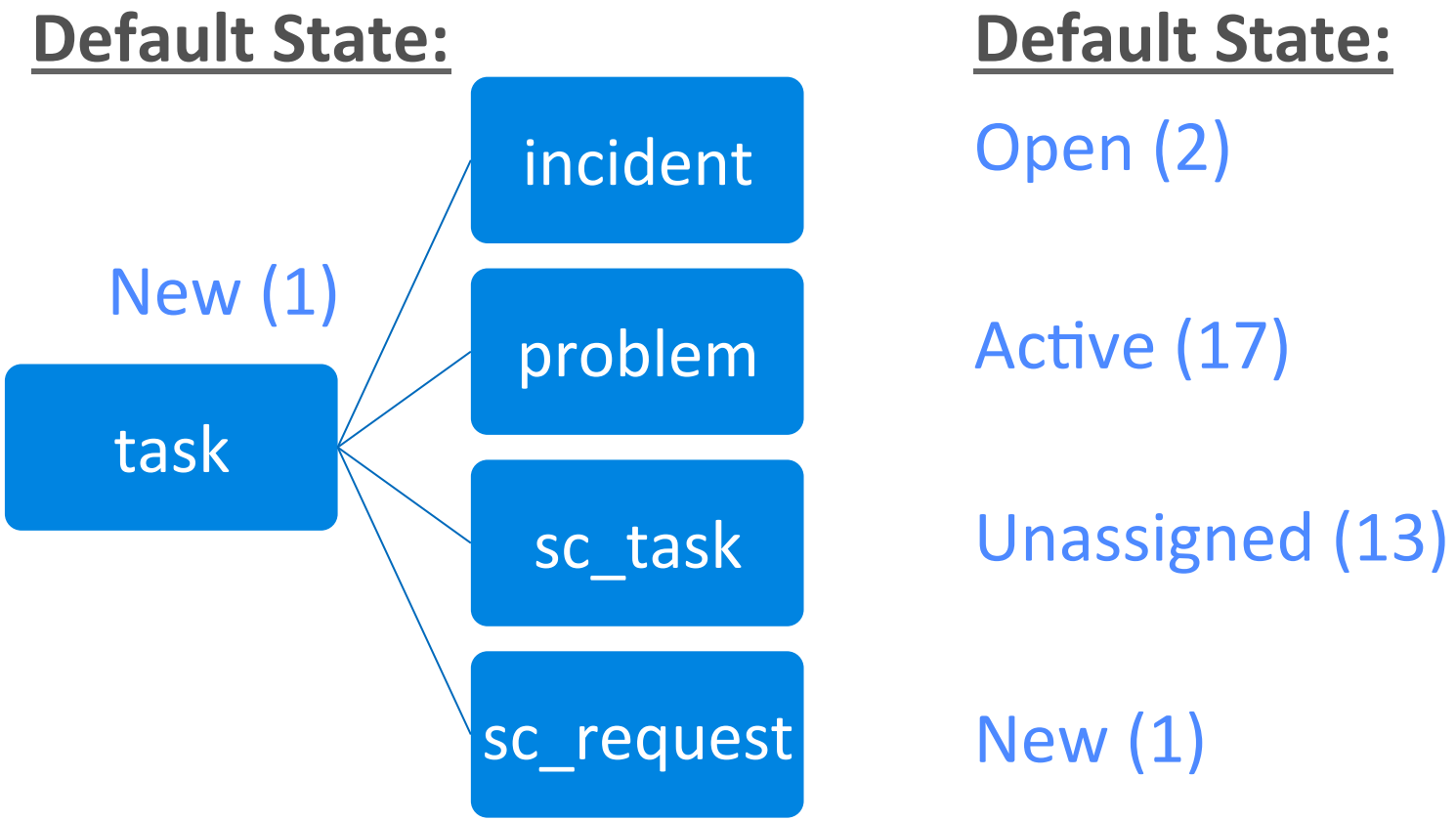
- Minimize adding fields to the base class (ex: task)
- Fields in a base class are available to all sub-classes
  - So are business rules that run on that table/field
- Ensure that your field is required across multiple applications
  - If is not required on all applications, add a filter to your business rules

Condition:	current.sys_class_name == 'incident' || current.sys_class_name == 'problem'

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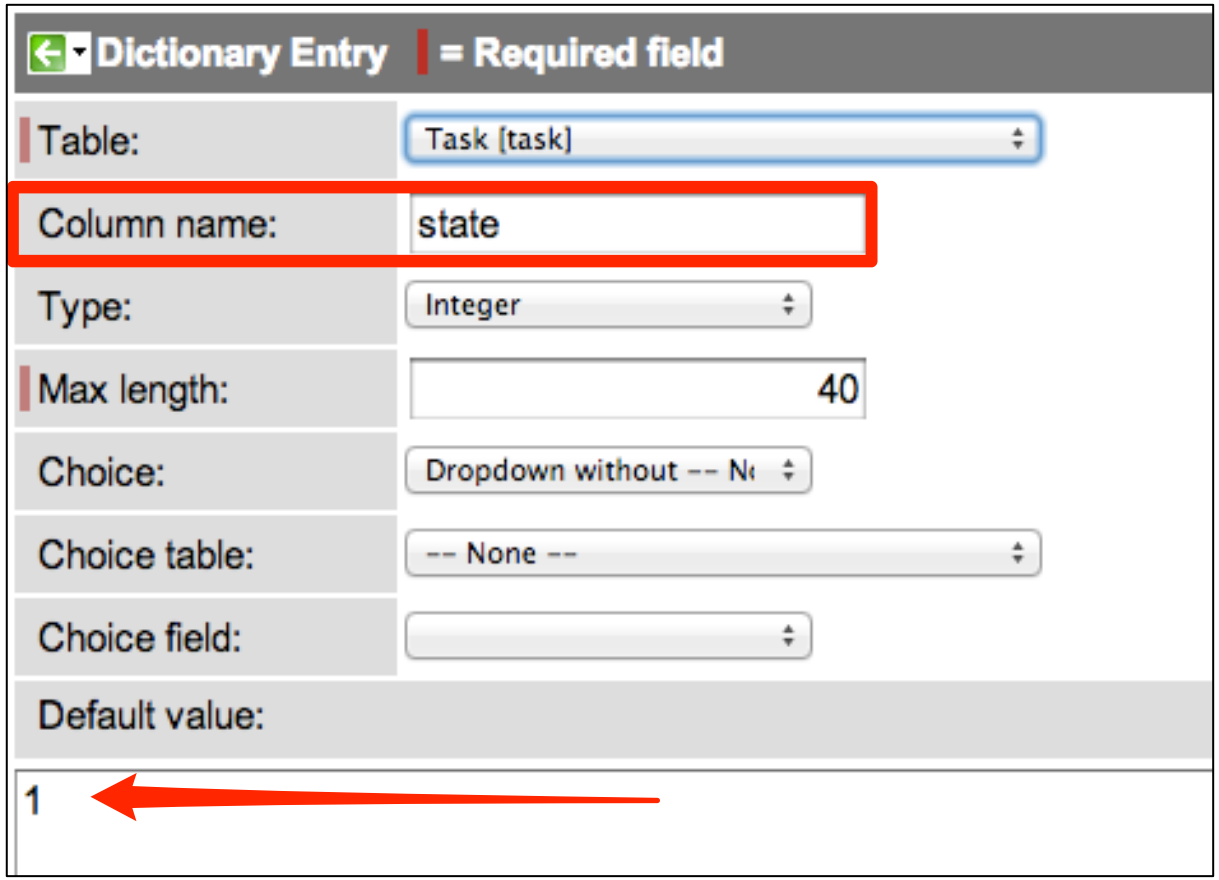
Dictionary Overrides

- Set different dictionary attributes on extended tables



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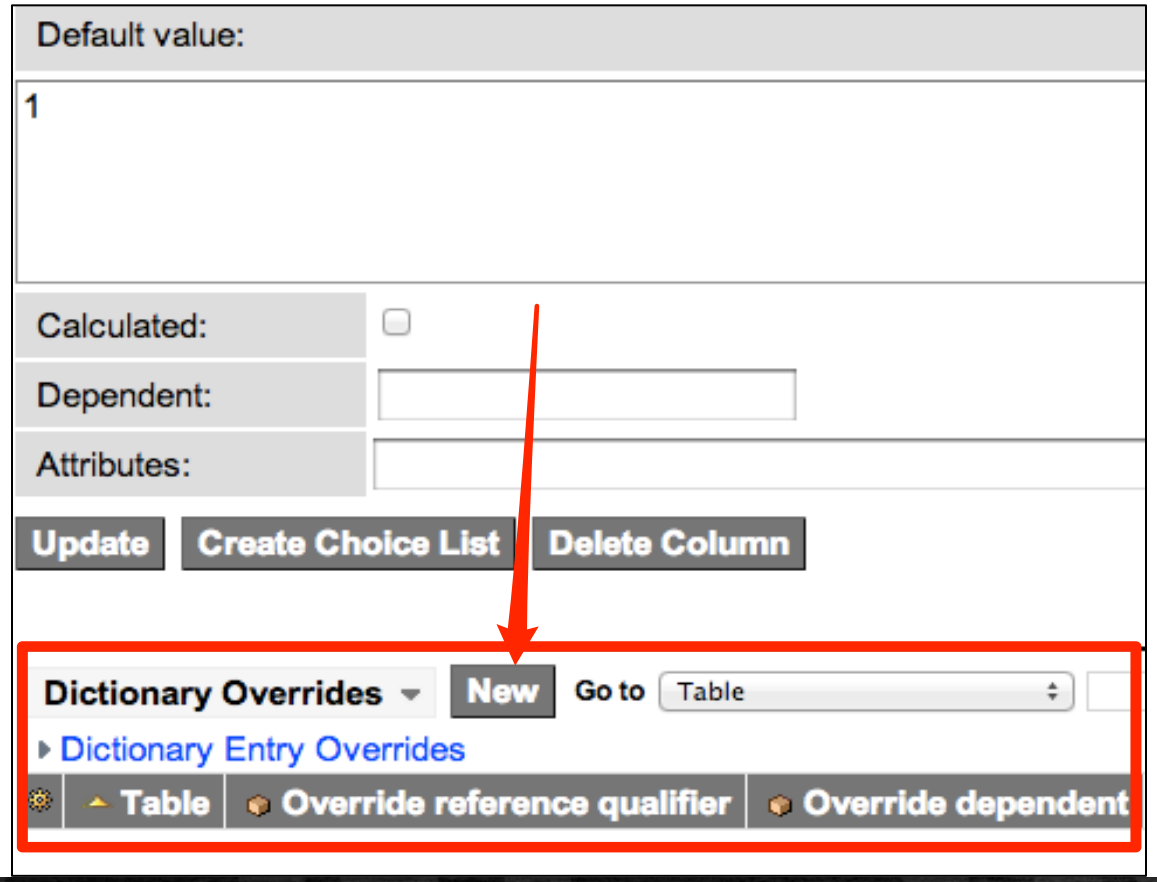
Dictionary Overrides



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Dictionary Overrides

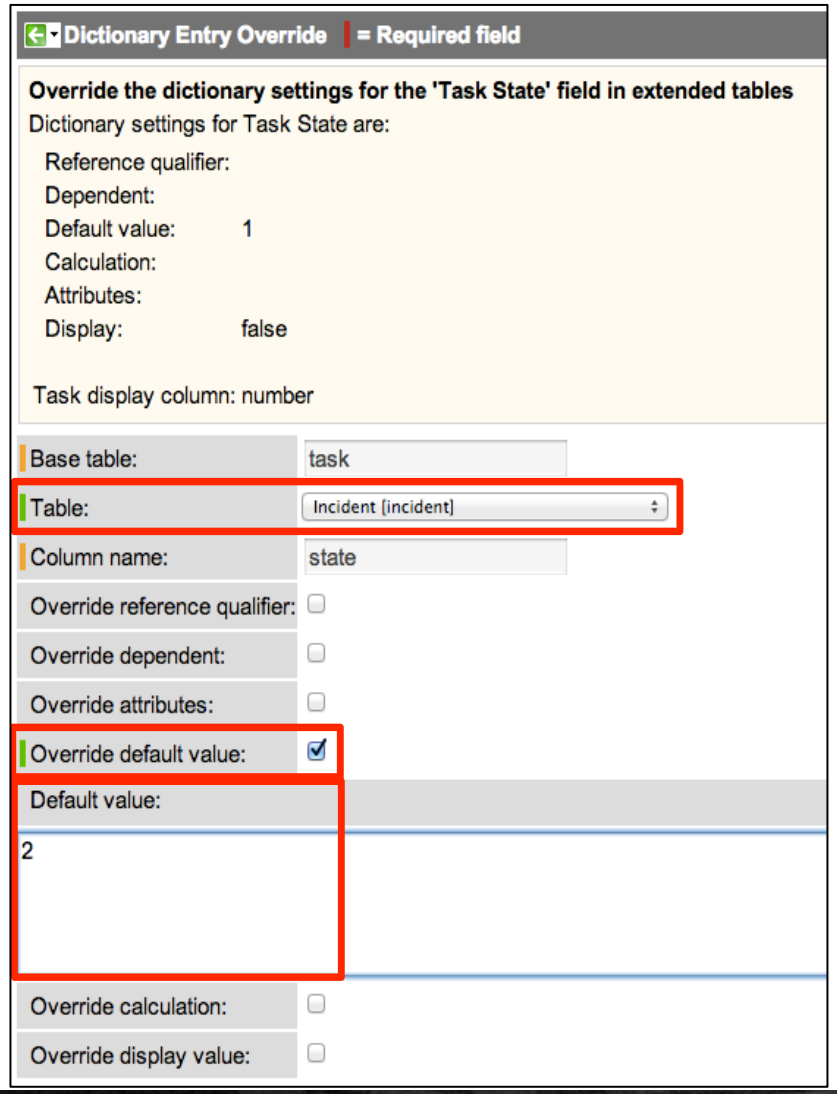
- From the Dictionary Overrides related list, click New



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Dictionary Overrides

- Select the table
- Check the attribute to override
- Enter the table specific value
- Save

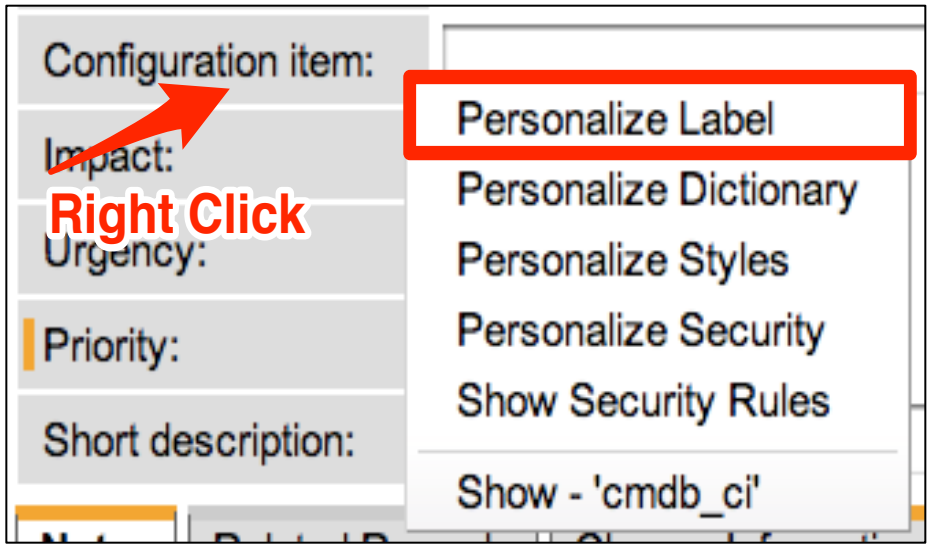


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Personalize Labels

Similar in concept to personalize dictionary for table specific labels

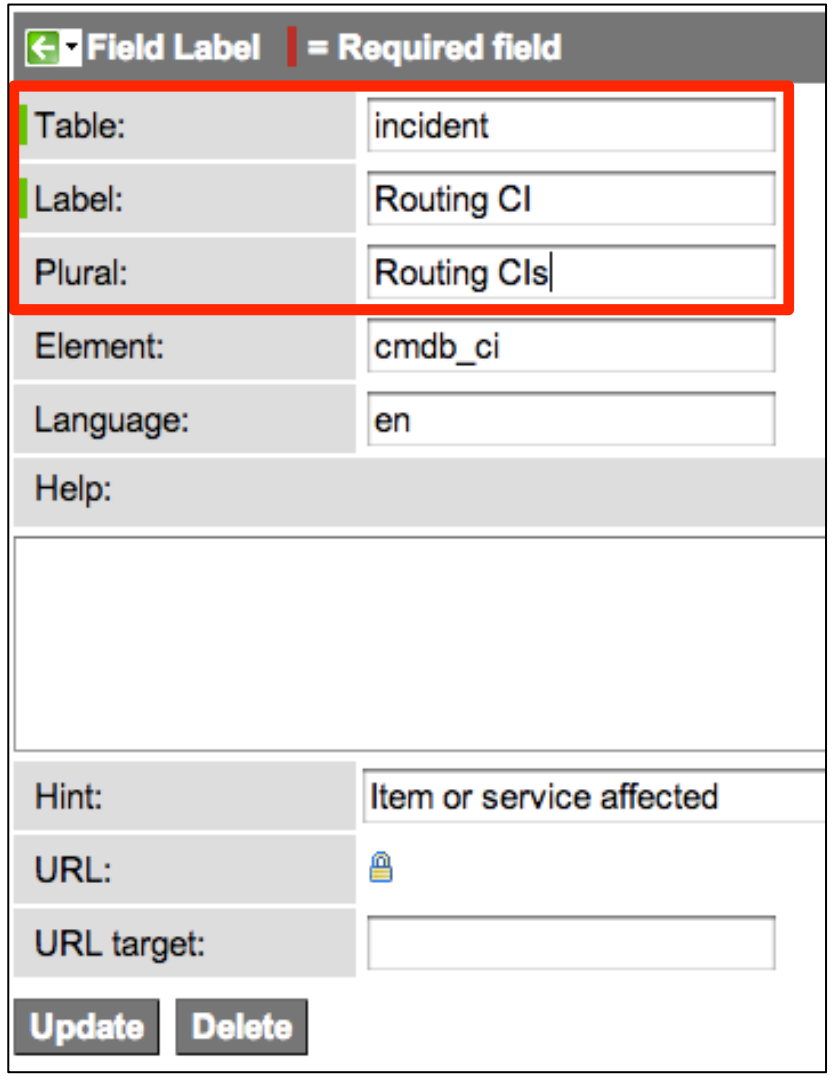
- Let's say the different streams have different labels for a CI
  - By default, task.cmdb_ci = "Configuration item"
  - Incident wants "Routing CI"
  - and Change wants "Assignment CI"



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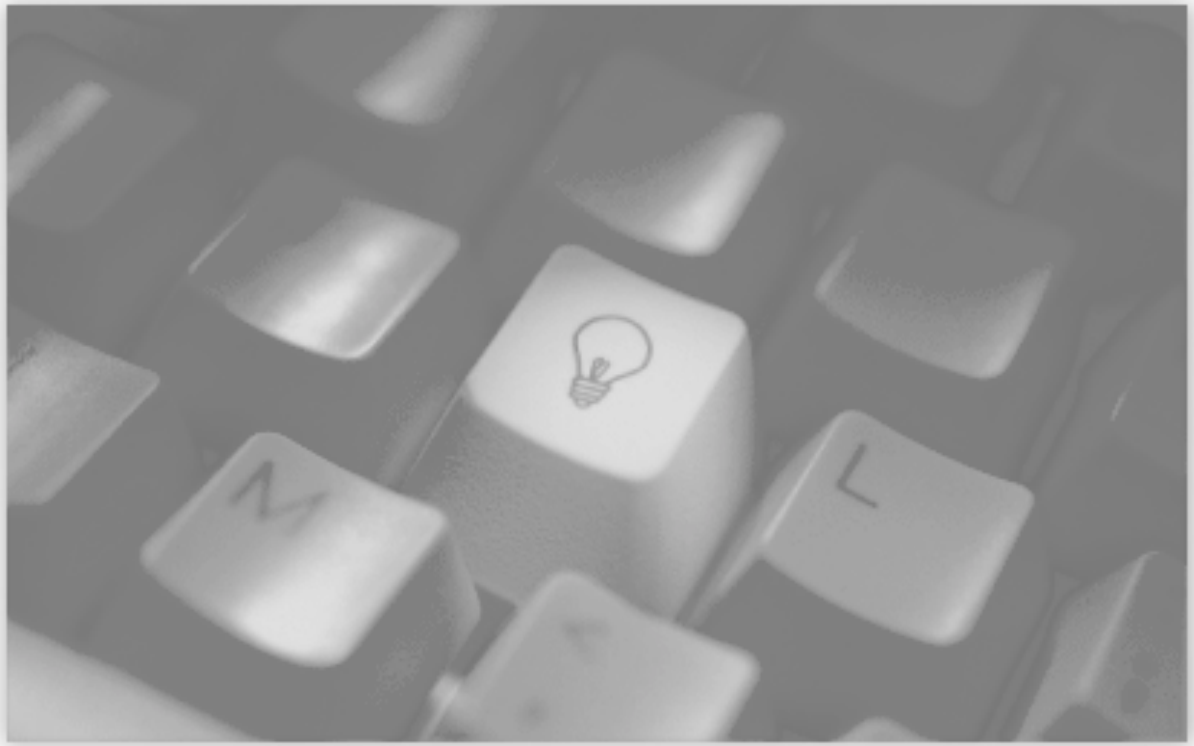
Table Specific Labels

- Right click on the field
- Select “Personalize Label”
- Update the table name
- Update Label and Plural
- Create a hint
- **Right Click> Insert**



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Lab 3



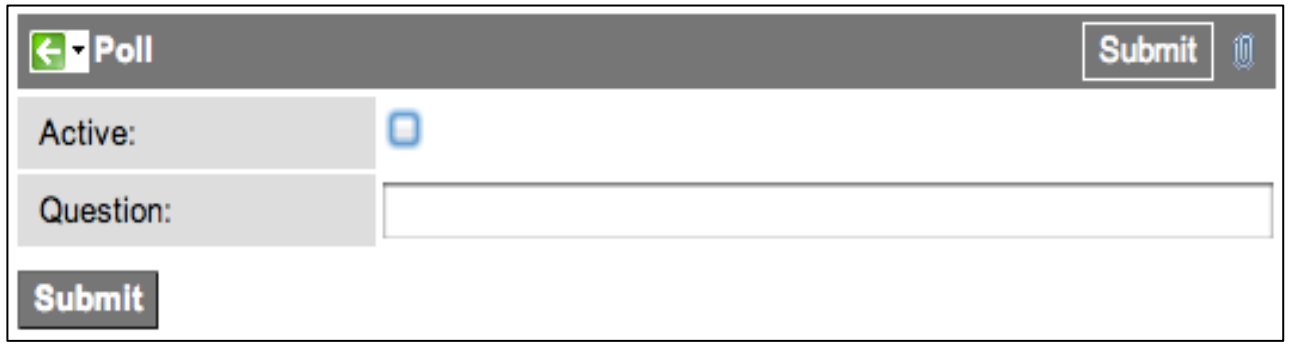
3.1 Access Request Fields
3.2 Entitlement Fields
3.3 Requirements Change

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Forms and Lists Best Practices

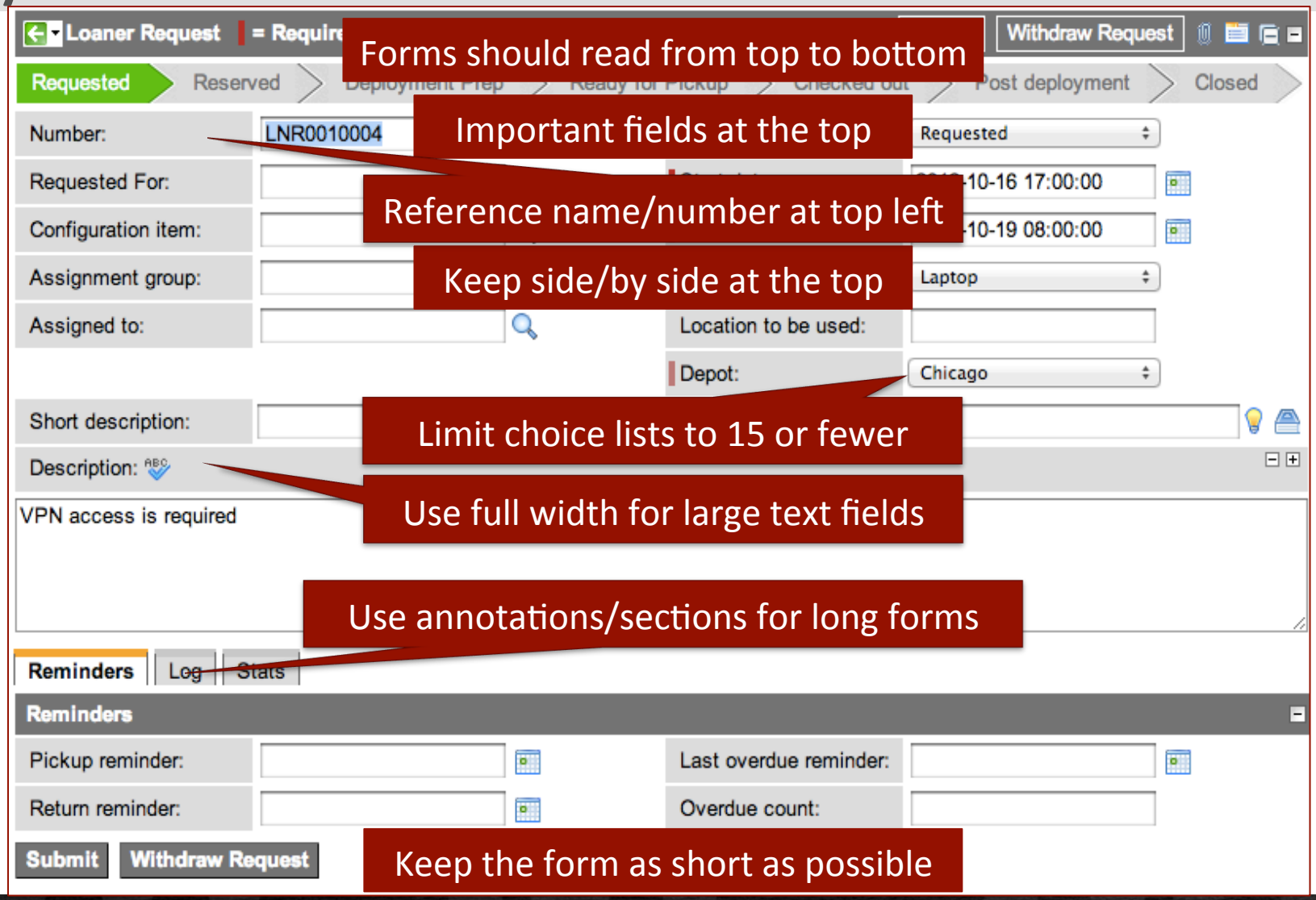
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- Create a form and list layout for every table



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Form Layout



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Use Views

System UI> Views

- Consider multiple views
- Use View Rules to use record data to define current view
- Specialized UI policies/client scripts (view specific)
  - Fewer UI policies and client scripts will load faster
- Define a view from a module (left nav)



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List Layout

Consider list controls carefully

Loaner Requests | New | Go to Number | 1 to 9 of 9

All > Active = true

Do not include HTML, large text, or journal fields

Number	Configuration item	Depot	Item type	Start date	End date	Assignment group	Assigned to	State
LNR0010001	*BETH-IBM	Chicago	Laptop	2012-07-20 17:00:00	2012-07-23 08:00:00	Service Desk	Beth Anglin	Deployment Prep
LNR0010002	*BOW-IBM	Chicago	Laptop	2012-07-06 17:00:00	2012-07-09 08:00:00	Service Desk	Beth Anglin	Checked Out
LNR0010003	*ANNIE-IBM	Chicago	Laptop	2012-07-23 08:00:00	2012-07-27 17:00:00	Service Desk	Beth Anglin	Reserved
LNR0010004	*ANNIE-IBM	Chicago	Laptop	2012-07-16 08:00:00	2012-07-18 10:00:00	Service Desk	Beth Anglin	Post Deployment
LNR0010005	*ASSET-IBM	Chicago	Laptop	2012-07-19 08:00:00	2012-07-23 17:00:00	Service Desk	David Loo	Ready for Pickup

Avoid horizontal scrolling

Do not use reference fields as the first column

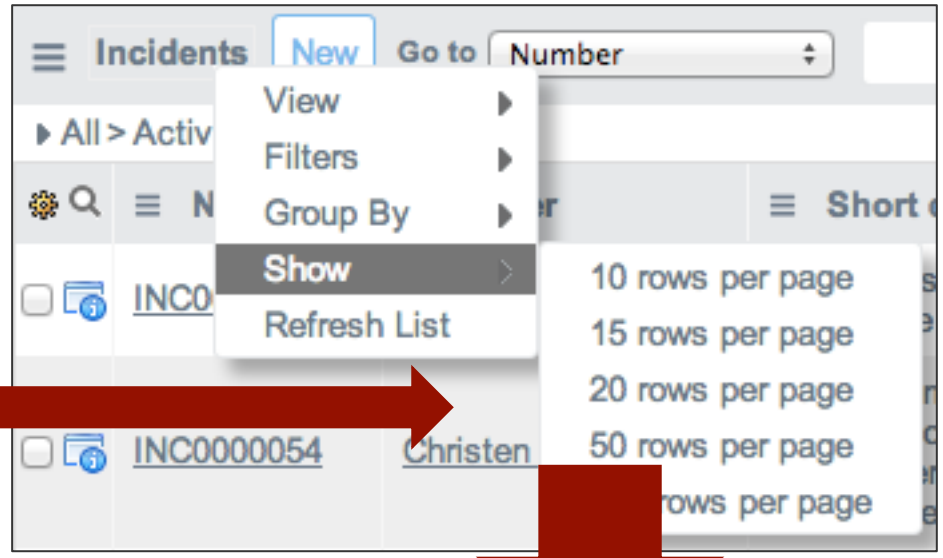
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Limit List Length

System Properties> System

'Items per page' drop-down options (comma separated, no spaces):

10,15,20,50,100



Task SLAs | **Incidents by Same Caller (1)** | Problems | Affected CIs

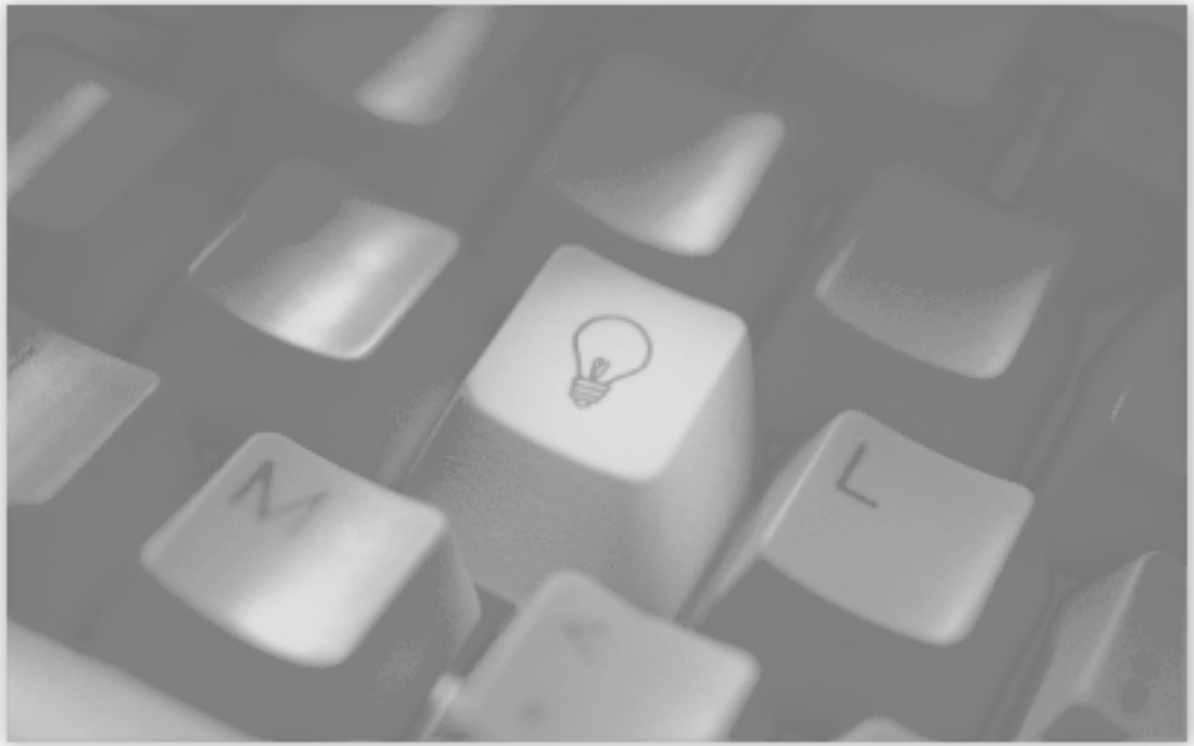
Incidents by Same Caller New Go to Number << < 1 to 1 of 1 > >>

Incidents

Number	Caller	Short description	Category	Priority	State	Assignment group	Assigned to
INC0000053	Margaret Grey	The SAP Human Resources application is not accessible	Software	1 - Critical	New	Software	Fred Luddy

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Lab 4



4.1 Access Request Form Layout

4.2 Entitlement Form Layout

4.3 Access Request & Entitlement List Layout

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Top Takeaways

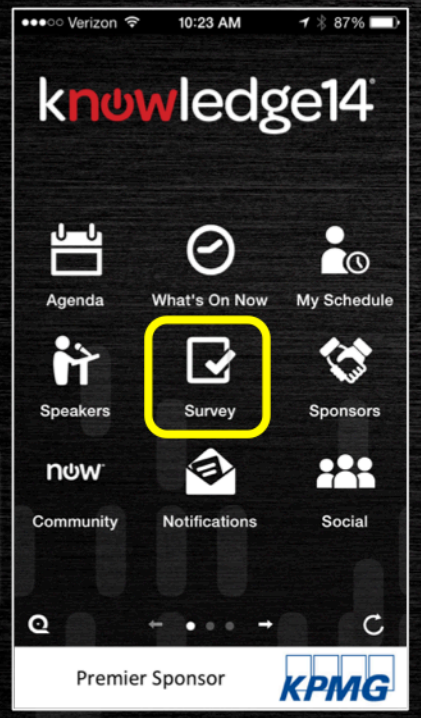
1 Ask questions to fully understand requirements

2 Use good names for tables and fields

3 Use dictionary overrides and personalize labels instead of creating new fields

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Thank You

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