knowledge14

April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Lab Guide

What's New - Eureka

John Roberts & Chris Pope

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

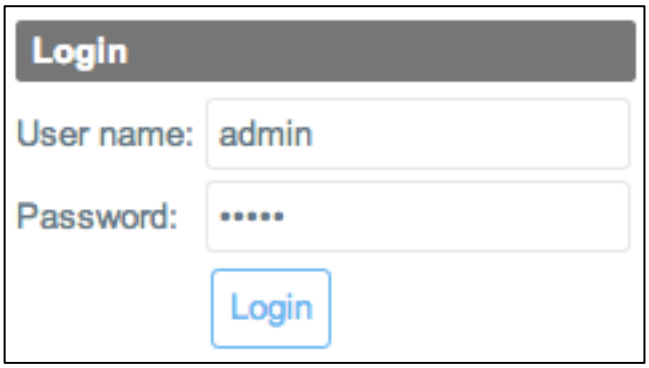
Try the new visual task boards for a new way to visualize and manage group and personal work queues.

Lab 1
Task Boards

Log on to Your Training Instance

1. The instructor provides you with an instance URL.

2. Log into your instance, using the username **admin** and the password **Knowledge14**.

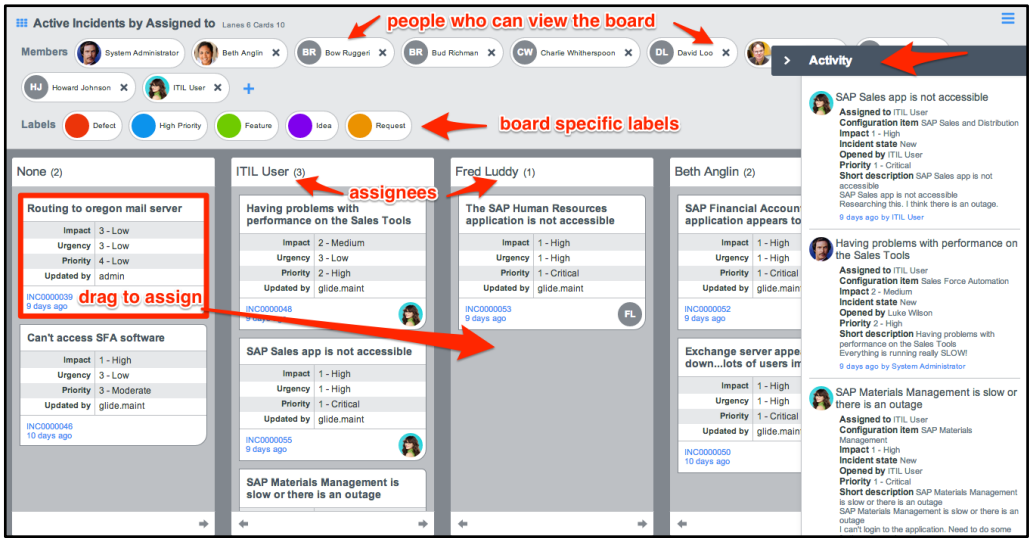


®2014 ServiceNow, Inc. All rights reserved.

Predefined Task Boards

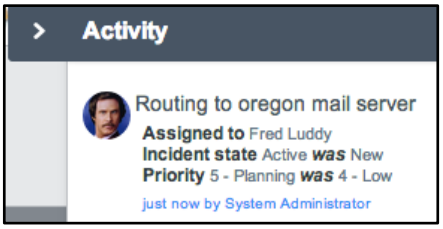
1. Navigate to **Self-Service > My Task Boards**.

2. Select the **Active Incidents by Assigned to** board. This board includes active incidents with lanes based on the Assigned to field.



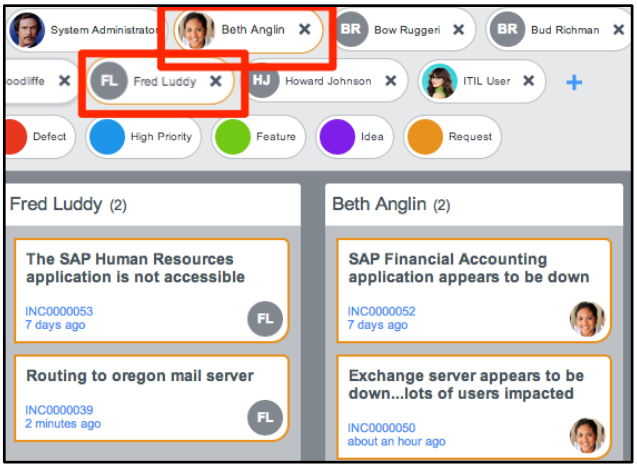
3. Click and drag the **Routing to Oregon mail server** to **Fred's** lane to reassign the incident.

4. Notice the activity stream updates with the change.

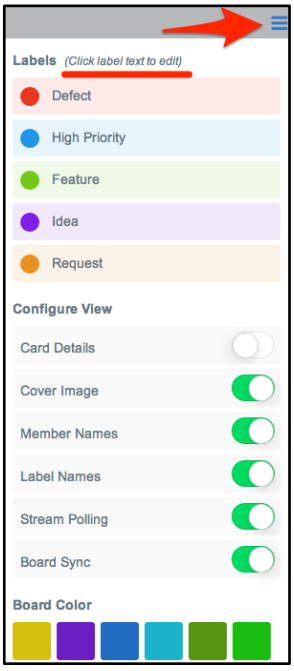


®2014 ServiceNow, Inc. All rights reserved.

5. To filter the cards displayed to only those assigned to Beth and Fred, click each of their member buttons and the board only displays their incidents.



6. Click the icon in the upper right of the board to access the task board control panel. Here you can configure the labels, views and colors.



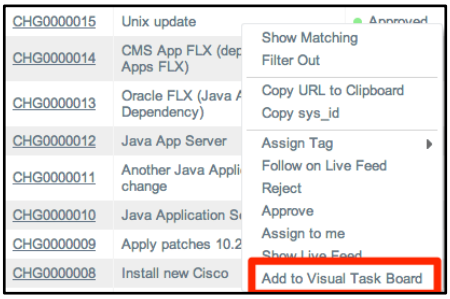
©2014 ServiceNow, Inc. All rights reserved.

Custom Task Boards

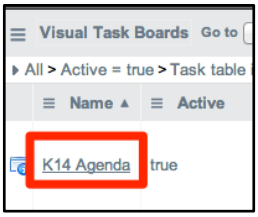
Custom boards can contain any task, including new private tasks. Tasks can be added from any task list or form. Add a Change Request to a board and explore some of the options related to the task boards.

1. Navigate to **Change > Open** to view the list of change requests.

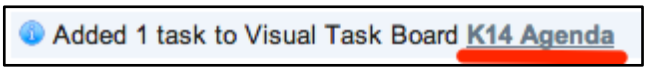
2. Right-click any change and select **Add to Visual Task Board**.



3. Click the **K14 Agenda** board to add the change to this board.

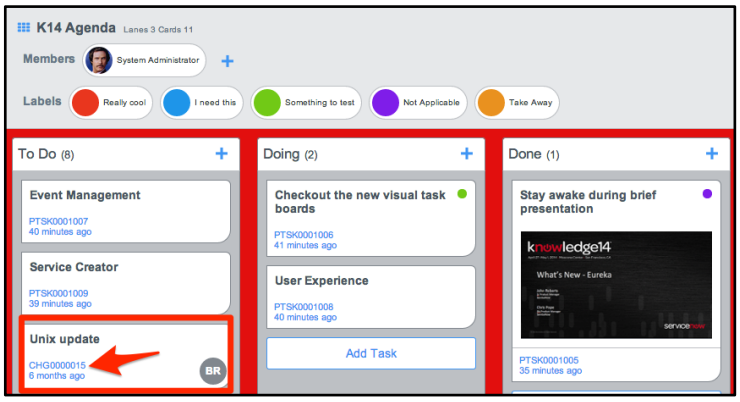


4. Use the link in the message to go to the board.



©2014 ServiceNow, Inc. All rights reserved.

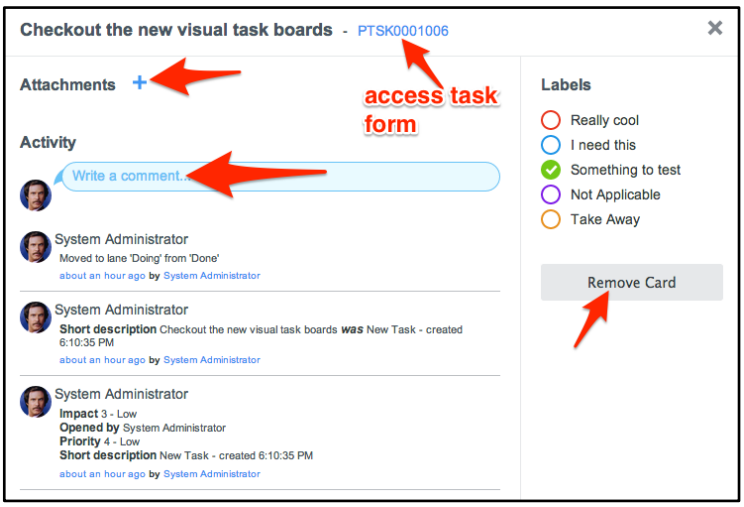
5. Notice the change request on the board with a number of private (**PTSK**) tasks.



6. Drag a label onto the cards to tag them. Cards may have multiple labels.

7. Just like filtering by members, you can click the labels to filter the board for those cards.

8. Click on any card to open it. You can make comments, change labels, add attachments, or remove the card from the board. You also have access to the full form view.



©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

Find your way around the new User Interface (UI) and discover the new features in the refreshed interface.

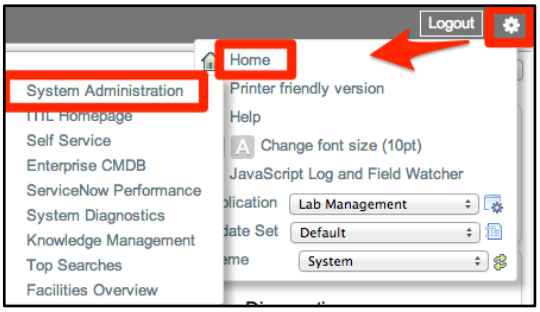
Updates include:

- A new System Administration homepage
- Improved navigation and list filtering
- Tags to quickly identify records
- Multiple records open at once

Lab 2
User Experience

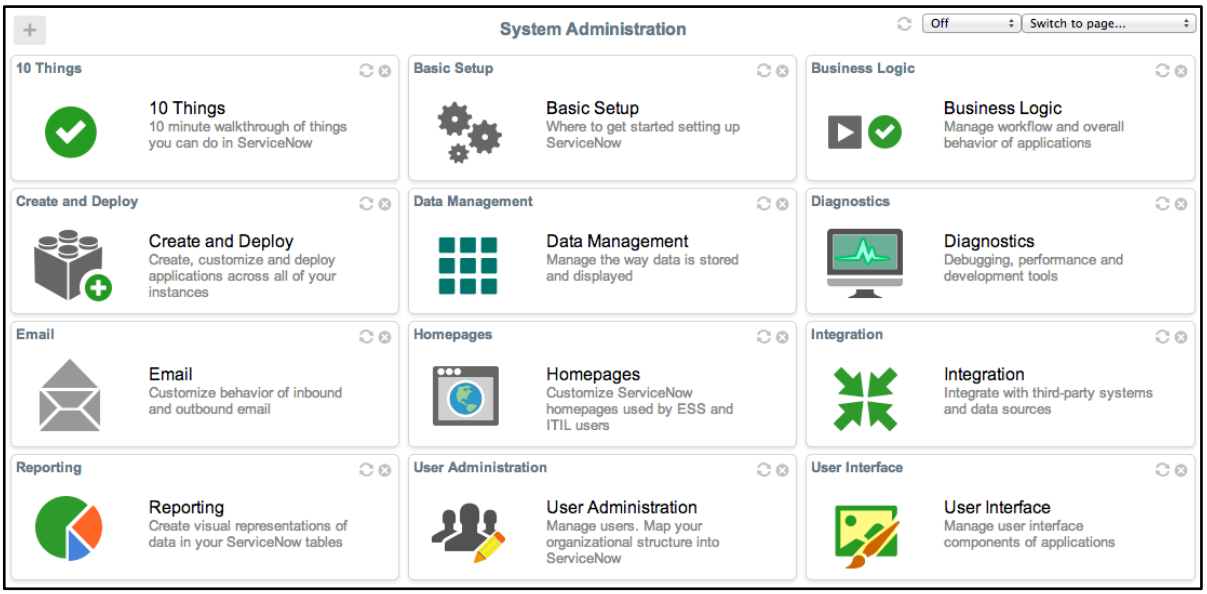
System Administration Homepage

1. Click the **gear** icon next to the **Logout** button and click **Home**.



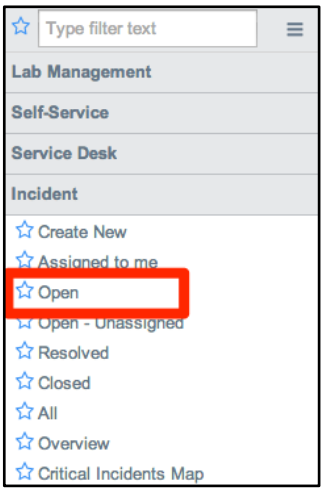
©2014 ServiceNow, Inc. All rights reserved.

2. Click on a couple different topics to explore the new homepage.



Navigation and Lists

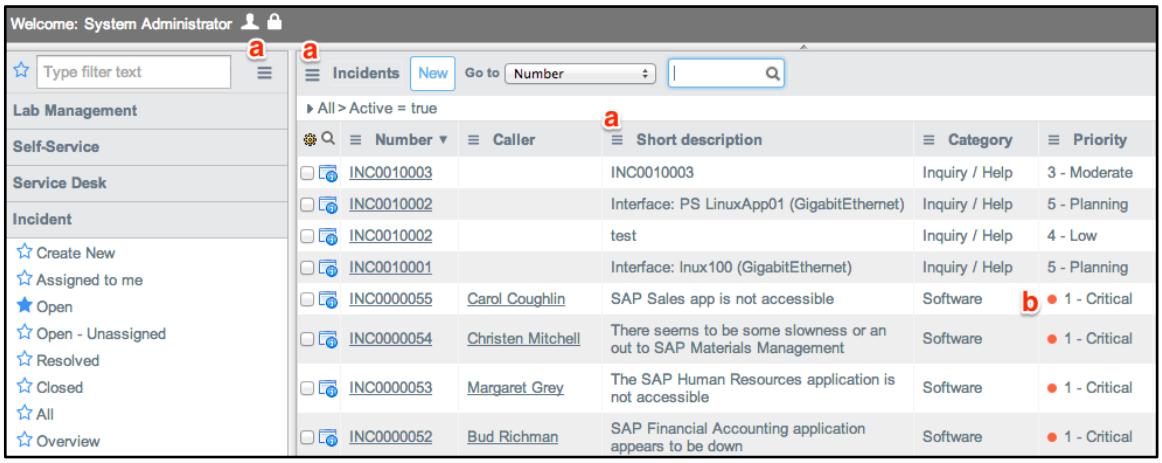
1. Navigate to **Incident > Open** to view the list of incidents.



©2014 ServiceNow, Inc. All rights reserved.

2. Note some of the changes:

   a. Icons to make it easy to understand there are menu options
   b. New field color styling



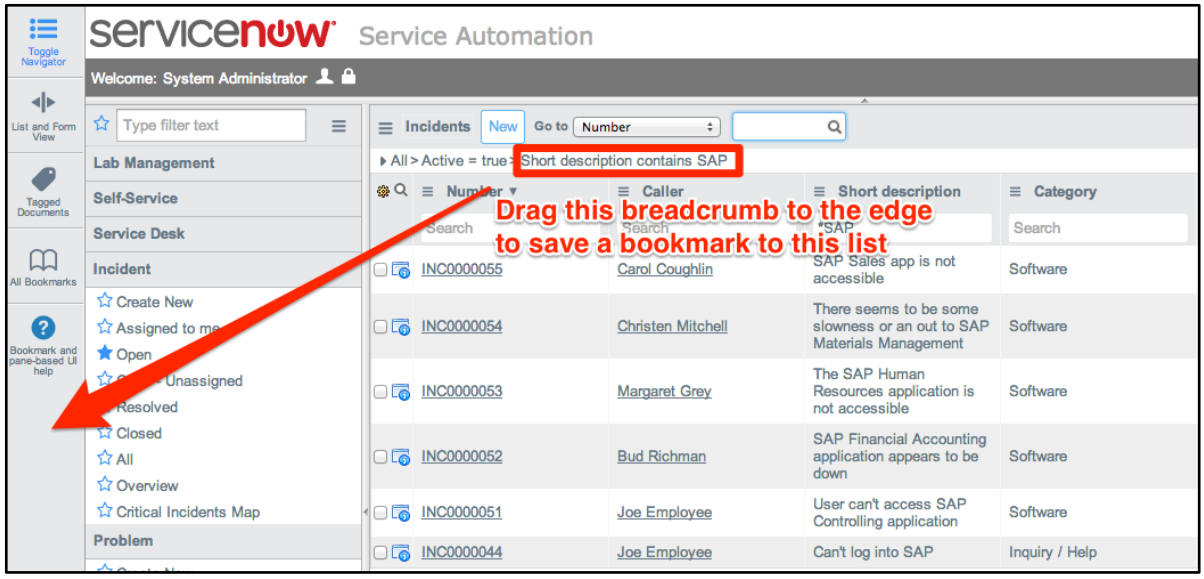
®2014 ServiceNow, Inc. All rights reserved.

Navigate List and Records

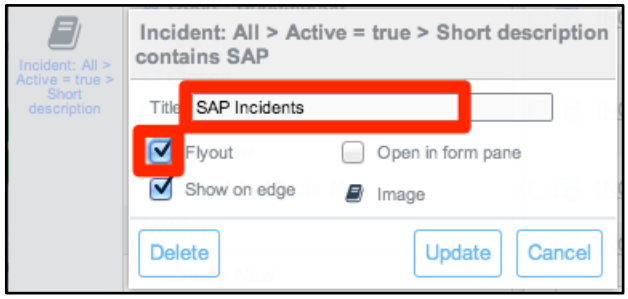
1. Click the **magnifying glass** icon to expand the column search options.

2. Type ***SAP** in the Short description search box to perform a "contains" search. View the list of results.

3. Drag the filter breadcrumb to the Edge as shown. This allows you to quickly access this filtered list of data. What is the title of the bookmark?



4. Hover over the new bookmark and click **Edit Bookmark**.



©2014 ServiceNow, Inc. All rights reserved.

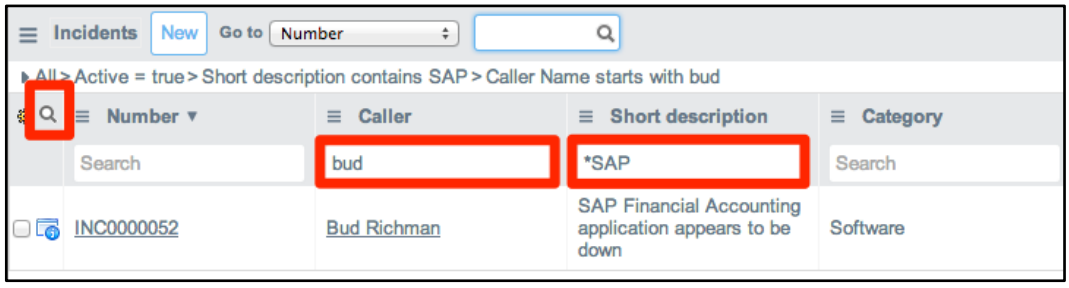
5. Change the Title to **Active SAP Incidents**.

6. Select the **Flyout** option. This allows you to work with this list without interrupting work in the main portion of the window.

7. Click **Update**.

8. Click the bookmark to see the flyout.

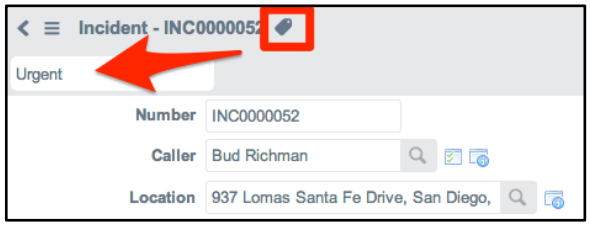
9. Type **bud** in the **Caller** search box to add more criteria to the search.



10. Click **INC0000052**.

11. Click the **tag** icon at the top of the form.

12. Type **Urgent** in the tag box.Tags are personal and allow you to quickly find records later.



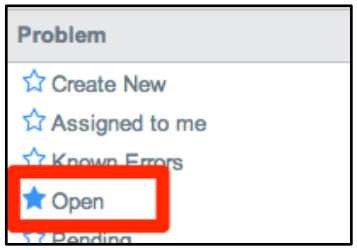
13. Click the bookmark again or the X icon in the upper right corner to close the flyout.

©2014 ServiceNow, Inc. All rights reserved.

Multiple Form Tabs

If you are working on a few things at once you might need quick access to those records. You can now open multiple form tabs and still keep the list in view.

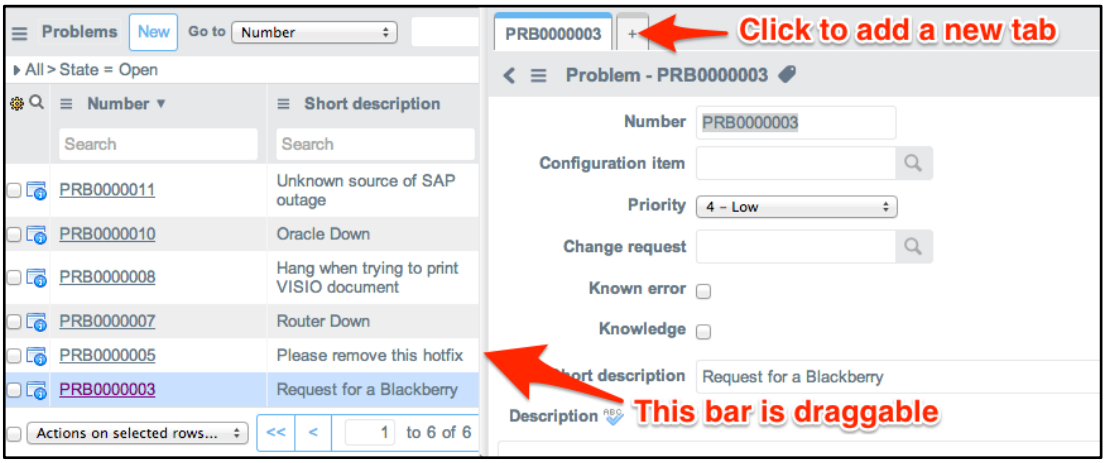
1. Navigate to **Problem > Open**.



2. Click the **Toggle Navigator**  button.

3. Click the **List and Form View**  button to view the split screen view.

4. Click on any **Problem** number to open the form view.

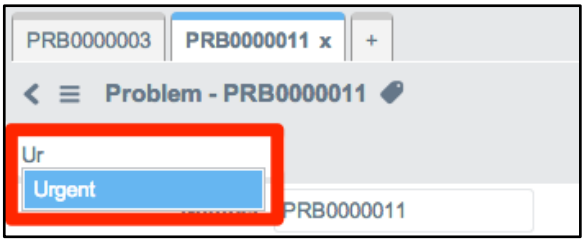


©2014 ServiceNow, Inc. All rights reserved.

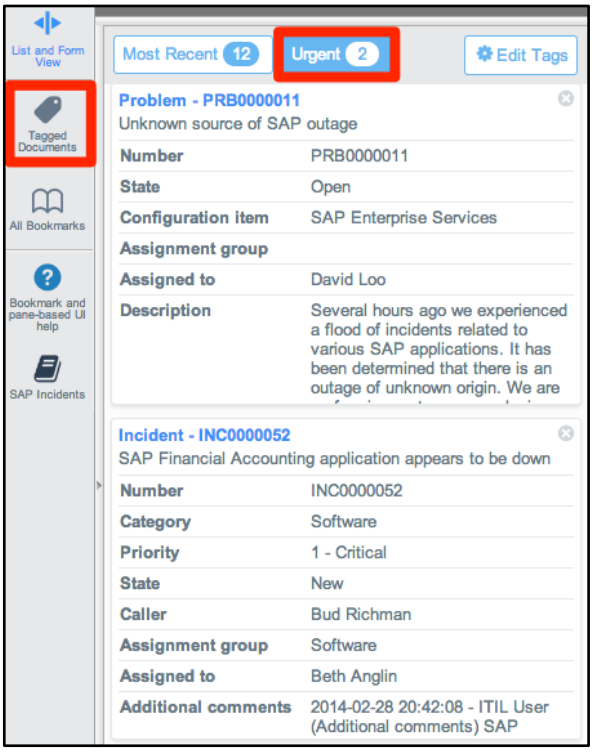
5. Click the tab **+** icon to create a new tab.

6. Click a different **Problem** from the list to open it in the new tab.

7. Add an **Urgent** tag to this problem.



8. Click **Tagged Documents** on the Edge. This displays all of your tags and tagged records in a card view. This view also works in the split screen so you can add more tabs and add items from the tag cards.



©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

Say goodbye to the personalize form slush-bucket and take control of forms with a new visual Forms Designer.

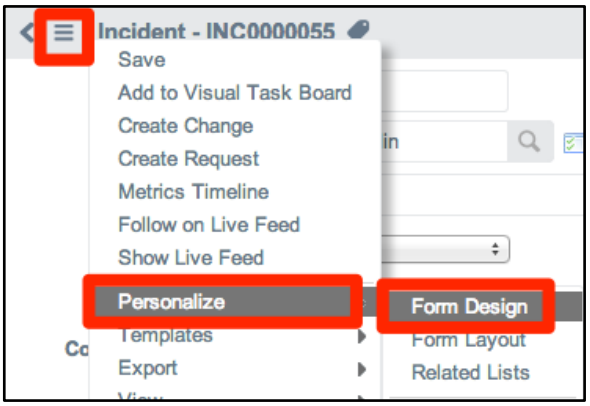
Lab 3
Form Designer

Personalizing Forms

1. Navigate to **Incident > Open**.

2. Open any **Incident** record.

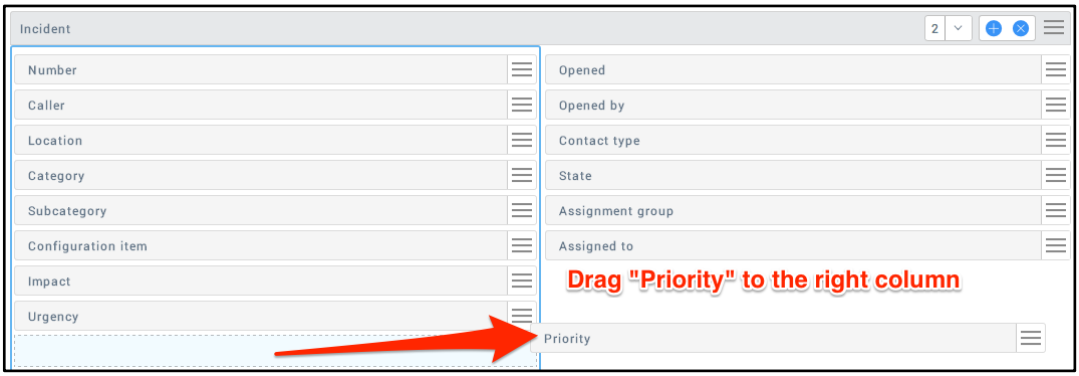
3. On the form header, click **Additional actions** . Select **Personalize > Form Design**.



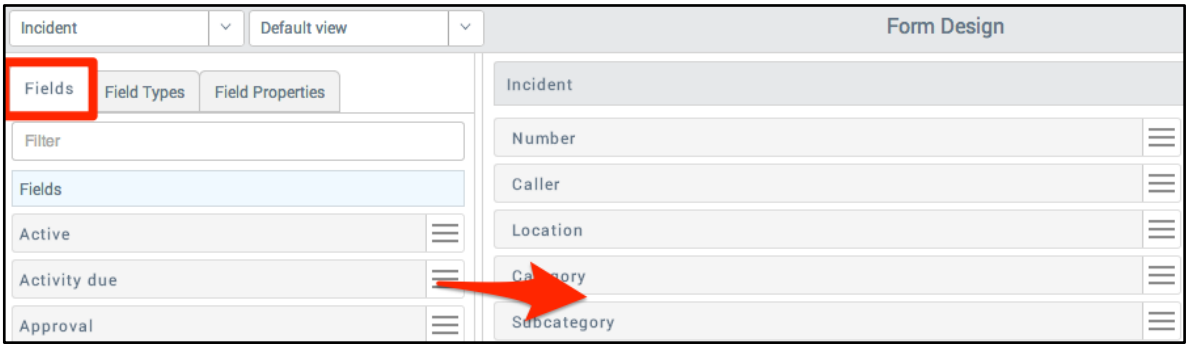
4. A new browser window opens with the new visual form designer.

©2014 ServiceNow, Inc. All rights reserved.

5. Move the **Priority** field from the left form column to the right.

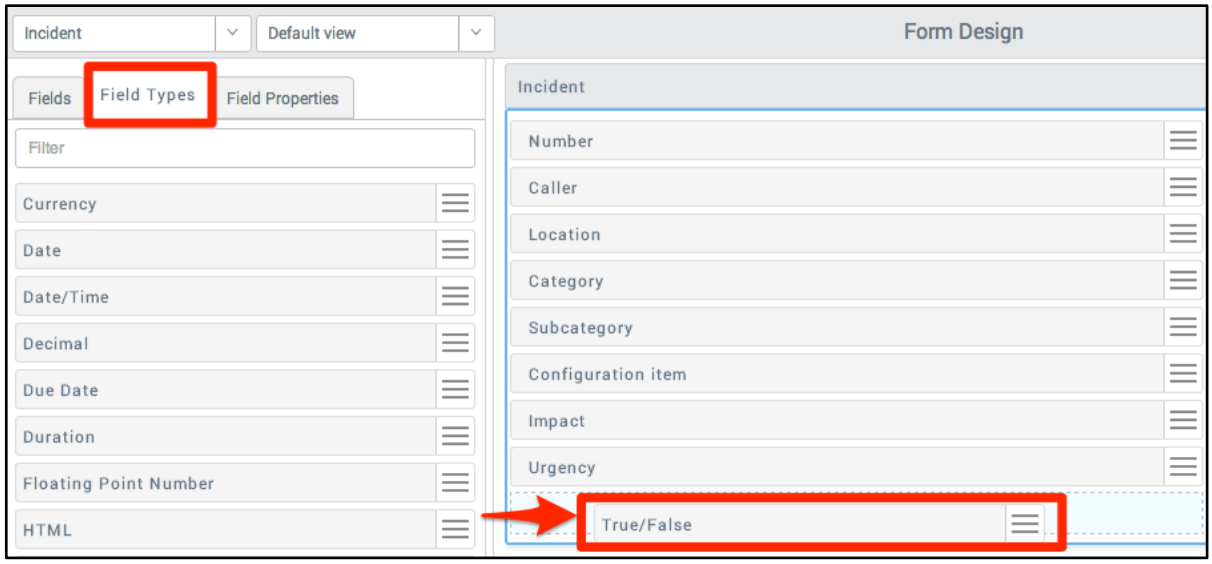


6. The **Fields** tab in the left pane shows the list of available fields for the selected table. You can drag fields onto the form and position them where you would like them.



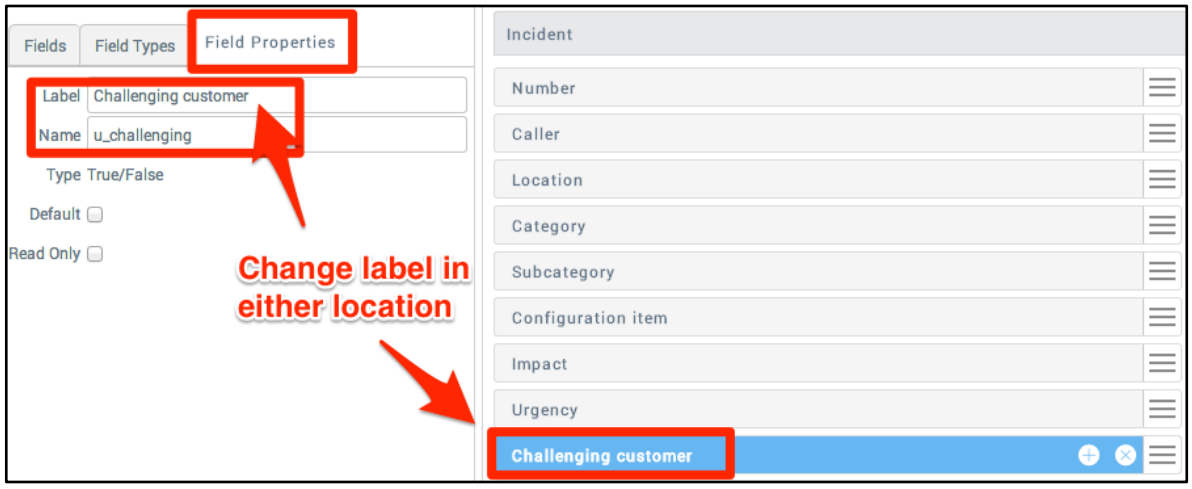
®2014 ServiceNow, Inc. All rights reserved.

7. New fields can also be created using the form designer. Select the **Field Types** tab and drag a **True/False** field onto the form.



8. Select the **Field Properties** tab and set the label and other properties as follows:

   Label: **Challenging customer**
   Name: **u_challenging**



©2014 ServiceNow, Inc. All rights reserved.

9. Click **Save**. NOTE: if you make a mistake, you can Undo any changes you made to the form.



10. Close the Form Design tab.

11. Right-click the Incident form header and **Reload form** to see the changes.

®2014 ServiceNow, Inc. All rights reserved.

Lab Goal

Allow line-of-business service provides to publish their services in the Service Catalog. The steps described in this lab require the **Service Creator** plugin to be activated.

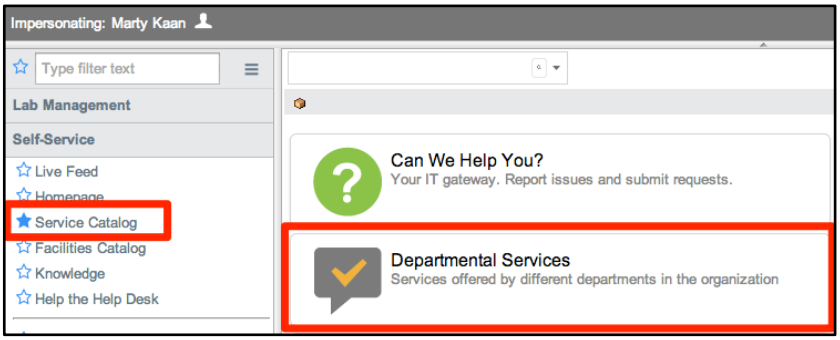
Marty runs a consulting team and would like to capture requests for consulting services via the service catalog. He would also like to track and assign the requests. Marty has already been granted the catalog_editor role.

Lab 4
Service Creator

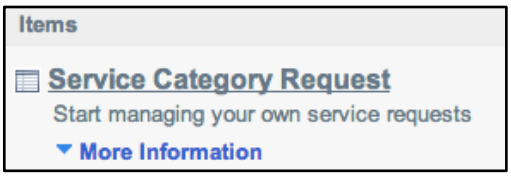
Propose a Catalog Category

1. Impersonate **Marty Kaan**.

2. Navigate to **Self-Service > Service Catalog**, and click **Departmental Services**.



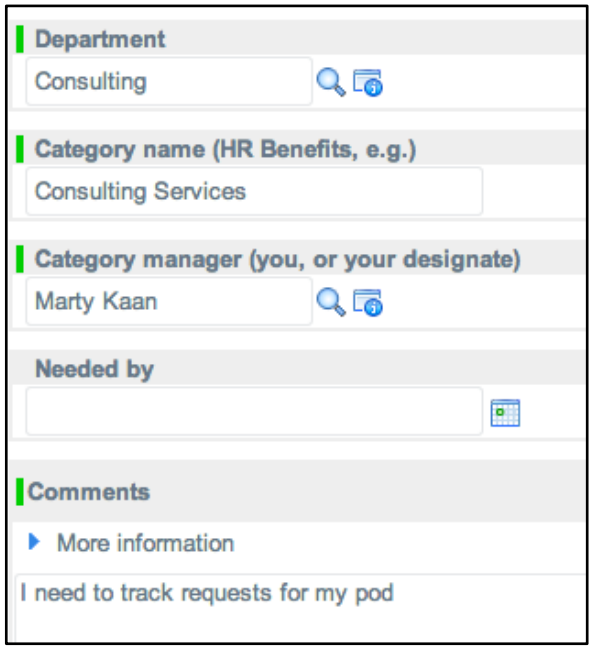
3. Select **Service Category Request** item to propose a new category for the catalog.



©2014 ServiceNow, Inc. All rights reserved.

4. Complete the required fields on the form as follows:

   Department: **Consulting**
   Category name: **Consulting Services**
   Category manager: **Marty Kaan**
   Comments: **I need to track requests for my pod**

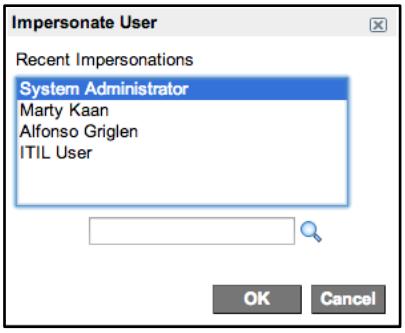


5. Click **Submit**.

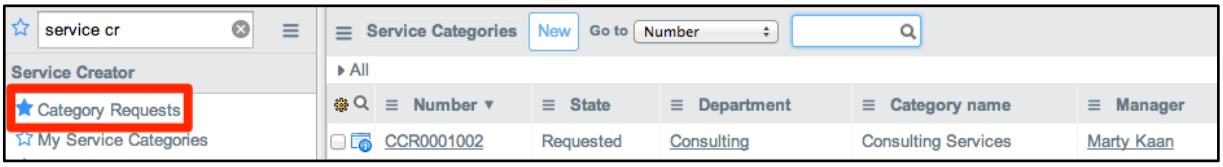
®2014 ServiceNow, Inc. All rights reserved.

Approve the Catalog Category Request

1. Return to **System Administrator** login to approve the request.

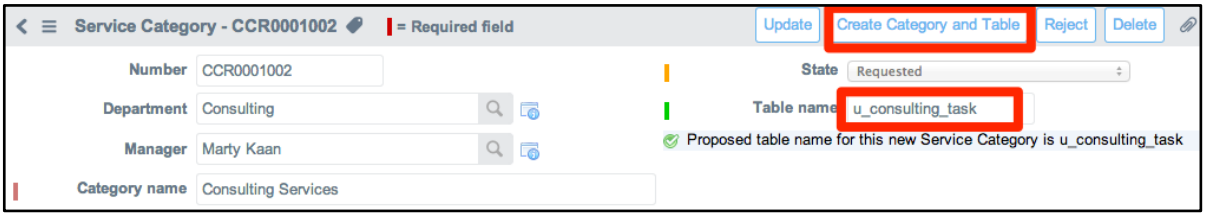


2. Navigate to **Service Creator > Category Requests** to view the pending requests.

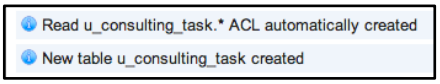


3. Open the request. The system automatically proposed a new task table to store the consulting service records.

4. Click **Create Category and Table** button to process the request.



5. The system creates the table and applies default security.



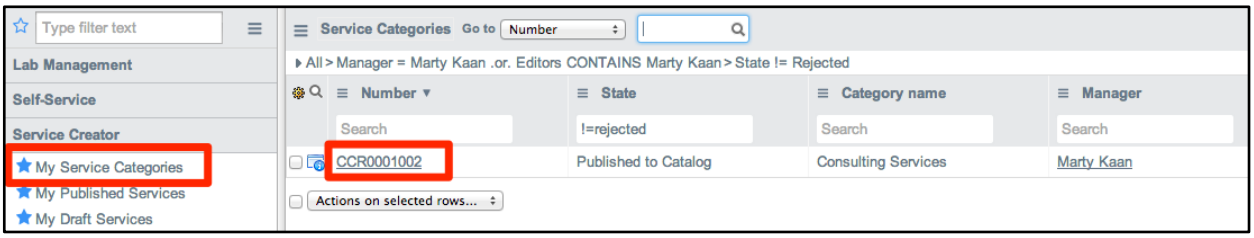
©2014 ServiceNow, Inc. All rights reserved.

Create a Draft Service

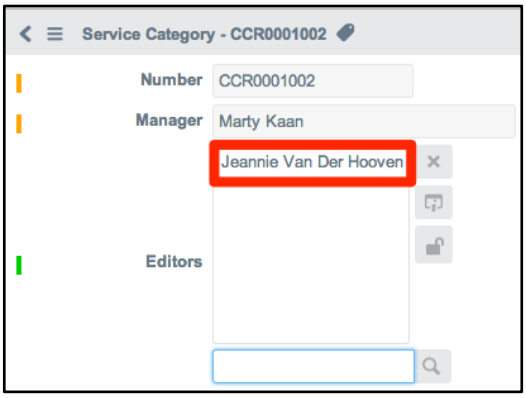
1. Impersonate **Marty Kaan** so to create a service for the catalog.

2. Navigate to **Service Creator > My Service Categories**.

3. Select the new category record.



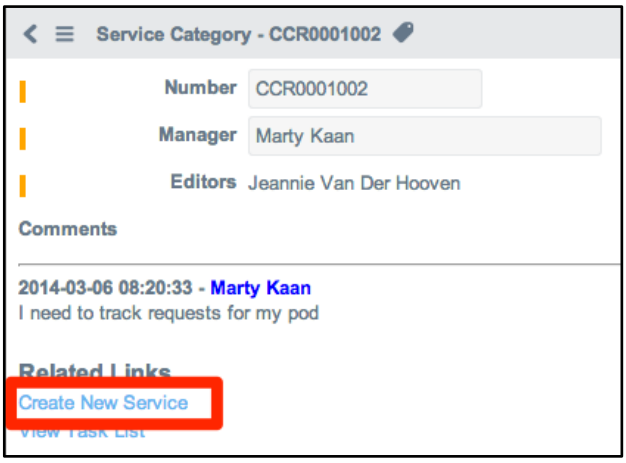
4. Since Marty is usually very busy, he wants to make sure he has a backup that can manage their team services. Edit the **Editors** field and add **Jeannie Van Der Hooven**.



5. Right-click the form header and **Save**.

©2014 ServiceNow, Inc. All rights reserved.

6. Under Related Links, click **Create New Service**.

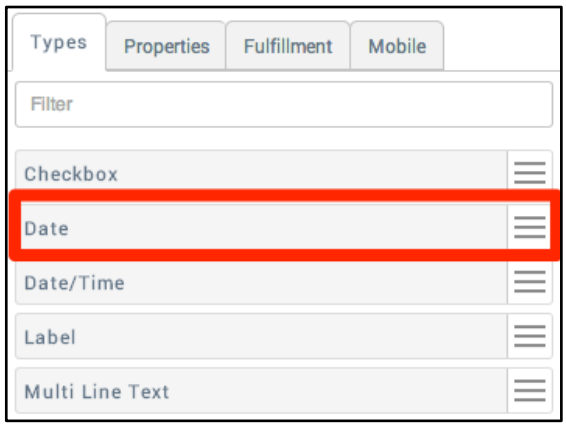


7. The Service Designer opens in a new browser window. Add a Name, Request Title, and optionally an Image and Description.



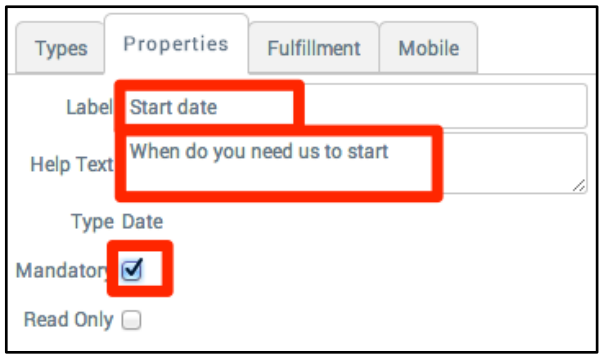
©2014 ServiceNow, Inc. All rights reserved.

8. On the **Types** tab of the left pane, drag a **Date** field type into the lower section of the form design.



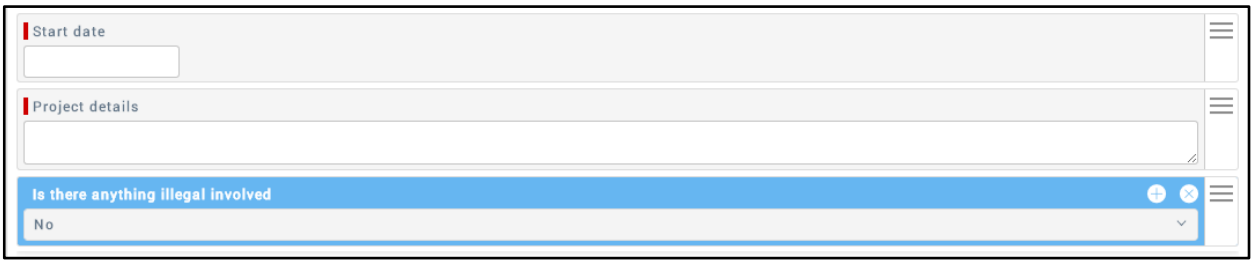
9. Select the **Properties** tab on the left and set the question properties as follows:

   Label: **Start date**
   Help Text: **When do you need us to start**
   Mandatory: **checked**

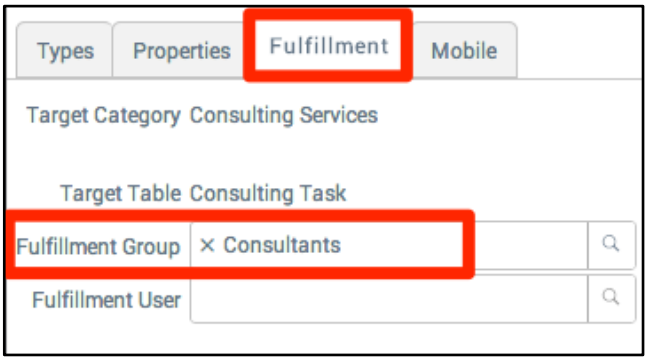


©2014 ServiceNow, Inc. All rights reserved.

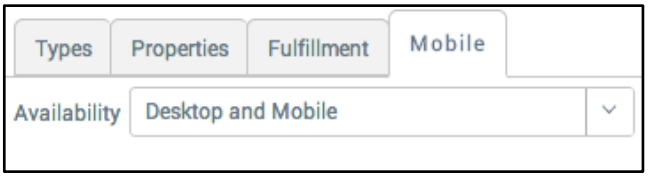
10. Optionally add some other question types.



11. Select the **Fulfillment** tab to define to whom the incoming requests should be assigned. Set the **Fulfillment Group** field to **Consultants.**



12. Select the **Mobile** tab to control which browser types should have access to this item in the catalog.



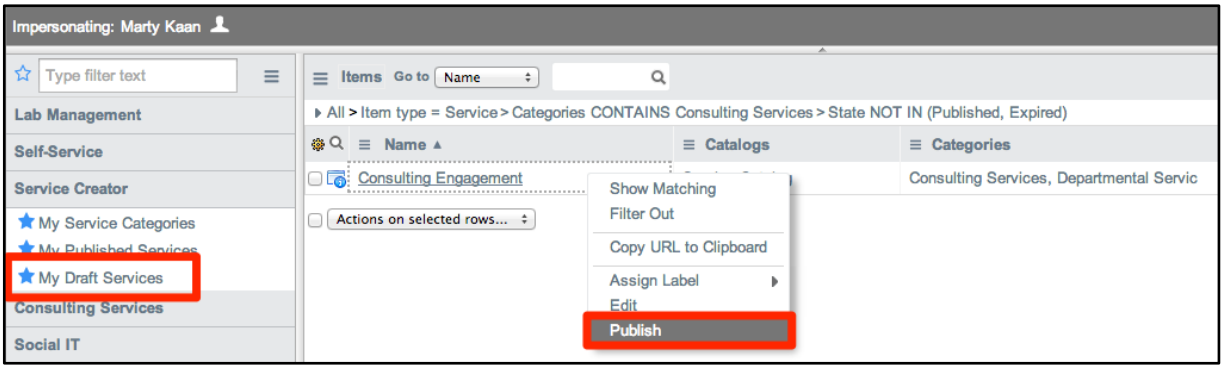
13. Click **Save and Close**.

©2014 ServiceNow, Inc. All rights reserved.

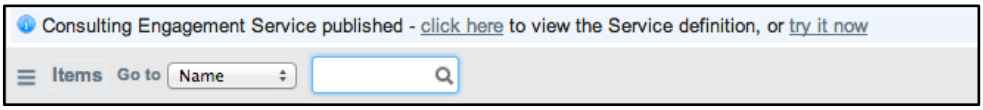
Publish the Service to the Catalog

1. Navigate to **Service Creator > My Draft Services** to display the list of draft services.

2. Right-click the new record and select **Publish.**



3. Confirmation received.



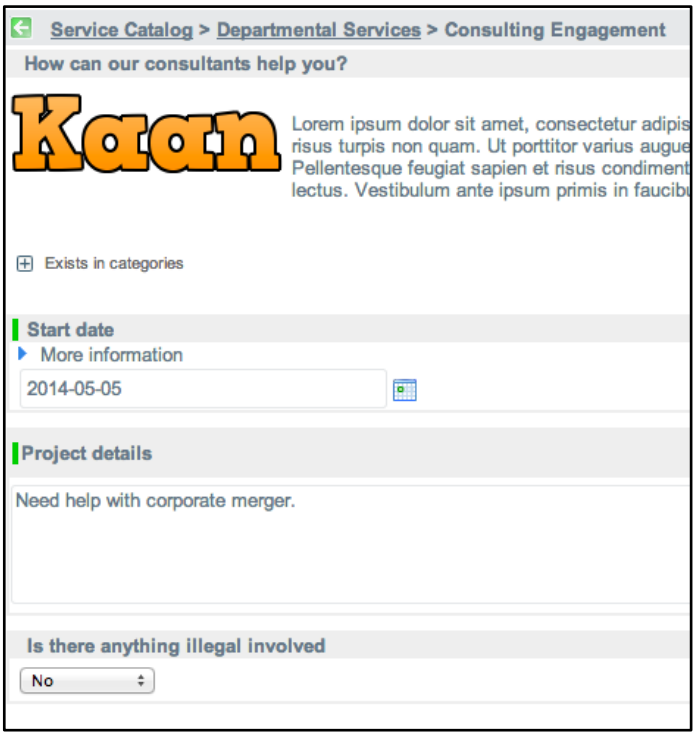
Test the New Service

1. Navigate to **Self-Service > Service Catalog** and open the **Departmental Services** category.

2. Select the new **Consulting Engagement** service.

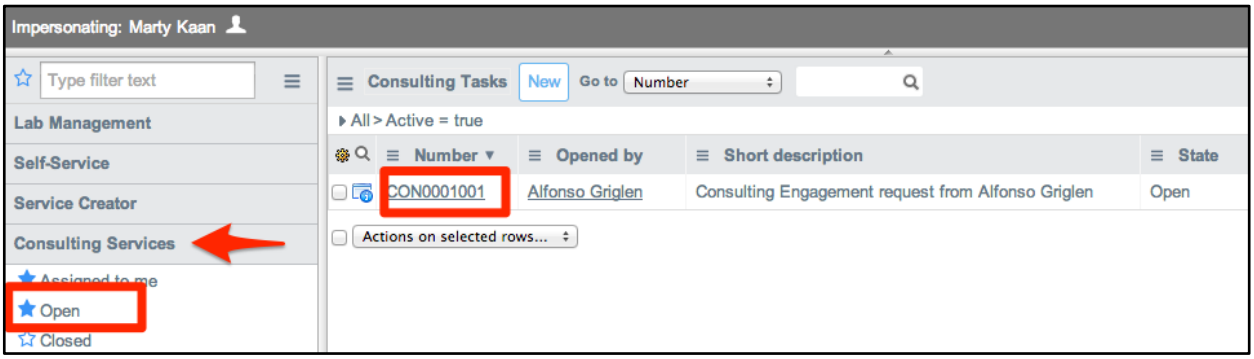
©2014 ServiceNow, Inc. All rights reserved.

3. Fill out the questions and submit the record.



4. Confirmation 

5. Navigate to **Consulting Services > Open** to view the list of work, including the request you just submitted. The consulting team can now manage and track their work and incoming requests.



©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

Review the new Business Services Maps (BSM) interface and controls.

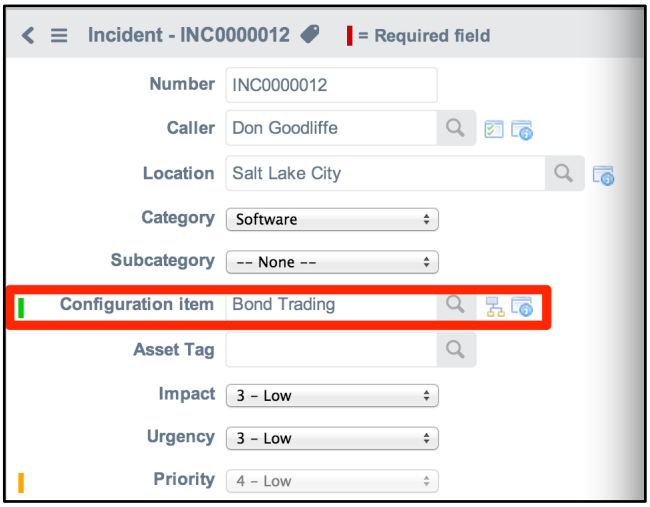
Lab 5
Business Services Maps

Launch a BSM Map from an Incident

1. Log in as **System Administrator**.

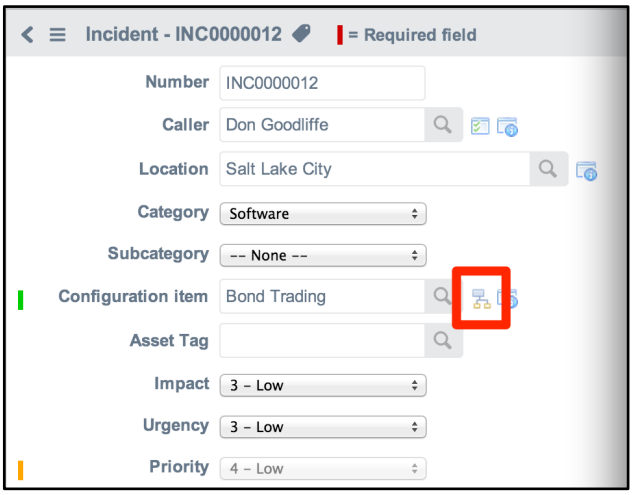
2. Navigate to **Incident > Open** and open any existing incident record.

3. Set the **Configuration Item** field to **Bond Trading**.



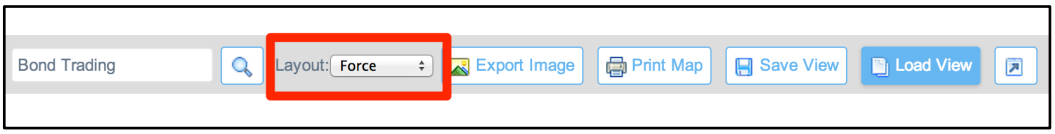
©2014 ServiceNow, Inc. All rights reserved.

4. Click on the **Show CI map** viewer icon next to the CI field.



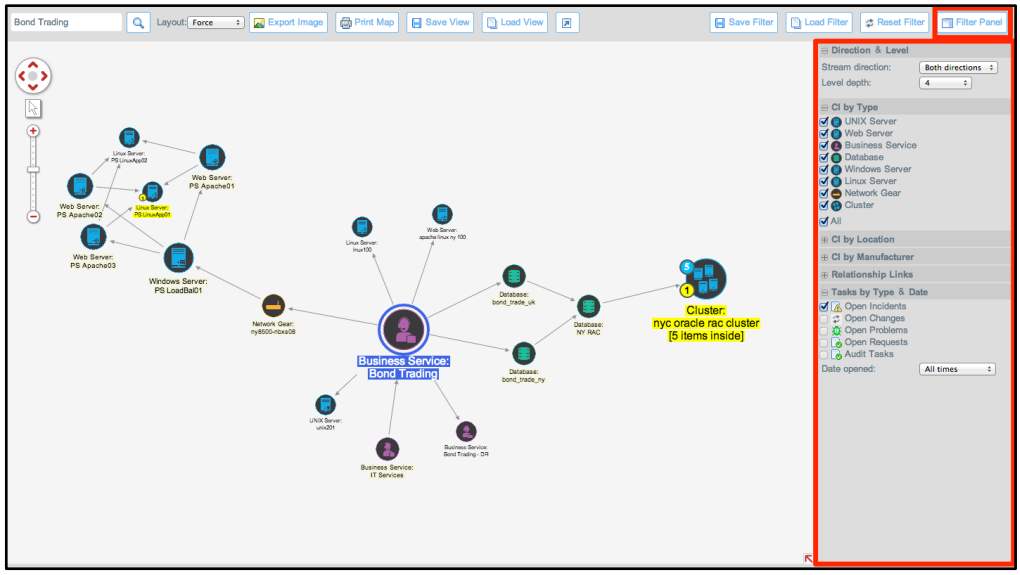
5. A new tab opens with the BSM Map View for the Bond Trading Business Service CI.

6. Change the Layout to **Force**, to organize the best layout of the CIs and relationships on the map.



©2014 ServiceNow, Inc. All rights reserved.

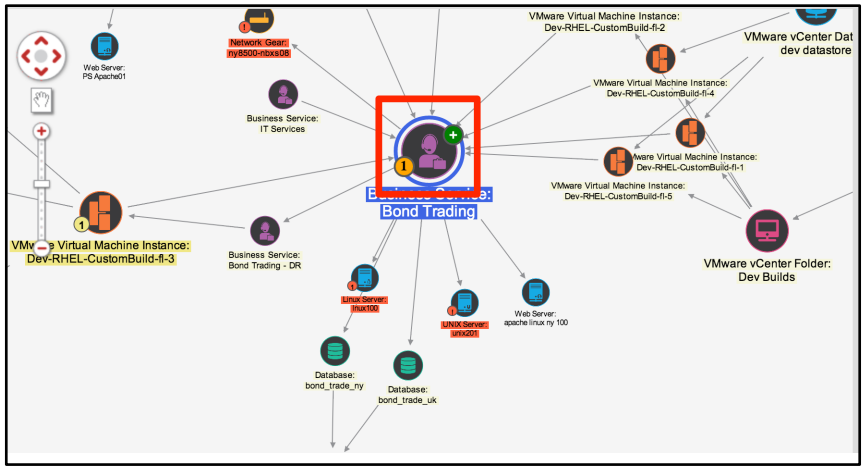
7. Click **Filter Panel** on the right hand side to display all filter options available based on the data on the map view.



8. Use the checkboxes to filter the view to display the information most appropriate to your goals.

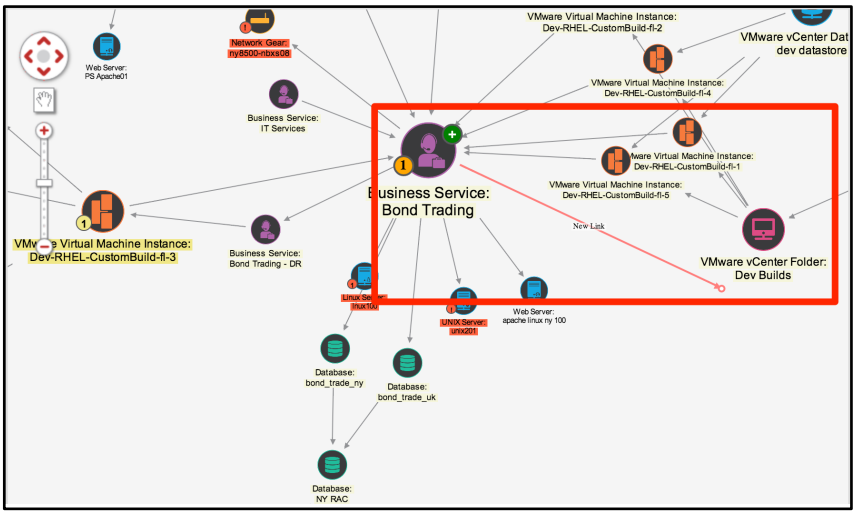
Create A New Relationship

9. Move your cursor over the CI you want to draw a relationship from and a **+** icon appears.

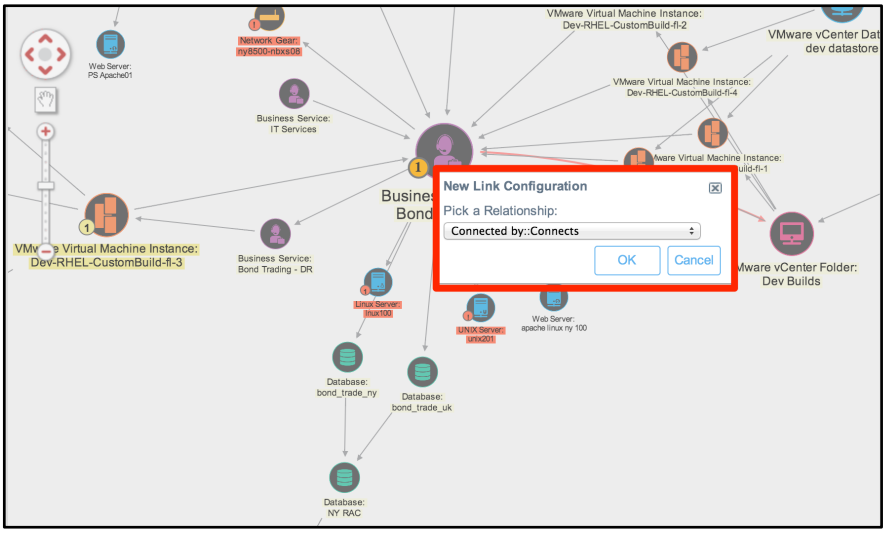


®2014 ServiceNow, Inc. All rights reserved.

10. Click on the '+' icon and drag the red line to the CI you want to create a relationship to.



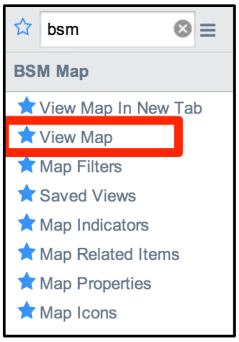
11. Select the relationship, and the two CIs are now connected.



®2014 ServiceNow, Inc. All rights reserved.

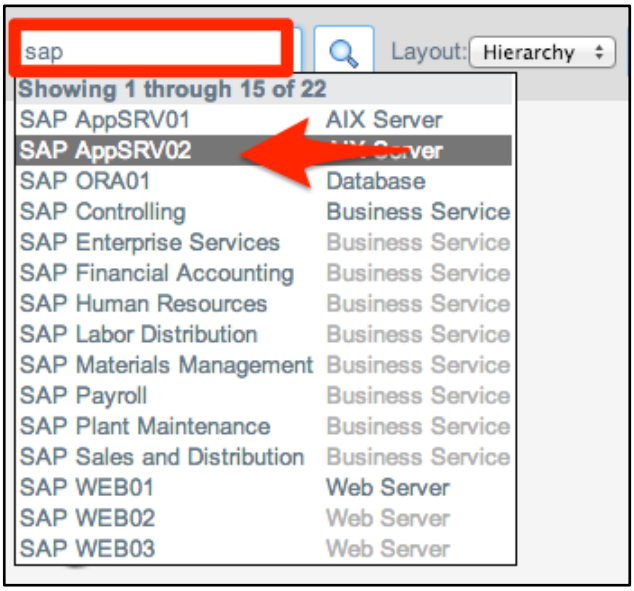
Search for a CI

1. Return to the main browser window and navigate to **BSM Map > View Map**.



2. The map opens and displays the last CI searched for and its relationships.

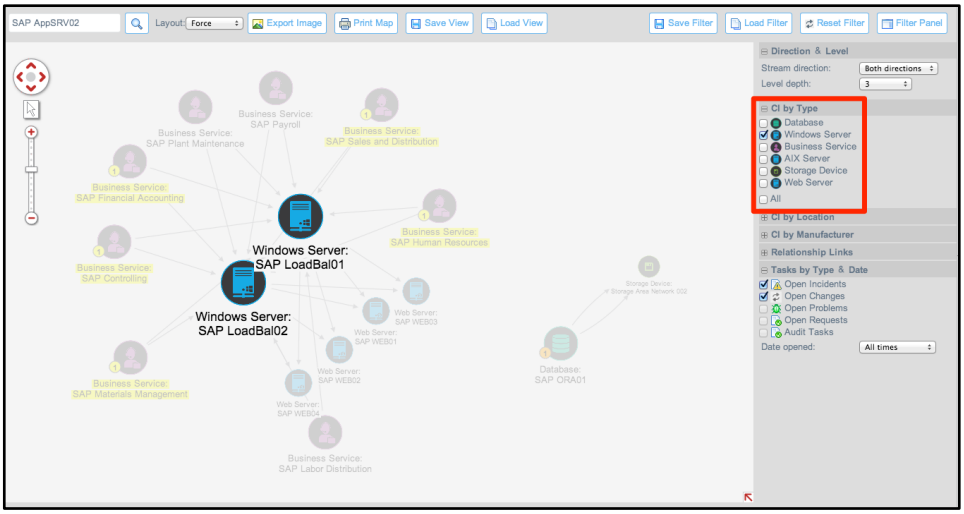
3. In the search box in the top left corner, type **SAP** then select **SAP AppSRV02**.



©2014 ServiceNow, Inc. All rights reserved.

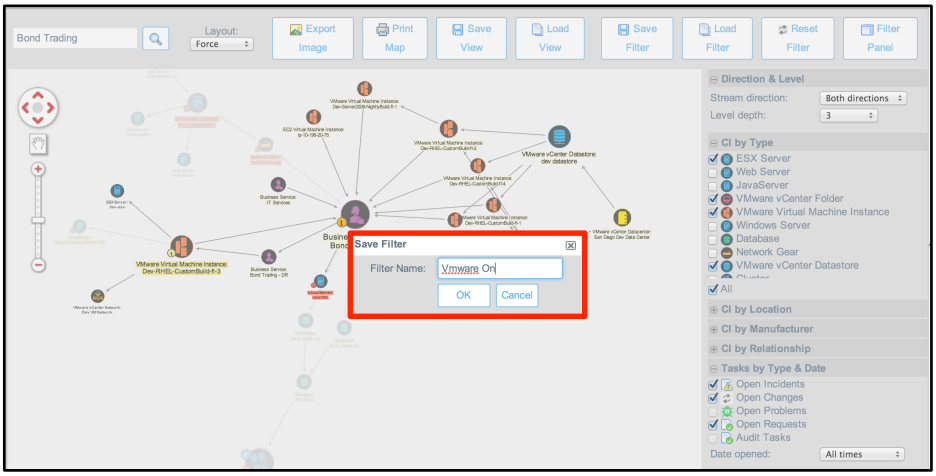
Create a New Filter

1. Deselect all non-Windows related CIs from the filter panel.



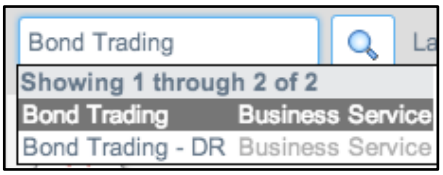
2. Click the **Save Filter** button in the top panel of the BSM Map.

3. Set the Filter Name to **Windows** and click **OK**.

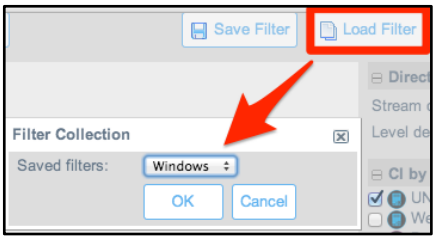


®2014 ServiceNow, Inc. All rights reserved.

4. Now search for the **Bond Trading** CI again.



5. Now load the filter we just created using the **Load Filter** button. Select the **Windows** filter.



6. The map displays with the filter applied. The filter is an exclusion filter so there may be new non-Windows types since they didn't exist on the map where we saved the filter.

©2014 ServiceNow, Inc. All rights reserved.

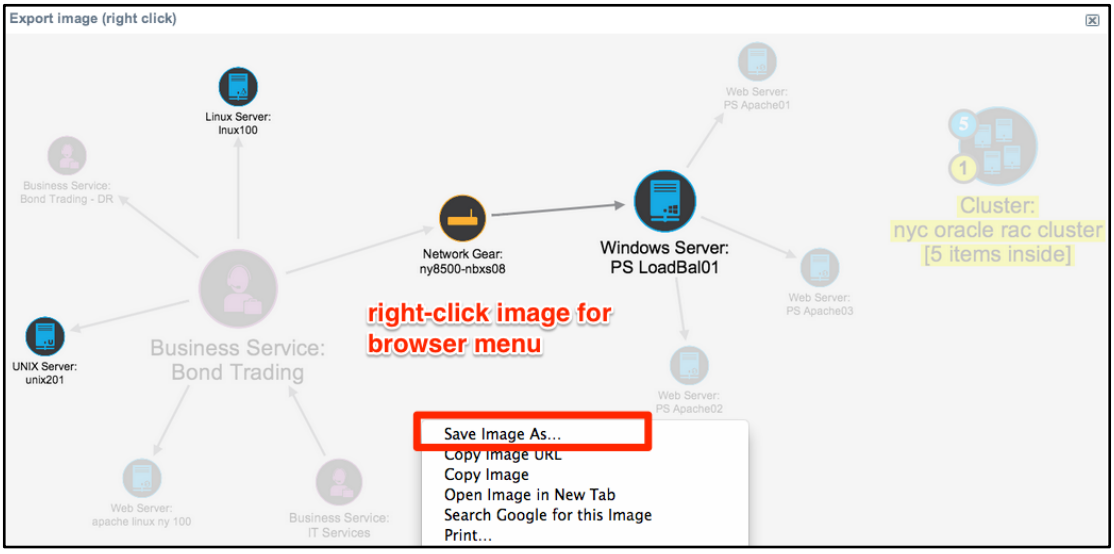
Export Image

1. Apply any filters or layout options to get the view you want.

2. Click **Export Image**.



3. A new pop-up displays the image to be exported. Right-click the image and use standard browser options to save the image.



4. Provide a file name and location to save.

©2014 ServiceNow, Inc. All rights reserved.

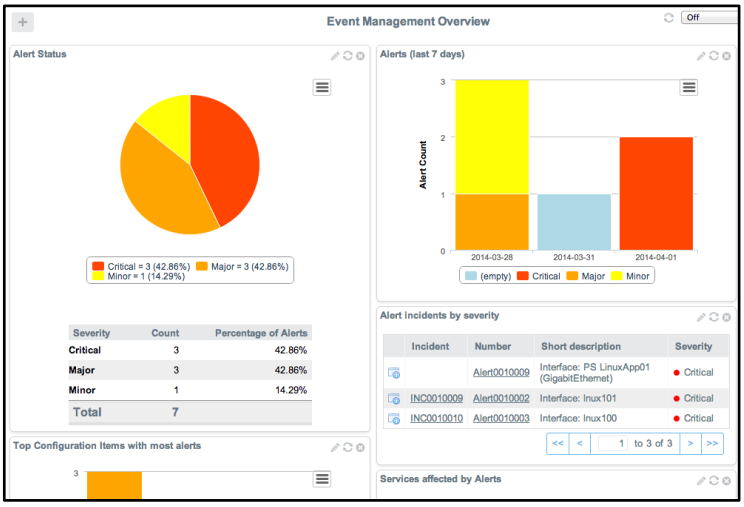
Lab Goal

Introduce the new Event Management application that automatically creates actionable alerts from infrastructure events generated by existing monitoring tools.

Lab 6
Event Management

Event Management Basics

1. Navigate to **Event Management > Overview**.



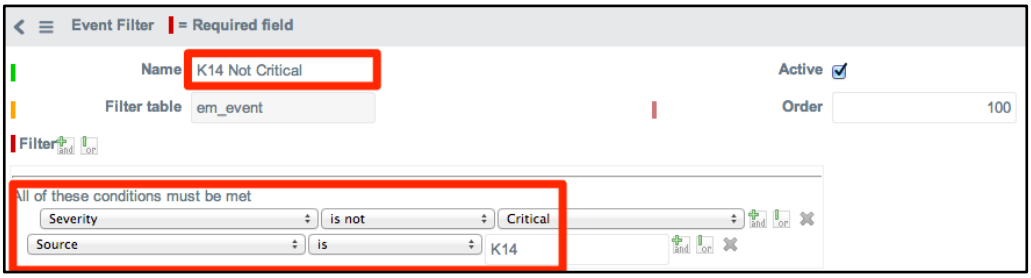
2. Navigate to **Event Management > Event Filters.**

3. Click **New** to create a filter to filter out non-critical events from the K14 source.

©2014 ServiceNow, Inc. All rights reserved.

4. Complete the form as follows:

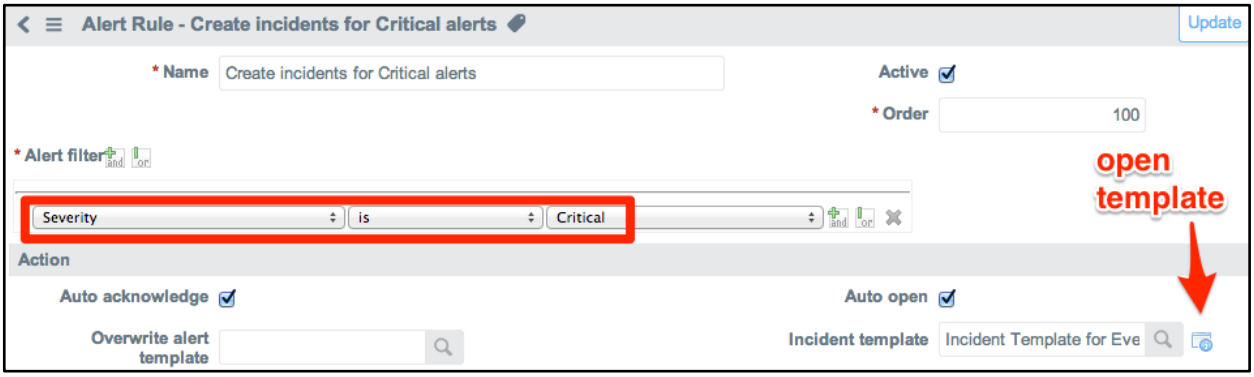
   Name: **K14 Not Critical**
   Filters:
   Severity | is not | Critical
   Source | is | K14



5. Navigate to **Event Management > Alert Rules**.

6. Find and open the **Create incidents for Critical alerts**.

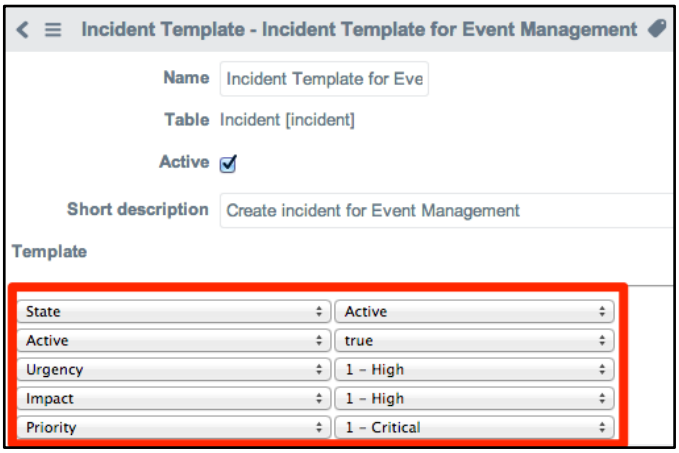
7. Click the reference icon next to the Incident template field to open the template record.



©2014 ServiceNow, Inc. All rights reserved.

8. Set the template values as follows to create a critical incident:

   Template:
   State | Active
   Active | true
   Urgency | 1 – High
   Impact | 1 – High
   Priority | 1 – Critical



9. Navigate to **Event Management > Events**.

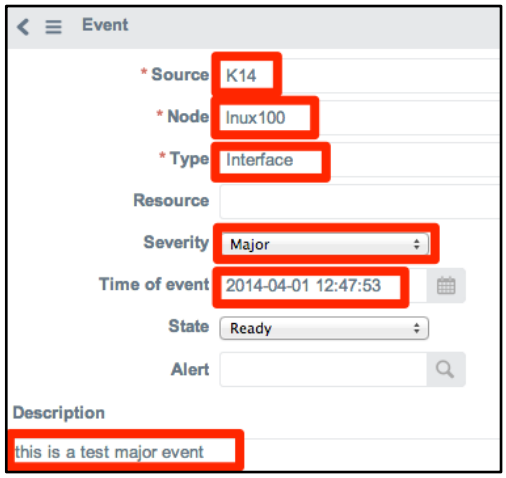
10. Click **New**.

    NOTE: Event records would typically be created from external monitoring systems via SOAP or REST.

©2014 ServiceNow, Inc. All rights reserved.

11. Complete the form as follows:

    Source: **K14**
    Node: **lnux100**
    Type: **Interface**
    Severity: **Major**
    Time of event: ***<set to now>***
    Description: **this is a test major event**



12. Click **Submit**.

13. Return to the list of Event records.

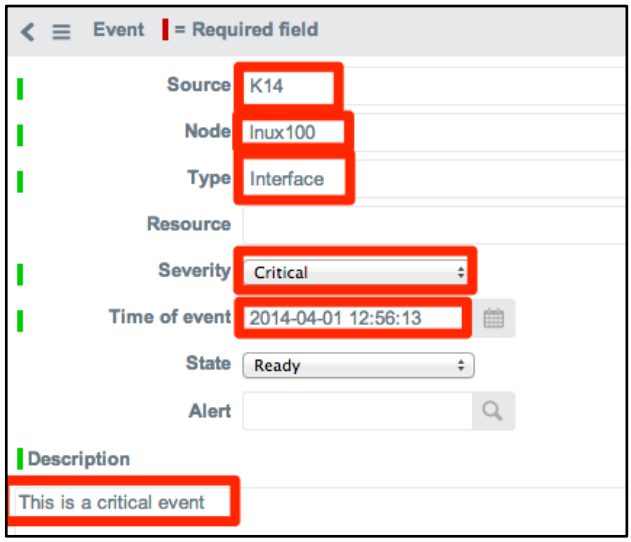
14. Sort the list on the Time of event field (Z-A). Notice the event is in a Ready state until the event processor runs. Click the **All** breadcrumb to refresh to list until the event is Processed. Notice there is no Alert generated since the event filter filtered it out.



©2014 ServiceNow, Inc. All rights reserved.

15. Create another new critical event as follows:

    Source: **K14**
    Node: **lnux100**
    Type: **Interface**
    Severity: **Critical**
    Time of event: ***<set to now>***
    Description: **this is a critical event**



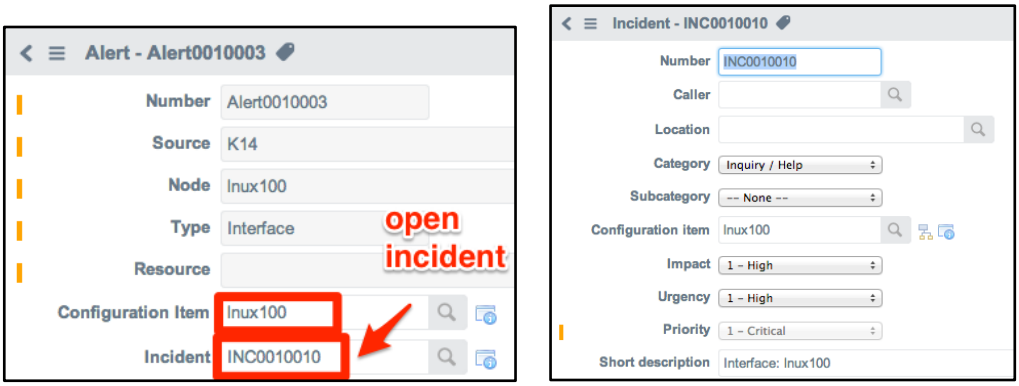
16. Click **Submit**.

17. Return to the event list and refresh the list until the event is processed. Notice that an alert is generated this time. Open the alert.



©2014 ServiceNow, Inc. All rights reserved.

18. From the alert form, open the new incident to view the details. The incident has the values defined in the template.



19. From the incident form you can also view the related list of alerts if you need more information.

©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

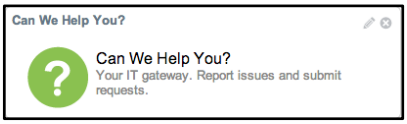
Introduce the new Demand Management application to collect, review, and prioritize incoming demand requests. The steps described in this lab require the **Demand Management** plugin to be activated.

Lab 7
Demand Management

Demand Intake

1. Navigate to **Self-Service > Service Catalog**.

2. Click **Can We Help You?**

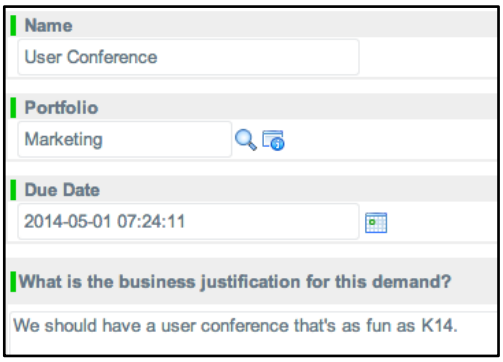


3. Click **Submit Idea**.



©2014 ServiceNow, Inc. All rights reserved.

4. Submit an idea, here is an example.

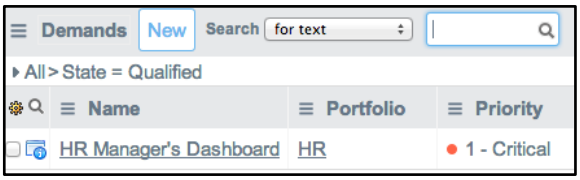


5. Navigate to **Demand Management > Demands > Submitted**.

6. Open the idea you just submitted. This is where a demand manager would start to define assessment data to be used during the evaluation process.

7. Review a demand that has already been qualified. Navigate to **Demand Management > Demands > Qualified** to view the list of qualified demands.

8. Open the **HR Manager's Dashboard** record.

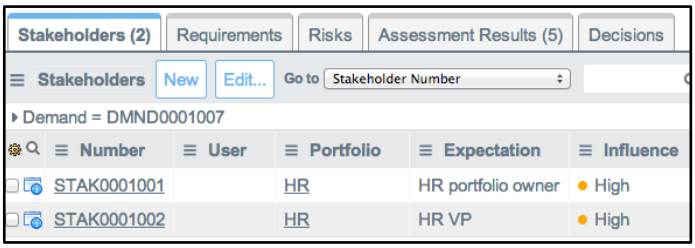


9. Review the **Assessment Data** fields to see what the demand manager provided. Common inputs are Risk, size estimate, cost estimates, priority and impact.

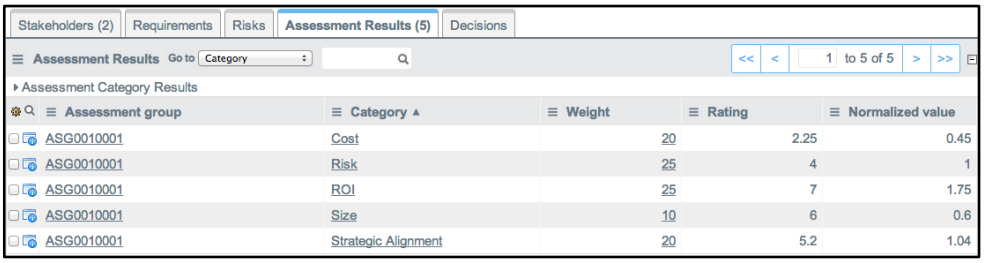


©2014 ServiceNow, Inc. All rights reserved.

10. Review the **Stakeholders** related list



11. , Review the **Assessment Results** related list.

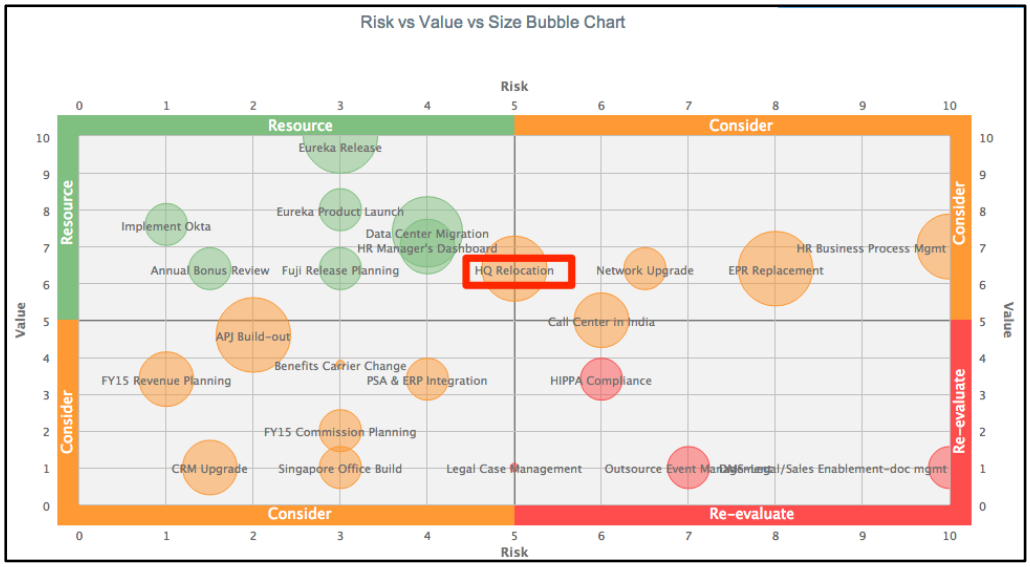


®2014 ServiceNow, Inc. All rights reserved.

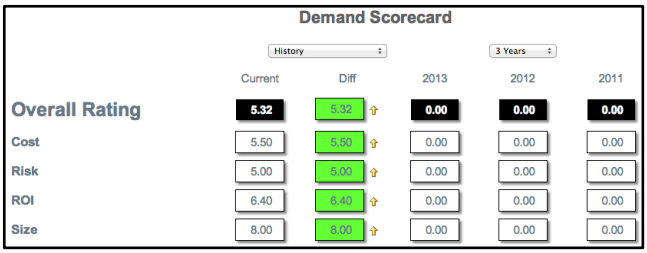
Demand Evaluation

The assessments allow you to compare the demands based on the metrics provided. This can be done with bubble charts, scorecards, and roadmaps.

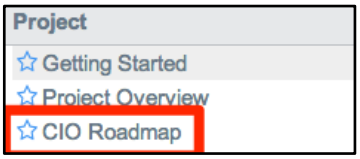
1. Navigate to **Demand Management > Bubble Charts > View**.



2. Find and click the **HQ Relocation** bubble to view the assessment scorecard.

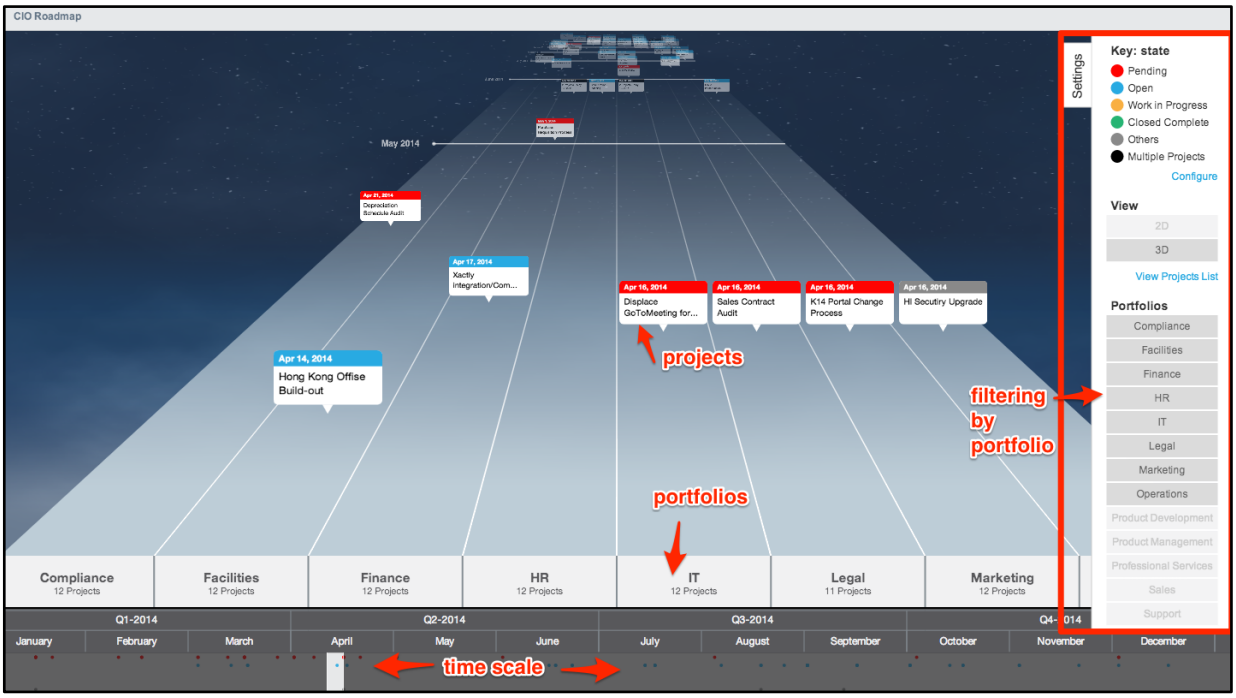


3. Navigate to **Project > CIO Roadmap**.



©2014 ServiceNow, Inc. All rights reserved.

4. Explore the interface controls and settings.



®2014 ServiceNow, Inc. All rights reserved.

Lab Goal

Define simple business logic with script-less business rule options. Here you create a rule that sets the incident location to the caller's location if a location is not specified.

Lab 8
Easy Business Rules

Create a New Business Rule

1. Navigate to **System Definitions > Business Rules**.



2. Click **New**.

3. Set the Name and Table as follows:

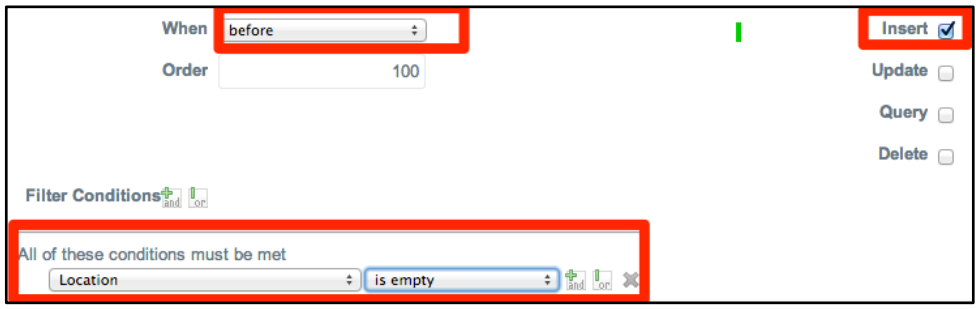
   Name: **Set Incident Location**
   Table: **Incident [incident]**



©2014 ServiceNow, Inc. All rights reserved.

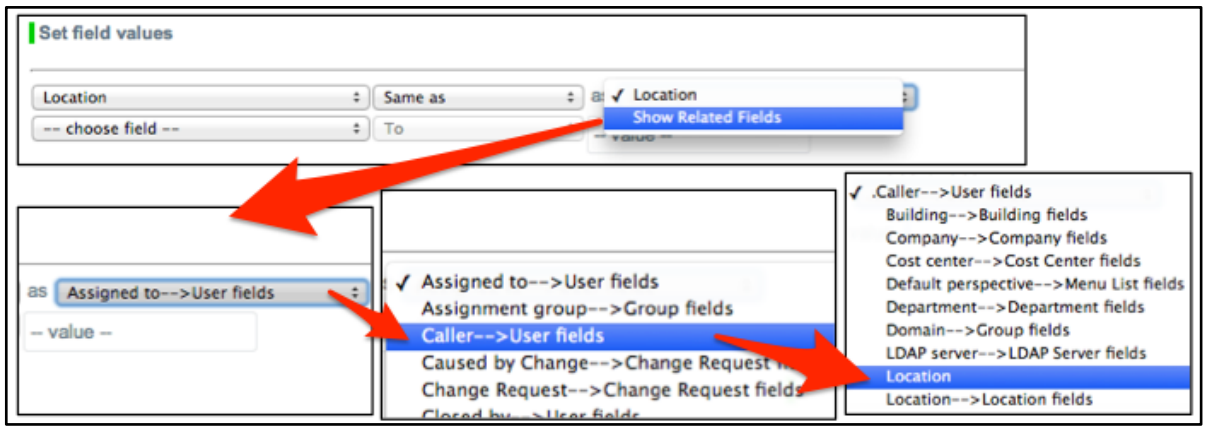
4. Complete the **When to run** form section as follows:

   When: **before**
   Insert: **checked**
   Filter conditions: **Location | is empty**



5. In the **Actions** form section under **Set field values**, set the **Location** field to be **Same as** Caller.Location by stepping through the choice options as follows:

   Select **Show Related Fields**
   Select **Assigned to-->User fields**
   Select **Caller-->User fields**
   Select **Location**



6. This rule runs the condition and set values without writing any script. Test if there is time.

©2014 ServiceNow, Inc. All rights reserved.

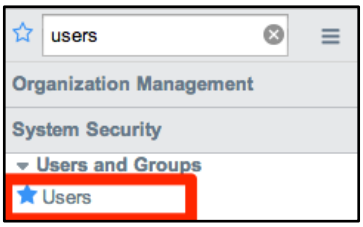
Lab Goal

Demonstrate a new way to perform simple data import and updates from Excel.

Lab 9
Simple Data Import

Import Users

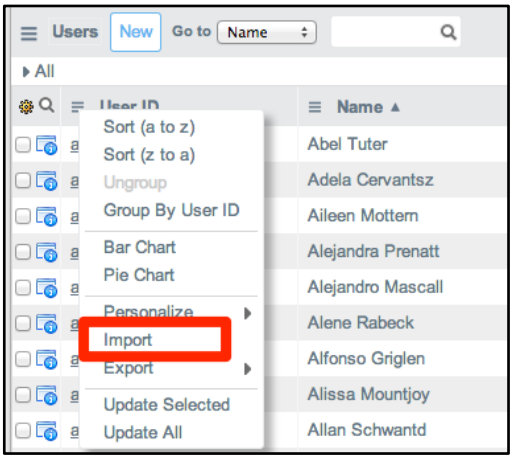
1. Navigate to **System Security > Users and Groups > Users**.



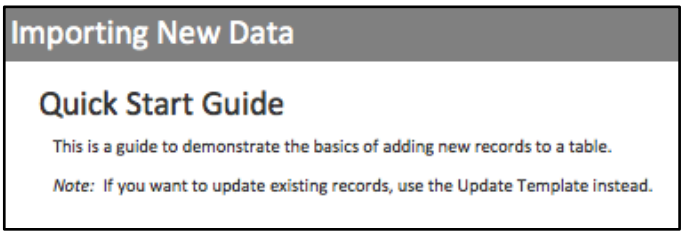
2. From any column header, click the  icon to access the column control menu.

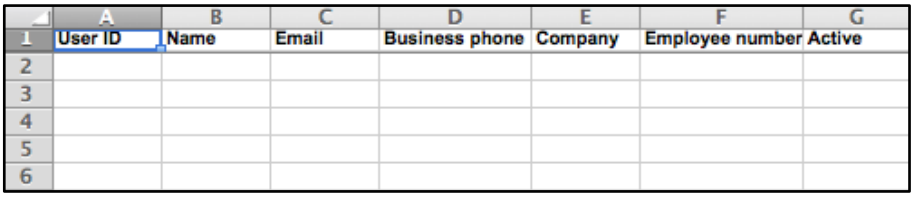
©2014 ServiceNow, Inc. All rights reserved.

3. Select **Import.**



4. Select **Insert** then click **Create Excel Template**. This downloads an Excel file with columns that match the list view. The spreadsheet also includes a quick start guide.





5. Once the data is populated, return to the import page and upload the file to insert new users. For these simple cases there is no need to worry about transform maps. You can also select the update option to download all of the existing data for making changes offline. Upload the file to update the user records.

©2014 ServiceNow, Inc. All rights reserved.