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Introduction to ServiceNow PPM

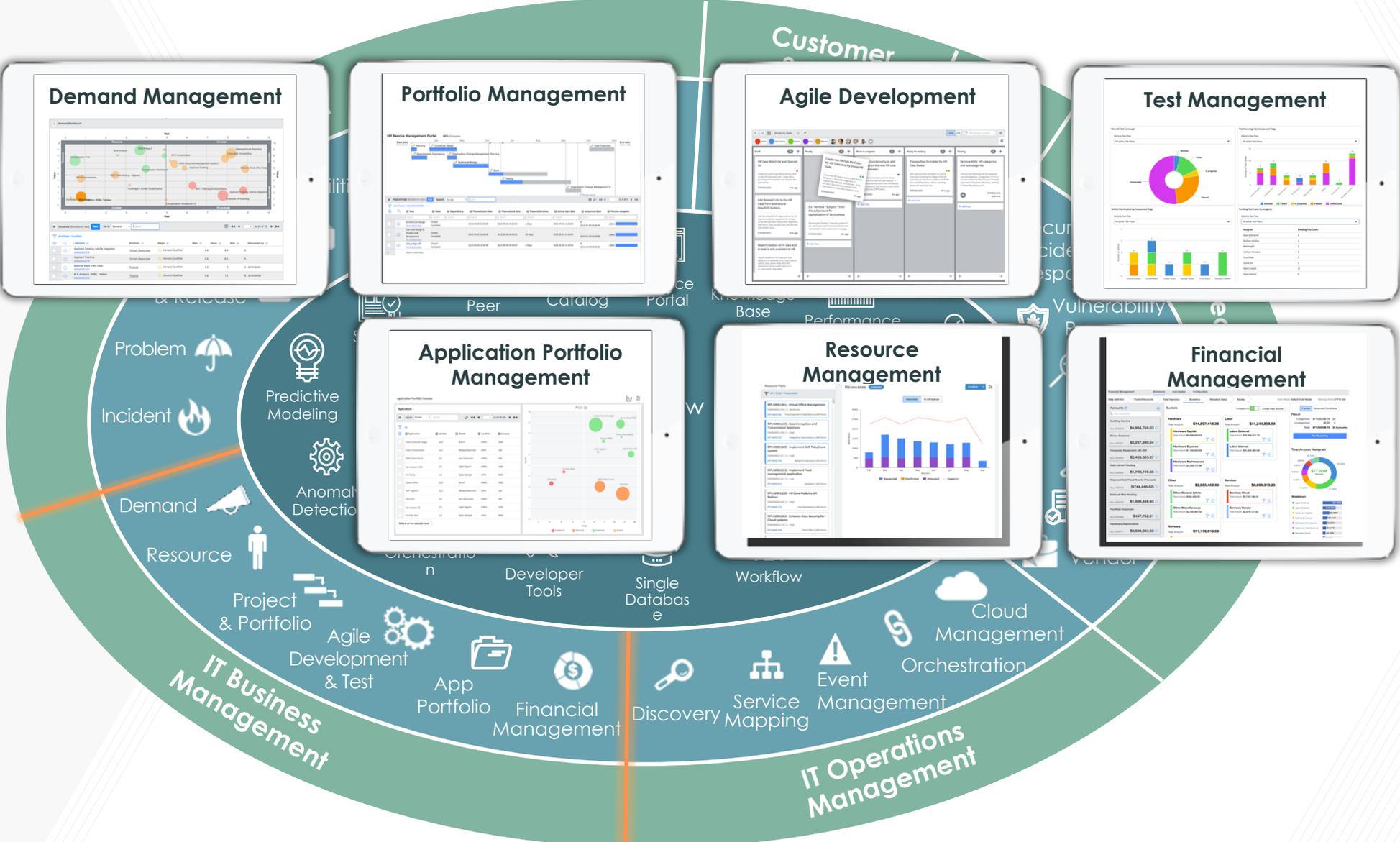
Quick Reference Guide

Who and What is ServiceNow?

- Provider of cloud-based software that automates IT Service Management (help-desk ticket system) and Project Portfolio Management (PPM) headquartered in Santa Clara, CA.
- It is a Software-as-a-Service (SaaS) business model with web interface.



One ITBM Platform



Bring Together All Strategic Planning



Visibility



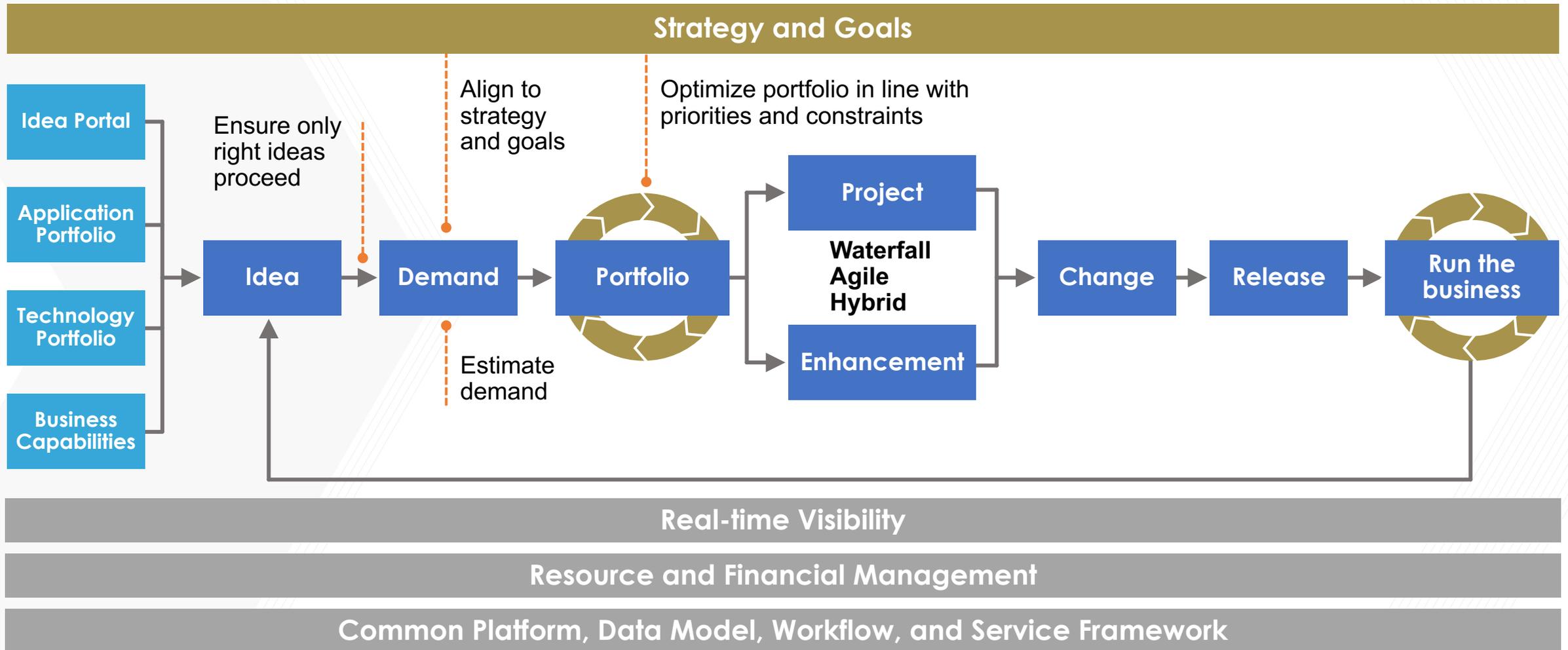
Alignment



Velocity



Platform Structure



ServiceNow Release Roadmap





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General Navigation

Service Portal

General Layout

Application Navigator

Favorites and History

Project Portfolio Modules

Service Portal

The screenshot displays the ServiceNow Service Portal interface. At the top left is the 'servicenow' logo. The top navigation bar includes links for 'Knowledge', 'Catalog', 'Requests', 'System Status', 'Cart', 'Tours', and a user profile for 'System Administrator'. The main header area features the text 'How can we help?' and a search bar containing the same text. Below the header is a horizontal menu with four items: 'Request Something' (Browse the catalog for services and items you need), 'Knowledge Base' (Browse and search for articles, rate or submit feedback), 'Get Help' (Contact support to make a request, or report a problem), and 'Community' (Community-sourced answers to your questions). The main content area is divided into several sections: 'Current Status' (No system is reporting an issue), 'Top Rated Articles' (Getting Around in Windows, 5 stars), 'Popular Questions' (No questions have been asked yet, with an 'Ask a Question' button), 'Announcements' (No information available), 'My Approvals' (You have no pending approvals), and 'My Open Incidents' (Three incidents listed: 'Unable to post content on a Wiki page', 'Unable to access the shared folder.', and 'Need access to the common drive.').

ServiceNow Layout

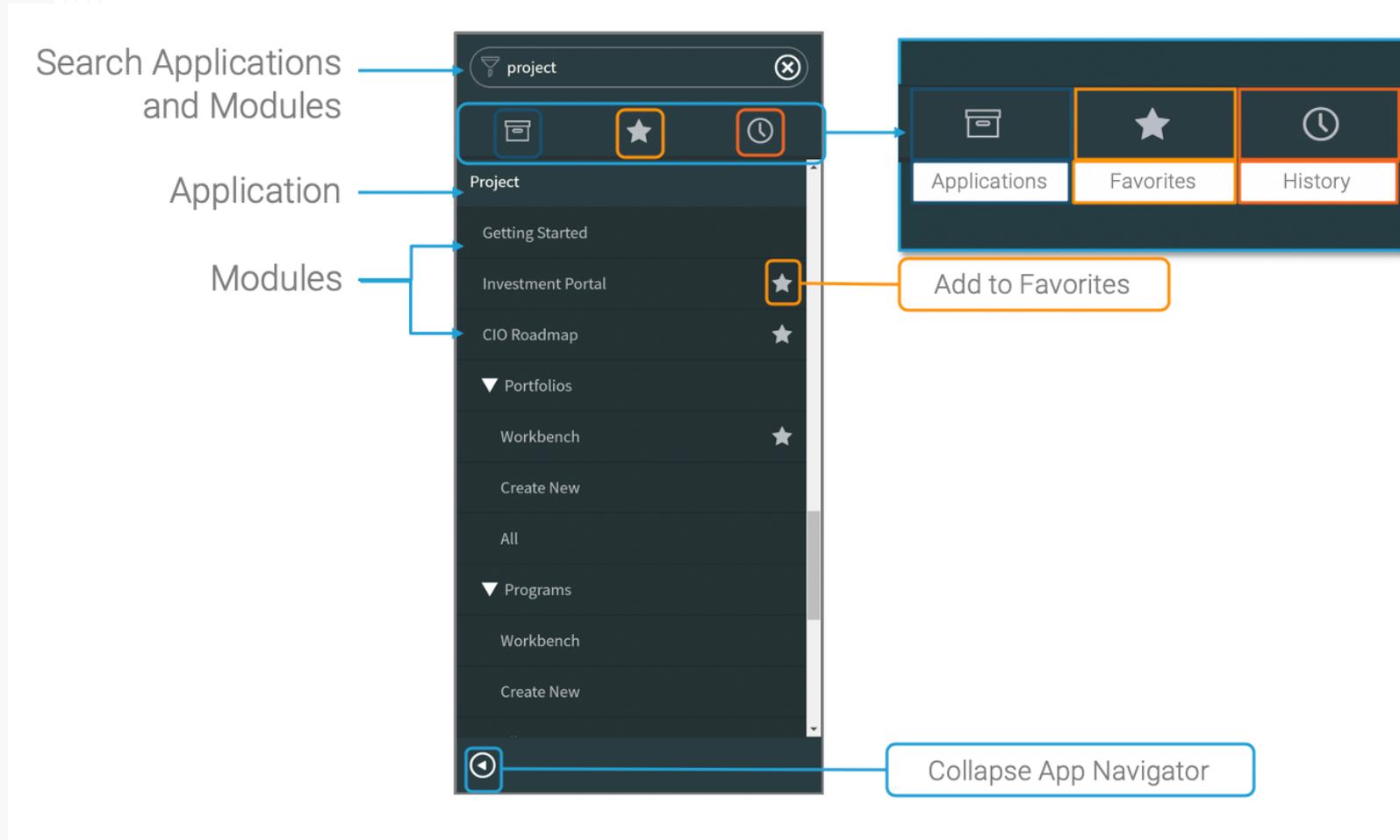
1
Banner
Frame

2
Application
Navigator

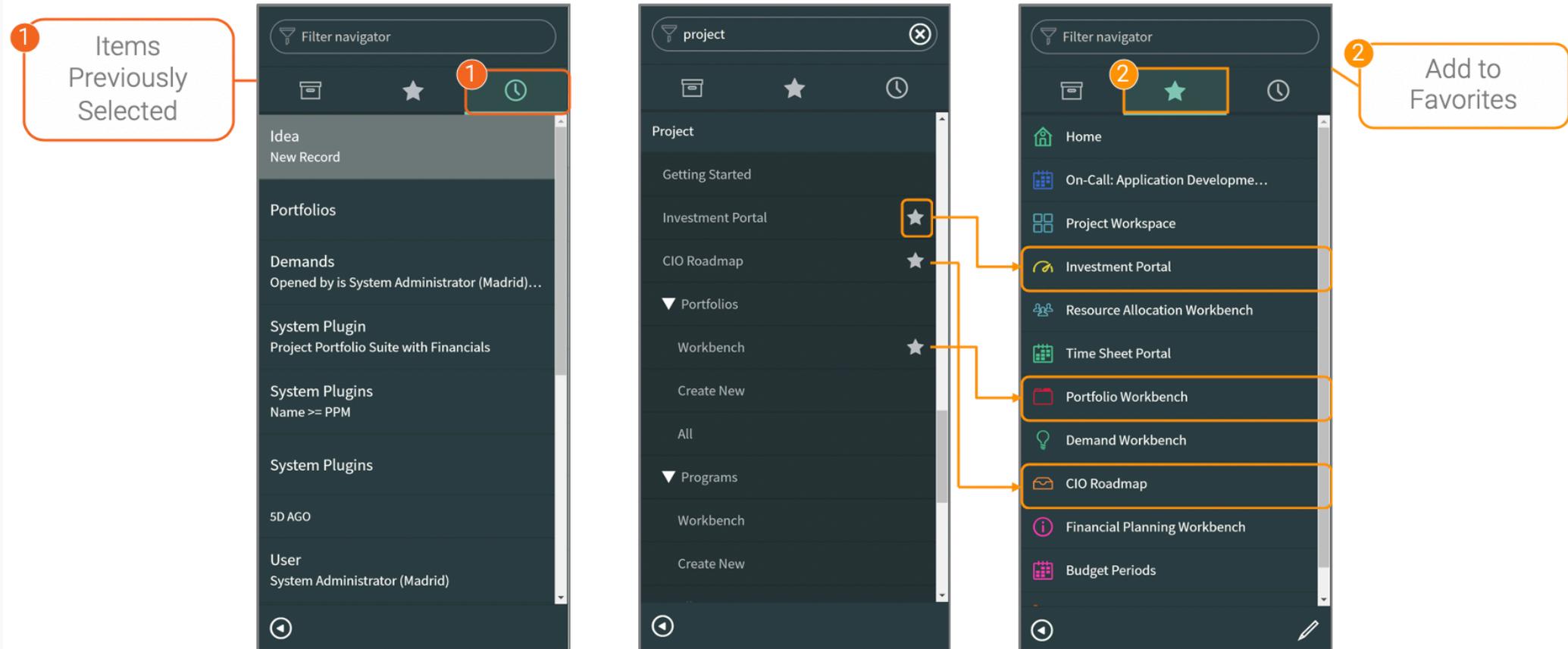
3
Content
Frame

The screenshot displays the ServiceNow Service Management interface. At the top, the header includes the 'servicenow Service Management' logo and the user profile 'System Administrator (Madrid)'. Below the header is a 'Filter navigator' and a 'System Administration' dropdown menu. On the left side, the 'Application Navigator' is visible, listing various categories such as Self-Service, Business Applications, Dashboards, Ideas, Demands, Service Catalog, Marketing Catalog, Knowledge, Help the Help Desk, Visual Task Boards, Connect Chat, and Incidents. The main content area features a 'Banner Frame' with a message: 'Make your life easier, create a dashboard!'. Below the banner, the 'Content Frame' displays a grid of widgets under the heading 'System Administration'. These widgets include: Guided Setup (Guided Setup tools to help you set up ServiceNow), System Security (Configure and monitor Instance security settings), Business Logic (Manage workflow and behavior of applications), Create and Deploy (Create, modify and deploy applications to your instances), Data Management (Manage the way data is stored and displayed), Diagnostics (Performance, development and debugging tools), Email (Customize behavior of inbound and outbound email), Homepages (Configure homepages for Service Desk and Self Service users), Integration (Integrate with 3rd-party systems and data sources), Reporting and Analytics (Create visual representations of your data), User Administration (Manage users, groups and their roles), and User Interface (Control the look and feel of applications). A 'Create dashboard version' button is located in the bottom right corner of the banner area.

Application Navigator

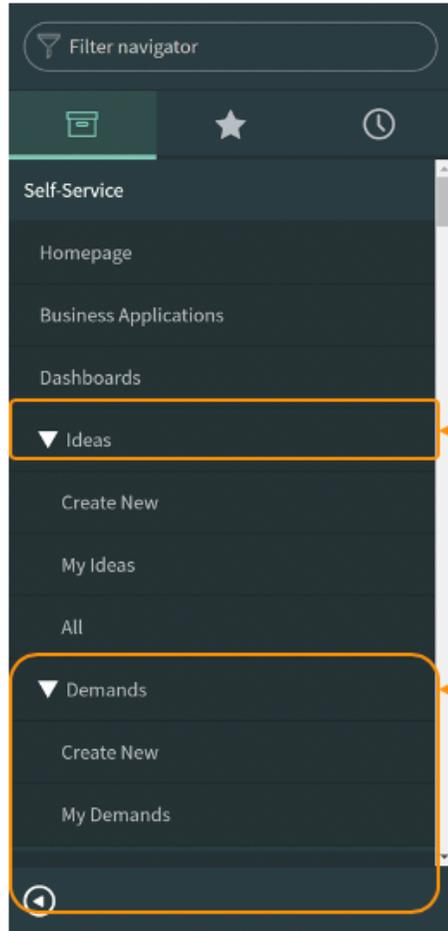


Application Navigator



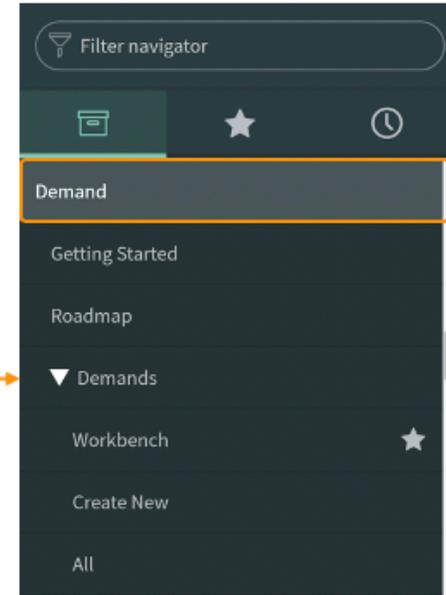
Project Portfolio Links (1)

Ideas and Demands can be found under the Self-Service application



Ideas

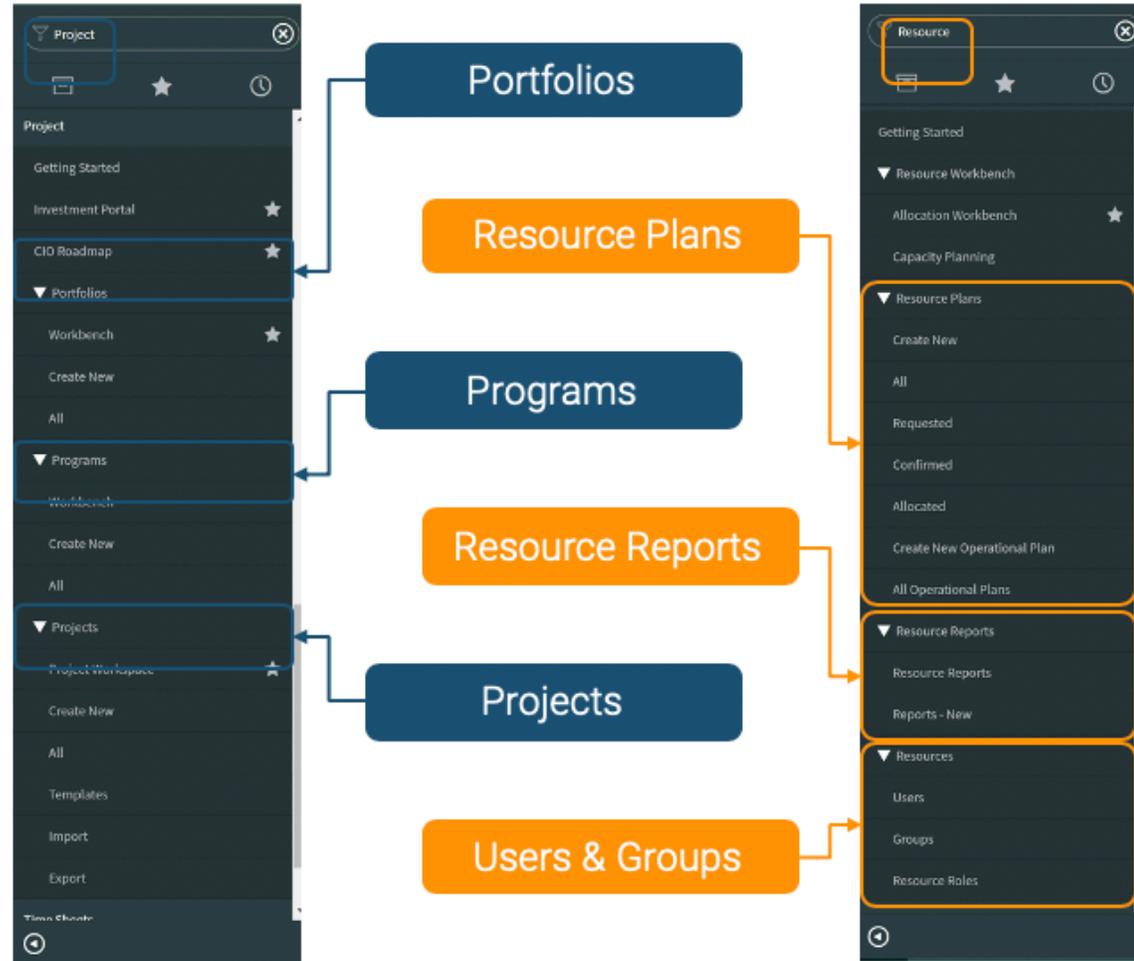
Demands



There is also a separate Demand module with additional links and functionality

Project Portfolio Links (2)

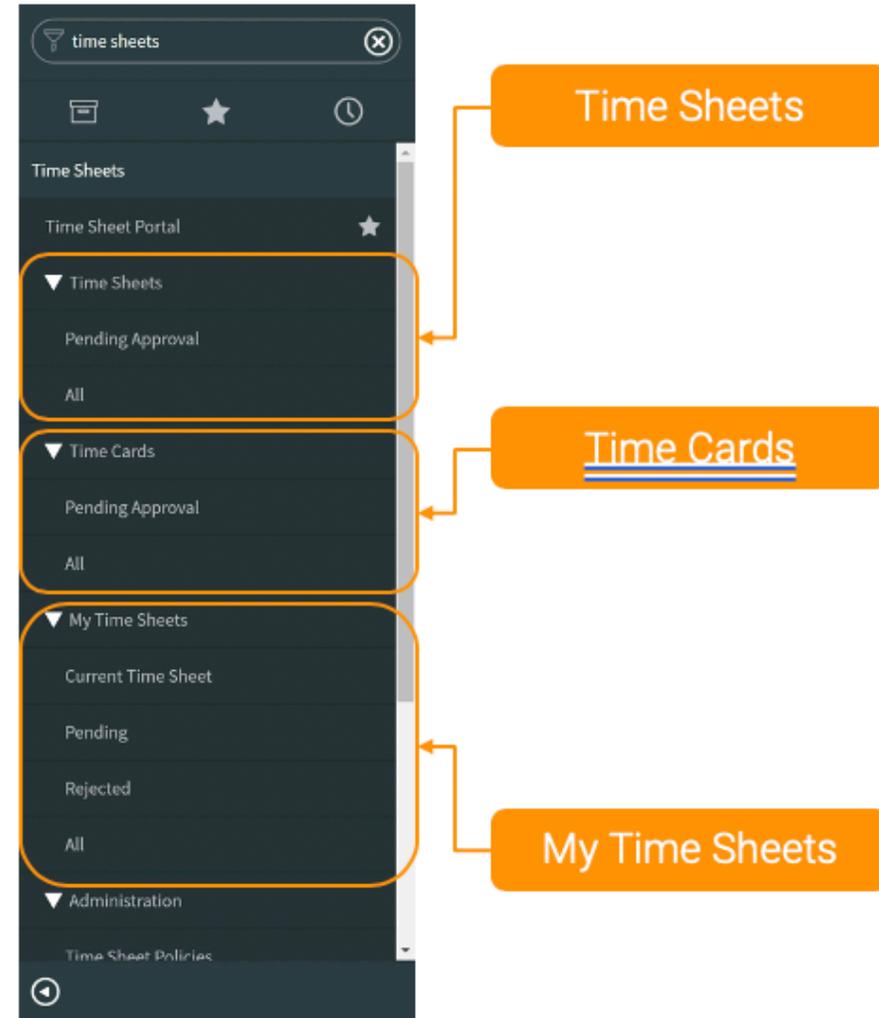
Portfolios, Programs, Project, etc. can be found under the **Project** application



The **Resource** application contains Resource Plans, Resource Reports, and Users and Groups

Project Portfolio Links (3)

The **Time Sheets** application contains Time Sheets, Time Cards, and My Time Sheets.





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Icons and Buttons

Field Icons on Forms

Save vs. Update vs.
Submit

General Icons

Context Menu

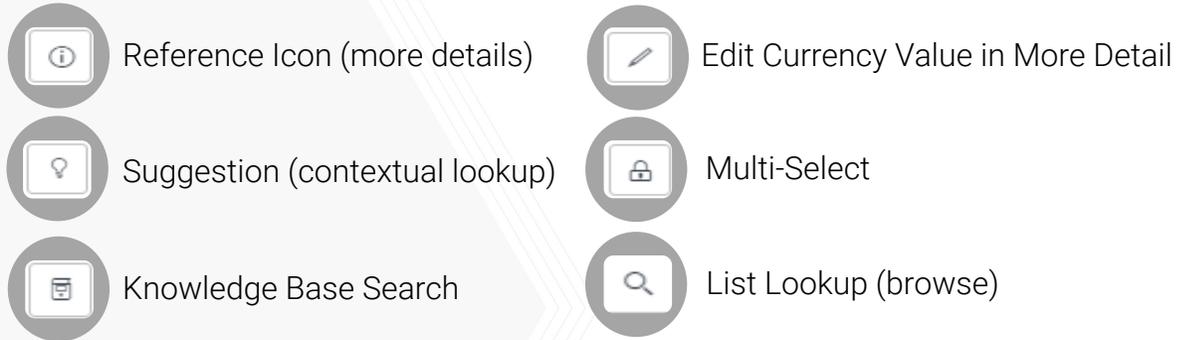
Navigation

Banner Frame

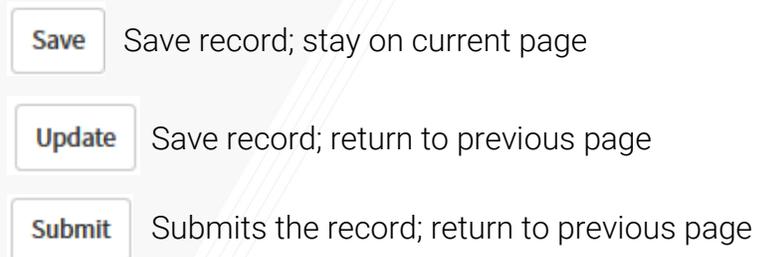
Homepage Layout and
Content

Icons and Buttons (1)

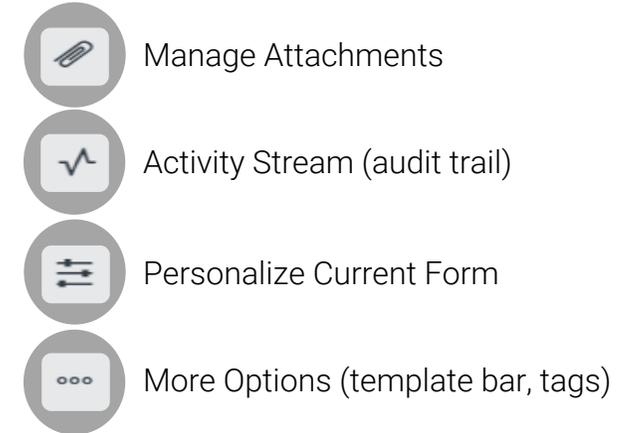
Field Icons on Forms



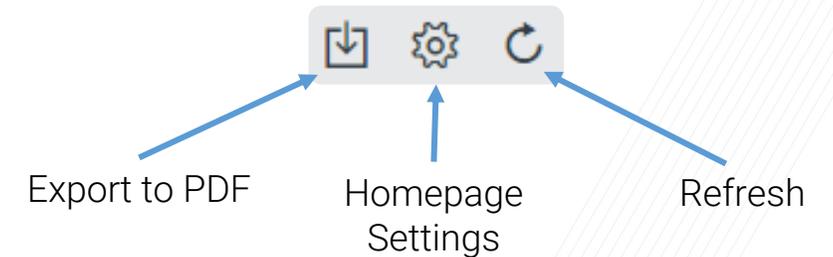
Save vs. Update vs. Submit



General Icons – Records/Forms

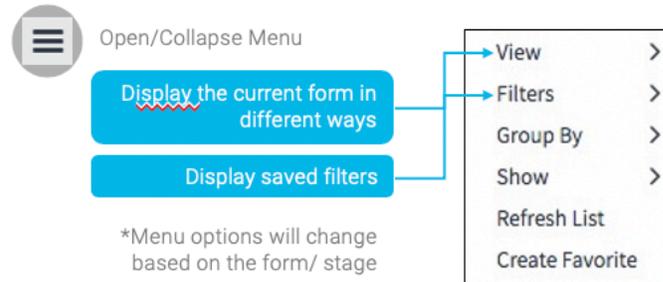


General Icons - Homepage

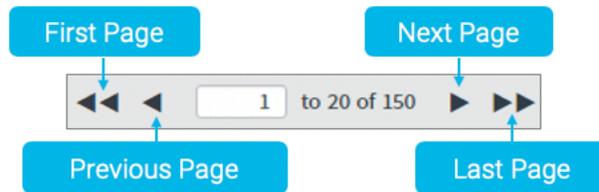


Icons and Buttons (2)

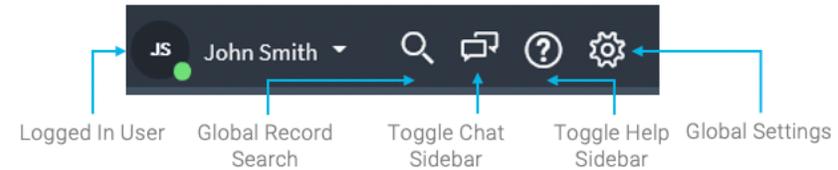
Form Context Menu



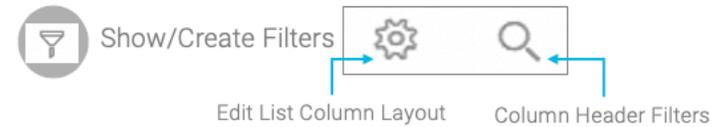
Navigation



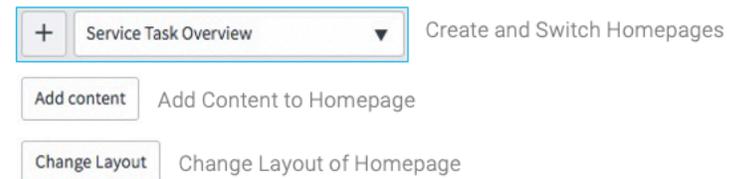
Banner Frame Toolbar



List View Filters



Homepage Layout and Content



The background of the slide is a collage of images. On the left, there's a large, semi-transparent white arrow pointing right. Behind it, a brown-tinted image shows the interior of a building with large, arched windows and a prominent light fixture. The Georgia Tech logo, consisting of the letters 'GT' in a stylized font, is visible in the top left corner of this image. The text 'Georgia Tech' is overlaid on the image in a white, sans-serif font.

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List Views

Custom Filters

Personalizing

Searching Lists

Creating Custom Filters

To create custom filters:

1. Click on the Filter icon.
2. Set conditions.
3. Name the filter.
4. Click the Save button.
5. Access your saved filters for a given view from the List Controls menu

The screenshot illustrates the process of creating a custom filter in a software application. The interface shows a search bar with the text "Project manager" and a search button. Below the search bar, there is a filter icon and a dropdown menu showing "All > Task type = Project". The filter icon is highlighted with a blue circle and the number 1. The dropdown menu is highlighted with a blue circle and the number 2. The filter icon is highlighted with a blue circle and the number 3. The dropdown menu is highlighted with a blue circle and the number 4. The filter icon is highlighted with a blue circle and the number 5. The dropdown menu is highlighted with a blue circle and the number 5. The filter icon is highlighted with a blue circle and the number 5. The dropdown menu is highlighted with a blue circle and the number 5.

1. Click on the Filter icon.

2. Set conditions.

3. Name the filter.

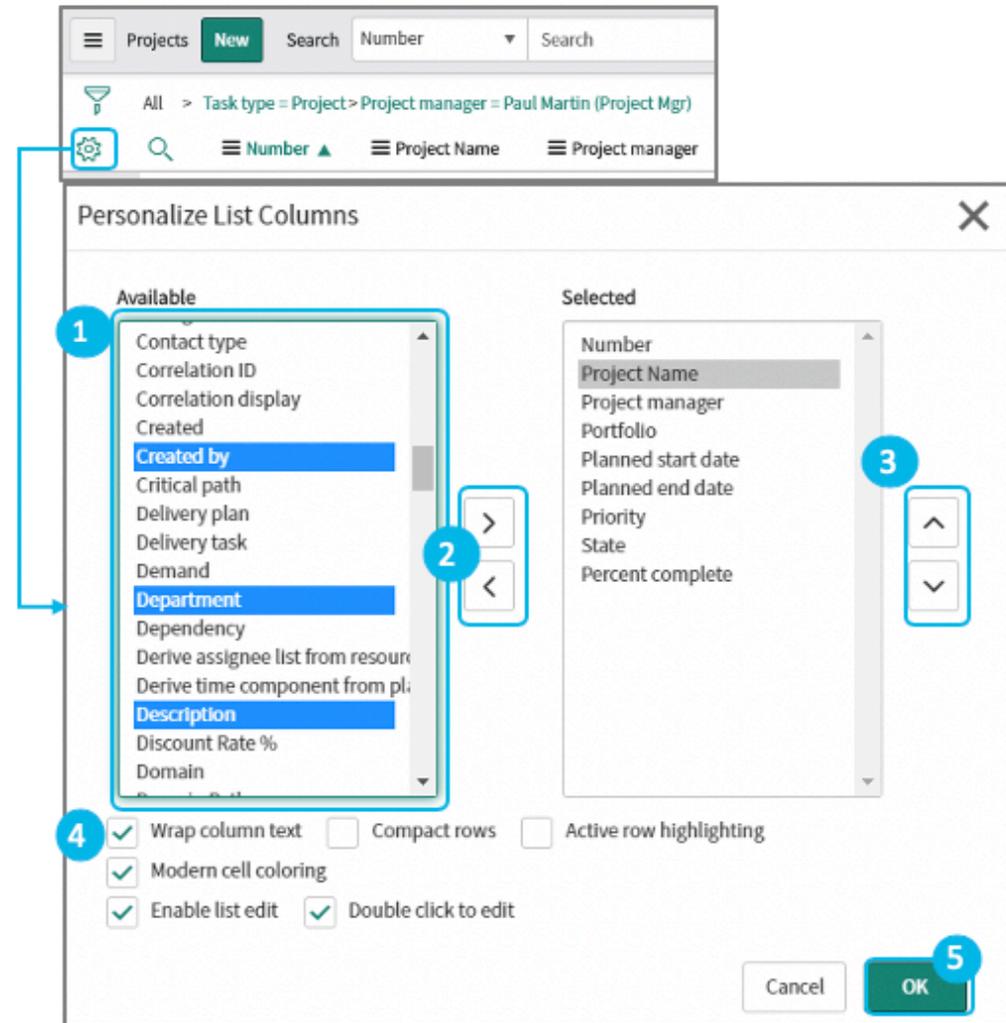
4. Click the Save button.

5. Access your saved filters for a given view from the List Controls menu

Personalizing List Views

To edit list views:

1. Highlight the desired field(s)
2. Move them between the Available and Selected lists with the right and left arrow buttons.
3. Highlight the Selected field(s) and change the order of fields in the list with the up and down arrow buttons.
4. Set other options.
5. Click the OK button.



Searching

- Use the Global List Search feature to search in all columns within the list view.
- Use the Column Search feature to search for specific text in any given visible column.

