ServiceNow Training Book

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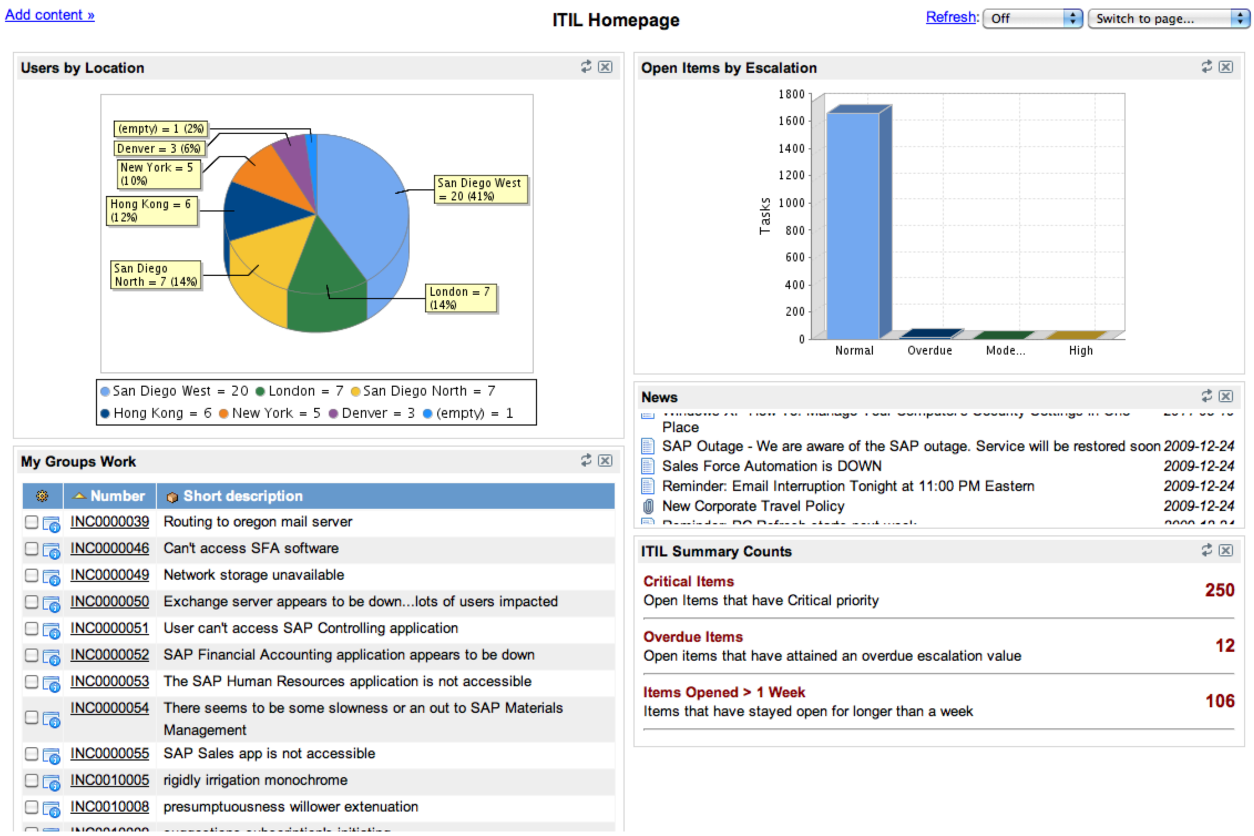
Introduction

Using the Service Desk

Overview

ServiceNow provides a default homepage and a Service Desk application to provide a basic set of service desk functions. Both of these can be customized to suit the processes you are involved in and the needs of the organization.

ITIL Homepage



The ITIL Homepage provides commonly used reports that give an overview of the processes you are involved in. Access the ITIL Homepage from the homepage icon () in the banner.

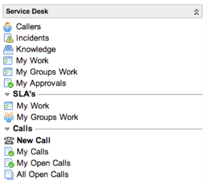
By default, the ITIL Homepage includes these reports:

- **Users by location:** a pie chart displaying users divided by location.
- **Open Items by Escalation:** tasks with an open state, grouped by escalation.
- **My Groups Work:** outstanding work for your group.
- **My Work:** your outstanding work.
- **ITIL Summary Counts:** tasks that are critical, overdue, and over a week old.

Because these reports link directly to the appropriate records and tables, you can use the work queues and the reports on critical tasks to manage your work directly from the homepage.

Menus and Modules

The Service Desk application includes these modules.



The Service Desk application provides commonly used modules for managing service desk activities.

- **Callers:** View callers' user information.
- **Incidents:** View active incidents.
- **Knowledge:** View the knowledge base.
- **My Work:** View the incidents, requests, tasks assigned to you.
- **My Groups Work:** View all unassigned work for your group.
- **My Approvals:** View all the approvals assigned to you.
- **SLA's**
  - **My Work:** View SLAs on your work.
  - **My Groups Work:** View SLAs on your group's unassigned work.
- **Calls** (Available only when Service Desk Call is active.)
  - **New Call:** Create a new call.
  - **My Calls:** View calls you created.
  - **My Open Calls:** View calls you created last month where the related record is still open.
  - **All Open Calls:** View all calls created last we

Incident Management

Overview

The goal of incident management is to restore normal service operation as quickly as possible following an incident, while minimizing impact to business operations and ensuring quality is maintained.

The ServiceNow platform supports the incident management process with the ability to log incidents, classify according to impact and urgency, assign to appropriate groups, escalate, and manage through to resolution and reporting. Any ESS user can log in to ServiceNow to record the incident and track it through the entire incident life cycle until service has been restored and the issue has been completely resolved.

Within the platform, incidents are handled with the task record system. Each incident is generated through a variety of methods as a task record, and populated with the pertinent information in individual fields. These tasks can be assigned to appropriate service desk members, who will deal with the task as appropriate. Once the incident has been properly dealt with, it is closed.

ServiceNow also supports many integrations with outside software. To find out more, visit the integration portal.

Note: *The incident alert management application allows you to manage communications around high-priority incidents, and is available starting with the Dublin release.*

Incident Management Process

The platform provides a number of tools to enable a service desk to implement the incident management process effectively.

Identifying Incidents

In addition to having users log incidents, it is possible to automatically generate incidents from pre-established conditions. Business rules use JavaScript to generate an incident after a certain series of conditions has been met. It is also possible to generate incidents from outside the platform with SOAP messaging.

Logging Incidents

By default, any user can create an incident within the system. There are a number of ways to do this provided in the base system:

- Employee Self Service: ITIL users or administrators can use the **Create New** module in the Incident application, or select **New** from the Incident list. The **Watch list**, **Incident state**, and **Impact** fields are available on the ESS view of the Incident form and the variable formatter is not available. ESS users have write access to the **Watch list** and **Impact** fields.
- Record Producers: Using the Create a New Incident record producer in the service catalog. (Note that this record producer sets the **Contact Type** field of the resulting incident to **Self-Service**.)
- Inbound Email Actions: An email addressed to the instance mailbox can create an incident according to inbound email actions.

Categorizing Incidents

Incident forms have fields for category and subcategory, which allow for easy classification of incidents. These categories can be used by the system to create automatic assignment rules or notifications. For instance, with a certain assignment rule, an incident with a category of **Database** could automatically be assigned to a Database group that always handles database issues.

Another important category for incidents is the incident state. This allows the service desk to track how much work has been done and what the next step in the process might be.

For more information, see Categorizing Incidents.

Prioritization of Incidents

ITIL uses three metrics for determining the order in which incidents are processed. All three are supported by Incident forms:

- **Impact:** The effect an incident has on business.
- **Urgency:** The extent to which the incident's resolution can bear delay.
- **Priority:** How quickly the service desk should address the incident.

ITIL suggests that priority be made dependent on impact and urgency. In the base system, this is true on Incident forms. Priority is generated from urgency and impact according to the following data lookup rules (Berlin release):

Impact	Urgency	Priority
1 - High	1 - High	1 - Critical
1 - High	2 - Medium	2 - High
1 - High	3 - Low	3 - Moderate
2 - Medium	1 - High	2 - High
2 - Medium	2 - Medium	3 - Moderate
2 - Medium	3 - Low	4 - Low
3 - Low	1 - High	3 - Moderate
3 - Low	2 - Medium	4 - Low
3 - Low	3 - Low	5 - Planning

By default, the **Priority** field is read-only and must be set by selecting **Impact** and **Urgency** values. To change how priority is calculated, administrators can either alter the priority lookup rules or disable the **Priority is managed by Data Lookup - set as read-only** UI policy and create their own business logic.

Versions prior to Berlin

Instances on Aspen or earlier versions calculate priority with the **calculatePriority** business rule. Earlier versions do not include any UI policy on the **Priority** field, so users can override the automatically generated priority value by simply changing the value.

Initial Diagnosis of Incidents

Initial diagnosis of incidents is largely a human process, wherein the service desk looks at the information within the incident and communicates with the user to diagnose the problem in the incident.

To aid in the process, the service desk can consult the configuration management database, which contains information on hardware and software within a network and the relationships between them. CMDB can be populated in two ways: Discovery and Help the Help Desk. Discovery is available as a separate product, but Help the Help Desk is available with the base system.

Escalation of Incidents

The platform has a built-in system of escalation rules which can ensure that incidents are handled speedily. Two escalators are available in the system:

- **Service Level Agreements:** SLAs monitor the progress of the incident according to defined rules. As time passes, the SLA will dial up the priority of the incident, and leave a marker as to its progress. SLAs can also be used as a performance indicator for the service desk.
- **Inactivity Monitors:** The inactivity monitors prevent incidents from slipping through the cracks by generating an event, which in turn can create an email notification or trigger a script, when an incident has gone a certain amount of time without being updated.

Investigation and Diagnosis of Incidents

Like the initial diagnosis and investigation, investigation and diagnosis are largely human processes. The service desk can continue to use the information provided within by the Incident form and the CMDB to solve the problem. Work notes can be appended to the incident as it is being evaluated, which facilitates communication between all of the concerned parties. These work notes and other updates can be communicated to the concerned parties through email notifications.

Resolution and Recovery of Incidents

After the incident is considered resolved, the incident state should be set to **Resolved** by the service desk. The escalators will be stopped and the service desk may review the information within the incident. After a sufficient period of time has passed, assuming that the user who opened the incident is satisfied, the incident state may be set to closed.

If an incident's cause is understood but cannot be fixed, the service desk can easily generate a problem from the incident, which will be evaluated through the problem management process. If the incident creates the need for a change in IT services, the service desk can easily generate a change from the incident, which will be evaluated through the change management process.

In addition to the base system incident management workflow, a Best Practice - Incident Resolution Workflow Plugin is available to bring the incident management workflow into better alignment with ITIL v3.

Closure of Incidents

Closed incidents will be filtered out of view, but will remain in the system for reference purposes. Closed incidents can be reopened if the user or service desk believes that it needs to be reopened.

Incidents that are on the **Related Incidents** list of a problem can be configured to close automatically when the problem is closed through business rules.

If the knowledge check box is selected, a business rule is triggered by closing the incident, and a knowledge article is generated with the information from the incident. This is useful for knowledge management, and knowledge-centered support, reducing the number of repeat incidents by distributing the information related to the incident.

It is also possible to generate customer satisfaction surveys upon closure of incidents. This allows the service desk to gather information about their quality of service directly from the user.

Continual Service Improvements to Incident Management

The service desk can improve the incident management process using information gathered within the platform. Much of the data is already stored within the incident record. More information can be gathered by enabling auditing, which allows for an accurate review of the history of the problem.

The following plugins allow you to gather additional incident information:

- **Metric Definition**: Define the key performance indicators to monitor within the system. With these metrics, and the information within the database, it is possible to generate reports that can then be added to homepages or automatically generated and distributed.
- **Database Views**: Join tables for reporting purposes.
- **Vendor Ticketing**: Add vendor data to incidents and integrate with Vendor Performance (starting with the Dublin release).

Using this information, it is possible to refine automatic rules such as the assignment rules, service level agreements, or inactivity monitors to better suit the service desk's unique environment.

Unnecessary incidents can be avoided by encouraging users to consult the knowledge base before creating an incident. For more information, see Knowledge Management with KCS.

User Interface

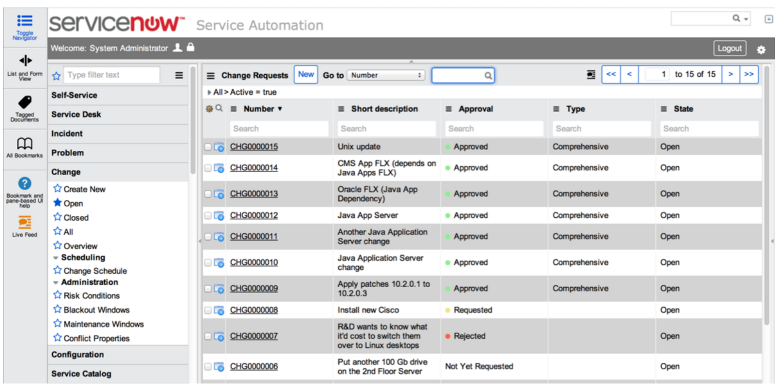
Navigation and the User Interface

Overview

The user interface is the main way to interact with the applications and information in a ServiceNow instance. Three versions of the user interface are currently available:

- **UI14:** gives the ServiceNow product an updated look, including redesigned icons, buttons, and color themes. It incorporates the UI11 interface and provides a series of usability improvements. The UI14 interface is available starting with the Eureka release.
- **UI11:** builds on the classic interface by adding the Edge and several features including split screen, bookmarks, and flyout windows. The UI11 interface was introduced in the June11 release.
- **Classic:** is the original ServiceNow product interface.

Note: *Screen shots in the ServiceNow wiki may reflect any version of the ServiceNow user interface.*

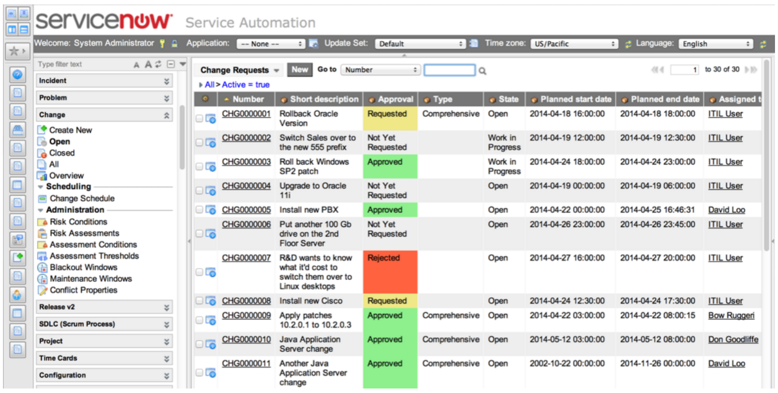


UI14 User Interface

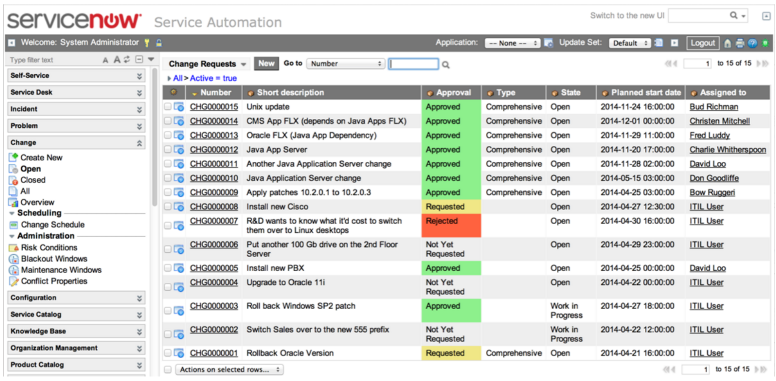
User Interface Tour

The user interface is divided into the following areas:

- **Banner frame:** runs across the top of every page and contains a logo, global navigation controls, and tools.
- **Application navigator** or **left-navigation bar:** provides links to all applications and modules.
- **Content frame:** displays information such as lists, forms, homepages, and wizards.
- **The Edge:** a toolbar on the left side of the interface that provides quick links to commonly used features. The Edge is available in UI14 and UI11.



UI11 User Interface

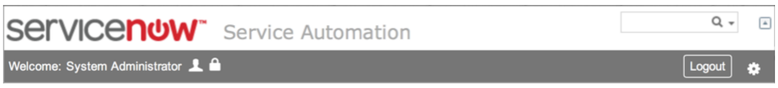


Classic User Interface

Banner Frame

The banner frame runs across the top of every page. It contains a logo and the following information, controls, and tools. Administrators can customize the banner.

UI14 Banner Frame

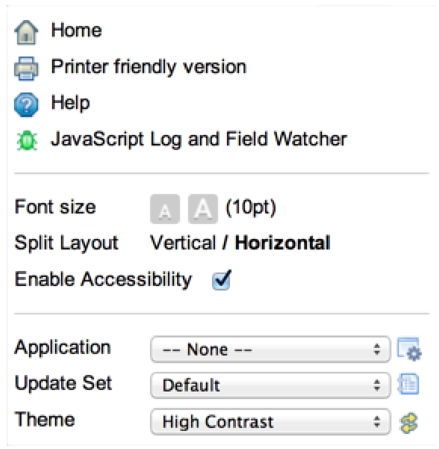


UI14 Banner Frame

The UI14 banner frame contains the following controls and tools.

- **Welcome message:** shows the name of the current user and provides a link to the user's profile.
- **Impersonation key** ( ) (administrators only)**:** allows the administrator to switch user views without logging out; useful for testing security and role-specific setup functions.
- **Elevated Privileges** ( ) (administrators only)**:** allows the user to elevate to a higher security role when needed and then return to their normal role.
- **Global Text Search** ( )**:** searches for text in multiple applications.
- **Collapse/Expand Banner** (/)**:** alters the amount of space the banner frame occupies.
- **Logout:** returns to the Welcome page for subsequent login.

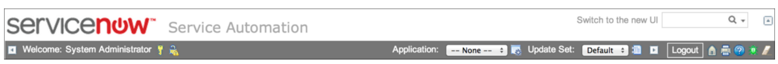
- **Gear icon ( ):** displays the system menu with additional settings and controls. Some of the icons and fields that appear under this icon appear directly in the UI11 and classic banner frames.
  - **Home ( ):** provides links to available application homepages.
  - **Print ( ):** opens a printer friendly version of the current content frame.
  - **Help ( ):** opens the ServiceNow Wiki in another window or tab.
  - **Debug** ( ) (administrators only)**:** opens the client-side JavaScript Debug window.
  - **Font Size (/):** changes the font size on all pages and menus. When you make a change, the new font size appears briefly in the Welcome banner.



UI14 System Menu

  - **Split Layout:** splits the content frame into two panes, either vertical or horizontal. In a vertical split, the list pane is on the left and the form pane is on the right. In a horizontal split, the list pane is on the top and the form pane is on the bottom.
  - **Enable Accessibility:** enables or disables the Section 508 accessibility features.
  - **Application** (administrators only)**:** provides a link to the Applications list, the Application picker, and the application icon ( ). If the application picker shows **None**, clicking the icon takes you to a blank application form; if it shows an application, clicking the icon takes you to the record for the selected application.
  - **Update Set** (administrators only)**:** provides a link to the Update Sets list, the Update Set picker, and the view current update set icon ( ).
  - **Language:** select a language or return to the default language ( ). This option is available if a language plugin is activated.
  - **Theme:** select a theme for the user interface or return to the system theme ( ).

UI11 and Classic Banner Frame



UI11 Banner Frame

The banner frame for UI11 and the classic interface contains the following controls and tools.

- **Welcome message:** shows the name of current user and provides a link to the user's profile.
- **Impersonation key** ( ) (administrators only)**:** allows the administrator to switch user views without logging out; useful for testing security and role-specific setup functions.
- **Elevated Privileges** ( ) (administrators only)**:** allows the user to elevate to a higher security role when needed and then return to their normal role.
- **Global Text Search ( ):** searches for text in multiple applications.
- **Header Expand/Collapse (/):** alters the amount of space the banner frame occupies.
- **Logout:** returns to the Welcome page for subsequent login.
- **Homepage ( ):** provides links to selectable application homepages.
- **Print ( ):** opens a printable version of the current content frame.
- **Help ( ):** opens the ServiceNow Wiki in another window or tab.
- **Debug** ( ) (administrators only)**:** opens the client-side JavaScript Debug window.

The **Switch UI** link may also appear in the banner next to the global text search field. This link allows switching between UI11 and the classic interface. Administrators control the the appearance of the link in the banner frame with the `glide.ui11.show_switch_link` property. This property is set to false for new instances and Eureka upgrades (starting with the Eureka release).

Application Navigator

The application navigator, or left-navigation pane, appears at the left of the screen and provides links to all of the applications and modules. Each application appears as a section in the application navigator denoted by an application label. Modules are listed by name under each application label. Use the application navigator to quickly find information and services.

To view information in the application navigator:

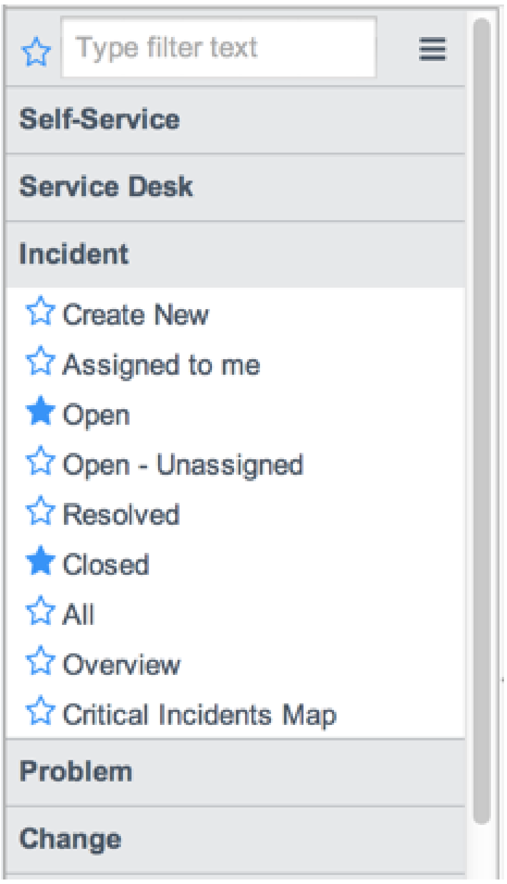
- Expand an application menu by clicking on the label to show the available modules. Click again to to collapse the application and hide the modules.
- Filter the applications and modules listed in the application navigator by entering text in the navigation filter at the top.

To view information in the content pane:

- Click a module.
- Enter **<table name>.list** into the navigation filter at the top to display the associated list.

For more information about using the application navigator, see Navigating Applications.

UI14 Application Navigator

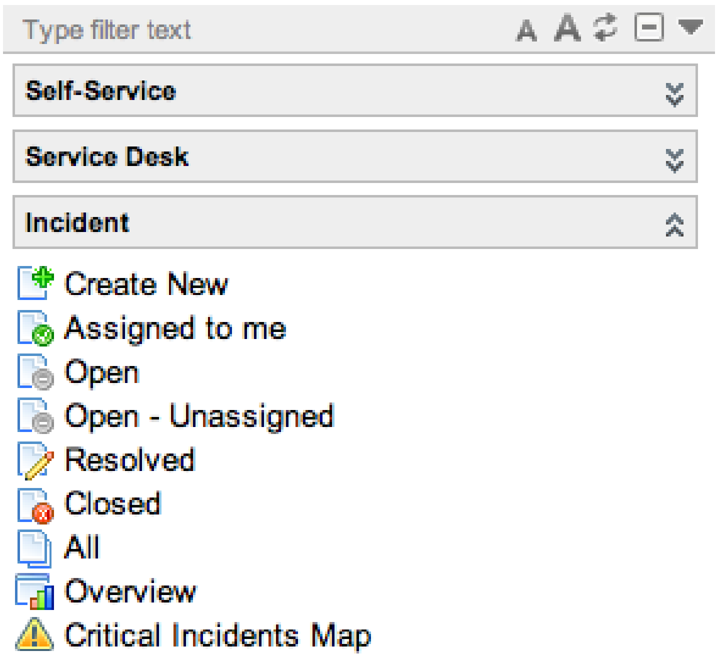


UI14 Application Navigator

In addition to displaying and filtering the applications and modules in the application navigator, users can:

- Use the module icons (☆) and the filter icon (☆) to select and view favorites.
- Make selections from the application navigator control menu by clicking the menu icon (≡) in the application navigator header.

UI11 and Classic Application Navigator



UI11 Application Navigator

In the UI11 and classic application navigator, each module is represented by a customizable icon. In addition to displaying and filtering the applications and modules in the application navigator, users have access to the following tools in the application navigator header.

- **Increase and Decrease Font Size** (/ **):** increases or decreases the size of the text in the instance. The header displays the font size after the icon is clicked.
- **Refresh** (**):** refreshes the list of applications and modules in the application navigator. A loading message appears briefly.
- **Collapse/Expand All Applications** (/ **):** collapses or expands all of the applications in the navigator.
- **Switch Perspective** (**):** Selecting a role filters the available applications by that role (for example, select ITIL to show only ITIL items such as Incidents, and filter out Asset Management items such as Asset Portfolio). You must have access rights to the items to see a perspective in the list. Administrators can customize perspectives. To see all available applications, click **All**.

Content Frame

The content frame is the main area of the user interface and displays different types of pages.

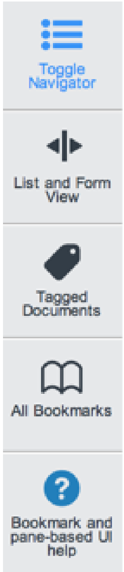
- **Welcome page:** appears when a user is not logged in. Administrators can customize the welcome page.
- **Homepages:** provide easy access to commonly used functions or information. Users and administrators can customize homepages.
- **Service catalog:** provides a portal for customers to order goods and services. It is similar to a homepage, where each gauge is a category of catalog items. For more information, see Using the Service Catalog.
- **Knowledge base:** allows for storage and publication of any information, such as desktop support information, company and department processes or procedures, or documentation on internally developed applications. It is similar to a service catalog, where each gauge is a topic in the knowledge base. For more information, see Knowledge Management with KCS.
- **Lists:** display information in a table. Users can search, sort, filter, and edit lists. For more information, see Using Lists.
- **Forms:** create or modify an individual record. For more information, see Using Forms.
- **Wizards:** are helper applications that provide a step-by-step user interface for a process. Wizards are created by an administrator.
- **Surveys:** enable users to take surveys and administrators to create surveys.
- **External URLs:** display content from outside the ServiceNow platform.
- **Custom URLs:** display ServiceNow content. Administrators can define a module using a custom URL.
- **Content pages:** display content built with the content management system.

The Edge

The Edge is a gray toolbar on the left side of the screen that is available in UI14 and UI11. This toolbar provides quick access to features such as bookmarks and flyout windows.

UI14 Edge

In UI14, the Edge provides the following functions:

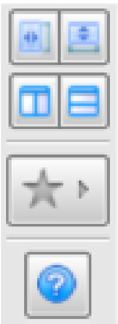


UI14 Edge

- **Toggle Navigator:** shows or hides the application navigator.
- **List and Form View:** splits the content frame into two vertical panes, with the list pane on the left and the form pane on the right. To split the content pane horizontally, click the gear icon () and then click **Split Layout Horizontal**.
- **Tagged documents:** displays the Tagged Documents page.
- **All bookmarks:** provides a list of all bookmarks in the Edge. For more information about creating and managing bookmarks, see Using Bookmarks.
- **Bookmark and pane-based UI help:** displays the Edge help window.

UI11 Edge

In UI11, the Edge provides the following functions:



UI11 Edge

- **Toggle navigator:** shows or hides the application navigator.
- **Toggle banner:** shows or hides the banner frame.
- **Toggle vertical split form pane:** splits the content frame into two panes, with the list pane on the left and the form pane on the right.
- **Toggle horizontal split form pane:** splits the content frame into two panes, with the list pane on the top and the form pane on the bottom.
- **All bookmarks:** provides a list of all bookmarks in the Edge. For more information about creating and managing bookmarks, see Using Bookmarks.
- **Bookmark and pane-based UI help:** displays the Edge help window.

Enhancements

Eureka

- The UI14 interface, introduced in the Eureka release, provides these new features and notable changes.
  - Access live stream information for all records currently displayed on a list. Click the list activity stream icon to show the recent record information in a flyout window. For more information, see Displaying Activity Streams.
  - Create tags on forms and use these tags to categorize different documents in a ServiceNow instance. Then click the **Tagged Documents** button on the Edge to access the Tagged Documents page and view these documents all in one place. For more information, see Tagging Documents.
  - Use form pane tabs to view multiple forms when using the split screen feature. For more information, see Using Form Pane Tabs.
  - Search for information within individual columns in a list. Click the search icon beside the column heading to enable search fields at the top of each column. For more information, see Searching Individual Columns.
  - Use predefined color themes to change the look of the interface. Access color themes from the gear icon on the banner frame. For more information, see CSS Theme Support.
  - Stationery column headings remain at the top of a list and do not scroll with the list content.
  - Record numbers are displayed in the form header.
  - A user preference modifies the display of field status indicators. On lists, indicators can be displayed as a circle on the left side of a field. On forms, mandatory fields can be marked with an asterisk (*). Field status indicators for modified and read-only fields have been removed. For more information, see Field Status Indicator.
  - Star icons replace the module icons in the application navigator and identify favorite or frequently used modules. Click the stars to select or deselect, then click the filter favorites icon in the application navigator header to view only the selected modules. For more information, see Navigating Applications.
  - The Edge includes updated buttons and adds a button for the Tagged Documents page.
  - Bookmarks can be created using an updated set of icons and additional colors.
  - The menu icon provides access to the application navigator control menu and to the list and form context menus.
  - The gear icon displays the system menu which contains some of the icons and fields previously displayed on the banner frame. For more information, see UI14 Banner Frame.
  - Changes to existing icons and the addition of several UI14 icons give the user interface an updated look.
  - The term *label* has been changed to *tag*.
- For existing instances, administrators must enable UI14. Administrators can also disable UI14.

Navigating Applications

Overview

An application is a group of modules, or pages, that provide related information and functionality in a ServiceNow instance. For example, the Incident application contains modules for creating and viewing incidents; the Configuration Management application contains modules for configuring servers, databases, and networks.

The application navigator, or left-navigation bar, provides links to all applications and the modules they contain, enabling users to quickly find information and services. To hide the application navigator:

- **UI14:** click the Toggle Navigator button () in the Edge.
- **UI11 and Classic:** click the Toggle Navigator button () in the banner frame.

Administrators can customize the application navigator to provide different modules by user role, modify or define applications and modules, and change its appearance.

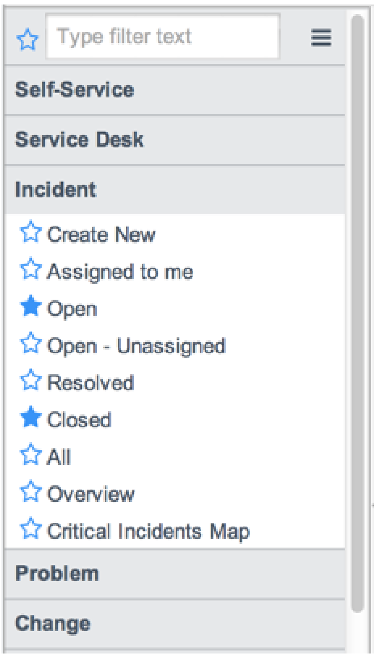
Using the Application Navigator

The application navigator comprises a list of application labels and the application navigator header. Each application appears as a section in the application navigator denoted by an application label. Modules are listed by name under each application label.

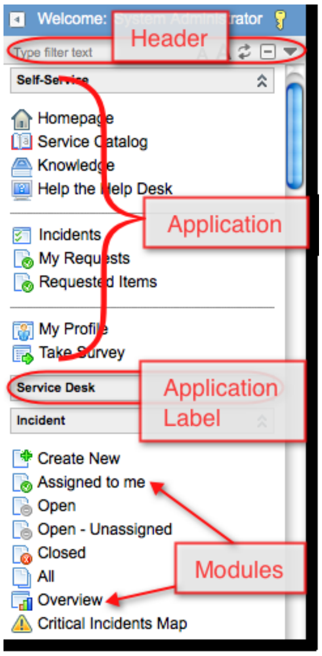
To expand or collapse an application section, click the application label. To open a module in the content frame, click the module name.

If you cannot find an item in the application navigator, consider the following reasons:

- You may not have access rights. The applications and modules available to a user may depend on the user's role. For example, the Finance department may not have access to change management modules.
- You may have applied a filter or switched perspectives.
- The application may be deactivated in your company's ServiceNow implementation. Contact the system administrator to activate it, if necessary.
- The application that contains the module you are looking for may be collapsed.



UI14 Application Navigator



UI11 Application Navigator

Module Icons

In addition to names, modules in the application navigator also have icons.

- **UI14:** each module has a star icon to the left of the module name. Use these stars to identify and view frequently used modules. For more information, see Using Favorites.
- **UI11 and Classic:** each module is represented by an icon that can be customized.

Application Navigator Header

The application navigator header provides the following tools, depending on the version of the interface currently in use. All tools available in UI11 are available in UI14, but the button and icon placement may be different.

UI14

- **Navigation Filter** (**):** filters the applications and modules that appear in the navigator based on the filter text. To learn more, see Using the Navigation Filter.
- **Filter** (**):** filters the modules displayed in the application navigator, either all modules or selected modules.
- **Menu** (**):** lists the following menu options.
  - **Roles:** similar to the **Switch Perspectives** option in UI11. Selecting a role filters the available applications by that role (for example, select ITIL to show only ITIL items such as Incidents, and filter out Asset Management items such as Asset Portfolio). You must have access rights to the items to see a perspective in the list. Administrators can customize perspectives. To see all available applications, click **All**.
  - **Automatically Add Favorites:** when enabled, selected modules are automatically marked as favorites.
  - **Refresh Navigator:** refreshes the list of applications and modules. Administrators who are customizing the navigator can test their work without refreshing the whole browser session.
  - **Collapse All Applications:** collapses all applications so that only application labels appear.
  - **Expand All Applications:** expands all applications so that all available modules appear.

Note: *To increase or decrease font size on pages and menus, click the gear icon on the banner.*

UI11 and Classic

- **Navigation Filter** (Type filter text): filters the applications and modules that appear in the navigator based on the filter text. To learn more, see Using the Navigation Filter.
- **Increase** ( ) and **Decrease Font Size** ( ): changes the font size on all pages and menus.
- **Refresh Navigator** ( ): refreshes the list of applications and modules. Administrators who are customizing the navigator can test their work without refreshing the whole browser session.
- **Collapse All** ( ) and **Expand All Applications** ( ): collapses all applications so that only application labels appear, or expands all applications so that all available modules appear.
- **Switch Perspective** ( ): filters the available items by role (for example, select ITIL to show only ITIL items such as Incidents, and filter out Asset Management items such as Asset Portfolio). You must have access rights to the items to see a perspective in the list. Administrators can customize perspectives. To see all available applications, click the arrow and select **All**.

Using Favorites

In UI14, the application navigator has a star icon beside each module name that can be selected ( ) or deselected ( ). Use these icons to select frequently used modules and then display only the favorites in the application navigator.

- Click the star icons to select and deselect modules as favorites.
- Click the filter icon ( ) beside the navigation filter to turn on and off favorite modules. Selecting this icon shows the favorite modules; deselecting shows all modules.

By default, a module is automatically selected as a favorite when you open the module. To disable this setting, click the menu icon ( ) in the application navigator header and select **Automatically Add Favorites** from the list to remove the check mark.

Using the Navigation Filter

The navigation filter helps users quickly access information and services by filtering the items in the application navigator or opening forms and lists directly.

- If a module name contains the text, the application label expands to show that module.
- If an application name contains the text, the application label expands to show all modules in that application.

To use the navigation filter:

1. Click **Type Filter Text** in the application navigator header, or press **Access Key** [1] **+ F**. A text entry field appears.
2. Begin typing the filter text (for example, *inc* for Incidents). The list of items available in the application navigator is filtered as you type.
    - To open a module, click the module name, or press the **Down Arrow** to highlight and then **Enter**.
    - If you know the table name and wish to open a list or form directly, enter the table name followed by *.list* or *.form* (*.LIST* or *.FORM* for a new tab or window). For example:
        - *incident.LIST* opens the incident list in a new tab or window.
        - *incident.form* opens a new incident form in the content frame.

Tutorials

The following video demonstrates the UI11 application navigator. For more e-Learning videos, see Tutorials.

Using the UI11 Navigation Filter (01:21)

References

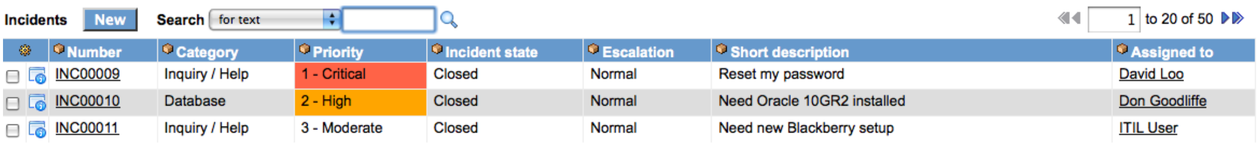
[1] http://en.wikipedia.org/wiki/Access_key

Introduction to Tasks

Overview

Within the platform, all ITIL processes are handled through tasks. A task is a specific type of record, controlled by the base class task. Tasks are created by users who are requesting the task to be performed, and are then updated as the task moves along the workflow. A task is created, work is performed upon it, and eventually it moves to a resolved state. Tasks allow users to request tasks, and track how they are being fulfilled by the appropriate parties. Tasks can be assigned to specific users or user groups. Many tasks are extended by child classes, such as Incident or Change.

A task in Record List view:



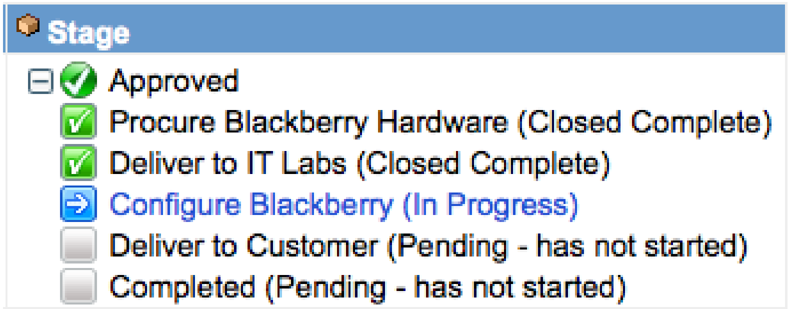
Number	Category	Priority	Incident state	Escalation	Short description	Assigned to
INC00009	Inquiry / Help	1 - Critical	Closed	Normal	Reset my password	David Loo
INC00010	Database	2 - High	Closed	Normal	Need Oracle 10GR2 installed	Don Goodliffe
INC00011	Inquiry / Help	3 - Moderate	Closed	Normal	Need new Blackberry setup	ITIL User

Out of Box Task Fields

Field Name	Description
Number	An identifying number for the task, which is used as the name of the task. Numbers are generated automatically when the task is created. Administrators can modify the number generation using number maintenance.
Priority	A signal of how high a priority the task should be for the assignee. When viewed on the Record List, the priority field will be color coded by degree of priority.
State	The status of the task, such as: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, and Closed Skipped.
Assigned To	The user or user group responsible with fulfilling the task.
Escalation	A signal of how long the task has been open. Usually, escalations are automatically configured using a Service Level Agreement. The longer the task is open, the more urgent the task is, moving from Normal to Moderate to High, and finally becoming Overdue. Like priority, this field is color coded in the list view.
Short Description	A short description of the task.
Task Type	A field which specifies the type of task, and adds a child class to extend the record. For more, see Tables and Classes

Workflow

An administrator can specify a specific workflow process to apply to tasks that meet certain conditions. Once a task is created that meets the conditions, the workflow will apply the process to the task, asking for approvals, notifying users, generating other tasks, running scripts, etc.



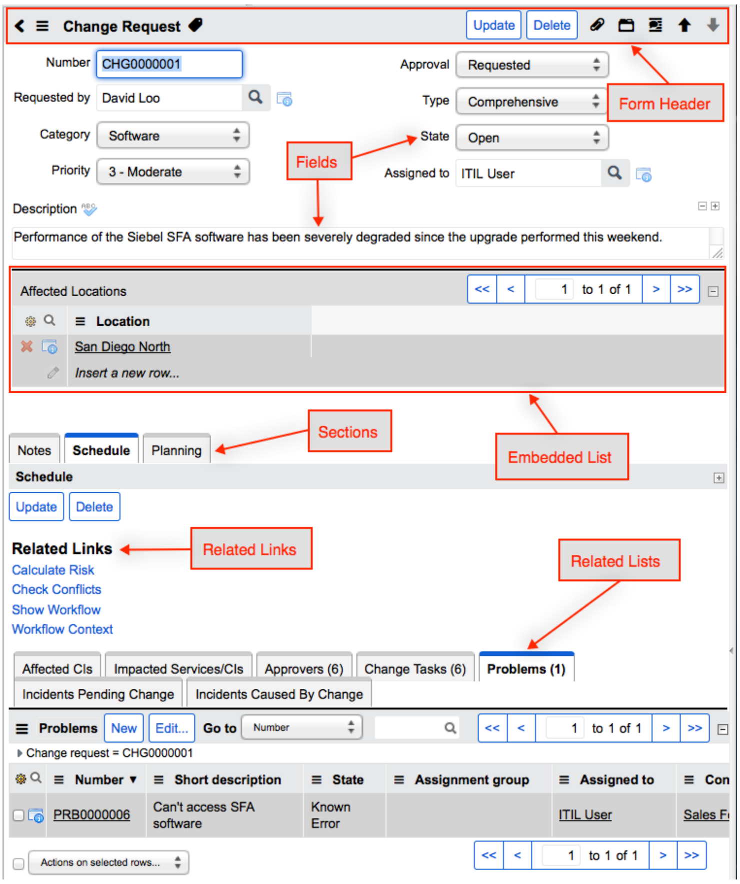
Using Forms

Overview

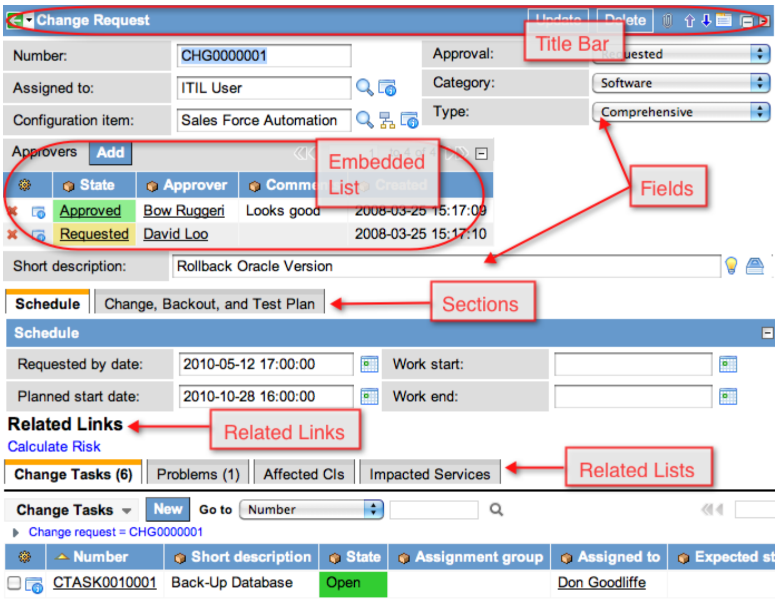
A form displays information from one record in a data table. The specific information depends on the type of record displayed. Users can view and edit records in forms. Administrators can customize forms.

The form interface contains the following elements:

- **Form header:** appears at the top of the form and provides navigational and functional controls. For more information, see Form Header.
- **Fields:** display individual items of data for the record. For more information, see Fields.
- **Sections:** group fields under a header. Users may collapse or display sections using tabs.
- **Related links:** provide access to additional functions based on record type and system setup. Administrators can add related links to forms using UI actions.
- **Related lists:** display records in another table that have a relationship to the current record. For more information, see Using Related Lists.
- **Embedded lists:** allow for editing related lists without having to navigate away from the form. Changes are saved when the form is saved. For more information, see Embedded Lists.
- **Response time indicator ( ):** appears at the bottom right of some forms to indicate the processing time required to display the form. For more information, see Response Time Indicator.



UI14 Form Elements

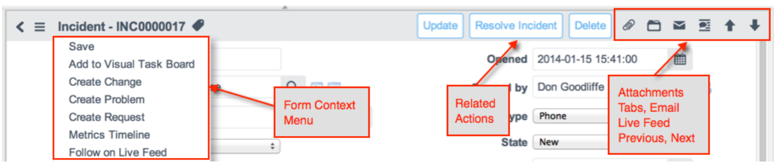


UI11 Form Elements

Form Header

The form header displays the title of the form (table) and provides a number of controls.

UI14

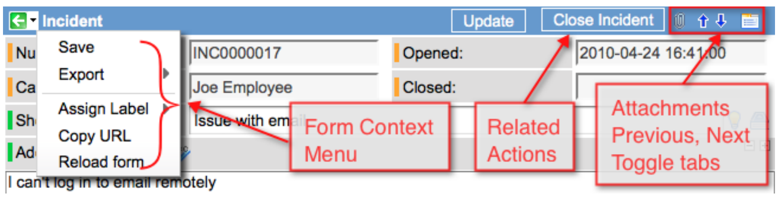


UI14 Form Header

The UI14 form header includes the following controls:

- **Back ( ):** navigates to the previously viewed page without saving changes.
- **Form context menu ( ):** also called a right-click menu; appears when a user clicks the menu icon beside the form title or right-clicks the form header.
- **Edit Tags ( ):** displays the **Add tag** field below the form header, which allows users to create custom tags and categorize documents. For more information, see Tagging Documents.
- **Submit** or **Update:** saves changes and returns to the previously viewed page.
- **Related Actions:** provides standard actions in the form header for some tables, such as Close Incident or Resolve Incident in incident.
- **Delete:** deletes the record from the list.
- **Attachments ( ):** allows users to view and add attachments to the record. For more information, see Uploading Attachments.
- **Toggle tabs ( ):** toggles between tabbed and sequential arrangements of form sections and related lists.
- **Annotations ( ):** displays on-form annotations. For more information, see Annotating Forms.
- **Email ( ):** opens an email window.
- **Show Live Feed ( ):** opens the document feed for this record in a flyout window.
- **Previous ( )** and **Next ( ):** open the previous and next record on the list from which the record was accessed. These controls save changes to the record.

UI11 and Classic



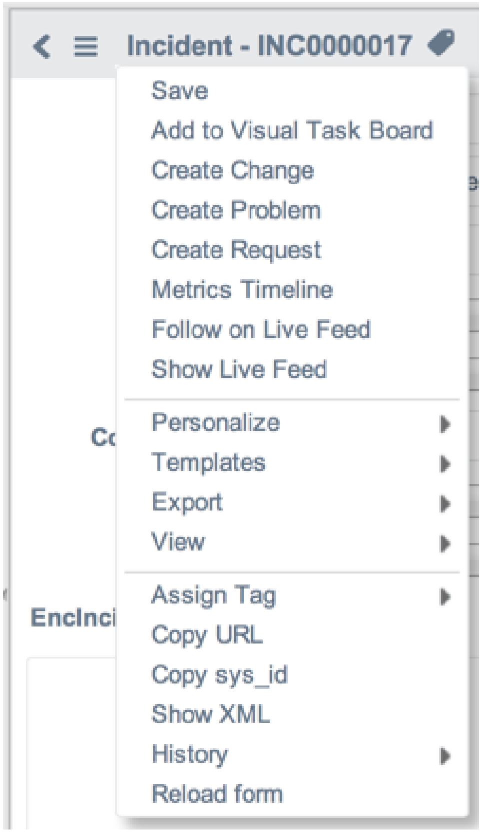
UI11 Form Header

The UI11 and Classic form header includes the following controls:

- **Back ( ):** navigates to the previously viewed page without saving changes.
- **Form context menu:** appears when a user points to the arrow ( ) beside the form title or right-clicks the form header.
- **Submit** or **Update:** saves changes and returns to the previously viewed page.
- **Related actions:** provides standard actions in the form header for some tables, such as Close Incident or Resolve Incident in incident.
- **Delete:** deletes the record from the list.
- **Attachments ( ):** allows users to view and add attachments to the record. For more information, see Uploading Attachments.
- **Email ( ):** opens an email window.
- **Show Live Feed (:** opens the document feed for this record in a flyout window.
- **Previous ( )** and **Next ( ):** open the previous and next record on the list from which the record was accessed. These controls save changes to the record.
- **Toggle tabs ( ):** toggles between tabbed and sequential arrangements of form sections and related lists.
- **Collapse / Expand all sections :** collapses or expands all form sections.

- **Collapse / Expand** / **:** collapses or expands the main form section.

Form Context Menu



UI14 Form context menu

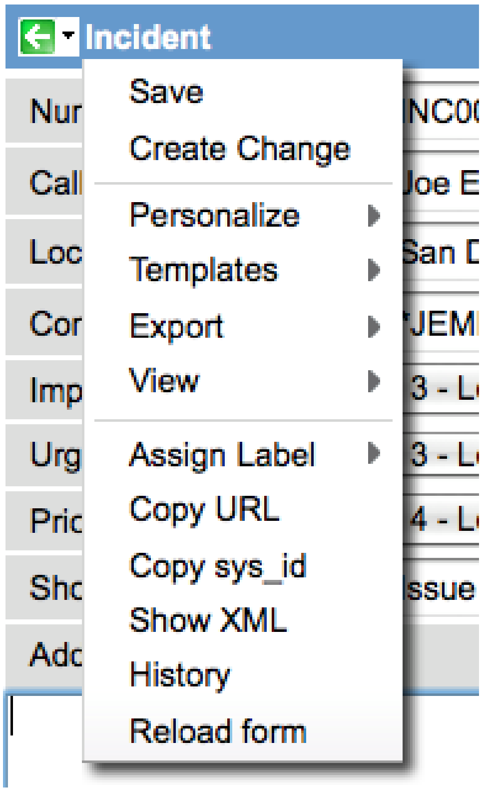
The form context menu provides controls based on the table and user access rights. Administrators can customize some of the options available on a context menu using UI actions.

Access the form context menu by clicking an icon or by right-clicking the form header.

- **UI14:** click the Menu icon ( ) beside the form title.
- **UI11:** click the arrow icon ( ) beside the form title.

Available options include:

- **Save:** saves changes without leaving form view.
- **Related actions:** provides standard actions in the form context menu for some tables, such as Create Change in incident.
- **Insert** and **Insert and Stay:** save the data to a new record instead of updating the current record. For more information, see Inserting a Record.
- **Personalize** and **Templates:** provide administrative functions, including personalizing forms and creating templates.
- **Export:** exports data to PDF. Administrators can also export to XML. For more information, see Exporting Data.
- **View:** changes fields to a predefined layout. Note that switching views submits the form, which saves all changes. Administrators can customize views.
- **Assign Tag** (UI14) or **Assign Label** (UI11 and classic)**:** adds a link to the record under a custom application label (new or existing). Labels provide quick access to frequently referenced or urgent information. For more information, see Creating and Using Labels.



UI11 Form context menu

- **Copy URL:** copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
- **Copy sys_id** (administrators only)**:** copies to the clipboard the sys_id of the record. Follow browser instructions if browser security measures restrict this function.
- **Show XML** (administrators only)**:** displays record data in XML format.
- **History** (administrators only)**:** displays audit history for the record (must be enabled for the table).
- **Reload Form:** reloads information from the database to refresh the form view.

Note: *Some of the options displayed on the form context menu depend on the user role and installed applications.*

Fields

A field represents an individual item of data on a record. Users can view and modify field data on a form. Fields may be configured as:

- **Mandatory:** requires a value before users can save the record.
- **Read-only:** prevents the current user from editing the field on the form.
- **Standard data entry:** accepts values such as numbers, text, choice lists, dates and times, and check boxes.
- **Specialized data entry:** accepts one or more of the following:
  - **Journal:** permits users to enter text. When the record is saved, journal field entries are listed under the input field, marked with the user name and timestamp (example, **Additional comments** on an incident).
  - **Suggestion:** provides the option to include predefined text in a text or journal field. For more information, see Suggestion Fields.
  - **Reference:** lets users select a record on another table (example, in an incident, the **Caller** field references the User table). Reference fields define a relationship between two tables. When a reference field is populated, point to the reference icon ( ) beside the field to preview the referenced record, or click the reference icon to navigate to the record.
  - **Watch List:** allows multiple users to subscribe to notifications of a task. A watch list is a common type of *glide list*, which is a field that allows users to select multiple records from another table.

- **HTML:** allows users to use HTML to define how field content renders (example, knowledge article text). HTML fields can include media elements, such as images, Web links, and videos.
- **Wiki:** allows users to use Wiki markup to define how field content renders. For more information, see Wiki Fields.
- **Image:** permits users to upload an image file (type of .gif, .jpg or .jpeg, or .png only).
- **Video:** permits users to upload a video file.
- **Normalized:** alters raw input to match standardized values for improved searching and reporting. For more information, see Normalizing and Transforming Field Values.
- **Currency or Price** accepts monetary information. For more information, see Currency or Price.
- **Translated HTML or Translated Text:** are similar to standard HTML or text fields, but can be translated if the Internationalization plugin is active. For more information, see Using Translated Text.
- **Duration:** indicates a length of time. The field automatically converts hours to days for values greater than 24 hours. For example, 30 hours is converted to 1 day and 6 hours.
- **URL:** accepts a URL (web) address and creates an active hyperlink.

See Introduction to Fields for more detailed information on fields.

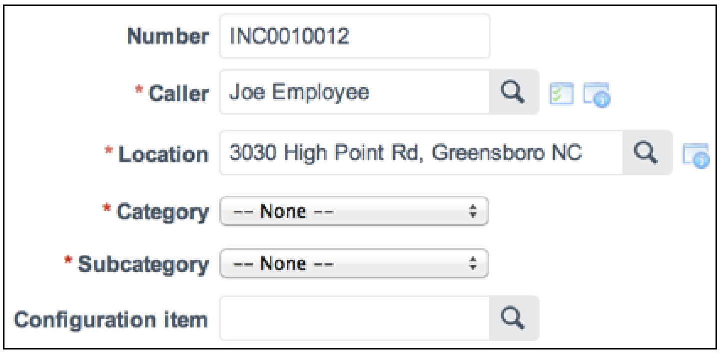
Field Status Indicators

Indicators are used on some fields to denote a special field type.

UI14

An asterisk (*) to the left of a field name indicates a mandatory field. The user must enter a value to save the form. The mandatory field status indicator is red when a field is empty and changes to light red when the user enters a value. Administrators can customize the colors of field status indicators.

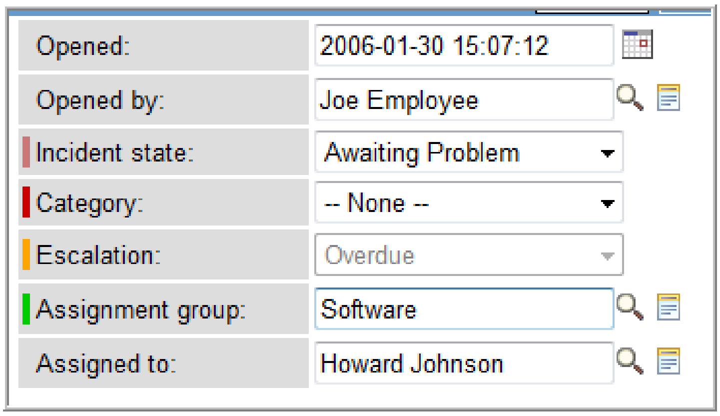
Fields do not show the modified and read-only status indicators starting with the Eureka release.



UI14 Field Status Indicators

UI11 and Classic

A field status indicator is a colored bar that may appear to the left of form elements. Administrators can customize the colors of field status indicators. These indicators convey the following statuses:



UI11 Field Status Indicators

- **Mandatory:** required field that is empty. The user must enter a value to save the form. Default color is red.
- **Populated Mandatory:** required field for which a value has already been saved in the database. Default color is light red. If the user enters a new value, the field status indicator changes to Modified (default green).
- **Modified:** contains data that has not been saved. Default color is green.
- **Read-only:** user cannot edit on the form. Default color is orange.

Sections

Sections provide headers for a group of related fields.

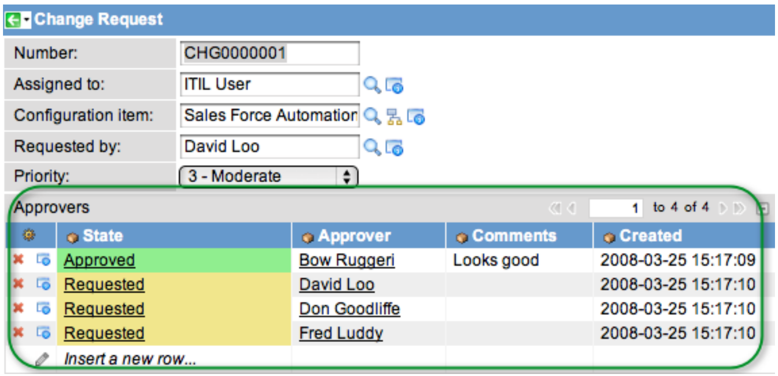
- To expand or collapse a section, click the expand ( ) or collapse icon ( ).
- To toggle between tabbed and sequential arrangements of sections, click the toggle tabs icon ( ).

Embedded Lists

Some forms may show related lists as embedded. Changes to embedded lists are saved when the form is saved. For more information, see Editing in Forms.

Use these controls to work with an embedded list:

- To expand or collapse an embedded list, click the expand ( ) or collapse icon ( ) in the list header.
- To add a new row, double-click **Insert a new row...**
- To edit a row, double-click in an empty area of the field. See Using the List Editor.
- To delete a row, click the delete icon ( ) beside the row.
  - New rows are removed immediately.
  - Existing rows are designated for deletion when the record is saved. To clear this designation, click the delete icon again.



Embedded list

Navigating to a Form

Users can navigate to the form for an existing record or to a blank form for creating a new record.

To open an existing record in form view, use one of these methods:

- Locate the record in a list and click the record number or the reference icon. For more information, see Navigating Applications and Using Record Lists.
- Append the table name, followed by *.do?sysparm_query=number=* and the record number to the instance web address. For example, the following URL opens incident INC0000007:

  https://<instance name>.service-now.com/incident.do?sysparm_query=number=INC0000007

  Additional record parameters can be applied with a URL. For more information, see Navigating by URL.

To open a blank form for a new record, use one of these methods:

- Open a list, such as Incident, and click **New**.
- In the navigation filter, type the table name followed by *.form*.
- Append the table name and *.do* to the instance web address. For example, the following URL opens a new Incident form:

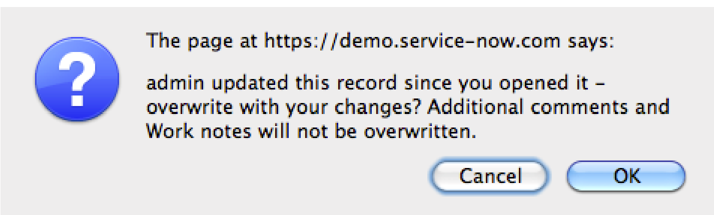
  https://<instance name>.service-now.com/incident.do

Editing in Forms

To edit a record in form view:

1. Navigate to the form.
2. Enter appropriate data.
3. Save the record using one of these methods:
   - Click **Submit** or **Update** to save changes and return to the previously viewed page.
   - Right-click the form header and select **Save** to save changes without leaving form view.
   - Right-click the form header and select **Insert** or **Insert and Stay** to save the data to a new record instead of updating the current record (see Inserting a Record).
4. If the record has been changed by another user since you opened it, an alert may appear. Click **OK** to confirm your changes.

   This alert is generated by the *Simultaneous Update Alert* client script.



Alert

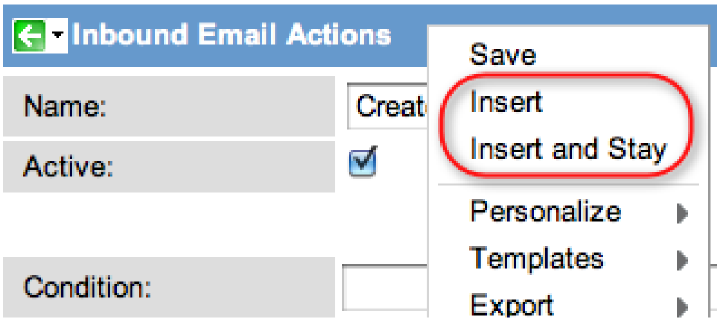
Note: *Depending on system setup, the data entered in a form may affect other options on the form or change its appearance. For example, if you select a status of* ***Closed*** *for an incident, a* ***Close Notes*** *field may appear and may be required to save the record. Administrators can create custom form effects in a variety of ways, including UI policies and client scripts.*

Inserting a Record

Insert provides a method for creating multiple similar items, such as email notifications, users, groups, or business rules. Administrators may also enable the Insert function for task records.

To insert a record:

1. Open a similar item.
2. Edit the item and give it a new **Name**.
3. Click one of the following:
   - **Insert** saves the item as a new record and returns to the previously viewed page.
   - **Insert and Stay** saves and views the new record.

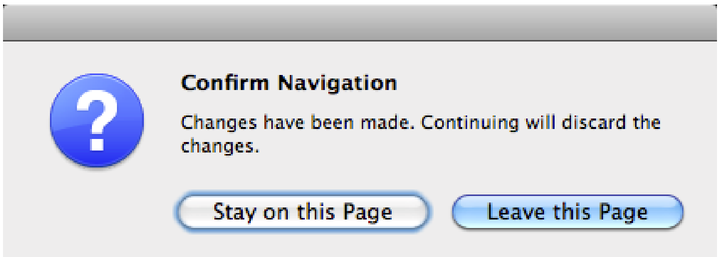


Insert

Canceling Changes

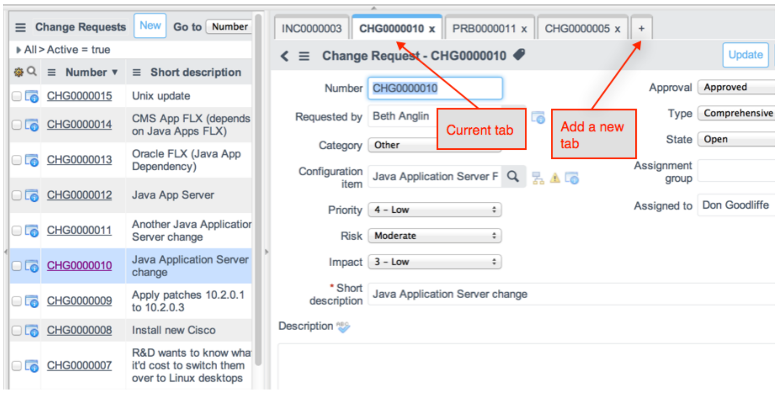
To cancel changes to a form, navigate away from the form view without saving the record. If a message appears, click **Leave this Page** to confirm cancellation.

Note: *Administrators can disable the confirmation message by setting the* `glide.ui.dirty_form_support` *property to* false.



Confirm cancellation

Using Form Pane Tabs



UI14 Form Pane Tabs

When using the split screen feature, you can open multiple forms in the form pane. Form pane tabs appear above the form header. The current tab is highlighted with a blue bar. Form pane tabs are available starting with the Eureka release.

1. View a list in the content frame (for example, the Incident list).
2. Click the **List and Form View** button on the Edge to split the screen.

   The list is displayed in the list pane on the left and an empty form pane with a new highlighted tab is displayed on the right.
3. Select an incident record in the list pane to display the incident in the highlighted tab.

   The incident number appears in the tab at the top of the form pane.
4. Click the **+** tab to add a new tab to the form pane.

   The new tab is added to the right of the current tabs and has the generic name **New Tab** until you select another incident from the list pane.

To remove tabs:

1. Select the tab to be deleted.
2. Click the **x** in the tab.

Tagging Documents

Tags enable you to categorize different documents in a ServiceNow instance and then view those documents on one page. Create new tags on forms and assign the tags to different documents. Then view the tagged documents or edit the tags on the Tagged Documents page. Tagging documents is available starting with the Eureka release.

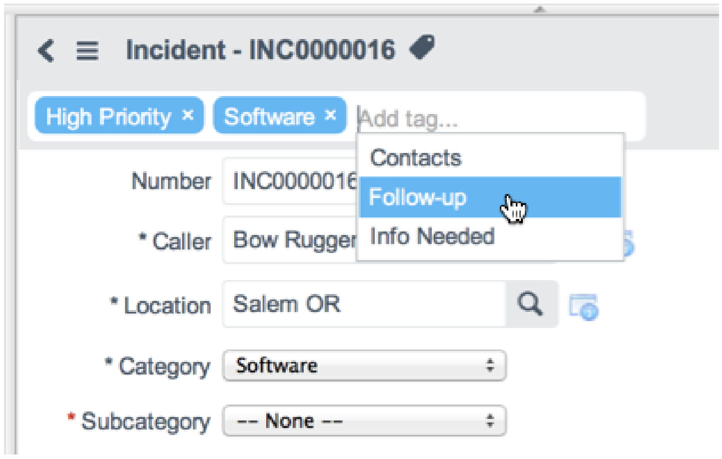
Note: *Tags are created per user and are not available system-wide.*

Creating Tags

Create tags using the edit tags icon ( ) at the top of a form. The tags you create appear below the form header and on the Tagged Documents page header.

1. Click the edit tags icon to expand the form header and display the **Add tag** field.
2. Click in the **Add tag** field and do one of the following:
    - Enter a new tag name and press Enter.
    - Select an existing tag from the choice list.

    The tag is added to the form and a new **Add Tag** field appears. You can assign more than one tag to a document.

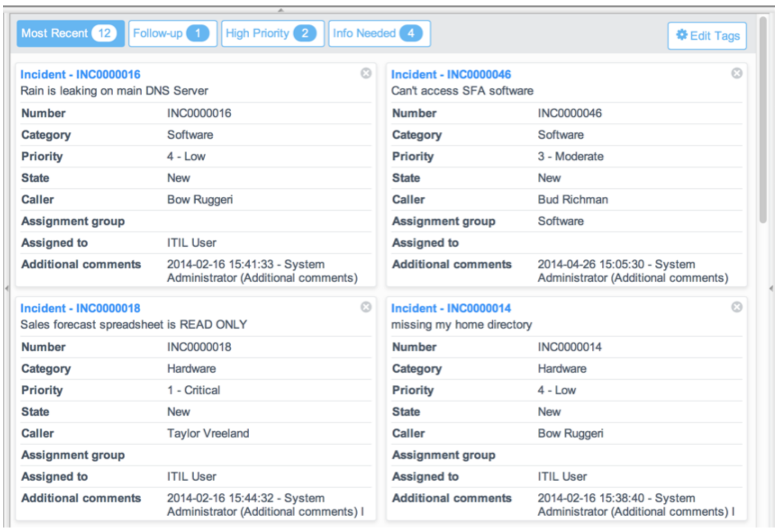


Creating form tags

To remove a tag from a form, click the **x** beside the tag name.

Viewing Tagged Documents

The Tagged Documents page displays recently viewed documents or user-tagged documents in the content frame. Access this page by clicking the **Tagged Documents** button on the Edge.



UI14 Tagged Documents Page

The page header contains a button for recently viewed documents and for each user-created tag.

- Click **Most Recent** to display the most recently viewed documents.
- Click any of the buttons for user-created tags to display the documents associated with that tag.

Individual preview areas display selected information for each document.

- Point to or click a document to expand the preview.
- Click the **Close** button in the upper right corner to close the preview and remove the tag from the document.

Editing Tags

You can edit tags from the Tagged Documents page.

1. Click the **Edit Tags** button on the right side of the page header.

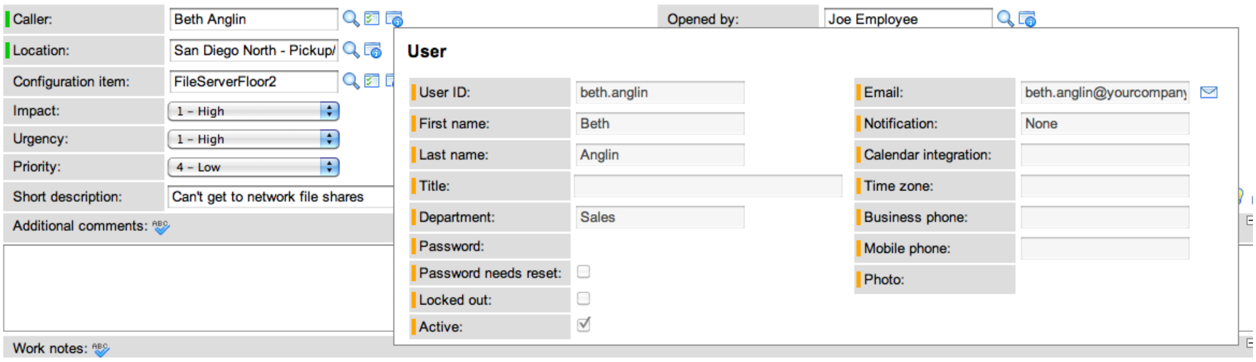
   This button expands the tag window and enables editing for all of the tags.
2. Click in a tag name and make the desired changes.
3. Click **Done** to save the changes.

   All documents with that tag are updated to reflect the change.

Reference Icon

Overview

The reference icon appears to the left of a record on a list, or to the right of a reference field on a form populated with a record. Pointing to the icon presents a read-only pop-up of the record's information:



Clicking the reference icon opens the referenced record.

Freezing the Pop-up

To freeze a pop-up, press the **Shift** key on the keyboard when pointing to the reference icon, and then move the mouse cursor. The pop-up window remains on the screen until it is closed or another pop-up is displayed

On some UK keyboards, this behavior is achieved with the **Alt** key.

Clicking Through the Reference Icon

To navigate to the referenced record, click on the reference icon. Note that clicking through a reference icon automatically saves the current record.

Windows Live

Users who are using the Windows Live Toolbar must disable the toolbar to use reference lookups.

Using Lists

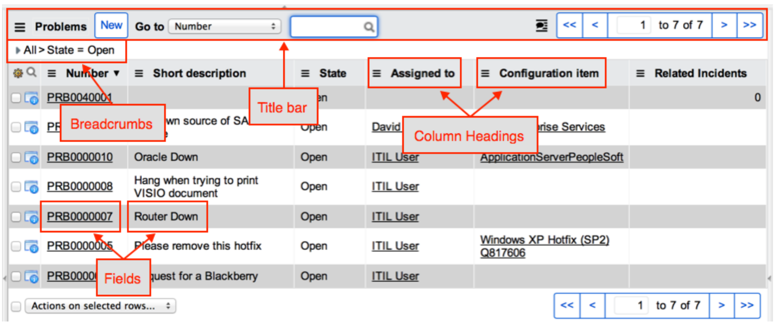
Overview

Lists display information from a data table. Users can search, sort, filter, and edit data in lists. Lists also may be embedded in forms and may be hierarchical (have sublists).

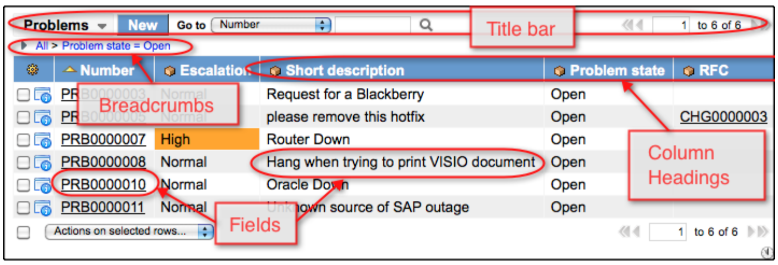
The list interface contains four main elements:

- Title Bar
- Breadcrumbs
- Column headings
- Fields

A response time indicator ( ) may appear at the bottom right of some lists to indicate the processing time required to display the list.



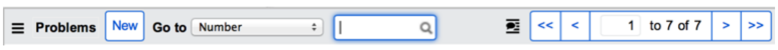
UI14 List View



UI11 List View

Title Bar

The title bar displays the title of the list (table) and provides several controls.



UI14 Title Bar

UI11 Title Bar

The title bar includes the following controls:

- **List controls:** appears when you click the menu icon ( ) to the left of the list title (UI14) or when you click the arrow icon ( ) beside the list title (UI11). This menu provides the following list controls:
  - **View:** changes the columns and order of the list to a predefined layout. Administrators can customize views.
  - **Filters:** applies a saved filter or allows you to edit a personal filter.

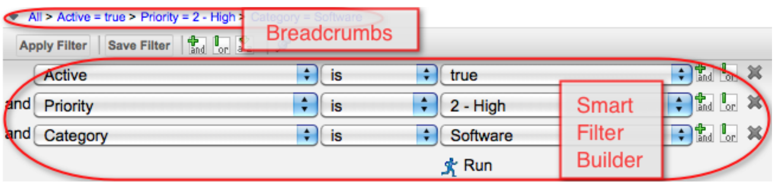
- **Group By:** aggregates records by a field.
- **Show:** changes the maximum number of records per page.
- **Refresh List:** refreshes the list to show changes immediately.

- **New:** opens a blank form that allows users to create a new record in the list.

  Clicking the **New** button in a filtered list automatically applies the same filter to the new record. For example, clicking **New** in the Closed Incidents list opens a new record preset with **Active** deselected. In a list filtered for active, priority 1 incidents, clicking **New** opens a new record preset with **Active** selected and **Priority** set to **1 - Critical**. You can change the preset values on the form as needed. If there is a field you do not want to have populated in this way, you can add the following dictionary attribute to the field: `ignore_filter_on_new=true`.
- **Go to** or **Search:** finds information in the current list. For more information, see Finding Information in Lists.
- **List Activity Stream** ( ): (UI14) shows recent record activity for all records currently displayed on a list. For more information, see Displaying Activity Streams.

Breadcrumbs

Breadcrumbs offer a quick form of filter navigation. A filter is a set of conditions applied to a table in order to find and work with a subset of the data in that table. The current filter is indicated by a hierarchical list of conditions—breadcrumbs—at the top of the table. For more information, see Using Filters and Breadcrumbs.

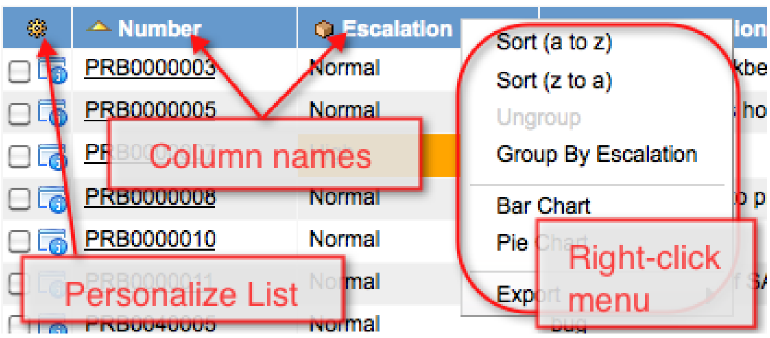


Breadcrumbs

Column Headings

Column headings appear at the top of a list header. These headings display column names and provide some list controls. Column headings are stationary at the top of the list and do not scroll with list content, starting with the Eureka release.

The column headings provide the following controls:



Column Headings

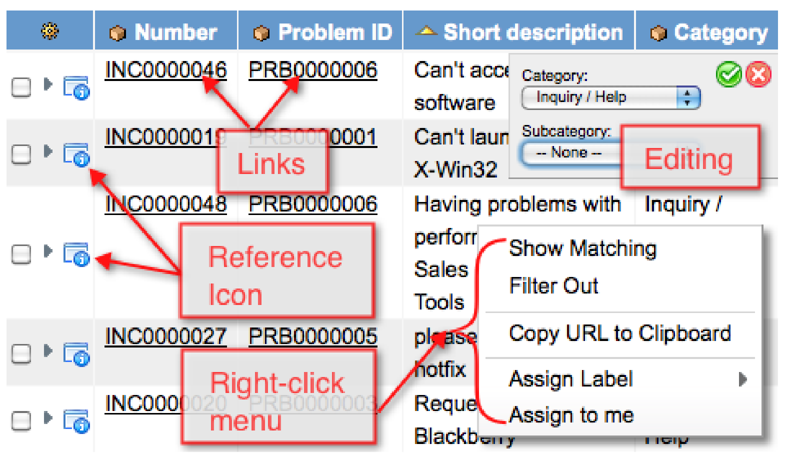
- **Sorting:** Click the column name to sort the list in ascending order. Click again to sort in reverse order. An arrow to the right of the column name indicates the column currently being sorted as well as the sort direction.
- **List context menu:** Access this menu, also called a right-click menu, by clicking the menu icon ( ) at the top of a list column (UI14) or by right-clicking the column heading (UI11). The list context menu offers these controls:
  - **Sort (a to z)** and **(z to a):** sort in ascending and descending order.
  - **Group By:** aggregate records by a field. For more information, see Finding Information in Lists.
  - **Bar Chart** and **Pie Chart:** create quick bar and pie chart reports based on the filter criteria of the list. Users can then modify these reports or create gauges (depending on access rights). For more information, see

Creating Reports.
  - **Personalize** (requires access rights)**:** provides administrative functions related to the information displayed and how it is controlled.
  - **Import** (administrators only)**:** import data from an XML file.
  - **Export:** exports data to Excel, CSV, XML (administrators only), or PDF. For more information, see Exporting Data.
  - **Update Selected** and **Update All** (administrators only)**:** change applicable field values. For more information, see Editing Lists.
- **Personalize List** ( ): customizes the list layout for the current user. For more information, see Creating Personal Lists.
- **Search** ( ): (UI14) enables the list header search.

Note: *Some of the options displayed on the list context menu depend on the user role and the installed applications.*

Fields

Fields display data and provide the following functionality.



UI11 Fields

- **Links:** open the associated record in form view. Click the reference icon or first column field to open the current record. You can also click a link to a related record in other columns to go to that related record.
- **Editing:** changes the information in one or more records. For more information, see Editing Lists.
- **Reference Icon** ( ): provides detailed information about the record. Point to the reference icon to open a pop-up window, or click it to open the record in form view. For more information, see Reference Icon.
- **Context menu:** also called a right-click menu, offers the following options:
  - **Show Matching** and **Filter Out:** provide quick filter options.
  - **Copy URL to Clipboard:** copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
  - **Copy sys_id** (administrators only)**:** copies to the clipboard the sys_id of the record. Follow browser instructions if browser security measures restrict this function.
  - **Assign Tag:** adds a link to the record under a custom application tag (new or existing). Tags provide quick access to frequently referenced or urgent information. For more information, see Creating and Using Labels.
  - **Assign to me**, **Approve**, and **Reject:** provide quick edit options.

Note: *Some of the options displayed on the field context menu depend on the user role and the installed applications.*

Field Status Indicator

Field status indicators are used to highlight certain fields and provide status information.

- In UI14, field status indicators on lists can be displayed as a colored circle on the left side of the field or using a field background color.
- In UI11 and the classic UI, field status indicators are displayed using a field background color.

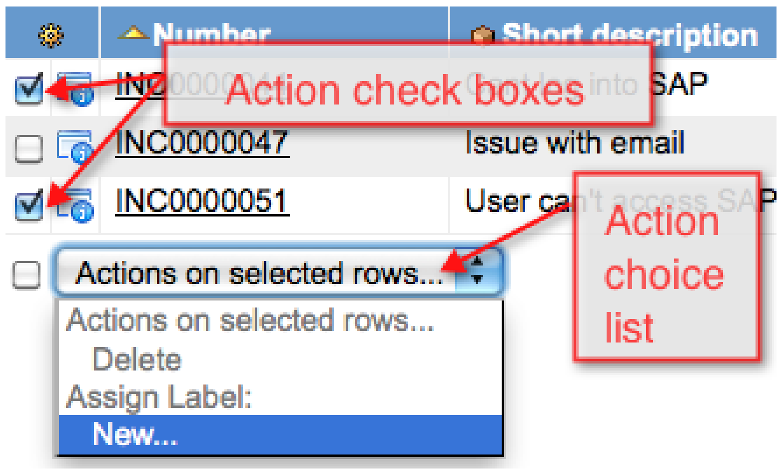
To select the style of the field status indicator in UI14:

1. Click the personalize list icon (⚙) in the upper left corner of a list.
2. Select the **Modern cell coloring** check box to use the UI14 style field status indicator. Clear this check box to use the UI11 and classic style.
3. Click **OK**.

For more information, see Creating Personal Lists.

Action Check Boxes

Action check boxes enable users to perform actions on selected items in a list.



Action check boxes and Actions choice list

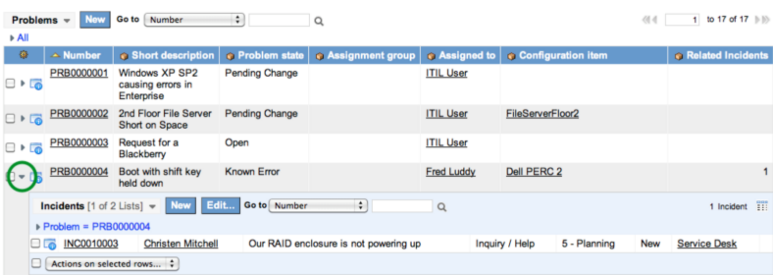
To use action check boxes:

1. Select the check boxes beside the records you want to affect. To select all records on the page, go to the bottom of the list and select the check box beside the **Actions** choice list.
2. Apply the desired action.
   - **UI14:** in the column list context menu, **Update Selected** records using an editing form. For more information, see Editing Lists.
   - **UI11 and Classic:** in the column heading right-click menu, **Update Selected** records using an editing form. For more information, see Editing Lists.
   - In the **Actions** choice list, **Delete** (administrators only), **Show on Live Feed**, **Assign Tag**, or **Remove Label** (if applicable). For more information, see Creating and Using Labels.

Hierarchical Lists

Lists can have sublists in a hierarchy that can also be accessed in list view. Hierarchical lists allow users to view records from related lists directly from a list of records without navigating to a form.

To expand or collapse the related lists on a record in a hierarchical list, click the arrow ( ) beside the reference icon.



An example hierarchical list

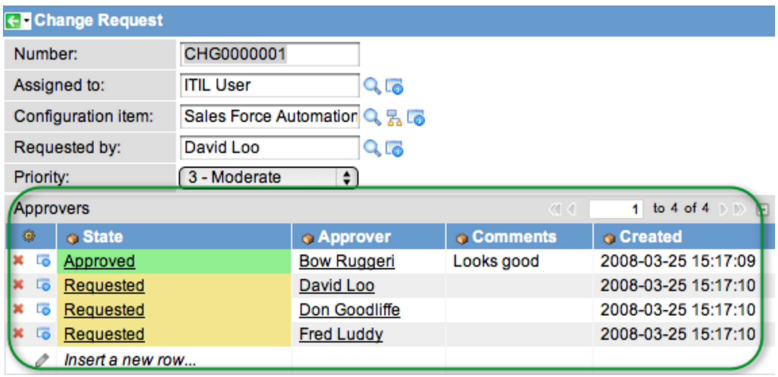
See Hierarchical Lists for more information on how to enable and use this feature.

Embedded Lists

Some lists may be embedded in forms. Changes to embedded lists are saved when the form is saved. For more information, see Editing in Forms.

Use these controls to work with an embedded list:

- To expand or collapse an embedded list, click the expand ( ) or collapse icon ( ) in the list header.
- To add a new row, double-click **Insert a new row...**
- To edit a row, double-click in an empty area of the field. See Using the List Editor.
- To delete a row, click the delete icon ( ) beside the row.
  - New rows are removed immediately.
  - Existing rows are designated for deletion when the record is saved. To clear this designation, click the delete icon again.



An embedded list

Navigating to a List

To open a list using the application navigator, click the list name or type the table name followed by *.list* in the application navigator filter. For more information, see Navigating Applications.

To open a list using a URL, append the table name and *_list.do* to the instance Web address. For example, the following URLs open the incident and change request lists, respectively, in the demo instance:

http://<instance name>.service-now.com/incident_list.do

http://<instance name>.service-now.com/change_request_list.do

To open a list in the content frame using a URL, add *nav_to.do?uri=* to the list Web address, as in the following examples:

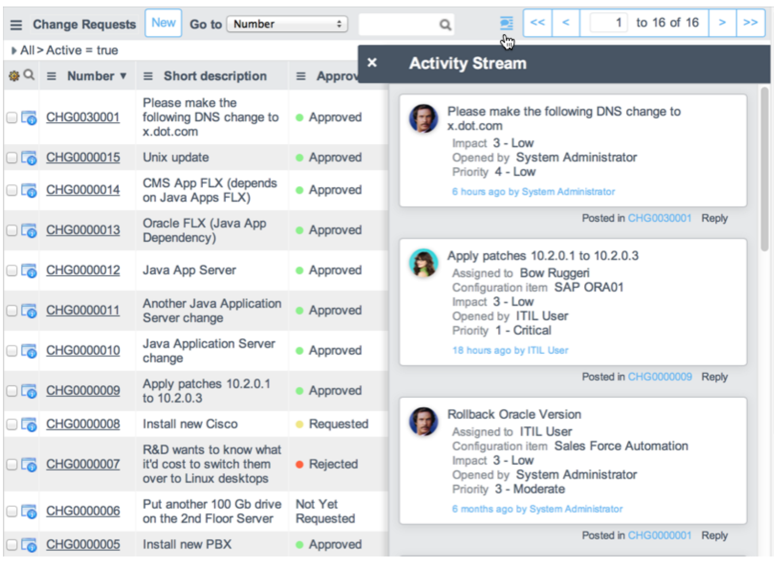
http://<instance name>.service-now.com/nav_to.do?uri=incident_list.do

http://<instance name>.service-now.com/nav_to.do?uri=change_request_list.do

Filters, views, and other parameters can also be applied using a URL. For more information, see Navigating by URL.

Note: *Consider creating bookmarks for commonly viewed lists.*

Displaying Activity Streams



Activity Stream Window

You can stream live activity information for all records on the current list. This feature is available starting with the Eureka release.

To view this information, click the list activity stream icon ( ) in the list title bar. This icon appears in the title bar for all task tables.

The live stream information appears in a flyout window, and is the same information that appears in the activity formatter for a record. The information in the flyout window updates automatically with audit and journal entries. Click the **x** at the top to close the activity stream.

Note: *Activity streaming is available for Internet Explorer 9 and higher.*

Editing Lists

Overview

Users can edit data in lists using a variety of methods:

- **Quick edit functions:** change applicable field values using the right-click menu.
- **List editor:** edit field values in a list without opening a form.
- **Multiple records:** edit more than one record at the same time using the list editor or an editing form.

Quick Edit Functions

To edit a record in a list using quick edit functions, right-click a field and select the appropriate function:

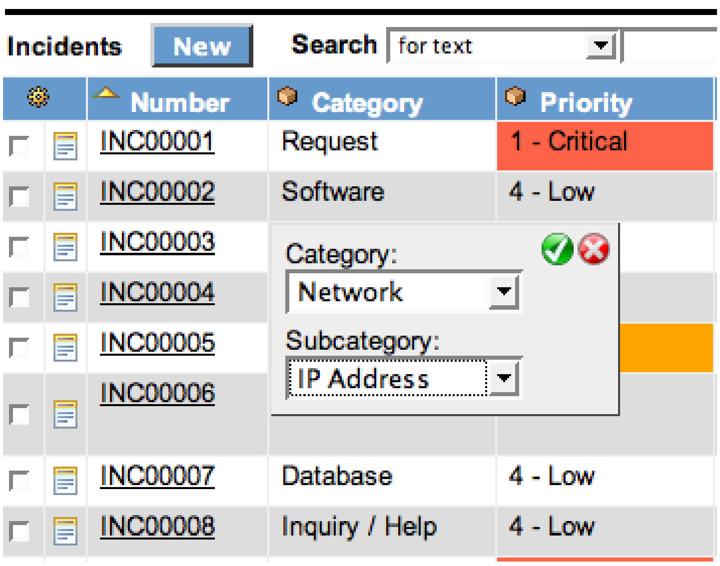
- **Assign to me:** for records that use assignments, adds the logged in user's name into the **Assigned to** field.
- **Approve:** for records that use approvals, changes the record's approval state to **Approved**.
- **Reject:** for records that use approvals, changes the record's approval state to **Rejected**.

Using the List Editor

The list editor allows users to edit field values directly from a list without navigating to a form. Administrators can configure the list editor. By default, list editing is disabled for some tables.

To use the list editor:

1. Double-click (or click, if you have personalized the list editor) in an empty area of the field. The appropriate editor for the field type opens. You can also use keyboard navigation to access the list editor.
   - Before the list editor opens, access rights to edit the field are verified. A loading indicator appears if this process takes longer than expected.
   - If the field has a dependency relationship (for example, *Category* and *Subcategory*), then a composite editor opens to allow editing of all dependent fields. You must have rights to edit all dependent fields to use the list editor.
2. Enter the appropriate values and click **Save** ( ), or click **Cancel** ( ) to retain the original value.



List editor

Using Keyboard Navigation for List Editing

Users can use spreadsheet-like keyboard navigation to edit data in list view.

To use keyboard navigation for list editing:

1. Navigate to the list you want to edit.
2. Press **Tab** until the first field in the list is selected (highlighted).
3. Use any the following key combinations to navigate through the list until the field you want to edit is selected.
   - Move right: **Tab** or the **Right Arrow** key.
   - Move left: **Shift + Tab** or the **Left Arrow** key.
   - Move down: the **Down Arrow** key.
   - Move up: the **Up Arrow** key.

   To select multiple fields in the same column, hold **Shift** and press the **Down Arrow** or the **Up Arrow** key.
4. Press **Enter**. The list editor opens.
5. Enter a new value. To add a new line in a multi-line text field, press **Shift + Enter**.
6. Save or cancel your changes in one of the following ways:
   - Press **Enter**. The new value is saved and the field below the edited field becomes selected.
   - Press **Tab**. If the list is configured to save immediately, the new value is saved. If the list is configured to save data by rows, an indicator appears beside the value and the list editor opens for the next field. The row is saved only when you navigate away from the row or click the **Save** ( ) button beside the row.
   - Press **Ctrl + Enter**. If the list is configured to save immediately, the new value is saved. If the list is configured to save data by rows, an indicator appears beside the value and the current field remains selected.
   - Press **Esc**. The list editor closes without saving changes and the field remains selected.

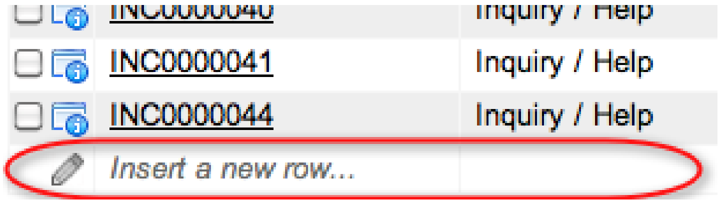
Note: *Depending on the browser you are using, you may use different key combinations to edit certain field values. For example, to edit a choice list using Chrome, press the Spacebar.*

Creating New Records

Users can create new records in list view. Administrators can configure the list editor to enable this feature for lists.

To create a new record in list view:

1. Navigate to the empty row at the bottom of the list.
2. Open the list editor for a field in the row and enter a value.
3. Save or cancel your changes.



Insert a new row (record)

Personalizing the List Editor

To personalize the behavior of the list editor:

1. Open the list.
2. Click **Personalize List** ( ) in the upper left corner.

- To allow the list editor to open for the list, select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening for the list.
- To open the list editor with a double-click, select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.

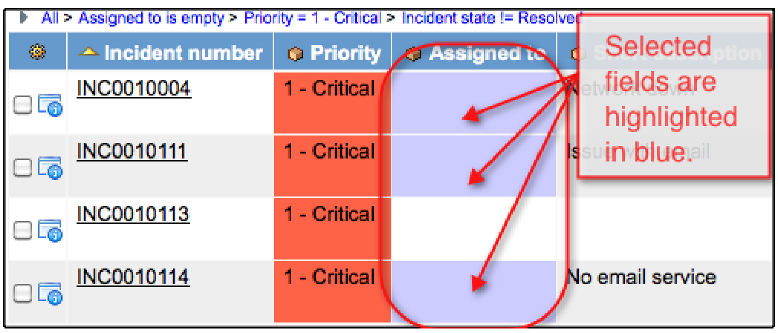
Editing Multiple Records

All users can edit multiple records at the same time using the list editor. Administrators and users with the list_updater role can edit multiple records at the same time using an editing form. If you want to update a single field on multiple records to have the same value, the list editor is the quickest method. If you want to edit multiple fields or fields that do not appear in the list view, use an editing form.

To edit multiple records in a list using the list editor:

1. Select the records you want to edit:
   - To select multiple consecutive fields, hold **Shift** and *drag* in the desired fields, or select a cell and then press **Shift + Up Arrow** or **Shift + Down Arrow**.
   - To select multiple non-consecutive fields, press **Shift** and click in one of the desired fields, then hold **Shift + Ctrl** (**Shift + Command** on Mac), and *click* in the desired fields.
2. Open the list editor by double-clicking (or clicking, depending on setup) in an empty area of the field.

   The number of selected rows that will be edited is indicated. If any rows cannot be edited (due to security constraints), that is indicated.
3. Enter the appropriate values and click **Save**.



Selected fields are highlighted in blue.

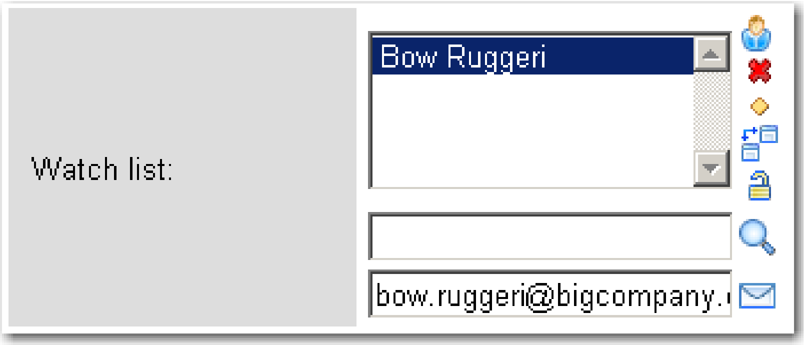
To edit multiple records in a list using an **editing form** (administrators and users with the *list_updater* role):

1. Select the records to edit in one of the following ways:
   - Select the check boxes in the record rows.
   - Select a field in the record rows.
   - Filter the list to show only the rows you want to edit.
2. Right-click the column header and select **Update Selected** or, if you filtered the data, select **Update All**. An editing form opens.
3. Enter appropriate values in any of the fields and click **Update** to save your changes in all selected records.

Configuring Watch Lists

Overview

Watch lists (**glide_list** field type) allow multiple users to subscribe to notifications of a task (see Using Watch Lists). Administrators can configure options for watch list fields.



Configuring Email Notifications for Watch Lists

To send email updates to users in the **Watch list**, select **Watch list** from the **Users/groups in fields** portion of the email notification (Berlin release).

Note: *To receive these notifications, users must have an email address defined in their user record or enter an email address into the watch list email field.*

Adding the Watch list to an email notification

Configuring Multiple Watch Lists

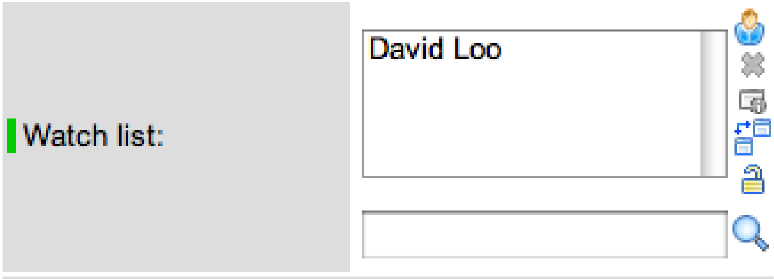
An advanced configuration using watch lists might involve placing two watch lists on a form, one for the general comments on a ticket and another for work notes or non-public comments. By configuring separate email notifications, separate users on each watch list can be notified about different information.

Troubleshooting Duplicate Email Notifications

If users on a watch lists are getting more than one email for each update to an incident, it may be because the people involved in the incident are replying to an email notification in which other user's names appear in the **To:** or **CC:** field. Recipients may be receiving email through their email system (Outlook, Groupwise, etc.) and through ServiceNow. To stop this duplication, remove the names of other users from the email or the Watch List.

Hiding Email Addresses in a Watch List

You can remove the email address text entry element from a watch list by personalizing the dictionary and adding the dictionary attribute **no_email=true**. You can add new users to the watch list from the reference field lookup.



Approvals

Overview

Approvals can be defined for all tasks and allow users or groups to be associated with a task, for the purpose of either approving or rejecting that task. Approvals are defined by navigating to **System Policy > Approvals**.

The following information defines an approval:

Field	Input Value
Approver	A reference to the user who is responsible for approving the related record.
State	Choices are: • Not Yet Requested (This state indicates that you are not yet asking your approvers to approve this request. Until you set the status to Requested they will receive no email notifications about the request.) • Requested • Approved • Rejected
Approving	A document_id reference field to the record being approved, on any table.
Comments	A journal field for storing comments regarding the approval.
Approval Summarizer	A formatter that displays key fields relevant to the approval from the referenced document. This summarizer will not display if there is no record referenced.

Approval Status

The approval status of a change request is determined by looking at the current status of all the approvers. If any approver has rejected the change, the approval status will be Rejected. If all approvers have approved the change, the approval status will be Approved. If all approvers are in the Not Requested status or if there are no approvers, the change status will be Not Requested, otherwise the status will be Requested.

For added flexibility when creating approvals, including the ability to set up an "one of" approval where only one person of a group of approvers needs to approve, consider using Workflows.

Generating Approvals

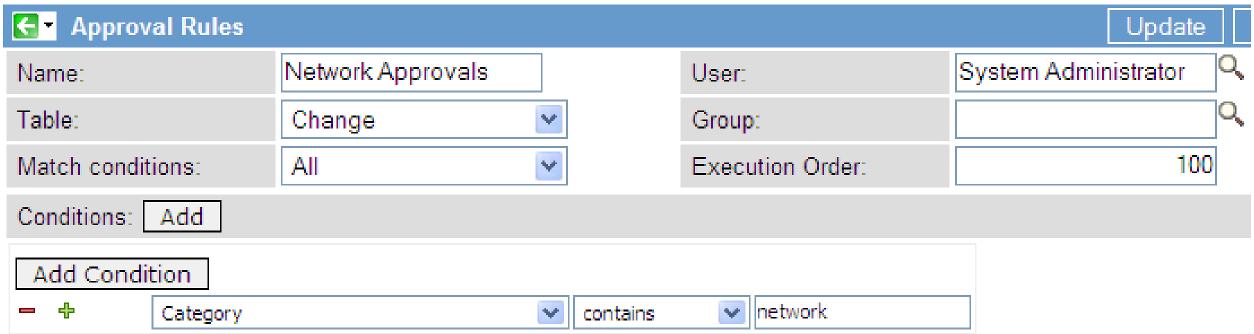
Generating Approvals using Workflows

Workflows are a powerful and flexible method of generating approvals. Use workflows to create group approvals and user approvals. A variety of variables are available to fine tune the approval process, including the actions that occur when approval or rejection take place. When a workflow activity generates an approval record, ServiceNow automatically populates the **Workflow activity** field on the approval record with a reference to the activity. Do not use this field when creating business logic. For more information, see Approval and Rollback Activities.

Generating an Approval using Approval Rules

The system can automatically generate an approval request to individuals or groups when specific criteria are met. The automatic generation of approval requests is driven using the System Policy feature.

In the sample below, a change opened in the category **network** is assigned to the System Administrator:



When an approver is automatically added based on approval rules, the status of the approval automatically defaults to "Requested".

Generating Approvals using the Approvers Related List

It is also possible to manually add approvers to a request. Additional approvers can be added by clicking the "Edit" button in the Approvers section near the bottom of a request.

When an approver is added manually, the status for that approver defaults to "Not Requested". When the status of the approver is changed to "Requested", the approver will be sent an email requesting approval action.

Multiple Approvers

With multiple approvers, all approvers must authorize the request before the status will change to "Approved". Should any approver reject the request, the status will immediately be set to "Rejected"

Receiving Notifications

Approval notifications will be sent at the following times:

- When an individual is assigned as an approver either automatically or manually. If a group is chosen, then all members of the group will be sent an email. By default, the email an approver receives will contain a "mailto" link that will allow the approver to either approve or reject the request directly from their email system.
- When the request reaches approved status, the person assigned to the request will receive an email indicating it has been approved.

The details contained in the emails and the points at which they are sent can be tailored using **System Definition > Business Rules** and **System Policy**.

Note for Blackberry users: In order to see the "mailto" links mentioned above to approve or reject a request (i.e. 'Click here to approve CHG55555' or 'Click here to reject CHG55555'), your Blackberry device must be using version 4.5 of their software which supports HTML emails. If your Blackberry device is using an earlier version, you will not be able to view or use the "mailto" links. However, as a workaround, users can reply to the email and simply add the statements **state:approved** or **state:rejected** within the body of the email before sending it to force the automatic approval/rejection functionality.

If you create an appropriate Inbound Email Action, you can let approvers respond to approval email notifications with a simple "yes" or "no" answer.

Knowledge

Knowledge Management with KCS

Overview

The knowledge management process ensures that important information flows freely throughout the IT department and to the entire organization. For organizations using knowledge centered support (KCS) processes, this information is also part of the incident management and problem management processes. By storing and making available information about common problems and issues, knowledge centered support helps prevent future redundant incidents.

The ServiceNow Knowledge Base application provides role-based tools to create, store, and publish this important information. It also provides tools for all users to find and view the information as needed.

Knowledge Management Roles

Knowledge management uses these roles:

- **knowledge role:** creates and translates articles; reviews and responds to feedback; works with article submissions.
- **knowledge_admin role:** performs all the activities of the knowledge role; reviews and responds to ratings, flagged articles, and user search information; updates the knowledge portal with links to outside resources.
- **admin role:** performs all the activities of the knowledge and knowledge_admin roles; applies role restrictions and other supplementary settings to articles, configures knowledge management properties; manages the label and message text for knowledge forms and pages.

Administrators assign these roles to the users and groups who maintain the knowledge content.

Application and Modules

The Knowledge Base application contains these modules, which are available to all users with the admin, knowledge_admin, and knowledge roles, unless otherwise noted.

Module	Description
Create New	Opens the Knowledge form where you can create a new article. The article number is provided. Enter the content for the article. Users with the admin role can set the article workflow state and assign roles if access is to be limited.
Published	Lists the articles whose workflow state is **Published**. These articles are accessible from the knowledge portal and search. Review or update published articles, as needed.
Edit	Lists all knowledge articles, regardless of their workflow state. Review or update the articles, as needed.
Retired	Lists articles whose workflow state is **Retired**. These articles are not accessible from the knowledge portal or search. Review the articles to determine whether any should be updated and republished, retained for historical reference, or deleted.
Feedback	Lists knowledge feedback records. Use the **Work notes** field on the Knowledge Feedback form to document any changes made as a result of the feedback.
View	Displays the knowledge portal. Search and view articles or click and drag a topic header to temporarily change the arrangement of topics in the portal.

Submissions	
Assigned to me	Lists all knowledge submissions assigned to the logged in user who has the admin, knowledge_admin, or knowledge role. Review the submission to determine whether to create an article and submit it for approval or to reject the submission and note the reason. Submissions are created only when the knowledge submission workflow is enabled.
Open Submissions	Lists all knowledge submissions with **Status** set to **Submitted** or **Assigned**. Review the record to determine whether to assign the submission to a knowledge worker, create an article and submit it for approval, or reject the submission and note the reason. Submissions are created only when the knowledge submission workflow is enabled. To list submissions that have been closed, create a filter by clicking the arrow beside the breadcrumbs..
KCS	
Flagged Articles	Lists articles that have been flagged as incomplete or inaccurate by users. Open the record to read the user's comment in the **Knowledge Feedback** related list and to modify the article as needed. *This module is available only to users with admin or knowledge_admin role.*
Ratings	Lists ratings from users. Click the **Created** date to open the rating record. Click the article number to open the article. *This module is available only to users with admin or knowledge_admin role.*
Search Log	Lists records of knowledge searches showing the search term and the number of results returned. Use this information to determine whether users are finding what they need in the knowledge base. *This module is available only to users with admin or knowledge_admin role.*
Overview	Opens the Knowledge Management homepage. Use the links at the top of the page to add content to the page or change its layout. *This module is available only to users with admin or knowledge_admin role.*
Administration	
Navigation Add-ons	Lets you add links on the knowledge portal to different search engines or related websites. *This module is available only to users with admin or knowledge_admin role.*
Properties	Lets you configure the knowledge base. *This module is available only to users with admin role.*
Messages	Lets you customize the text that appears in various knowledge base locations, such as button labels, category names, and feedback options. *This module is available only to users with admin role.*

Using Knowledge

All users of the ServiceNow application can access the knowledge portal to search, where they can search for and view knowledge articles and provide feedback to help improve the knowledge base. For more information, see Using the Knowledge Base and Searching Knowledge.

Creating Knowledge

You can provide knowledge content:

- By creating new articles in the Knowledge form.
- By linking to content in other knowledge systems.
- From existing incidents.
- From existing problems.
- From the service catalog.
- From events by creating a business rule to generate relevant knowledge.
- By publishing managed documents to the knowledge base

Administrators can enable the knowledge submission workflow to have new knowledge articles created as *submissions* that are moderated by knowledge workers before they are published.

Translating Knowledge

Organizations with knowledge users who speak multiple languages can activate the optional knowledge internationalization features. For more information, see Knowledge Internationalization.

Tracking and Reporting on Knowledge

Several tracking and reporting options withing ServiceNow help you see how the knowledge content is being developed and used over time. For more information, see Knowledge Management Reporting and Knowledge Article Tracking.

Creating Knowledge

Overview

The ServiceNow knowledge base houses the information an organization needs to keep and share. For example, it might include desktop support information, company/department processes and procedures, and documentation on internally developed applications.

Add information to the knowledge base by:

- Creating articles manually.
- Creating articles automatically from an incident.
- Creating articles automatically from a problem.
- Creating articles automatically from events.
- Linking to or importing content stored in another knowledge base.
- Publishing managed documents to the knowledge base

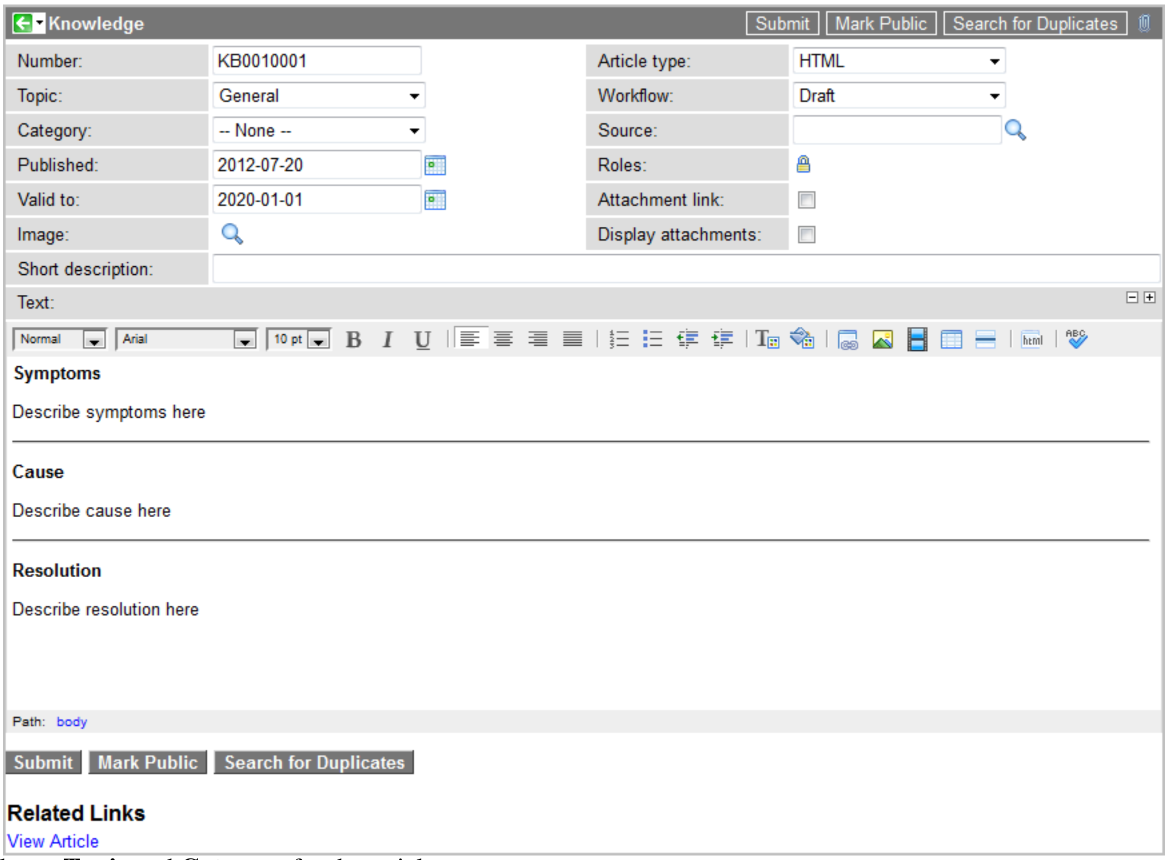
By default, most new articles are created as drafts and move through a review state before they are published. Some exceptions to the standard workflow include posting news from the Problem form and creating an article from an event.

If the administrator enables the optional knowledge submission workflow, articles created from incidents or problems become *knowledge submissions*, which are processed through a different path. For more information, see Knowledge Workflow.

Creating Knowledge Manually

Users with the admin, knowledge_admin, or knowledge role can create knowledge base articles directly in the Knowledge form.

1. Navigate to **Knowledge Base > Create New**.



2. Select a **Topic** and **Category** for the article.
3. Enter a **Short description** to identify the article in the knowledge portal and search results.
4. In the **Text** field, enter the article's content.

   Use HTML or Wiki Markup to format the content, according to the **Article type** selection.
5. Fill in other fields on the form, as appropriate (see table).
6. Click **Submit**.

This table describes all fields and buttons on the Knowledge form. The descriptions identify fields that are available only to users with specific roles.

Field	Input Value
Number	Do not modify. The record number is assigned by the system and should not be changed.
Topic	Select the topic in which the article should appear in the knowledge portal. To add options, right-click the field label and choose **Personalize Choices**.
Category	Select a category to further organize articles in the knowledge portal. Available categories depend on the selected topic. To add options, right-click the field label and select **Personalize Choices**.
Published	Enter the date the article was published. The current date is used by default.
Valid to	Enter the date when the article expires. Only **Published** articles within the valid date range are visible to most users. ServiceNow supplies a default date. To change the default date, right-click the field label and choose **Personalize Dictionary**. *This field is available only to users with the admin role.*

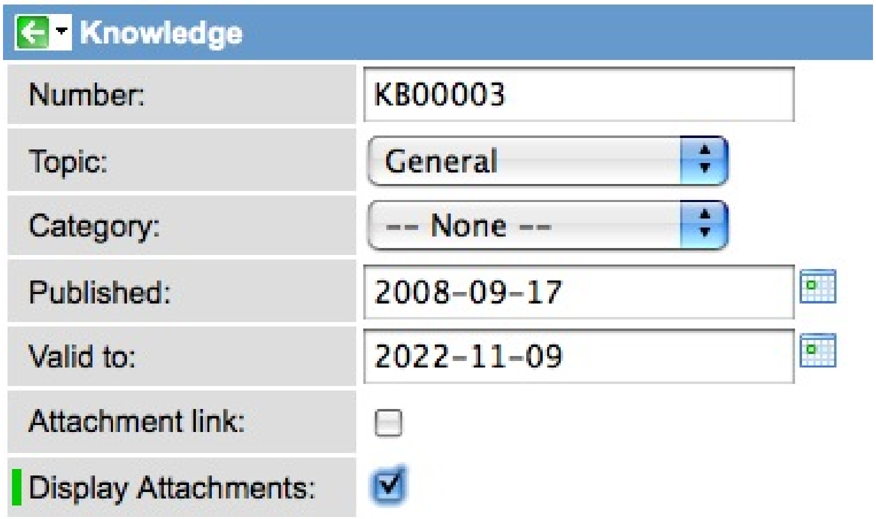
Image	Click the reference lookup icon ( ) to select an image that was previously uploaded to the ServiceNow database. The image appears as an icon beside the article name in the knowledge portal. *This field is available only to users with the admin role.*
Article type	Select the markup language to use for formatting the article: • **HTML:** the **Text** field offers a WYSIWYG interface with a toolbar to apply formatting and create links. Click the HTML icon on the toolbar to display HTML mode, where you can view and format with HTML commands. • **Wiki:** the **Text** field offers **Wikitext** icon that toggles between a preview of the formatted text and an edit field where you can enter text with Wiki markup language to define formatting.
Workflow	Select the workflow state for the article: **Draft**, **Review**, or **Published**. Generally, only **Published** articles appear in the portal. Users with role-based permissions might also see articles in the draft or review state in the portal and search results, depending on administrator settings. *This field is available only to users with the admin role.*
Source	Click the reference lookup icon to select the task that formed the basis for this article, if any. *This field is available only to users with the admin role.*
Roles	Specify user roles to limit who can view the article. Otherwise, all users can view the article after it is published. *This field is available only to users with the admin role.*
Attachment link	Select this check box to have this article's link open a file attachment. To upload the attachment, click the paperclip icon in the upper right corner. The link in the knowledge portal or search results opens the attachment instead of navigating to the text of the article. You can link to one attachment per article. *This field is available only to users with the admin role.*
Display attachments	Select this check box to display a list of attachments below the article. Although you can link to only one attachment (see the **Attachment link** field), you can attach multiple files and list them below the article in article view. *This field is available only to users with the admin role.*
Short Description	Enter text to appear as a title for the article in the knowledge portal and search results.
Text/Wiki	Enter the text of the article. This area accepts either HTML or Wiki Markup, according to the selected **Article type**. If **Article type** is **HTML**, you can work in WYSIWYG mode, using the toolbar above the text field to apply formatting and create links. Click the HTML icon on the toolbar to open HTML mode, where you can view and format the text with HTML commands. See Using HTML Fields for information on using the HTML editor. If **Article type** is **Wiki**, click the **Wikitext** icon to toggle between an edit field and the formatted text. See Knowledge Management Wiki Support for information on using wiki tags.
Update	Click the **Update** button to save any changes made to the form and return to the article list. To save changes and stay on the form, right-click the header bar and choose **Save**.
Mark Public / Mark Internal	Click the **Mark Public** button to make the article accessible to everyone. This action sets **public** as the role for the article. Click the **Mark Internal** button to make the article accessible only to the roles specified by the administrator. If no roles are specified, the article is available to the public and there is no change.
Search for Duplicates	Click this button to search the knowledge base for existing articles that contain similar content.
Delete	Click this button to delete the knowledge article from the system. You must confirm the request before the record is deleted.

Note: *If you include a permalink URL to another knowledge article, do not include the <span id="permatext"> tag that is part of the permalink CSS, otherwise the normal permalink at the bottom of the article does not render correctly.*

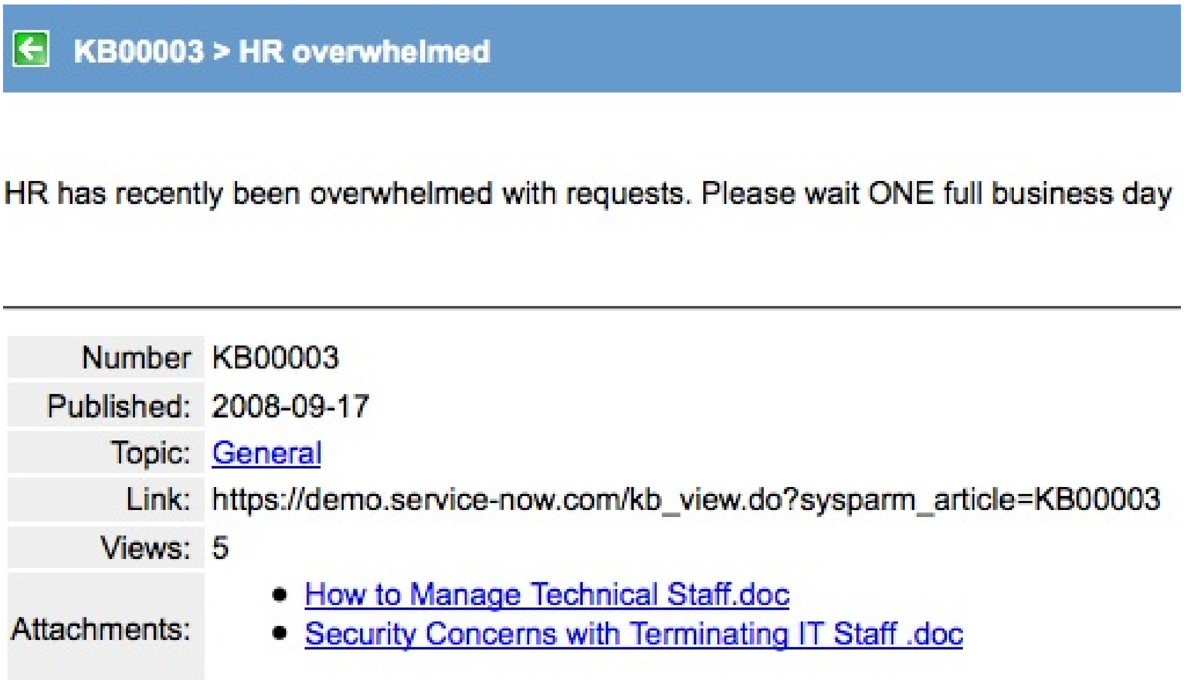
Making Attachments Visible

Like other records, you can add attachments to knowledge articles. By default, they appear only to users with the admin, knowledge_admin, or knowledge role, who can view the knowledge record by navigating to **Knowledge Base > Edit** or clicking the **Edit Article** button when viewing the article.

Select the **Display Attachments** check box on the Knowledge form to display a list of attachments to users viewing the article. You might need to personalize the Knowledge form to display this field.



A list of attachments appears below the article if **Display attachments** is selected.

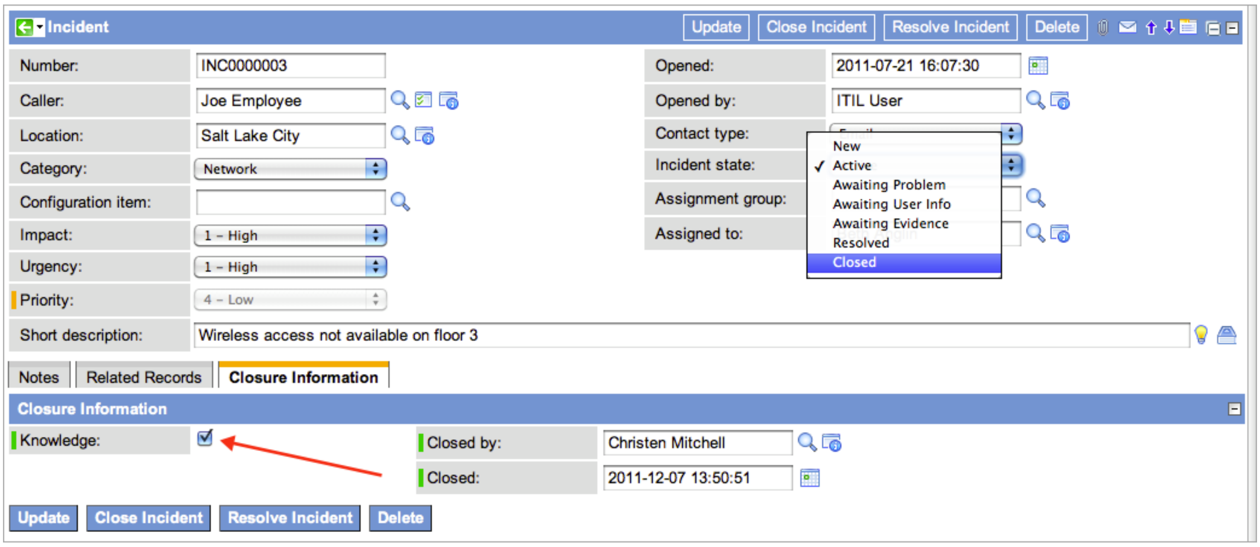


Creating Knowledge from an Incident

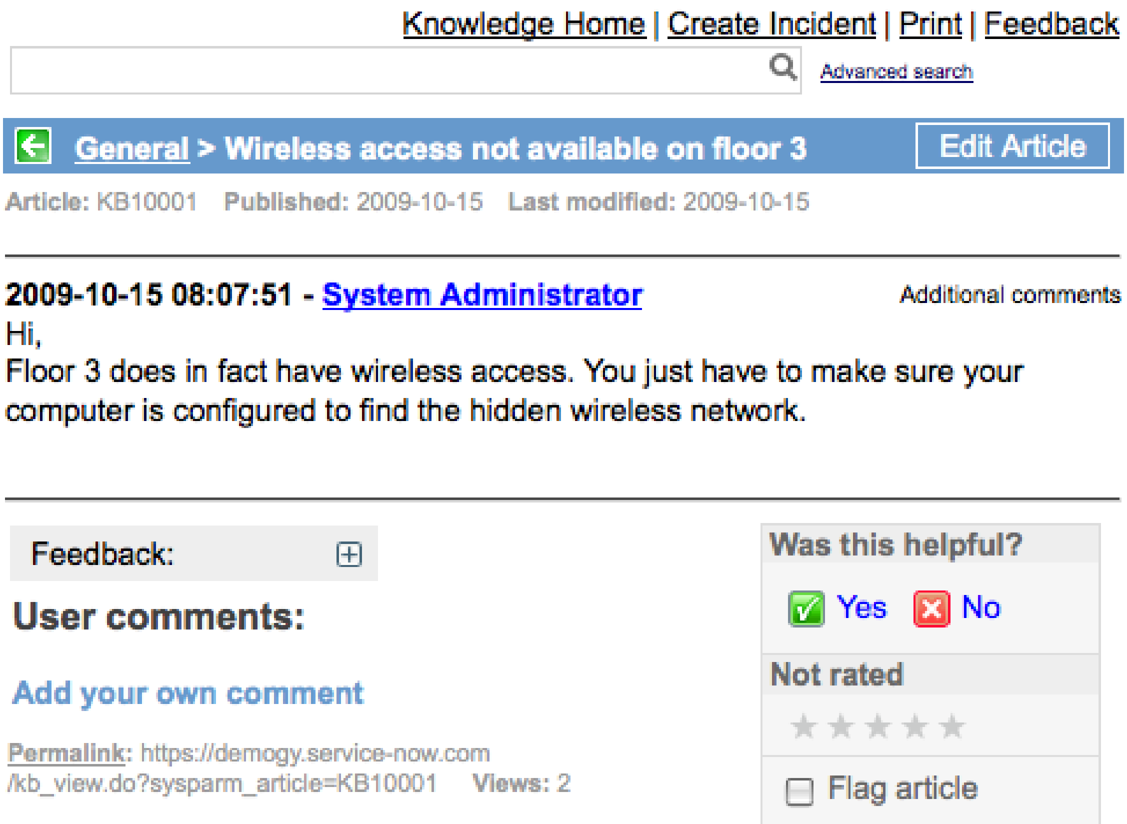
Incidents within ITIL processes often generate information that may be needed in the future. ServiceNow can automatically submit relevant information to the knowledge management process when the incident is closed.

Select the **Knowledge** check box in the Incident form's the **Closure Information** section to enable this feature. Closing the incident triggers the business rule **Incident Create Knowledge**. By default, the business rule creates a knowledge article in the **Draft** workflow state. The incident **Short description** becomes the article **Short description**. The incident **Additional comments** become the article **Text**. If the knowledge submission workflow is enabled, the incident **Short description** and **Additional comments** become a knowledge submission instead of an article. For more information, see Knowledge Workflow.

For example, this is an incident being closed.



And this is the resulting article as it appears in the knowledge base.



Creating Knowledge from a Problem

The ServiceNow Problem form includes four options for creating knowledge directly from the problem:

- **Knowledge** check box
- **Communicate Workaround** related link
- **Post Knowledge** related link
- **Post News** related link

Using the Knowledge Check Box

Like incidents, problems within ITIL processes often generate information that may be needed in the future. ServiceNow can automatically submit relevant information to the knowledge management process when a problem is closed.

Select the **Knowledge** check box on the Problem form to enable this feature. Closing the problem triggers the business rule **Problem Create Knowledge**. By default, the business rule creates a knowledge article in the **Draft** workflow state, ready for a knowledge team member to review and publish. The problem **Short description** becomes the article **Short description** and the problem **Work notes** become the article **Text**. If the knowledge submission workflow is enabled, the problem **Work notes** become a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Communicating a Workaround

To update all incidents associated with a problem, go to the Problem form and click the **Communicate Workaround** related link. This adds the problem number and the contents of the s **Workaround** field as a new entry in the **Activity** field on all related incidents.

By default, any entries made in an incident **Activity** field generate an email notification to the **Caller** on the Incident form. The **Communicate Workaround** option on the Problem form quickly and easily communicates workarounds to multiple users from one place, eliminating the need to manually update each incident.

If group on-call rotation scheduling is in effect when you communicate a workaround, ServiceNow stops the escalations on the associated incidents because the workaround has been communicated to the end users.

This effectively communicates knowledge to the appropriate audience, but does not create a knowledge article.

Posting Knowledge

To create a new knowledge article from a problem immediately, rather than when the problem closes, go to the Problem form and click the **Post Knowledge** related link. The resulting knowledge article contains the following information:

- The problem number and **Short description** become the knowledge article **Short description**.
- The problem **Description** and **Work notes** become the knowledge article **Text**.
- The problem **Configuration item** becomes the knowledge article **Configuration Item** for the **Affected Products** related list.
- The article **Topic** is set to **Known Error**.

By default, ServiceNow creates a knowledge article in **Draft** workflow state. If the knowledge submission workflow is enabled, the problem **Short description** and **Work notes** are placed into a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Posting News

To quickly create and publish a knowledge article in the News topic, go to the Problem form and click the **Post News** related link. The resulting knowledge article contains the following information:

- The problem number and **Short description** become the knowledge article **Short description**.
- The problem **Description** and **Work notes** become the knowledge article **Text**.
- The problem **Configuration Item** becomes the knowledge article **Configuration Item** for the **Affected Products** related list.

By default, the **Post News** related link creates an article in the **Published** workflow state. *These articles appear in the **News** topic of the knowledge portal immediately.*

If the knowledge submission workflow is enabled, the problem **Short description** and **Work notes** are placed into a knowledge submission instead of an article. For more information, see Knowledge Workflow.

Modifying the UI Actions

Administrators can modify the behavior of the the **Communicate Workaround**, **Post Knowledge**, and **Post News** related links. Navigate to **System Definition > UI Actions** and modify the record with the same name as the related link. For more information, see UI Actions.

Accessing External Knowledge Articles

Use **Knowledge Base > Navigation Add-ons** to configure access to another knowledge base, either public or private, or to a public search engine.

The process of importing knowledge base articles depends on how the source data is stored and formatted. If you need to import knowledge content directly from another source to the ServiceNow knowledge base, please contact your Account Executive or Professional Services consultant.

Searching

Introduction to Searching

Overview

Find information quickly in ServiceNow by using any of the available searches. Searches are not case sensitive. Use advanced options for more specific queries:

- Wildcards: use a symbol to represent zero or more characters.
- Phrase searches: find a phrase with multiple terms.
- Searching lists: control the query for list searches of a specific field.
- Boolean operators: refine searches with operators such as AND and OR.
- Attachment searches: search in files that are attached to records.
- International character sets: perform searches with any Unicode characters.
- Punctuation: perform searches that contain punctuation.

Zing is the text indexing and search engine that performs all text searches in ServiceNow.

Available Searches

Use any of the following searches to find information in ServiceNow:

- Lists: find records in a list; search in a specific field (Go to), all fields (Search), or in a specific column.
- Global text search: find records in multiple tables from a single search field.
- Knowledge base: find knowledge articles.
- Navigation filter: filter the items in the application navigator.
- Live feed: filter, search, or sort messages in live feed.
- Search screens: use a form-like interface to search for records in a table. Administrators can create these custom modules.

Wildcards

Wildcards are available for Zing.

The following searches support single and multiple character wildcard searches:

- Global text search
- Knowledge base
- Lists (text searches of all fields)

To perform a single character wildcard search, use the percent sign (%) symbol. This wildcard finds terms that contain any one character to replace the percent sign. For example, to find text or test, search for:

```
te%t
```

To perform a multiple character wildcard search, use the asterisk (*) symbol. This wildcard finds terms that contain 0 or more characters to replace the asterisk. For example, to find planned or placed, search for:

```
pl*d
```

You can use wildcard characters anywhere in a search term. If a wildcard returns too many options for an efficient search, a message appears asking you to refine the search. Administrators can configure the limit for wildcard searches with the **glide.ts.max_wildcard_expansion** property.

Phrase Searches

Use quotation marks to search for a phrase with multiple terms. Zing finds only matches that contain the exact words in the exact order you specify, ignoring stop words (common words that are excluded from searches) and punctuation. For example, the following searches return the same results because the stop word *a* is ignored:

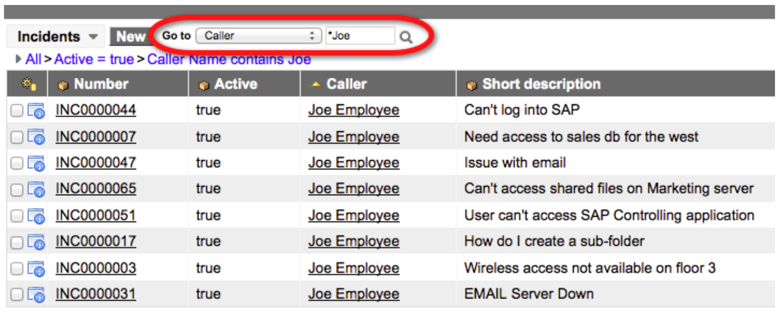
```
"email password"
```

```
"email a password"
```

Wildcards do not work within quoted phrases; they are ignored as punctuation.

Searching Lists

By default, a list view includes a **Go to** search option that includes a choice list and a search field. The choice list contains a general text search option in addition to an option for each column name in the list. The column names are actually the field names on the record form. Use the choice list in conjunction with the search field to filter the list of records by the desired field.


Incidents New Go to Caller *Joe
All > Active = true > Caller Name contains Joe

Number	Active	Caller	Short description
INC0000044	true	Joe Employee	Can't log into SAP
INC0000007	true	Joe Employee	Need access to sales db for the west
INC0000047	true	Joe Employee	Issue with email
INC0000065	true	Joe Employee	Can't access shared files on Marketing server
INC0000051	true	Joe Employee	User can't access SAP Controlling application
INC0000017	true	Joe Employee	How do I create a sub-folder
INC0000003	true	Joe Employee	Wireless access not available on floor 3
INC0000031	true	Joe Employee	EMAIL Server Down

The Go to search for a list of incidents filtered by callers with the name Joe

To use the Go to search:

1. Navigate to a list of records.
2. If necessary, modify the fields for the list of records by clicking the gear icon ( ) and selecting the desired fields.
3. From the **Go to** choice list, select the desired field on which to filter.
4. In the search box, enter the text to search for.
5. Click the search icon ( ).

Searching Values in Choice Lists

Each option in a choice list is defined with a column label and a value. For example, the **State** choice list field on the Incident form contains several options. The text you see for each option, such as **New** and **Closed**, among others, is the column label. Each of these column labels has an underlying value. On the Incident form, the default value for **New** is **1** and the default value for **Closed** is **7**.

To search for records based on the values in a choice list, use the **Go to** search and do either of the following:

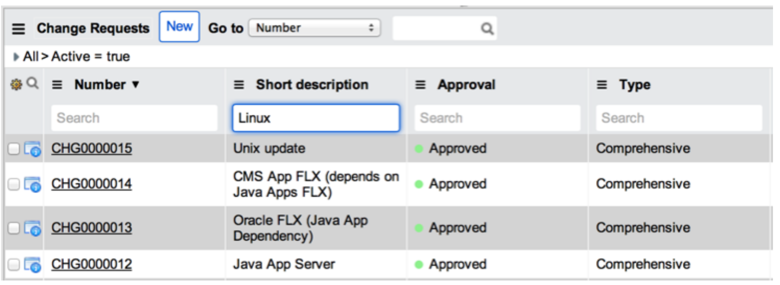
- Select **for text** as the Go to search option and enter the text of the column label. For example, entering **Resolved** when you search for text on a list of incidents returns all incident records that have **Resolved** somewhere in the record, including the **State** field.
- Select **State** as the Go to search option and enter the value for that state. For example, entering **6** when you search the **State** field on a list of incidents returns all incident records that have a state greater than or equal to (=>) 6. Assuming the default values for the Incident form, all records in the **Resolved** and **Closed** state appear because the value for the **Resolved** is 6 and the value for **Closed** is 7.

Selecting **State** in the Go to search and entering **Resolved** would not return any records because the search is looking for the value, not the column label.

Administrators can see the underlying values of all choice list options by right-clicking a choice list field and selecting **Show Choice List**.

Choice list values are also useful for scripting. See Client Scripts for more information.

Using the List Header Search



UI14 Column Search

In addition to searching by field or for text, you can also search individual columns in a list starting with the Eureka release.

1. Click the search icon ( ) beside the personalize list icon ( ) to expand the column headers and add a search field to each column.
2. To search a single column, enter 0the search text in the desired column search field and press **Enter**.

   The search returns records that match the search term.
3. To search multiple columns, do one of the following:
   - Enter the search text in each of the desired column search fields and press **Enter**.
   - Search an individual column and then search additional columns based on the results of the first search.

   Each time you enter search criteria in a column search field and press **Enter**, the results will narrow.

To clear a column search:

- Delete the text in the search field for the desired column and press **Enter**. This returns results for any remaining column search criteria.
- Delete the text in all of the column search fields to return all records in the list.

Using Wildcards with List Searches

If you enter text in the search box without using any wildcards, the system performs the search for values greater than or equal to the value you enter. For text fields, this means that the search first sorts the records on the selected field, then finds the first record that starts with the text and all following records. For numeric fields, this means that the search finds all records where the number field ends with the entered number.

You can use wildcards to refine your search. The following wildcards are available:

- ***searchterm:** or **%searchterm%**: search for values that contain *searchterm*
- **%searchterm:** search for values that end with *searchterm*
- **searchterm%:** search for values that start with *searchterm*
- **=searchterm:** search for values that equal *searchterm*
- **!*searchterm:** search for values that do not contain *searchterm*
- **!%searchterm:** search for values that do not end with *searchterm*
- **!=searchterm:** search for values that do not equal *searchterm*

Administrators can add a property to perform a default *contains* search instead of a *greater than* search. To make this change, add the property **glide.ui.goto_use_contains** (it is not available by default) and set the property value to **true**.

Boolean Operators

Boolean operators combine search terms with logic operators. The following searches support boolean operators:

- Global text search
- Knowledge base
- Lists (text searches of all fields)

For these searches, the AND operator is applied by default, which means if no Boolean operator is entered between two terms, the AND operator is used. For knowledge base searches, if the AND search returns poor results, the search is automatically re-run with the OR operator. Administrators can configure the knowledge base search to always use OR by modifying the **glide.knowman.search.operator** property.

Note: *Boolean operators are case-sensitive. For example,* OR *is an operator while* or *is a search term that may be a stop word.*

OR or vertical bar symbol (|)	Finds a match if either of the terms exist in a document (a union using sets). For example, to find documents that contain either "email password" or just "email", search for:
	`"email password" OR email`
	or
	`"email password" | email`

AND	Finds a match if both terms exist in a document (an intersection of sets). For example, to find documents that contain "CPU load" and "10 minutes", search for: `"CPU load" AND "10 minutes"`

NOT, minus (**-**), or exclamation point (**!**)	Excludes documents that contain the term after NOT (a difference of sets). For example, to find documents that contain "CPU load" but not "10 minutes", search for:
	`"CPU load" NOT "10 minutes"`
	or
	`"CPU load" -"over 10"`
	The NOT operator cannot be used with just one term. For example, the following search returns no results:
	`NOT "10 minutes"`
	NOT must be a stand-alone word. For example:
	`atom NOT ion` excludes the term *ion*
	`NOTION` searches for the term *notion*
	Minus and exclamation point must immediately precede the excluded term. For example:
	`email !Joe` Excludes *Joe*
	`email ! Joe` Includes *Joe*.

Searching for Attachments

Searches return matches in attachments when the attachment indexing option is enabled for the table you are searching. By default, this option is enabled for the knowledge base. Administrators can enable or disable this option for any table.

Searching with International Character Sets

Zing indexes the full range of Unicode characters to provide i18n support for searches.

How Zing Analyzes Characters

For Zing indexing and queries, documents are treated as a sequence of words. Words may be a single character (typical for Chinese and Japanese pictograms), or they may be space-separated sequences of letters (typical of Latin, Arabic, and Pinyin languages).

When dividing a document into words, Zing uses the following rules to interpret Unicode characters.

- **Punctuation**: Some punctuation and symbols are indexed in special cases (see How Punctuation Affects Search Results). In all other cases, punctuation characters are converted to spaces. Spaces define the basic unit of word separation.
- **Pictograms**: Each Chinese or Japanese pictogram is indexed as a separate word (as if it were a single Latin-1 character surrounded by spaces).
- **Letter**: All other characters (such as Latin-1, Arabic, or Pinyin) are individual letters of space separated words. Sequences of letters define indexable words.

Wildcards and i18n

Wildcard text searches (with "*" and "%") are only effective with multiple character words. A wildcard within a sequence of pictogram characters returns too many options for an efficient search. Wildcards are best used with letter-based words.

Stemming and i18n

During queries, search terms that are not part of phrases (not enclosed in quotation marks) are generalized to their "stemmed" word. Stemming removes a variety of common inflections, such "-s", "-es", "-ing", or "-ed". All words with a common stem are treated as synonyms of the original search term. Zing uses the Porter stemmer [1], which is most effective for English text.

Searching HTML Content

The ServiceNow system can index the following elements in HTML tags starting with the Eureka release. Other HTML codes are not indexed.

- **Title attributes:** In any HTML tag, the title attribute, which is a different element than the *title* HTML tag.
- **Anchor link targets:** In any anchor link that specifies an href, the linked-to URL.
- **Alt text for images:** In any image element, the alternative text for screen readers.

How Punctuation Affects Search Results

Zing uses select punctuation symbols to improve search results (available with the Berlin release). For example:

- **Apostrophes ('):** ignores trailing possessives and retains most others. For example, a search for *O'Reilly's* locates matches to *O'Reilly* and *O'Reilly's*.
- **IP addresses**: locates numbers that follow a typical IP address pattern.
- **Numbers**: locates terms that follow a typical product or record number pattern. To meet this pattern, search terms must contain frequent numbers and only these punctuation characters: underscores (_), hyphens (-), or periods (.). For example, a search for *INT123-456* locates exact matches to the search term.
- **Acronyms:** locates acronyms whether they are separated by periods (.) or not. For example, a search for *u.s.a.* locates matches to *usa* or *u.s.a.*. Note that wildcard searches may affect acronym handling. For example, a search for *u.s.** may yield better results than a search for *u.s**.
- **Company names:** locates terms containing punctuation characters that are common in company names: ampersands (&), plus signs (+), or hyphens (-). For example, a search for *RM&S* locates exact matches to the search term.
- **Host names:** locates sequences of letters and numbers separated only by periods (.). For example, a search for *en.myhost123.com* locates exact matches to the search term.

Note:

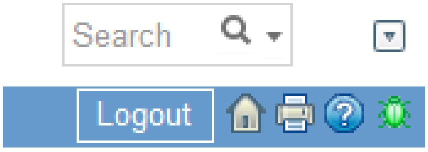
- Punctuation handling must be enabled by an administrator.
- The punctuation handling described here does not affect wildcards and boolean operators. These operators provide separate Zing functions.

References

[1] http://en.wikipedia.org/wiki/Stemming

Using Global Text Search

Overview



Global text search

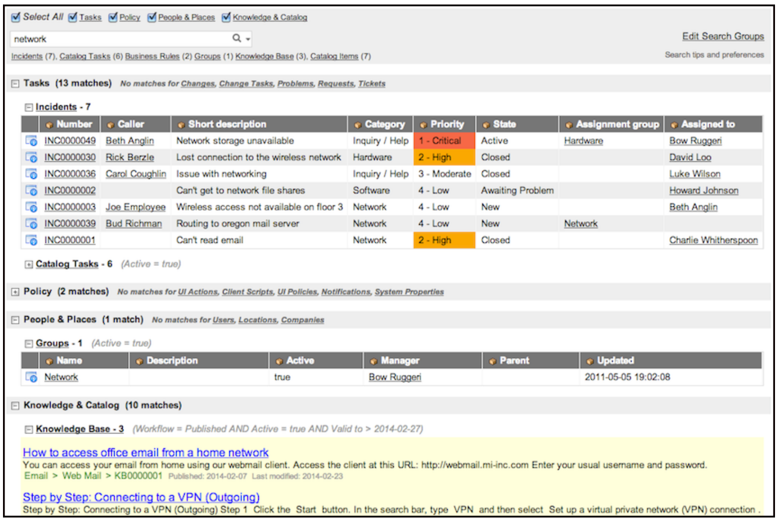
Global text search finds records in multiple tables from a single search field.

To perform a global text search, click in the search box (located in the upper right of the banner frame) or press **Access Key** [1] **+ S**.

Search results are grouped into logical collections called search groups. Users can search the groups for which they have access rights. Within each search group, results are divided by table. Administrators may customize search groups. The default search groups are:

- **Tasks**: e.g., Incidents, Change Requests, Problems
- **Policy**: e.g., Business Rules, UI Policy, Client Scripts
- **People & Places**: e.g., Users, Groups, Locations, Companies
- **Knowledge & Catalog**: Knowledge Base and Service Catalog

Knowledge and Service Catalog results are displayed as they are in their respective applications, while other results are displayed in list format.

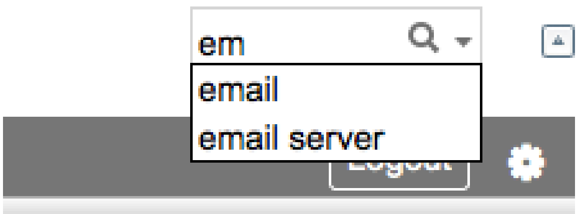


Example. Search results for *network*.

Search Suggestions

Type-ahead suggestions

The knowledge base and global text searches provide suggestions as you type. Type-ahead suggestions appear under the search box. Suggestions are based on similar searches that begin with the same characters.

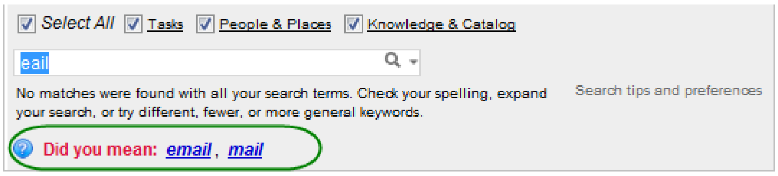


Type-ahead search

"Did you mean?" suggestions

The knowledge base and global text searches provide “Did you mean?” suggestions. Suggestions appear if your original search does not return any results and an alternate spelling or similar recent search does. For example, if you misspell a search term (such as *eail*), the correct spelling (*email*) may appear as a suggestion. Suggestions appear beneath the search box on the results page.

Note: *Administrators must enable the "Did you mean?" properties for users to see these suggestions.*



Did you mean? suggestions

Controlling the Results You See

Text Search Groups

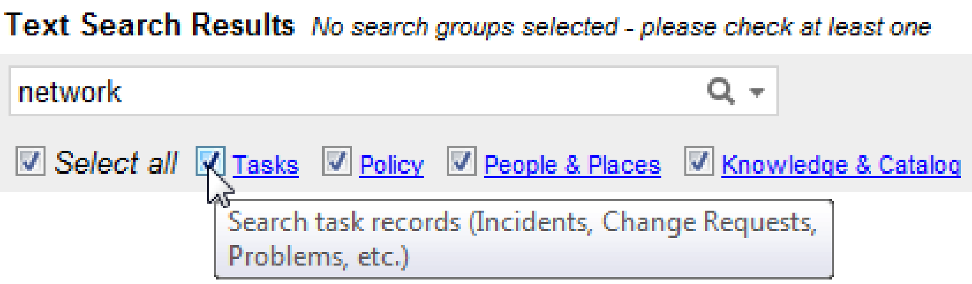
Navigating to **System Definition > Search Groups** displays the record list of the groups that global search results will be organized in. These groups can be modified as filters. For instance, by default the Policy group returns results for active scripts. Changing the conditions in the Policy record can return results for all scripts, rather than just active ones.

Collapse or Expand Results

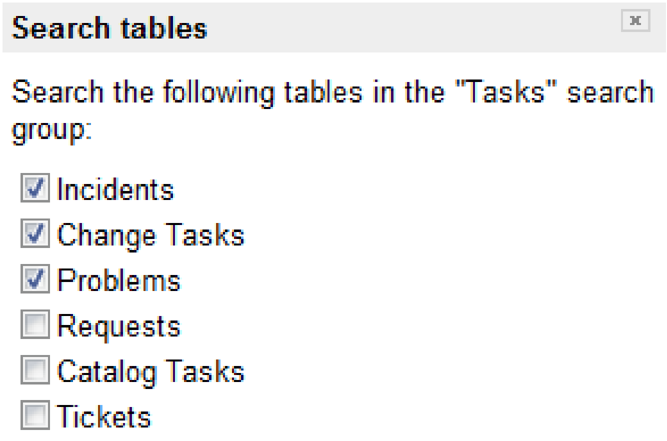
You can collapse/expand each search group and search table as you wish, and your settings are used for subsequent searches if you choose. For example, if you are rarely interested in Policy or Core Items search results, but still wish to search them each time, you can collapse them.

Deselect Results

If you do not want to search some groups or tables, you can deselect a search group or table on a per-user basis. Your preference is saved for subsequent searches. To deselect a search group, uncheck its checkbox on the search results page:



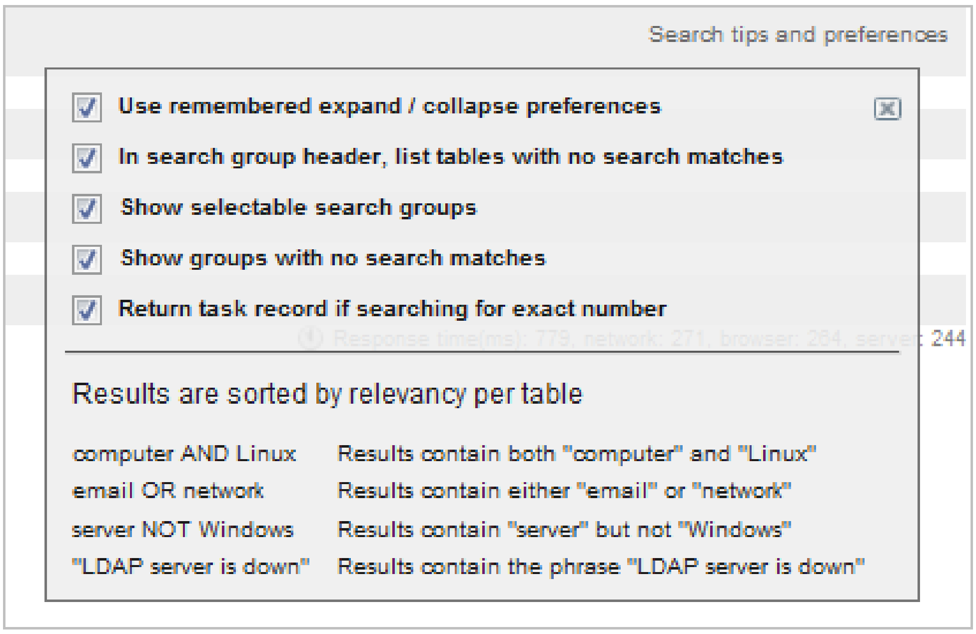
If you click a search group's link (e.g., the blue "Tasks" link in the above screenshot), you will get a dialog where you can deselect specific tables in each group:



Preferences

Click the **Search tips and preferences** link to set the following personal Global Text Search preferences:

- **Use remembered expand / collapse preferences** - specifies whether you want the collapse state of any search groups/tables remembered for your next search. For example, when checked, if you collapse the search results for the "People & Places" search group, it will be collapsed on your next search. When unchecked, all groups/tables are expanded for every search.
- **Show list of tables with no search matches** - specifies whether or not you wish to see a summary of tables that had no search matches. For example: **No matches for Requests, Catalog Tasks, Tickets**
- **Show selectable search groups** - hides or displays the search group checkbox row
- **Show groups with no search matches** - if unchecked, hides a search group if it returns no matches. If checked, you get a placeholder row telling you there were no matches for that group.
- **Return task record if searching for exact number** - if unchecked, displays the full search results page even if the search term matches a task number. If checked, you get the task record when the search term matches a task number.



Finding Information in Lists

Overview

Users can quickly find information in a list by searching, sorting, and grouping the list.

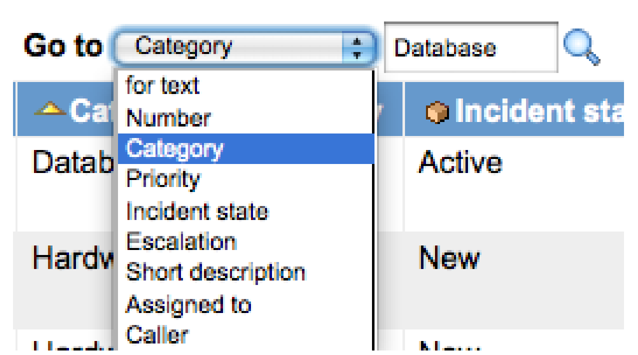
Searching a List

The list title bar includes options for searching the list. Administrators can enable text searches for any list.

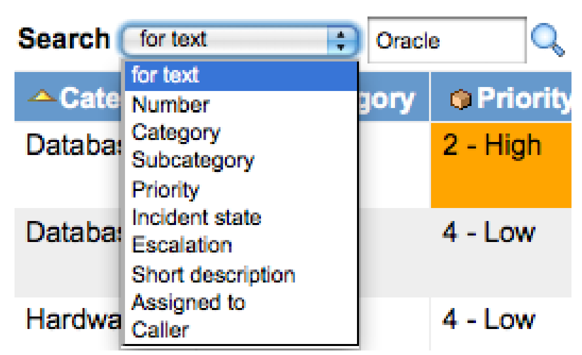
To search a list:

1. Select a field (for **Go to**) or select **for text** (for **Search**).
2. Enter the search text and press **Enter** or click the search icon ( ).
   - **Go to:** for most fields, sorts by the selected field and returns records where the field value is equal to or greater than the search term. For the **Number** field, which is a string type field, finds the records that have a number ending with the number that you enter. For example, searching a list of incidents by selecting **Number** and entering **4** shows records with numbers like **INC0000004** and **INC0000014**.
   - **Search:** returns records that contain the search term in any field.

Use wildcards to further refine list searches.

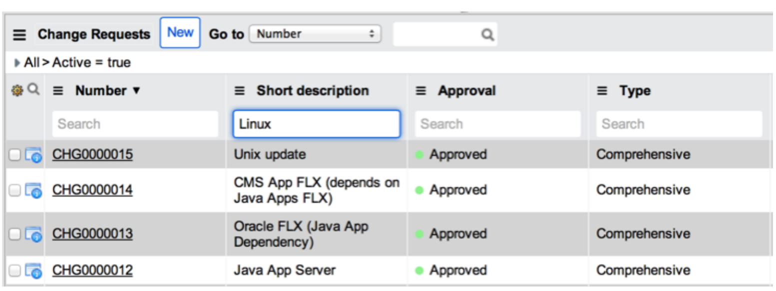


Go to



Search

Searching Individual Columns



UI14 Column Search

In addition to searching by field or for text, you can also search individual columns in a list. This feature is available starting with the Eureka release.

1. Expand the column headers and add a search field to each column by clicking the search icon ( ) beside the personalize list icon ( ).
2. To search a single column, enter the search text in the desired column search field and press **Enter**.

   The search returns records that match the search term.
3. To search multiple columns, do one of the following:

- Enter the search text in each of the desired column search fields and press **Enter**.
- Search an individual column and then search additional columns based on the results of the first search.

  Each time you enter search criteria in a column search field and press **Enter**, the results will narrow.

To clear a column search:

- Delete the text in the search field for the desired column and press **Enter**. This returns results for any remaining column search criteria.
- Delete the text in all of the column search fields to return all records in the list.

Sorting a List

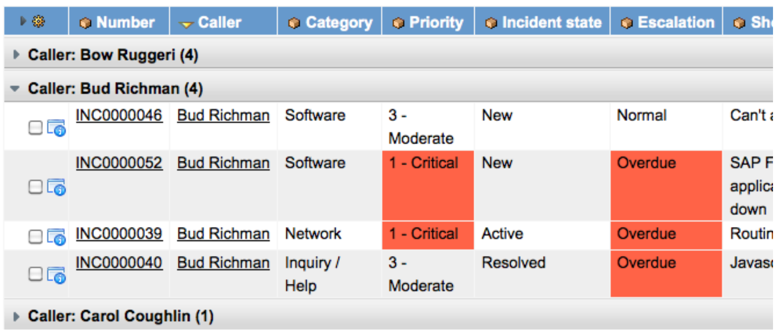
To sort a list, use one of the following methods:

- Click a column name to sort the list in ascending order. Click again to sort in reverse order.
- Right-click a column name and select **Sort (a to z)** or **Sort (z to a)** to sort in ascending or descending order, respectively.
- Specify a sort order with a filter. Filters provide for sorting by more than one column (for example, by *Category* and then *Subcategory*). To learn more, see Using Filters and Breadcrumbs.

The current sort order is indicated by an arrow next to the column name (, up for ascending and down for descending). Only the primary sort order is indicated. Note that you cannot sort a list by an array-based field, such as a Glide list.

Grouping Items in a List

Grouping aggregates a list by a field and displays the record count per group. Grouping can help you find data quickly by organizing and providing a summary of search or filter results. For example, this picture shows active incidents grouped by caller.



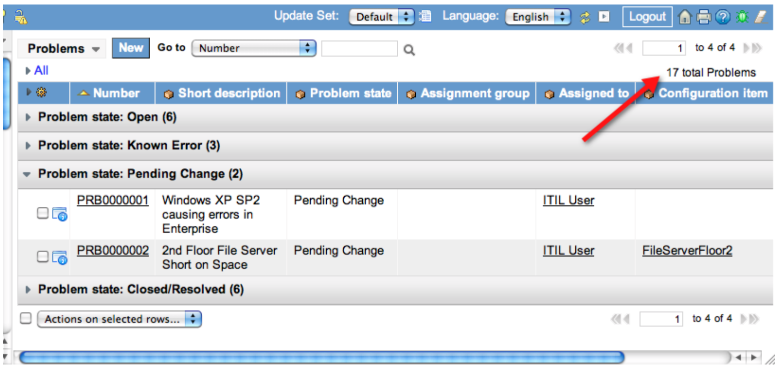
Group By

To group items in a list, use one of these methods:

- On the title bar, click the context menu and select **Group By**. Select the field by which to group the list. To remove a grouping, select **-- None --**.
- Right-click the column name and select **Group By**. To remove a grouping, select **Ungroup**.

To use a grouped list:

- Groups are named the values of the field selected for grouping.
- Record count per group appears next to the group name.
- The total number of items in the list (all groups combined) appears just below the paging controls in the list. This is shown only when the list is grouped on a field.



Group By

- To expand or collapse a group, click the arrow (▸) next to the group name.
- To expand or collapse all groups, click the arrow at the top of the list.
- To open the full list for a group, click the group name.
- The maximum number of records shown per group is the number of records per page in list view.
  - To see all records for a given group, open the full list.
  - To change the number of records per page, click the title menu and select **Show**.
- The maximum number of groups shown is 100 by default, but may be configured by an administrator.

Searching Knowledge

Overview

The knowledge search lets all users search the ServiceNow knowledge base for specific articles or topics and then filter, organize, and refine search results, depending on administrator settings. Use the **Advanced search** link to filter search results by topic, category, and search location.

By default, only published articles that have not passed their *valid to* date appear in knowledge searches for most users. Draft and review articles appear to users with role-based permissions. Administrators can change the roles that see draft or review articles, as needed.

In addition to the search options above the knowledge portal, you can search the knowledge base from:

- **Global text search:** available to users with role-based permissions, the global text search field in the banner frame searches the knowledge base as well as other types of records to which you have access rights.
- **Forms:** the knowledge icon ( ) appears beside certain fields. Click the icon to launch a knowledge search for the field's text. The search results appear in a pop-up window. This icon appears beside the **Short description** field on the Incident and Problem forms by default; administrators may add it to other forms.
- **Content pages:** created with the Content Management System (CMS), content pages can include knowledge search options.

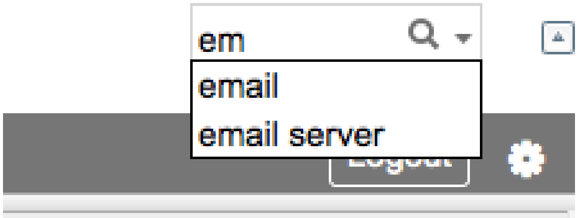
By default, knowledge searches also search the contents of attachments. Administrators can enable or disable this feature.

Note: *Knowledge search terms are stemmed* [1]*, meaning that searches may return similar words.*

Search Suggestions

Type-ahead suggestions

The knowledge base and global text searches provide suggestions as you type. Type-ahead suggestions appear under the search box. Suggestions are based on similar searches that begin with the same characters.

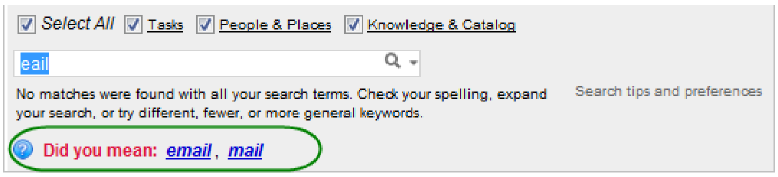


Type-ahead search

"Did you mean?" suggestions

The knowledge base and global text searches provide "Did you mean?" suggestions. Suggestions appear if your original search does not return any results and an alternate spelling or similar recent search does. For example, if you misspell a search term (such as *eail*), the correct spelling (*email*) may appear as a suggestion. Suggestions appear beneath the search box on the results page.

Note: *Administrators must enable the "Did you mean?" properties for users to see these suggestions.*



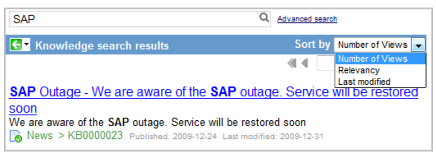
Did you mean? suggestions

Sorting Search Results

By default, knowledge search results are ordered by view count (**Number of Views**) only - the article with the highest view count appears at the top, and so on.

The articles viewed most frequently over the past 30 days (default) appear at the beginning and the least viewed articles appear at the end. Administrators can modify the time period considered when sorting by view count.

Select an option from the **Sort by** field to sort by relevancy or by date modified, rather than view count.

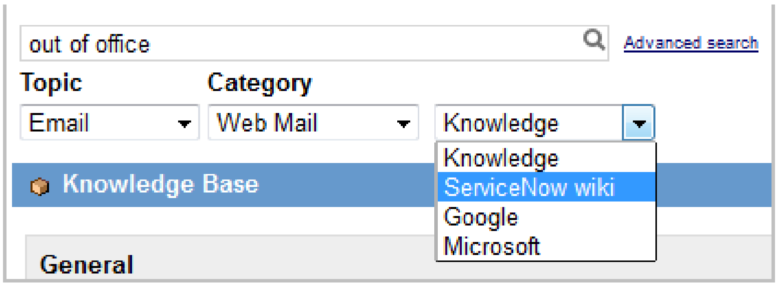


Note: *The sort option selected for* ***Sort by*** *is the only sorting factor applied; the other factors are not considered for secondary ranking. So, for example, if you select to sort by Relevancy, and the search returns several results with the same relevancy values, the Number of Views or Last modified values are not considered when ordering these same-value results.*

Refining Search Results

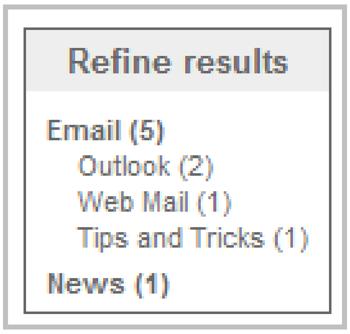
Refine search results with the **Advanced search** link and the **Refine results** box on the search results page. Availability of these options depends on administrator settings.

- **Advanced search:** use the advanced search options to filter results by topic or category and to search sources other than the knowledge base, such as the ServiceNow Wiki or Google. By default, these options appear when you click the **Advanced search** link beside the knowledge search field.



Advanced Search

- **Refine results:** click a topic or category in the **Refine results** box to see only articles in the selected topic or category.



Refine search results

After refining a search, you can either refine it further or return to search all articles:

Refine further or return

Searching Knowledge from Forms

The knowledge search icon ( ) appears beside the **Short description** field on the Incident and Problem forms by default. Administrators can add the icon to other fields and forms and customize the search function.

Click the icon to search the knowledge base for the text in the associated field. Search results appear in a pop-up window, eliminating the need to navigate away from the current page. The pop-up results window offers the same options for refining the search as the standard search results page.

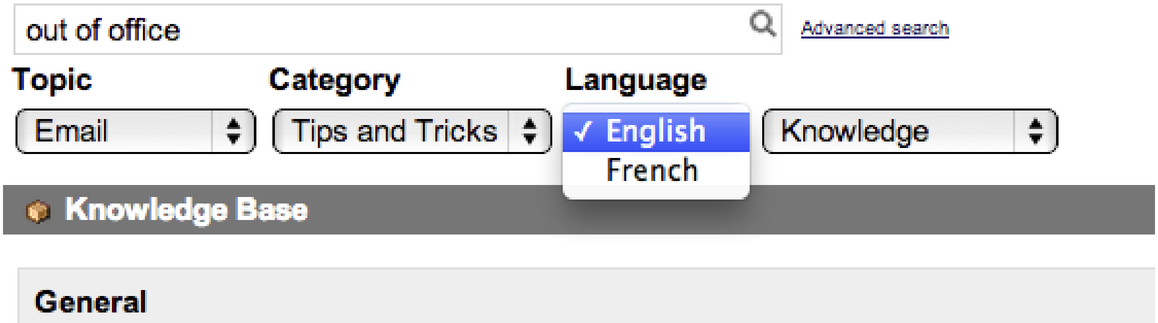
When viewed from the pop-up window, the article view includes an **Attach to Task** button; the button name changes to reflect the active form. Click this button to attach the article to the current incident, problem, or other record. Other users who open the same record can refer to the attached knowledge articles, as needed.

Users with the admin or knowledge_admin role also see an **Edit Article** button. Click this button to open the article's Knowledge form.

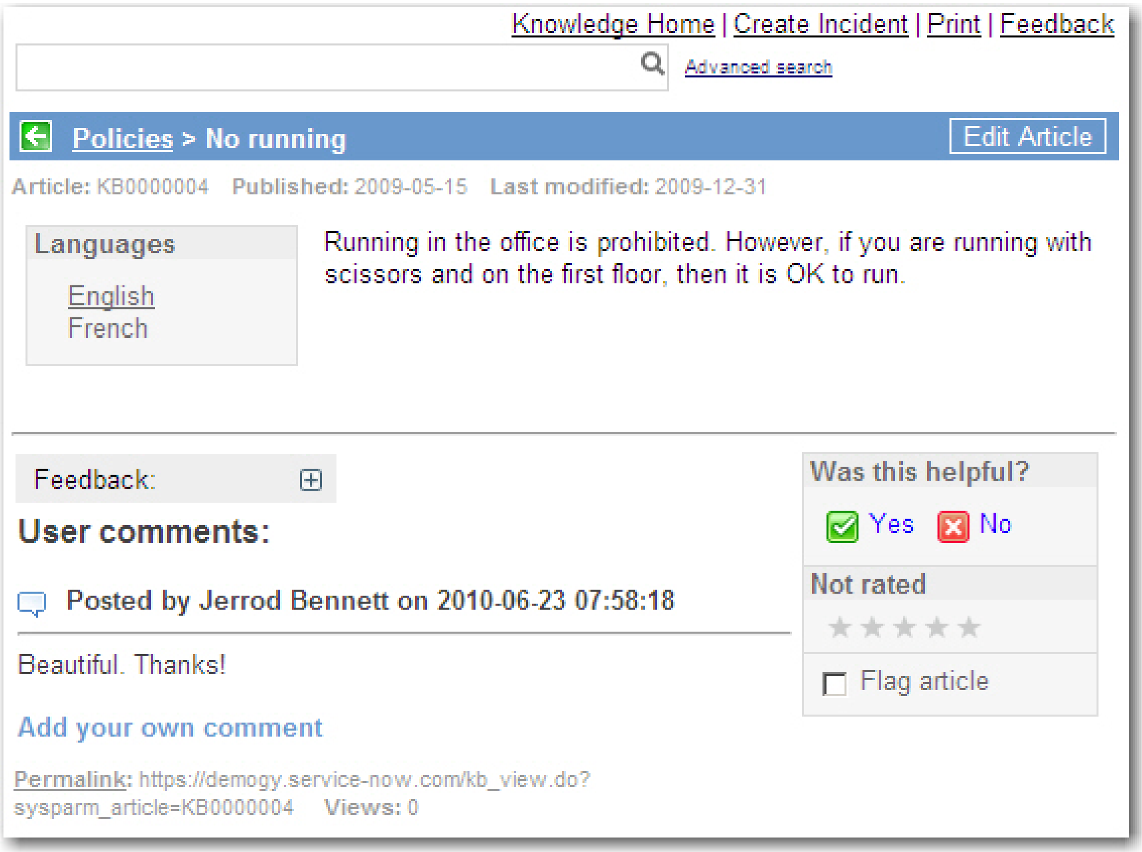
Using Language-Based Knowledge Searches

If knowledge management internationalization is active in your instance, advanced search includes a **Language** option. Select a language to search the knowledge base for articles in that language.

Note: *The language selection applies only to knowledge searches.*



If more than one translation of an article is available, the **Language** box appears in article view. Click a language link to display the article in the selected language.



Searching with International Character Sets

Zing indexes the full range of Unicode characters to provide i18n support for searches.

How Zing Analyzes Characters

For Zing indexing and queries, documents are treated as a sequence of words. Words may be a single character (typical for Chinese and Japanese pictograms), or they may be space-separated sequences of letters (typical of Latin, Arabic, and Pinyin languages).

When dividing a document into words, Zing uses the following rules to interpret Unicode characters.

- **Punctuation**: Some punctuation and symbols are indexed in special cases (see How Punctuation Affects Search Results). In all other cases, punctuation characters are converted to spaces. Spaces define the basic unit of word separation.
- **Pictograms**: Each Chinese or Japanese pictogram is indexed as a separate word (as if it were a single Latin-1 character surrounded by spaces).
- **Letter**: All other characters (such as Latin-1, Arabic, or Pinyin) are individual letters of space separated words. Sequences of letters define indexable words.

Wildcards and i18n

Wildcard text searches (with "*" and "%") are only effective with multiple character words. A wildcard within a sequence of pictogram characters returns too many options for an efficient search. Wildcards are best used with letter-based words.

Stemming and i18n

During queries, search terms that are not part of phrases (not enclosed in quotation marks) are generalized to their "stemmed" word. Stemming removes a variety of common inflections, such "-s", "-es", "-ing", or "-ed". All words with a common stem are treated as synonyms of the original search term. Zing uses the Porter stemmer [1], which is most effective for English text.

Customization

Customizing Homepages

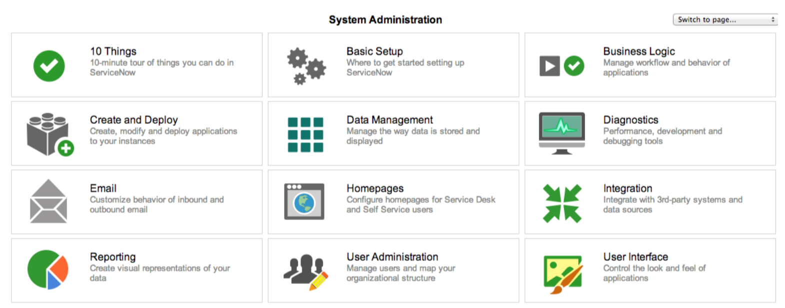
Overview

Every user can have a customized homepage that they see when they log in. The content on your homepage comes from a variety of sources, such as:

- Graphs and charts generated from a report.
- Application modules.
- A service catalog category.
- The scrolling news widget, which is the News knowledge category.

System Administration Homepage

The System Administration homepage was redesigned in the Eureka release to use show administrative tasks as catalog categories. These categories provide administrators with quick access to all the items they need to configure core features, such as homepages, user administration, and email notifications. You cannot add or remove content from this new homepage.



The System Administration homepage showing administrative tasks as catalog categories

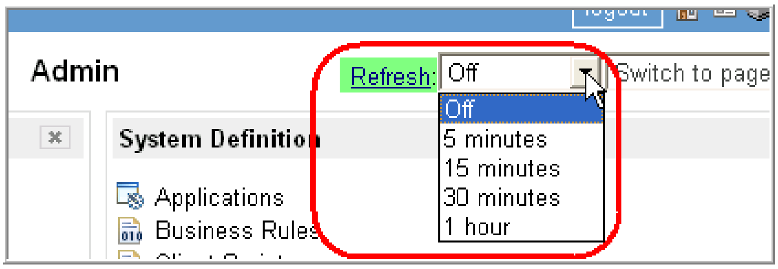
Viewing Your Homepage

When a user logs on ServiceNow, their homepage appears. If the user personalized their homepage, the personalized homepage appears. If they did not personalize their homepage, the homepage for their role, such as admin or itil, appears. If their role has no homepage, a blank page appears. After a user logs in, they can return to their homepage by clicking the home icon ( ) in the upper-right corner of the browser window.

Note: *A user sees the homepage with the lowest* ***Order*** *value of the pages they have roles to see when they log in. See Creating New Homepages for more information.*

Refreshing the Homepage

Homepage users can specify a refresh time of 5, 15, 30, or 60 minutes, or no refresh. The default is no refresh. Users can click the **Refresh** link at any time.



Refreshing the homepage

Modifying the Number of Records Displayed in List Gauges

The number of records displayed in a list gauge on your homepage is limited to the number of records displayed in your lists. For example, if you display 100 records in your lists, a maximum of 100 records appears in your list gauge.

Customizing a Homepage

Administrators can customize the default homepages that appear for each user by navigating to **Homepage Admin** and selecting the homepage. Any user can customize the homepage that is specified for their role by navigating to **Self-Service > Homepage**.

Adding Homepage Items

To add an item to your homepage, go to your homepage and click the **Add content** icon ( ) or link at the top. A window will open that lets you select from a number of different homepage items you can add. Some items pertain to specific features and applications, such as CMS content blocks and the Work Management dispatch map. So the list of items varies depending on what is active on your system.

	Warning: Each gauge on your homepage is the equivalent of running a report. For example, a homepage with 10 gauges runs 10 separate reports each time it refreshes. Keep this in mind when adding lots of content to your homepage. If your homepage consistently loads slowly, try removing gauges to determine why.

- **Gadgets:** Items like a knowledge search field and sticky notes.
- **Knowledge Base:** Knowledge base categories.
- **Labels:** Labels that you use to organize records.
- **System Applications:** Applications and modules.
- **World Clocks:** Any available World Clock.
- **Gauges:** All available dashboard gauges. Gauges are defined in **System UI > Gauges** and can be configured to link to an existing report.
- **Catalog Categories:** Active service catalog categories (this was renamed from **Service Catalog** starting with the Eureka release). The homepage uses the category's desktop icon as the homepage icon.
- **Catalogs:** Service catalogs, including all of their active categories (starting with the Eureka release).
- **Diagnostics:** Information you can use for monitoring and troubleshooting your instance, like database connections and JVM garbage collection.
- **Live Feed:** Your company feed.
- **Text Search:** Lists of top searches in your instance.
- **Filters:** System definition filters.

For more information on adding content to homepages, see Adding Existing Gauges to a Homepage

Moving Homepage Items

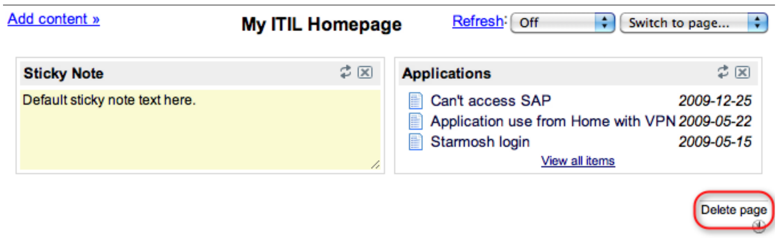
Reposition elements on your homepage by dragging and dropping them to a new location.

Removing Homepage Items

To remove a homepage item, click the [X] on the right side of the item's header.

Deleting Custom Homepages

Users can delete a customized homepage and use the default homepage by clicking the **Delete** link in the bottom right of the page.



Deleting a custom homepage

Creating Personal Lists

Overview

Personal lists modify a specific list view according to individual preferences. Users can create personal lists. Administrators can manage the personal lists function.

Personal list layout options include:

- Column selection and order
- Row spacing
- Text wrapping
- List editing
- List highlighting

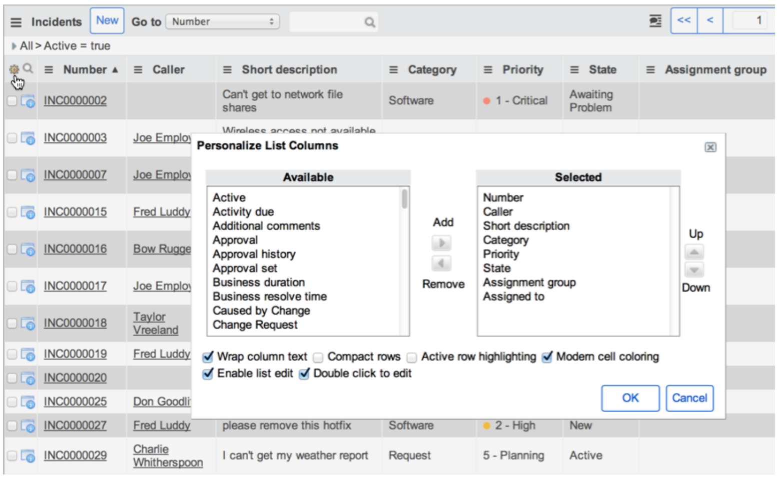
Personalizing a List

To personalize a list:

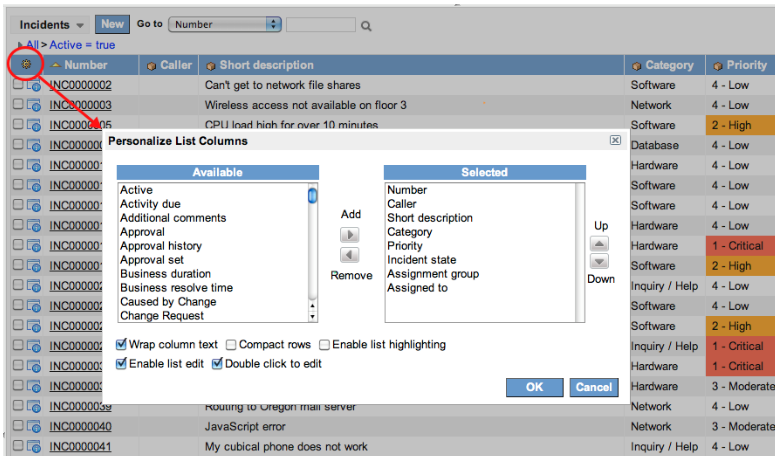
1. Open the list.
2. Click the personalize list icon ( ) in the upper left corner.
3. Use the slushbucket to select the columns and the desired order.

   The first non-reference field automatically links to the form view of the record. For this reason, consider using the record number as the first column in your personal list layout.

4. Select display options.
   - To display long text on more than one line, select the **Wrap column text** check box. Clear the check box to display text on one line.
   - To condense the vertical space between rows , select the **Compact rows** check box. Clear the check box to use standard row spacing.
   - To highlight list rows as the cursor passes over them, select the **Enable list highlighting** check box. Clear the checkbox to restore the static, alternate row highlighting.
   - To use updated field status indicators available in UI14, select the **Modern cell coloring** check box. Clear the check box to use field status indicators available in UI11 and the classic interface.
5. Select list editing options (requires setup).
   - To allow the list editor to open for the list, select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening for the list.
   - To open the list editor with a double-click, select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.



UI14 Personalize List



UI11 Personalize List

Note:

- To reset a list to the default layout, click the personalize list icon ( ) and select the **Reset to column defaults** check box.
- If a list is personalized, an indicator ( ) appears in the upper left corner.

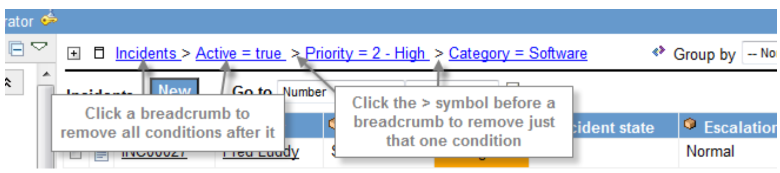
Using Filters and Breadcrumbs

Overview

A filter is a set of conditions applied to a table in order to find and work with a subset of the data in that table. Users can apply, modify, create, and save filters. The current filter is indicated by a hierarchical list of conditions—breadcrumbs—at the top of the table.

Breadcrumbs

Breadcrumbs offer a quick form of filter navigation. They are ordered from left to right, with the leftmost condition being the most general and the rightmost condition being the most specific. Clicking a breadcrumb removes all of the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.



Breadcrumbs

In the example, clicking **Priority = 2** removes the condition **Category = Software** and returns all active incidents with a priority of 2. By contrast, clicking the condition separator (>) before **Priority = 2** removes the condition **Priority = 2** and returns all active incidents in the software category. In both cases, removing a condition returns a larger results set.

Finally, clicking **Incidents** goes to the top of the hierarchy, removing all conditions and returning all incidents in the system.

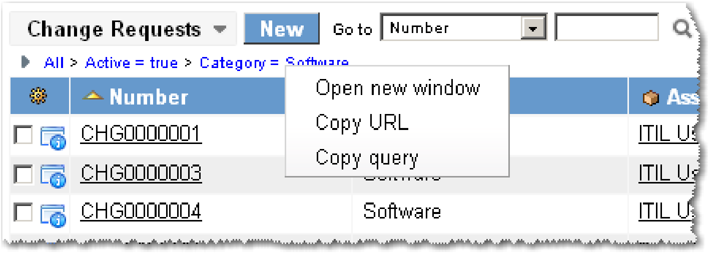
Additional navigational functions are available. Right-click a breadcrumb and select one of the following:

- **Open new window:** opens the results list for the breadcrumb in a new tab or window.
- **Copy URL:** copies to the clipboard the URL for the results list of the breadcrumb. Follow browser instructions if browser security measures restrict this function.
- **Copy query:** copies to the clipboard the encoded query for the breadcrumb. You can use this query in the URL of an instance or in the reference qualifier field of a dictionary entry.

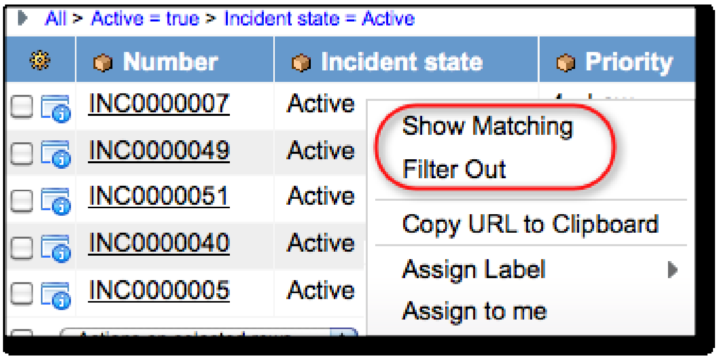
  For example, if you are viewing a list of all active incidents with a high or medium impact, right-click the breadcrumb and copy the query `active=true^impact=1^ORimpact=2`. You can append this query to the end of the instance URL:

  https://{instance_name}/incident_list.do?sysparm_query=active=true^impact=1^ORimpact=2.

This selection is not available for the **All** breadcrumb. Follow browser instructions if browser security measures restrict this function.



Right-click menu



Quick filters

Quick Filters

To quickly filter a list using a value in a field, right-click in the field and select **Show Matching** or **Filter Out** (for date fields choose from **Show Before**, **Show After**, and **Filter Out**). These functions add a condition as a rightmost breadcrumb of the current filter.

In this example, right-clicking **Active** and selecting **Show Matching** adds the condition *Incident state = Active* as the most specific condition of the filter. By contrast, right-clicking **Active** and selecting **Filter Out** adds the condition *Incident state != Active* as the most specific condition of the filter.

For date and date-time fields you can also use **Show After** or **Show Before** to define a time based filter.

Creating Filters

A filter restricts what records appear in a list by providing a set of conditions each record must meet to be included in the list. A condition consists of these parts:

- **Field:** Each field contains data from a particular column in the list's table. Selecting a reference field allows you to dot-walk to data from other tables.
- **Operator:** Each field type has its own set of valid operators. The operator sometimes also determines if a value is needed.
- **Value:** Each field has its own set of valid values determined by the field type. Reference fields have access to auto-complete, and choice lists provide a drop-down list of options.
- **Grouping:** Each condition line is grouped with either an AND or OR connector. The filter requires all condition lines linked with an AND connector to be met. The filter evaluates each condition line linked with an OR connector separately.

Create filters on a list using the condition builder. To make the condition builder appear every time you open the list, click the Pin/Unpin Filter icon / so that the pin is pressed down.

To create a filter:

1. Open the condition builder by clicking the arrow ( ) beside the breadcrumbs.
2. Select a **field** from the drop-down list.

   The field type determines the available operators and values. For example, the **Active** field may have a value of *true*, *false*, or *empty*, while a text field may have many different values. Similarly, the **greater than** operator does not apply to the **Active** field, but it does apply to the **Priority** field. For more information, see Condition Builders.
3. Select an **operator** from the drop-down list.

4. Select or enter a **value**, if appropriate.
5. Add or remove conditions to construct the desired filter:
   - To add a top-level condition, click **Add AND condition** or **Add OR condition** on the condition builder tool bar, above the conditions.
   - To add a dependent condition, click **Add AND condition** or **Add OR condition** beside the condition.
   - To remove a condition, click **Delete** beside the condition.
6. To specify the sort order of the results, click **Add Sort** , then select a **field** to sort by and a sort **order**.
7. Click **Save** to keep the filter for future use. For more information, see Saving Filters.
8. Click **Run** to apply the filter.

Note: *To find all records that do not contain the specified value, create a filter with two conditions:* ***[field] [is not] [value]*** *or* ***[field] [is] [empty]****.*

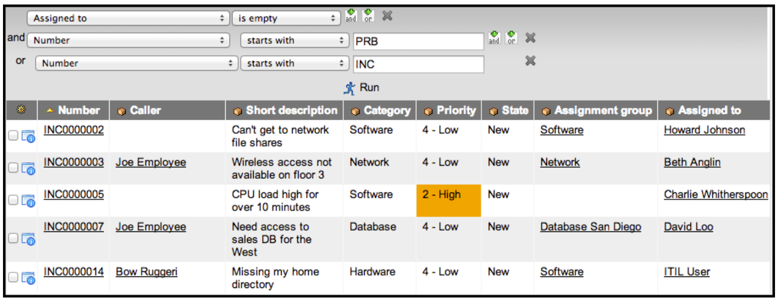
Using OR Conditions

The condition builder uses two different types of OR conditions, top level and dependent.

Using a dependent OR condition, you can specify alternative criteria to a single operation. Dependent OR conditions work in the manner A and (B or C).

For example, to return a list of all unassigned problem and incident records from the Task table, create a filter with a dependent OR on the **Number** field.

- **[Assigned to] [is] [empty]** AND **[Number] [begins with] [PRB]** OR **[Number] [begins with] [INC]**.

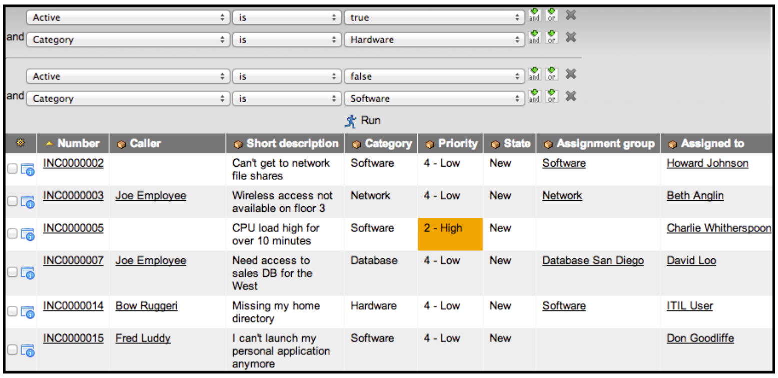


Dependent OR condition

A top-level OR condition allows you to display the results of multiple filter criteria in a single list. Top level OR conditions work in the manner (A and B) or (C and D).

For example, to return a single list of all active incidents with a category of hardware, and all inactive incidents with a category of software, create two condition sets separated by a top-level OR condition.

- **[Active] [is] [true]** AND **[Category] [is] [Hardware]**
- Top level **OR** condition
- **[Active] [is] [false]** AND **[Category] [is] [Software]**



Top level OR condition

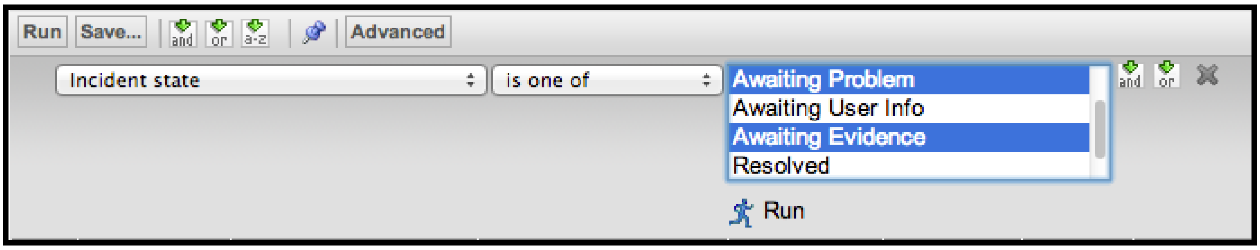
Top-level and dependent OR conditions can be used together. Filters using both types of OR conditions work in the manner (A or B) or (C or D). By mixing AND conditions with top-level and dependent OR conditions, you can create very specific filters.

Filtering on Multiple String Values

For a string field, you can create a filter that searches for multiple values by creating a comma delimited list. This feature enables administrators to copy and paste search criteria from a Microsoft Excel spreadsheet into a filter, for example. It is available starting with the Aspen release.

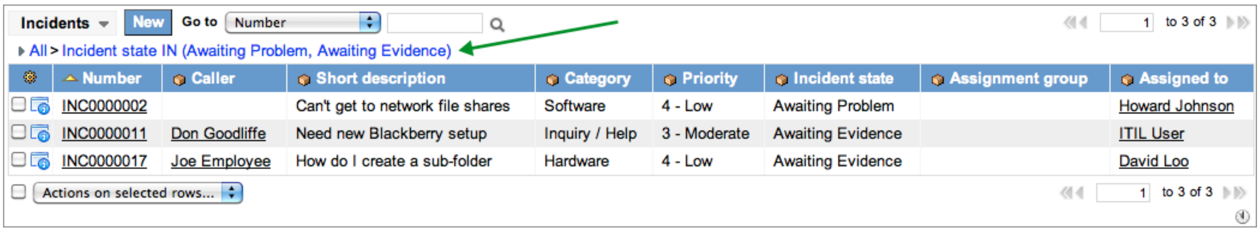
1. Create the filter with the **is one of** or **is not one of** operator.

   All selections from the field's choice list appear.
2. Select one or more of the options by using multiple selection key commands.



   The choice list remains visible.
3. Click **Run** to filter the list.

   The filter conditions appear as a comma-delimited string at the top of the results list.



Using the Dynamic Operator

The dynamic operator, **is (dynamic)**, lists predefined dynamic filter options where the condition value is computed from a value in a reference field. For example:

Field	Operator	Dynamic FIlter Option	Description
Caller	is (dynamic)	Me	Computes the value of Caller based on the current user viewing the list.
Assignment group	is (dynamic)	One of My Groups	Computes the value of Assignment group based on the current user viewing the list.

Saving Filters

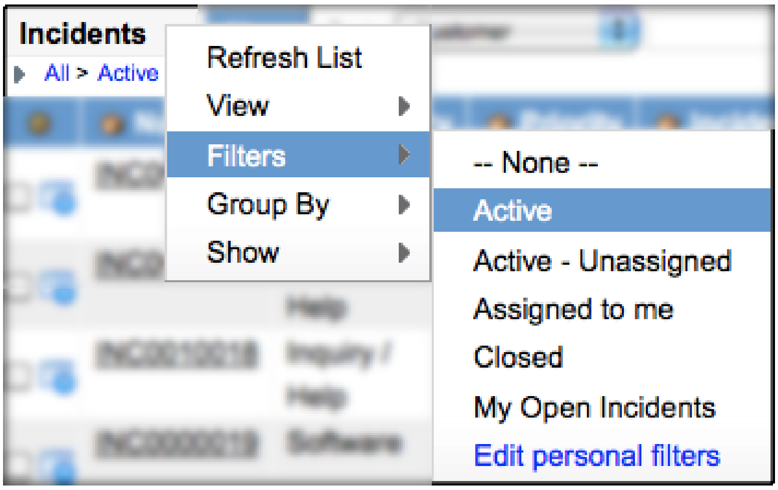
Depending on your access rights, you may save filters for everyone, a user group, or yourself.

To save a filter:

1. Create or modify a filter.
2. Click **Save**.
3. Enter a name for the filter in the **Save as** field.
4. Select who the filter is **Visible to**:
    - To create a personal filter (all users), select **Me**.
    - To create a global filter (requires access rights), select **Everyone**.
    - To create a filter for a specific user group (requires access rights), select **Group** and then enter or search for the group name.
5. Click **Save**.

Using Saved Filters

To apply a saved filter, select the filter name in the title menu. The filter runs and the breadcrumbs appear.



Selecting a saved filter

To edit or delete personal filters, select **Edit personal filters** from the title menu. The Filter [sys_filter] table opens with the filter **User = [current user]**. Filters created from this view are saved as personal filters for the current user.

Editing Saved Filters

An administrator can edit any filter.

1. Navigate to **System Definition > Filters**.
2. Select the filter you want to edit.
3. Modify the **Filter** conditions. as necessary.
4. Click **Update**.

Deleting Filters

Administrators can delete any saved filter: global, group, or personal.

1. Navigate to **System Definition > Filters**.
   - To see who created the filter and when, personalize the list to add the **created_by** and **created** fields.
   - To see who has access to the filter, personalize the list to add the **user**, **group**, or **domain** fields. Filters that are not assigned to a user or group are global.
2. Click the filter name and click **Delete**, then confirm the request.

Scripted Filters

The condition builder alone cannot create some filters, such as displaying a record set that is dependent on an unrelated table. Administrators with a knowledge of JavaScript can create JavaScript functions for use in advanced filters.

To use a scripted filter:

1. Create a new script include.
2. In the script include **Script** field, create a JavaScript function that returns an array of sys_ids.
   - Ensure that the function uses the same name as the script include.
   - Ensure that the script include is **Active** and **Client callable**.
3. Call the JavaScript function from the condition builder.

For more information, see GlideRecord queries and Script Includes.

Example

A company provides *intensive care* for a group of customers. To track these services, the service manager needs a high-level journal and links to all incidents that the customers raise.

The company creates a new application, *Intensive Care*, and a table, *u_intensive_care*. While the table contains a reference field for the customer name, there is no direct link to the user table. Thus, the manager cannot set up an incident list filter for customers who are under intensive care using the condition builder.

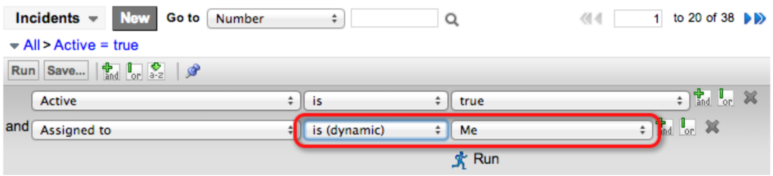
Solution

Write a JavaScript function that uses a GlideRecord query to build an array of user sys_ids in the u_intensive_care table (see sample code, below). Call the function from the condition builder in the Incident table (condition, **Caller is javascript:myFunction**()).

```
function myFunction(){
  var arrUsers = [];
  gr = new GlideRecord('u_intensive_care');
  gr.query();
  while (gr.next()){
    arrUsers.push(gr.u_customer.toString());
  }
  return arrUsers;
}
```

Dynamic Filter Options

Dynamic filter options enhance filters by allowing users to run a set query against a reference field without having to enter JavaScript code in the condition builder. All dynamic filter options use the **is (dynamic)** operator and call a particular scripted filter.



Dynamic operator with predefined Value

Dynamic filter options are active by default starting with the Dublin release.

To create a dynamic filter option:

1. Create a scripted filter as a client-callable script include or business rule.
2. Navigate to **System Definition > Dynamic Filter Options**.
3. Click **New**.
4. Enter the Dynamic Filter Option form fields (see table).
5. Click **Submit**.

Field	Description
Label	Enter the text you want to appear as an option when a user selects the **is (dynamic)** operator.
Script	Enter the name of the function you created.
Field type	Select **Reference**.
Reference script	Select the client-callable script include or business rule you created for the scripted filter.
Referenced table	Select the table this filter option applies to.
Available for filter	Select this option to display the option as a filter breadcrumb.
Order	Enter a number to designate the placement of this option in the filter option choice list.
Roles	Select the role a user must have to see this option.
Active	Enable or disable the option.

Default Dynamic Filter Options

The following dynamic filter options are available by default.

Target Table of Reference Field	Option Label	Description
User [sys_user]	Me	The reference field contains the current user.
	One of My Assignments	The reference field contains the current user or someone for whom the current user is a delegate *for assignments*.
	One of My Approvals	The reference field contains the current user or someone for whom the current user is a delegate *for approvals*.
	Users With Roles	The reference field contains users that have any role.
Group [sys_user_group]	One of My Groups	The reference field contains a group to which the current user belongs.

Enhancements

Eureka

- After you run a filter on a list, the list header search fields are displayed and filled in with the corresponding search criteria.

Dublin

- Dynamic filter options have been added.

Berlin

- The options **Next quarter** and **Next 2 quarters** are now available for date filters.

Condition Builder

Overview

A condition builder constructs a condition statement with a series of contextually generated fields. Condition builders are used in many operations, such as creating filters, administering surveys, and administering access control.

Condition Builder Format

A condition consists of three parts:

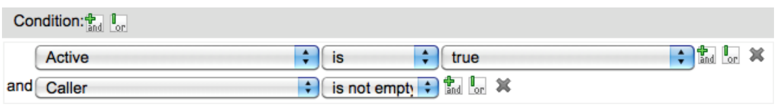
- **Field:** a choice list based on the table and user access rights. The choice list includes fields on related tables by dot-walking.
- **Operator:** a choice list based on the field type. For example, in the Incident table, the **greater than** operator does not apply to the **Active** field but it does apply to the **Priority** field. For a full list, see operators.
- **Value:** a text entry field or a choice list, depending on field type. For example, in the Incident table, the **Active** field offers a choice list with the values *true*, *false*, and *empty*, while the **Short Description** field offers a text entry field.

Building Conditions

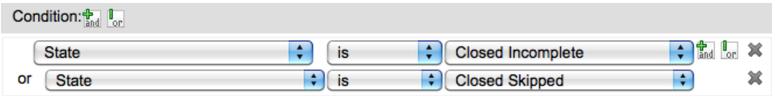
To add a dependent condition, click **Add AND condition** ( ) or **Add OR condition** ( ) next to the condition.

To add a top-level condition, click **Add AND condition** or **Add OR condition** on the condition builder toolbar, above the conditions.

To remove a condition, click **Delete** ( ) next to the condition.



Example Condition. *Active is true* **and** *Caller is not empty*.



Example Condition. *State is Closed Incomplete* **or** *State is Closed Skipped.*

Filtering on Empty Fields

Most filter operations do not return empty fields in their result set. You can create a filter that displays records with an empty field value in addition to records that match the initial filter conditions. For example, when viewing all records that are assigned to the **Hardware** group, to include records with an empty **Assignment group** field:

1. Create the filter condition **Assignment group is Hardware**.

   This condition does not return those records where the **Assignment group** field is empty.
2. Click **OR** next to the original filter condition.
3. Create an additional filter condition of **Assignment group is empty**.
4. Run the filter.

Operators

Several logical operators are available for each field type when creating a condition.

Field type	Operators	Field type	Operators
String:	• starts with • ends with • contains • does not contain • is • is not • is empty • is not empty • matches pattern • matches regex • is anything • is one of • is empty string • is same as • is different	**Reference:**	• is • is not • is empty • is not empty • starts with • ends with • contains • does not contain • is anything • is empty string • is same as • is different
Date-time:	• on • not on • before • after • between • trend • relative • is empty • is not empty • is anything • is same as • is different • is more than • is less than	**Numeric:**	• is • is not • is empty • is not empty • less than • greater than • less than or is • greater than or is • is anything • is same as • is different

Choice list (integer):	• is • is not • is one of • is not one of • is empty • is not empty • less than • greater than • less than or is • greater than or is • is anything • is same as • is different	**Choice list (string):**	• is • is not • is one of • is not one of • contains • starts with • ends with • does not contain • is anything • is same as • is different
Boolean:	• is • is not • is empty • is not empty • is anything • is same as • is different	**Event:**	***Note:*** *These operators are available for Email notification conditions.* • changes • changes from • changes to
is (dynamic)	• Me • One of My Assignments • One of My Approvals • Users With Roles • One of My Groups		

Values for Date/Time Fields

When you filter on fields of type Date/Time, such as the **Created** field on any task record, several time-related options are available like **Today**, **This week**, **Last 3 months**, and so on.

For example, at 12PM on June 1st, a user in New York filters a list of incidents using the **Created on Today** condition. The resulting list shows all incidents created during the last six hours: between midnight (00:00:00) and the user's current time, noon (12:00:00), on June 1st. A filter for **This week** returns incidents created between the previous Monday at midnight to the current day and time. A filter for **Last 3 months** returns incidents between midnight on the 1st of the month, three full months ago. For example, if you choose the **Last 3 months** filter on April 15th, the results show records created since January 1st. The system calculates January, February, and March as the *last three full months*.

Enhancements

Eureka

- The `glide.list.filter_max_length` property allows administrators to set a maximum character limit for a condition builder query.

Dublin

- The **is (dynamic)** operator is available for dynamic filter options.

Calgary

- Several new operators are available to compare field values. Use field comparison to evaluate equality between fields on the same table or on related tables. New logical operators provided by field comparison appear in the list of available operators by field type.

Berlin

- The condition builder now accepts the **Changes**, **Changes to**, and **Changes from** operators. These operators are only valid for conditions where an event is triggered, such as an email notification.

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