knowledge15
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Content Management 101

Personalize Your Self-service Portal

Jon O'Beirne & Reed Owens

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Page

Intentionally

Left

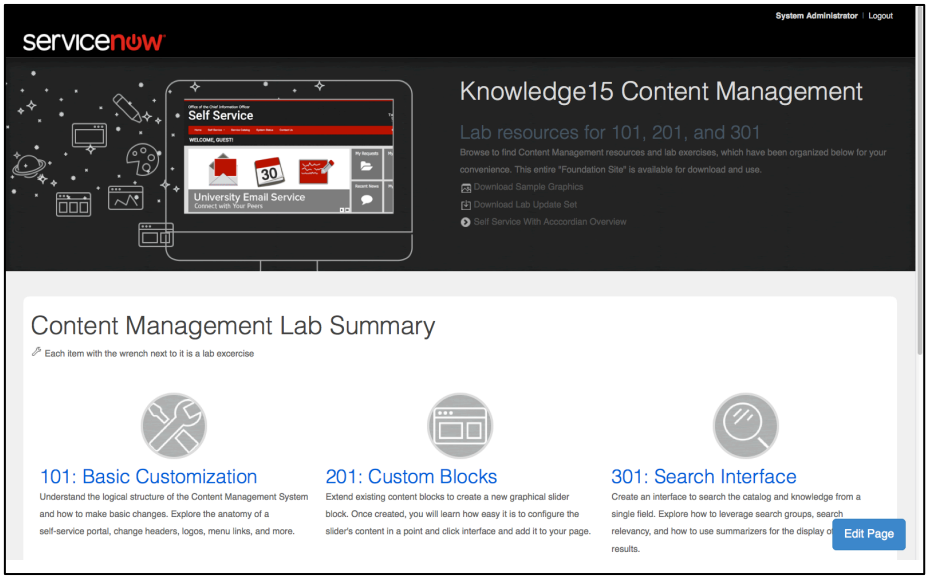
Blank

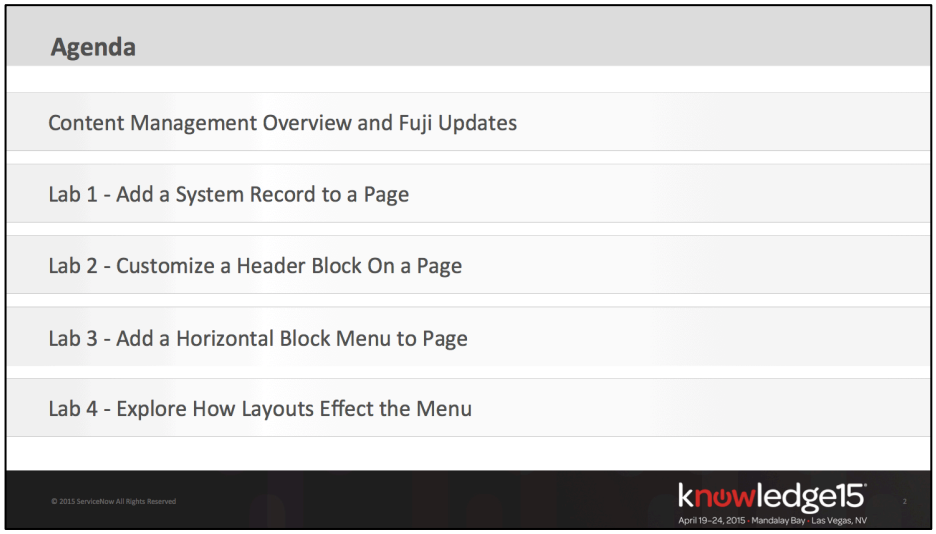
Agenda for Content Management Labs (Labs 1-4)

To make easier to follow, a prebuilt site with working examples has been made with navigation to help illustrate the functional areas covered in each of the labs.

1. Open **https://LabPrefix###.lab.service-now.com/foundation/**

2. Click the corresponding links in the first column of the page label: **101: Basic Customization**.





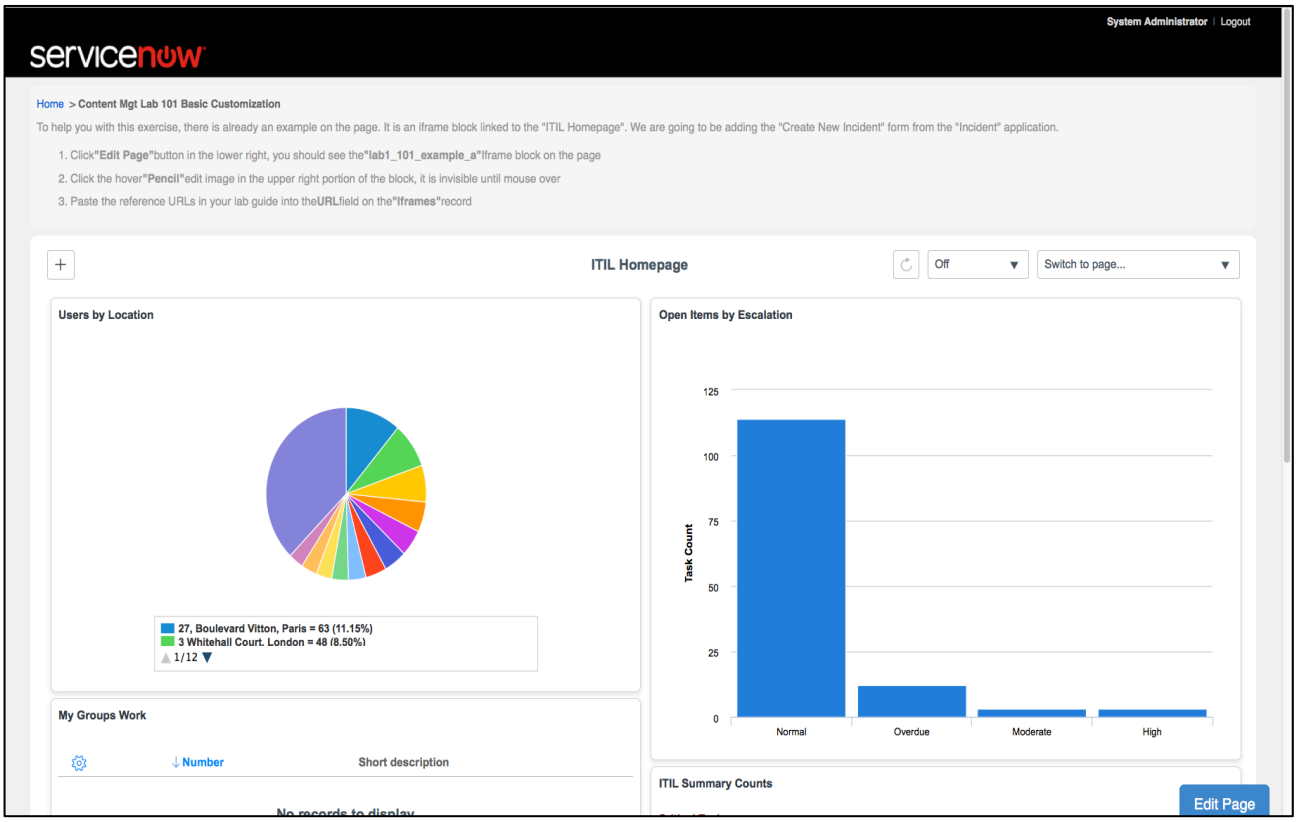
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Lab Goals

Labs 1-4 Overview

The **ServiceNow Content Management** application was designed with a simple purpose in mind and was based on our community's need to have more control over the user interface. The application provides an easy way to allow system records, forms, and lists to be referenced through an **Iframe** block on the page.

There is already an **Iframe** block on the page. In these labs, you paste reference URLS into the block to see how each system element renders on the page.



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Lab Goal

To help you with this exercise, there is already an example on the page. It is an IFrame block linked to the **ITIL Homepage**. This lab explains how to add the **Create New Incident** form from the **Incident** application

Lab 1 Add a System Record to a Page

1. Open **https://LabPrefix###.lab.service-now.com/foundation/lab1_101.do** or from the ***foundation*** home page click **101: Basic Customization->Add system record to page**.

2. Click **Edit Page** button in the lower right. Notice the **lab1_101_example_a Iframe block on the page**.

3. Click the hover **Pencil** edit image in the upper right portion of the block (it is invisible until the mouse hovers over it).

4. Paste reference links in the URL field on the **Iframes** record.

5. Reference URLs to try out in the Iframe block:

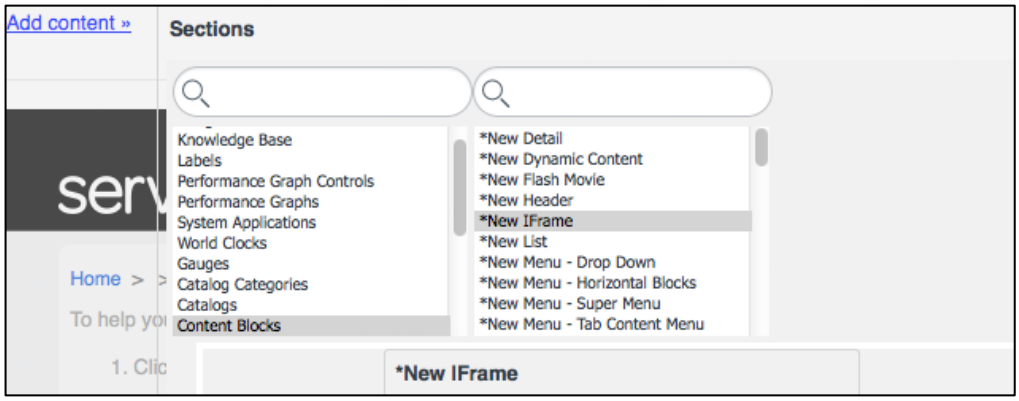
   Incident form URL
   /incident.do
   Default Service Catalog
   /catalog_home.do?sysparm_view=catalog_default
   Human Resources Overview
   /home.do?sysparm_view=top_searches_overview
   Live Feed URL
   /$live_feed.do

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Options and Variations to Lab 1

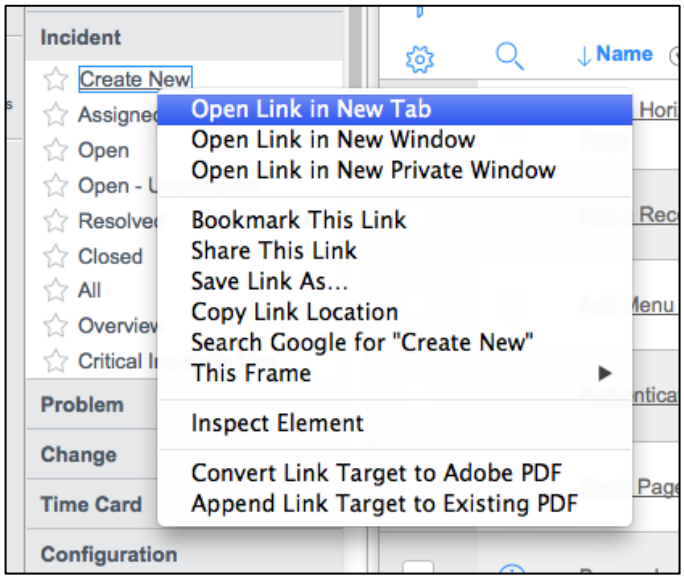
If you want to add a new block to the page, you can. Just make sure the IDs are different.

1. In edit mode, click **Add Content** in the upper left and select **Content Blocks** from the first column, and ***New IFrame** from the second column in the dialog window. Usually, it is best to not have two IFrame blocks on the same page.



Question: How do you add any record from the system to the page via IFrame?

2. To add a new block, click **Add Content** in the upper left and select **Content Blocks** from the first column, and ***New IFrame** from the second column in the dialog window.

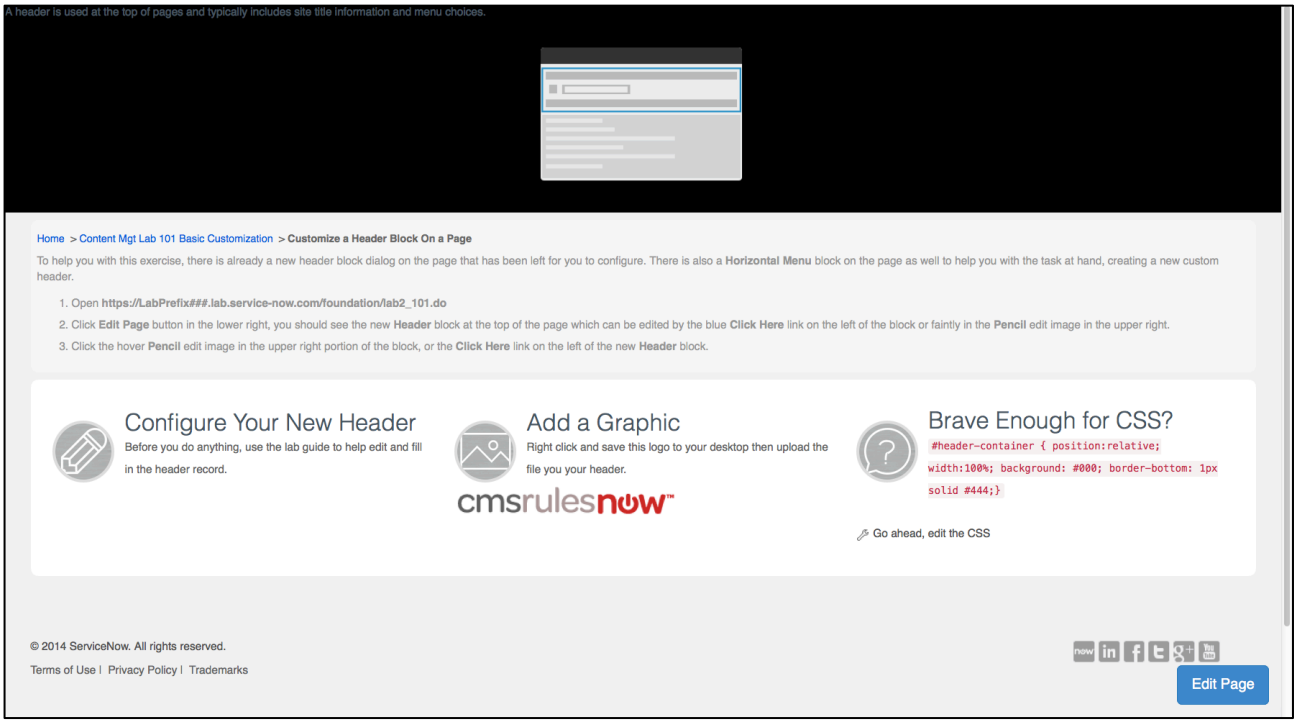


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Lab Goal

Now that you are comfortable adding system records as content to the pages within the Content Management application, this lab explains how to brand the page with a **Header** block and a logo.

Lab 2 Customize a Header Block on a Page



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Customize a Header Block On a Page (Lab 2)

To help you with this exercise, there is a new **Header** block dialog on the page for you to configure. There is also a **Horizontal Menu** block on the page to help you with the task at hand, creating a new custom header.

1. Open **https://LabPrefix###.lab.service-now.com/foundation/lab2_101.do** or from the ***foundation*** home page click **101: Basic Customization->Customize header block on page**

2. Click **Edit Page** button in the lower right. Notice the new **Header** block at the top of the page, which you can edit by selecting the blue **Click Here** link on the left of the block or faintly in the **Pencil** edit image in the upper right.

3. Click the hover **Pencil** edit image in the upper right portion of the block, or the **Click Here** link on the left of the new **Header** block.

4. Enter the following information in the Application form:

   Name: **My Header Block**
   Text: **Information About Site**
   Top Menu: **SM Header Top Menu**
   Bottom Menu: **Portal – Header Menu**
   Logo: **Upload Test Graphic (my_logo.png)**
   Experiment With Activation Of: **Search, Font Size, Login**

5. After you finish the changes to the header, click **Update** on the record to return to the page you were just on.

6. Add a logo to the **Header** record if you have not already done so.

7. To change the **CSS**, click the **Go ahead, edit the CSS** link on the page. It will take you to: **https://LabPrefix###.lab.service-now.com/foundation/lab2_101_a.do**

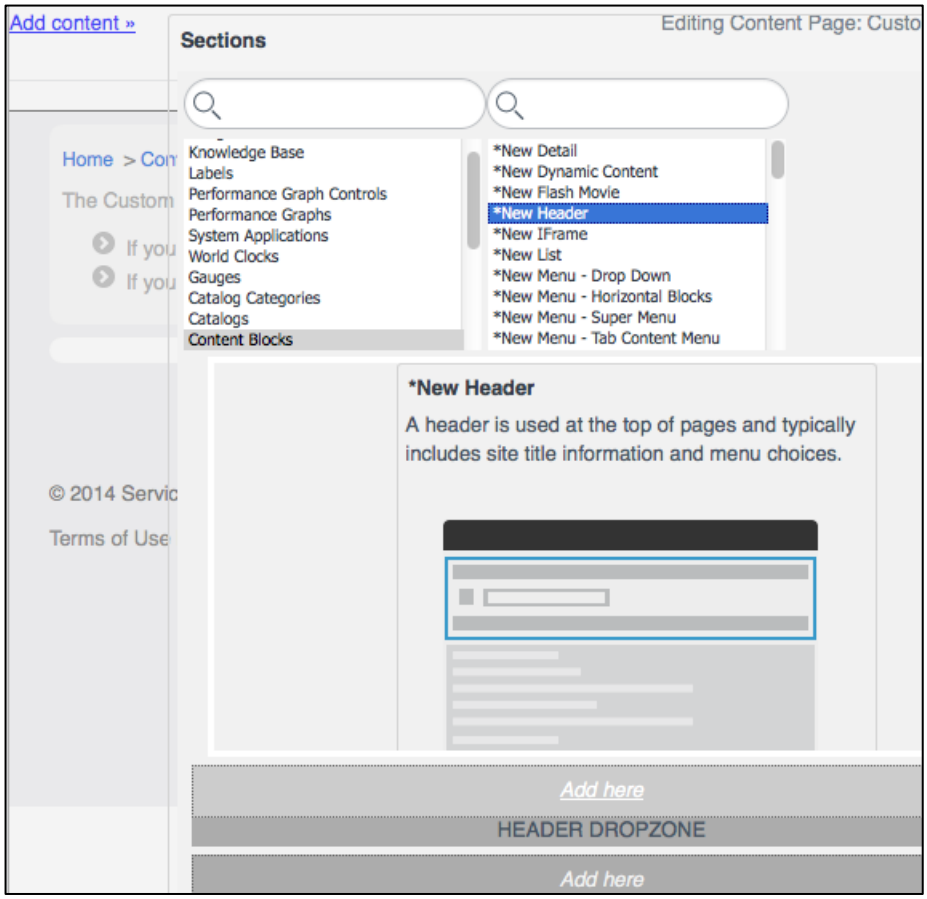
8. If you are happy with the black background; do not worry about it; it is fine to keep it that way.

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Options and Variations to Lab 2

If you want to add a new block to the page, you can. Just make sure the IDs are different.

1. In edit mode, click **Add Content** in the upper left and select **Content Blocks** from the first column, and ***New Header** from the second column in the dialog window.

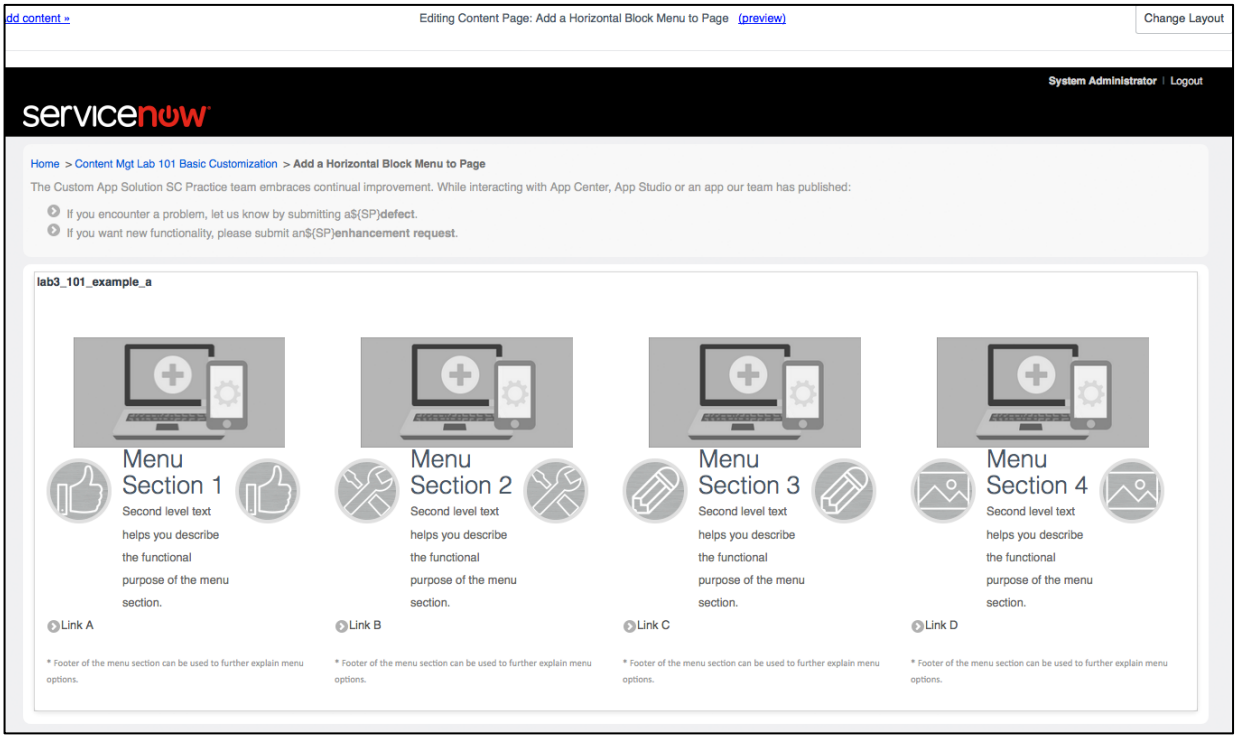


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Lab Goal

To help illustrate the power of **Horizontal Block** menus, there is already a menu named **lab3_101_example_a** on the page. Make adjustments to the menu as you see fit to properly balance the menu on your page. Menus are not just about linking to the pages within your site; symmetry is an important factor in how your customer can find information on the page.

Lab 3 Add a Horizontal Block Menu to a Page



1. Open **https://LabPrefix###.lab.service-now.com/foundation/lab3_101.do** or from the ***foundation*** home page click **101: Basic Customization->Add horizontal block menu to page**.

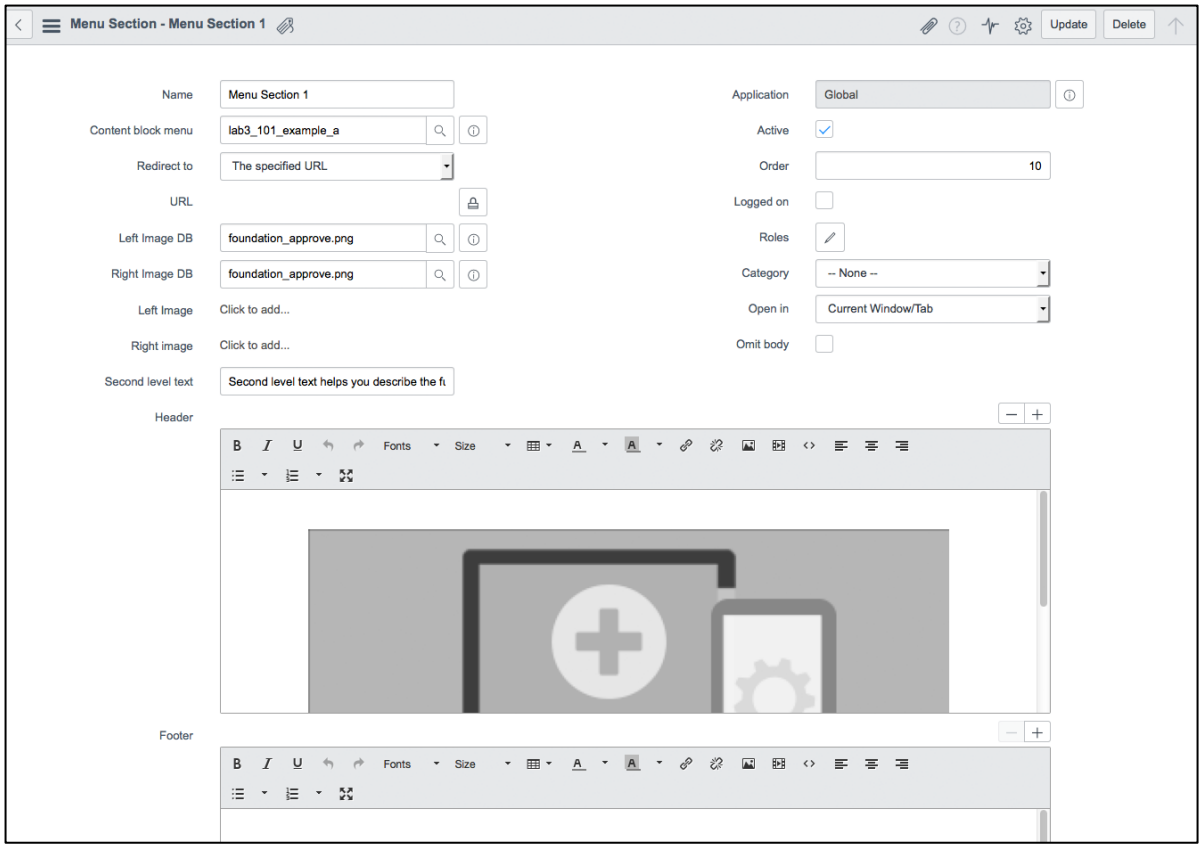
2. Click **Edit Page** button in the lower right. The **lab3_101_example_a** menu should be in edit mode. To edit the block, click the **Pencil** edit image in the upper right of the **Menu** block.

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3. Click the hover **Pencil** edit image in the upper right portion of the block, or the **Click Here** link on the left of the new **Header** block.

4. The **Menu Section** record has many fields, here is a breakdown of what they do:

   Name: Defines the name of the block, which is referenced when adding content to a page in edit mode.
   Content Block Menu: References the parent **Menu** record that the **Menu** section is a child of. This reference can easily be changed to quickly reorganize menus.
   Left Image DB: Image appears on left of the menu name. References the **DB_IMAGE** table. Over 350 Service Management images were added in Fuji to help build application interfaces.
   Right Image DB: Same as above, but the image will show up on the right of the menu name.
   Header: HTML field that allows you to put elements above the **Menu** section**.**
   Footer: HTML field that allows you to put elements below the **Menu** section**.**



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Things to Consider in Exercise 3

As mentioned above, this is a design exercise. Each Menu section should be of equal height and width. Proper balance and symmetry is important.

1. Try using only the left, the right, or the header for your graphics on all **Menu** sections on your **Menu**.

2. Try keeping in mind that word count on the **Second Level Text** needs to be consistent on all **Menu** sections.

3. This is a design exercise so have fun! The next lab goes through some layout options for your menu. Explore how the menu will look from one to four columns on the page.

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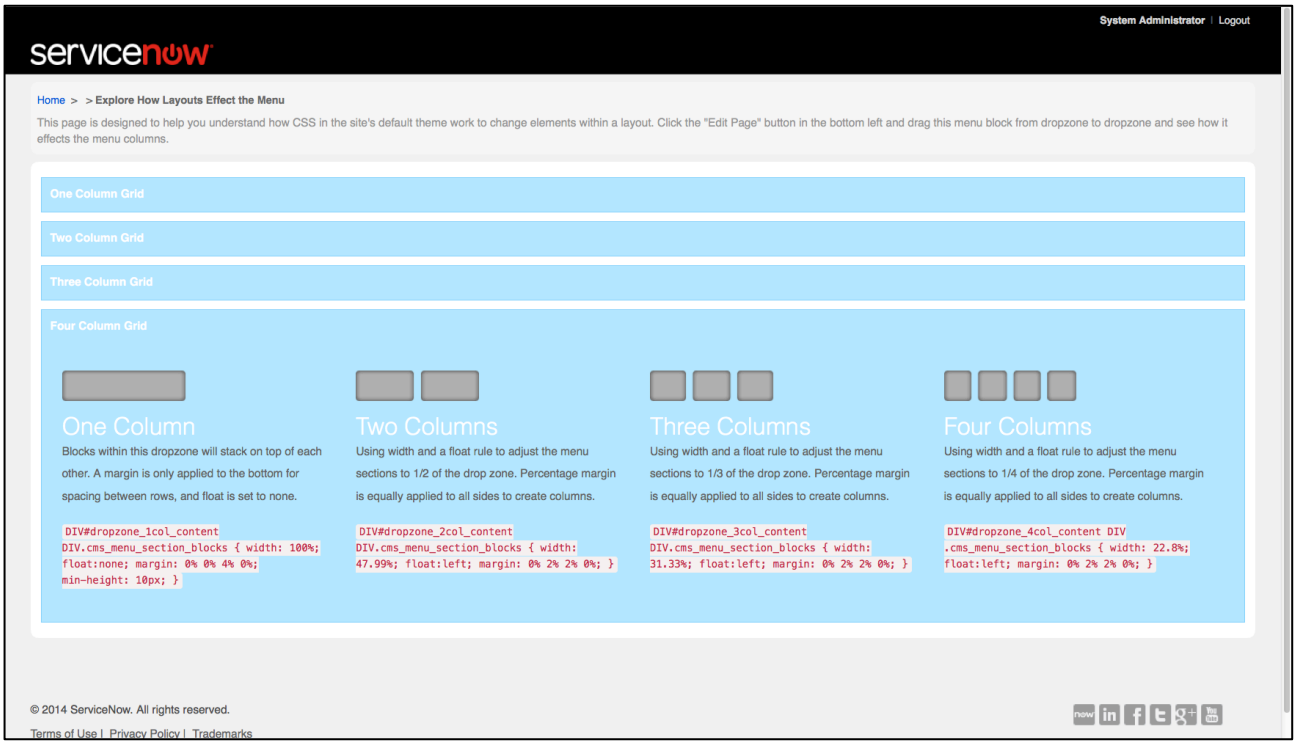
Lab Goal

Now that you have set up the **Horizontal Block** menus, take some time to see what happens when you use CSS to create a responsive float grid that is great for rapid prototyping.

To help illustrate responsive design, a Content Management **Layout** has been created to easily drag **Horizontal Block** menus into **Drop Zones** to change the width of the **Menu** sections.

Lab 4
Explore How Layouts Effect the Menu

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1. Open **https://LabPrefix###.lab.service-now.com/foundation/lab4_101.do** or from the ***foundation*** home page click on **101: Basic Customization->Use menu to explore layout options.cms**.

2. Click **Edit Page** button in the lower right. The **Baseline Layouts** and **Grids Menu Horizontal Menu** block appear in the **Dropzone** at the bottom of the page.

3. Click and drag the block into the different light blue **Dropzones** on the page and observe how the menu responds based on which **Dropzone** it is dragged into.

4. Now, explore the possibilities of using multiple menus in different **Dropzones**.

5. Use existing menus or create new menus to create a balanced page for the user interface

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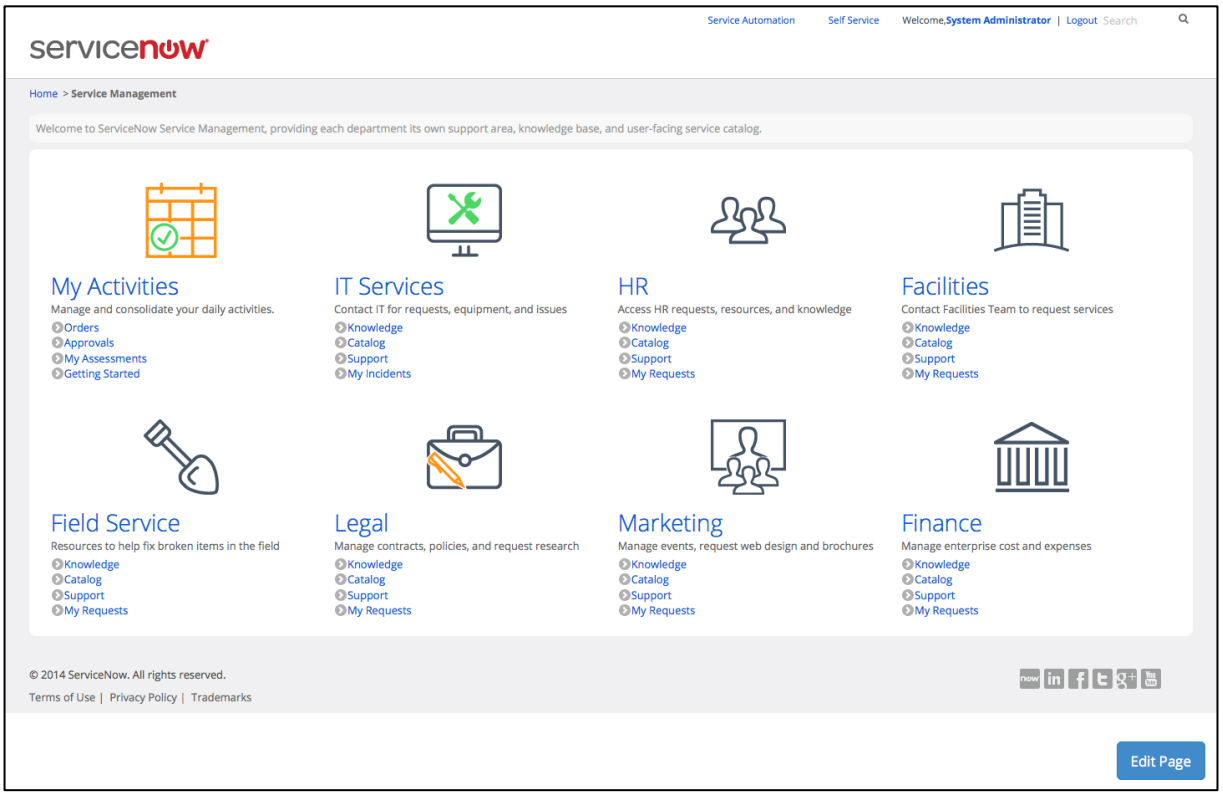
New Service Management CMS Interface

Fuji marks an important step forward for the ServiceNow platform. We will look back upon this release as the one that took us light years ahead functionally and aesthetically. Not only are the forms and lists contemporary and aesthetically pleasing, they are also fully responsive!

As practitioners of web design and best practice, we need to stop and look at the work that has been completed within the content management application in the past and decide what to keep, and what to discard.

Fuji provides an updated version of self-service and a new service management interface shown here.

https://YOUR_INSTANCE_NAME.service-now.com/service_management/



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The Following System Plugins Contain Service Management CMS interfaces:

CMS User Interface - Service Management Core - com.snc.service_management.core.cms
This plugin contains an updated self service interface and connections to the IT knowledge base, catalog, and help sections.

Facilities Service Automation CMS Portal - com.snc.facilities_service_automation.cms
This plugin contains connections to the "Facilities" application and an interface for facilities knowledge base, catalog, and help sections.

Preview Field Service Automation CMS Portal - com.snc.work_management.cms
This plugin contains connections to the "Work Management" application and an interface for work management knowledge base, catalog, and help sections.

Finance Service Automation CMS Portal - com.snc.finance_service_automation.cms
This plugin contains connections to the "Finance" application and an interface for finance knowledge base, catalog, and help sections.

Human Resources Service Automation: Core CMS Portal - com.snc.hr.core.cms
This plugin contains connections to the "HR" application and an interface for HR knowledge base, catalog, and help sections.

Legal Service Automation CMS Portal - com.snc.legal_service_automation.cms
This plugin contains connections to the "Legal" application and an interface for legal knowledge base, catalog, and help sections.

Marketing Service Automation CMS Portal - com.snc.marketing_service_automation.cms
This plugin contains connections to the "Marketing" application and an interface for marketing knowledge base, catalog, and help sections.

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