City and County of San Francisco

ServiceNow
Telecommute Agreement Submission Guide
&
Application User Guide

Table of Contents

ServiceNow Telecommute Agreement Application Introduction

The ServiceNow **Telecommute Agreement** is a digital form of the paper version that provides up-to-the-minute visibility to the status of the employee request, as well as any additional information added during the approval process. It allows for greater transparency and efficiency through the online review and acknowledgement process.

Please note:

The ServiceNow **Telecommute Agreement** custom application is developed by Department of Technology (DT) ITSM program team and designed to (A) mirror the Department of Human Resources (DHR) City Telecommute Application and Agreement paper form and (B) automate/closely align with the CCSF Telecommuting established process. It is both the Employee's and the Management's responsibility to follow their departmental/organizational specific guidelines when submitting and approving an *Employee Telecommute Agreement* using this digital/automated medium.

This application user guide provides basic instructions for navigating the ServiceNow "**Telecommute Agreement** " application to create, update, track, and view the **Employee Telecommute Agreement records**.

ServiceNow Telecommute Agreement Application Highlights

The following summarizes and highlights some of the application design principles and features.

- ✓ Scalable design - Accessible by all CCSF Departments and Agencies (*This Application can be accessed by all active CCSF employees and Contractors (registered POI)*)
- ✓ Easy to use/intuitive User Interface
- ✓ Employee can save draft and complete form over time
- ✓ Record can be edited throughout the process life cycle up to approval completion phase
- ✓ Various dynamic list types (filters) to easily locate records
- ✓ System generated **notifications**
- ✓ **Application Security**
  - o Secure Access – **M**ulti **F**actor **A**uthentication (**MFA**) to access platform/application
  - o Role-based application access control (RBAC)
  - o **Data/View segregation** by departments
  - o Restricted application/record access and viewing by role/persona (Employee, Manager, HR, Dept. Head)

DHR – Employee Telecommuting Instructions

If you are an employee interested in telecommuting, you should:

- Talk with your supervisor to determine if you are eligible
- Read and agree to the Telecommuting Policy
- Read and agree to comply with the Technical Guidelines
- Fill out a telecommute application/agreement form by creating a new record in ServiceNow
- Get your telecommute agreement approved according to your department's approval process
- Complete the required telecommuting employee survey to help the City gather data and evaluate the program.

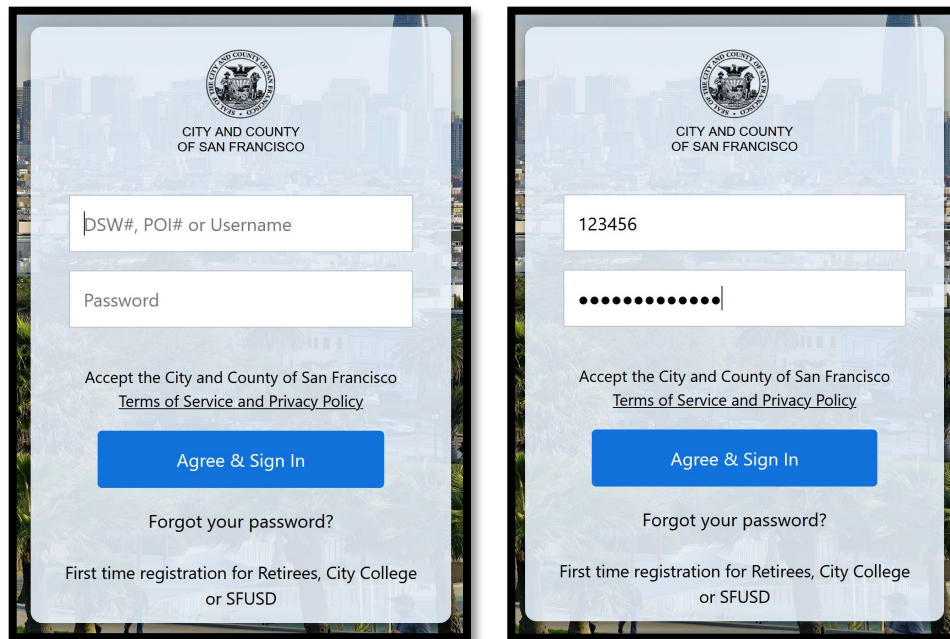All program materials are posted at "sfdhr.org/telecommute".
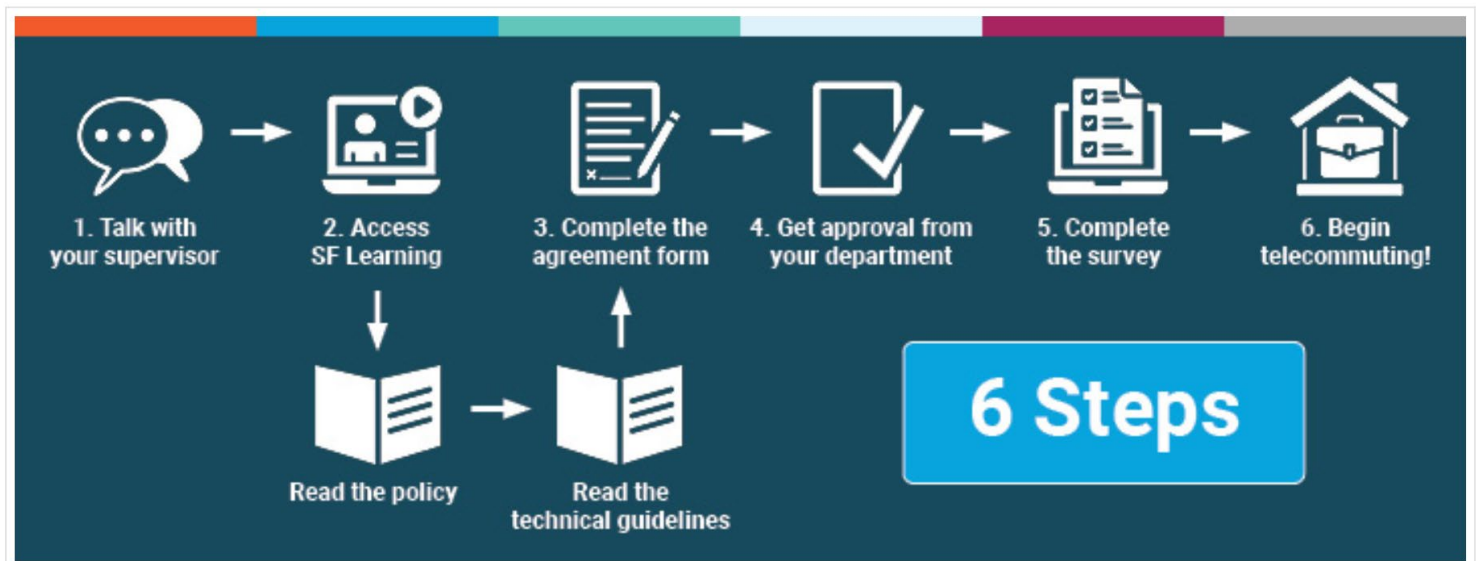
Accessing ServiceNow Platform

To access ServiceNow **Telecommute Agreement** custom application, users must first login to the **ServiceNow platform** (platform hosting/managing the Telecommute Agreement form submission/workflow). ServiceNow can be accessed by all active CCSF employees and contractors (registered POI).

Users can access the ServiceNow instance / Telecommute Agreement form in one of two ways (listed below). For all login methods, users should enter their credentials as depicted in "Figure 1" below (Multifactor Authentication using DSW# / POI# credentials or city email for contractors).
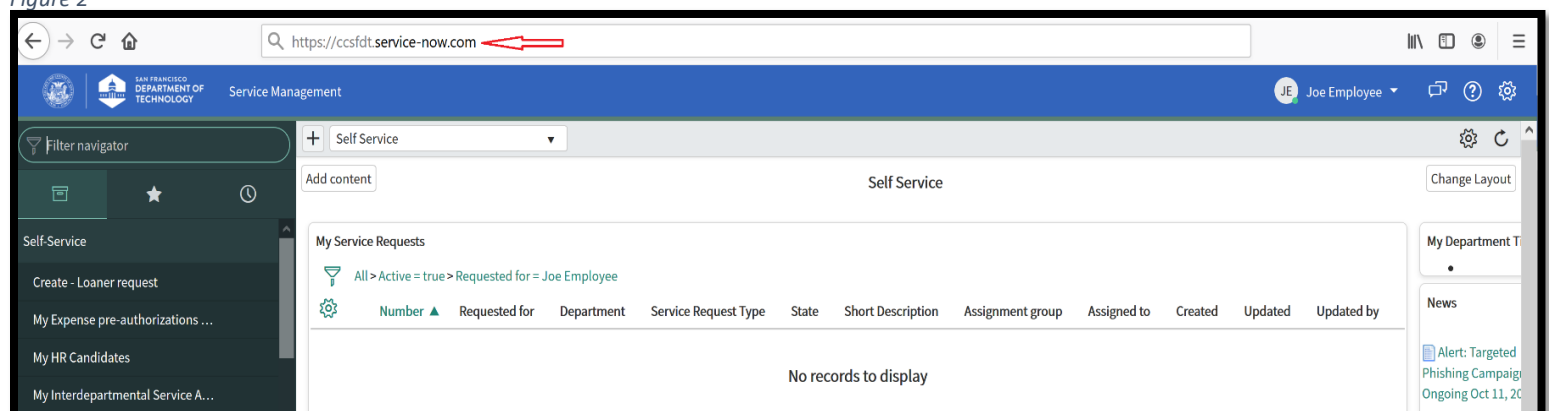
Figure 1

1. **Direct link** to ServiceNow Platform/Application: https://ccsfdt.service-now.com

   Once your credentials have been authenticated, your ServiceNow default homepage (landing page – Figure 2) will be displayed. *(Your view in the system is determined by your role in the system; therefore, your screen may look different from the screens shown in these materials and from other users.)*.

Figure 2

2. CCSF Employee portal - **MyApps Portal:** https://myapps.sfgov.org

Once your credentials have been authenticated, the MyApps default homepage (landing page – Figure 3) will be displayed *(Your view in the system (application tiles) is determined by your role in the system; therefore, your screen may look different from the screens shown in thes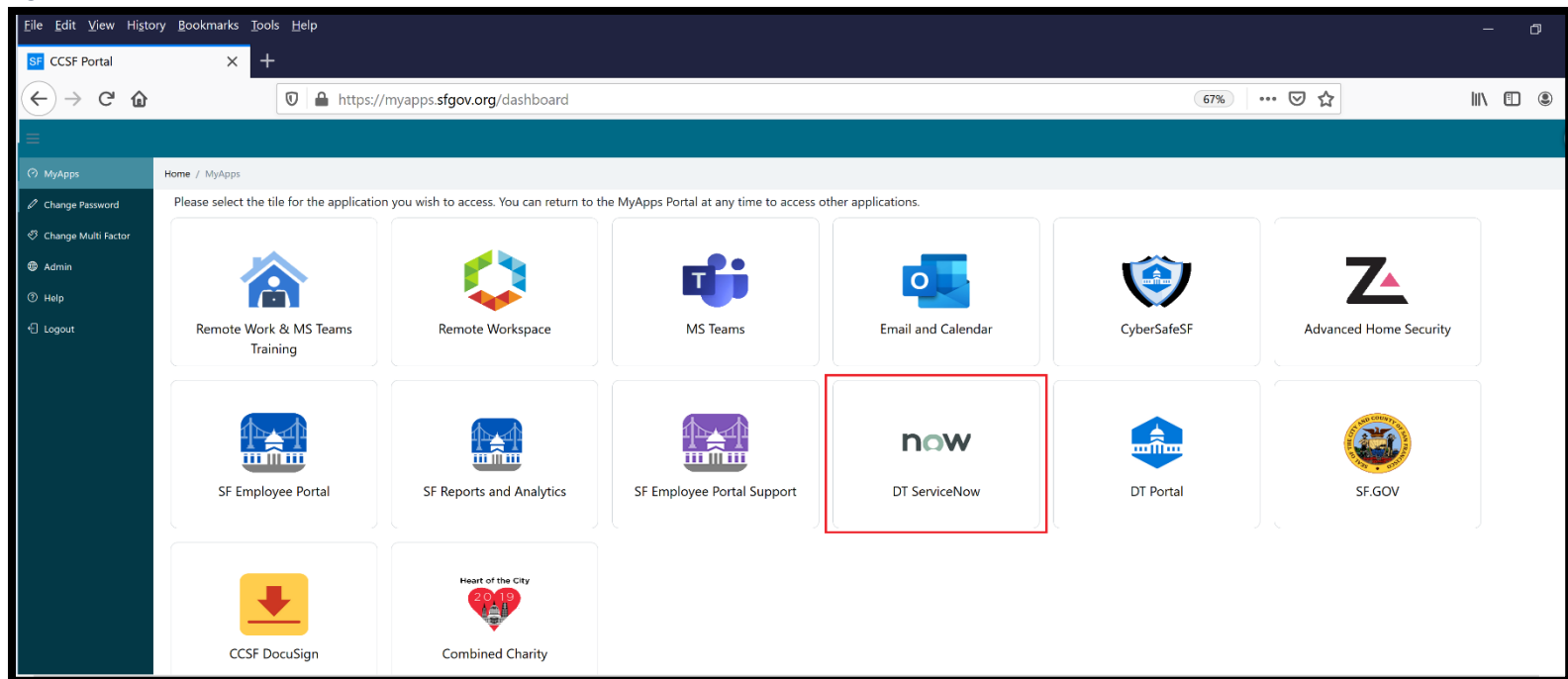e materials and from other users.).* To access ServiceNow Application, click on the **now** DT ServiceNow application tile (depicted within red box below – Figure 3)

Figure 3

After clicking on the **now** DT ServiceNow application tile you will be re-directed to ServiceNow and your default homepage (landing page) will be displayed *(Your view in the system is determined by your role in the system; therefore, your screen may look different from the screens shown in these materials and from other users.).*

Figure 4
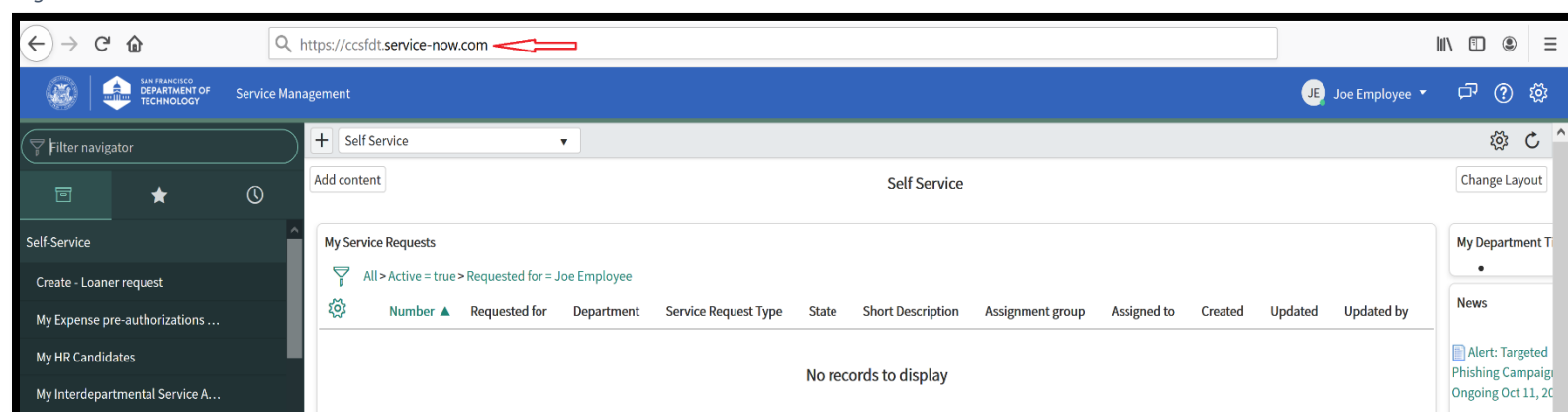
Accessing Telecommute Agreement Application/Digital Form in ServiceNow

Once your credentials have been authenticated and you are logged into ServiceNow platform, you can access the **Telecommute Agreement** application from the "Application Navigator/Left Navigation Bar*" under "**CCSF – Telecommute Agreement**" application menu as depicted in Figure 6 below.

To search quickly through your Application Navigator to view a particular Application or Module, use the Filter Navigator and type in the desired application/module name as depicted in Figure 5 below. The Filter Navigator is located at the top of the Application Navigator.

The Application Navigator is a list of available Applications and their corresponding Modules. Applications contain one or more Modules, which group together related information and functionality. Modules can contain links to a new record, lists of records with varying filters applied.
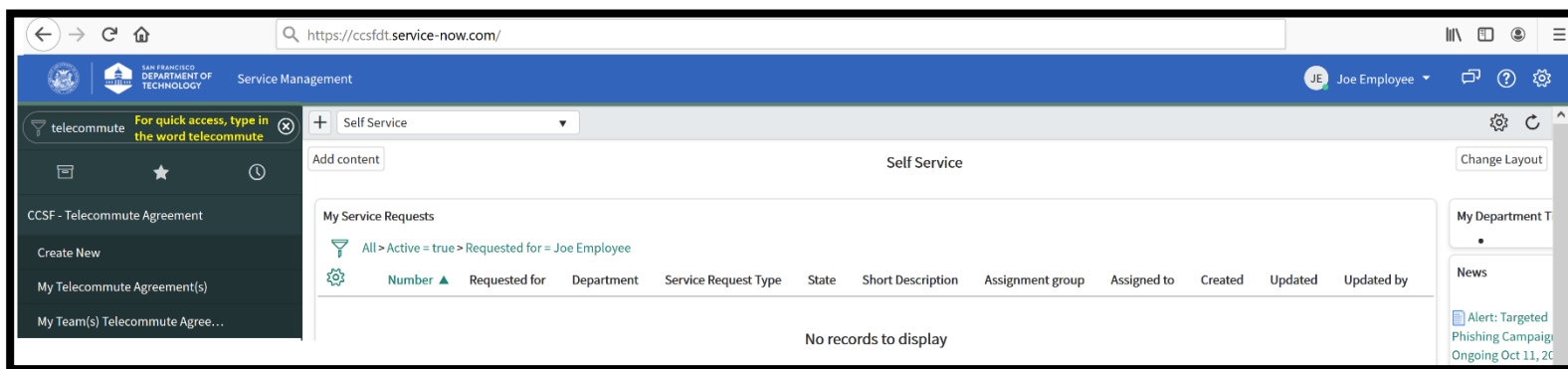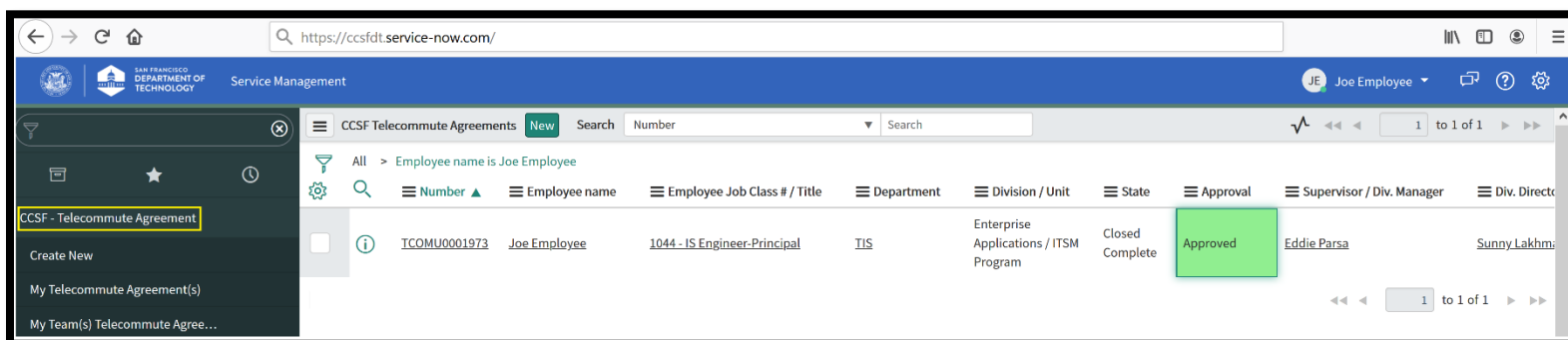
Figure 5

Figure 6

Field Descriptions

1. **Number** - This is the unique **Telecommute Agreement** record identifier. It is system generated and a restricted field. To ensure that the number field cannot be changed when first opening a record, this field is **Read-only**.

2. **Fiscal Period** - Auto-populated - This field is **Read-only.**

3. **Employee name** – Name of the employee for whom the record is being created for. Auto-populated based on logged in user (person creating a record). This field is **Read-only.**

4. **DSW number** – Auto-populated based on employee. This field is **Read-only**.

5. **Employee Job Class# / Title** – This is the employee's classification. Auto-populated based on employee. Editable field – To modify, click on the magnifying glass to select from list of available Job Class# / Title.

6. **Opened** – Auto-populated value. This field is populated with the timestamp that a user "**Opened**" the record for the first time. This field is **Read-only**.

7. **Department** – Auto-populated based on employee. This field is **Read-only**.

8. **Division / Unit** – Manual entry – Employee Division / Unit within their department.

9. **State** – Automatically updated value. State describes a progress made through the lifecycle of the record. The default setting for this field is **Open**. This field is **Read-only.**

Open	Awaiting Div. Manager approval	Awaiting Div. Director approval	Closed Complete

The State selections and definition for ServiceNow "Telecommute Agreements" are:

- **Open:** The initial State of a newly created record
- **Awaiting Div. Manager Approval:** Record is pending "**Supervisor / Div. Manager**" approval
- **Awaiting Div. Director Approval:** Record is pending "**Div. Director / Appointing Officer / Designees**" approval
- **Closed Complete:** Marks the completion of the Telecommute Agreement **submission/approval** process in ServiceNow
- **Rejected:** Employee Telecommute Agreement is rejected by either one of the approving parties

10. **Approval** - Automatically updated value - describe an approval status. The default setting for this field is **Not Yet Requested.** This field is **Read-only.** The approval states are:

Not Yet Requested	Requested	Approved Or Rejected
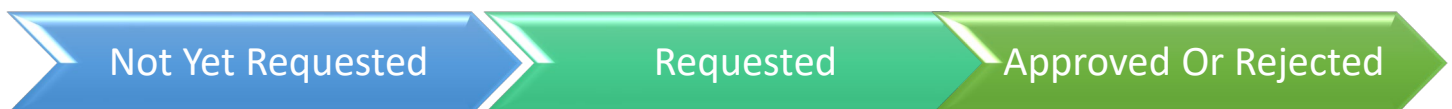
- **Not Yet Requested:** The initial Approval state for newly created record. Approval has not yet requested
- **Requested:** Approval request has been submitted - Record is pending approval
- **Approved:** Employee Telecommute Agreement is approved at all levels/by all approving parties
- **Rejected:** Employee Telecommute Agreement is rejected by either one of the approving parties

11. **Opened by** – Auto-populated value. This field is populated with the name of the user who "**Opened**" the record for the first time. This field is **Read-only**.

ServiceNow Telecommute Agreement Submission/Approval Process Flow

Open	Awaiting Div. Manager Approval	Awaiting Div. Director Approval	Closed Completed

Not Yet Requested	Requested	Approved

State: "Open" / Approval: "Not Yet Requested"

To initiate the process, a new employee Telecommute Agreement must be created. The Employee:

1. **Create/Initiate new Telecommute Agreement in ServiceNow**

2. **Complete the form** by:

   ➢ Populating/completing all the attributes/fields on main form & the following sections/tabs

Telecommute Information	Telecommuting Equipment	Telecommuting Work Plan	Approval By	Employee Acknowledgements

   - **Telecommute Information**
   - **Telecommute Equipment**
   - **Telecommuting Work Plan**
   - **Approval By**
   - **Employee Acknowledgements**

   ➢ Attaching any required documentation using paperclip icon (**Form Icons**).
   ➢ **Saving form/record** - You can save and complete form over time.

3. **Submit for Approval**

   ➢ Upon submission, "State" and "Approval" values will change to "Awaiting Div. Manager Approval" and "Requested" respectively.

State: "Awaiting Div. Manager Approval" / Approval: "Requested"

Record is pending "**Supervisor / Div. Manager**" approval. While pending approval (Approval is in "**Requested**" state), all sections with the exception of "**Approval By**" still can be edited/modified by either the Employee or the approver. Upon "**Supervisor / Div. Manager**"

- ➢ **Approval**
  - o "State" will change to "Awaiting Div. Director Approval"
  - o System generated approval request will be sent to the "**Div. Director / Appointing Officer / Designees**"
- ➢ **Rejection**
  - o "State" and "Approval" values will change to "Rejected"
  - o The Employee will receive system generated "rejection" notification
  - o The Employee has an option to edit/update record as necessary and re-submit for approval

State: "Awaiting Div. Director Approval" / Approval: "Requested"

Record has been approved by "**Supervisor / Div. Manager**" and is pending "**Div. Director / Appointing Officer / Designees**" approval. While pending approval (Approval is in "**Requested**" state), all sections with the exception of "**Approval By**" still can be edited/modified by either the Employee or the approver. Upon "**Div. Director / Appointing Officer / Designees**"

- ➢ **Approval**
  - o "State" and "Approval" values will change to "Closed Complete" and "Approved" respectively
  - o The Employee will receive system generated approval/completion notifications
- ➢ **Rejection**
  - o "State" and "Approval" values will change to "Rejected"
  - o The Employee will receive system generated "rejection" notification
  - o The Employee has an option to edit/update record as necessary and re-submit for approval

State: "Closed Complete" / Approval: "Approved"

Electronic filing/approval of the Employee Telecommuting Agreement has been completed.

- ➢ Telecommuting Agreement "State" and "Approval" values are "Closed Complete" and "Approved" respectively
- ➢ The Employee has an option to "**Copy Agreement**" for a different time period and/or arrangement type

State: "Rejected" / Approval: "Rejected"

The Employee Telecommute Agreement has been rejected by either one of the "**Supervisor / Div. Manager**" or the "**Div. Director / Appointing Officer / Designees**". The Employee has an option to edit/update record as necessary and re-submit for approval.

Create/Initiate new Telecommute Agreement in ServiceNow

Before starting this task, please make sure to follow/adhere to the DHR Employee Telecommuting instructions and guidelines. To initiate a new "Telecommute Agreement" in ServiceNow:

From the "Application Navigator/Left Navigation Bar" navigate to "**CCSF – Telecommute Agreement**" application module and select/click on "**Create New**" (Figure 7) and a new record (form) will open (Figure 8).

Figure 7

Figure 8

Complete the form

Click through all the following sections/tabs and populate with telecommute details & attach any required documentation using paperclip icon (**Form Icons**). You can save draft and complete form over time.
<mark>**Please note:**</mark> Make sure to follow your department guidelines as it relates to selecting specific departmental/divisional choices for certain attributes listed in each of these sections.

Telecommute Information

Figure 9

Telecommuting Work Plan

Figure 10

Telecommute Equipment

Approval By

Approver selection is limited to only 2 persons labeled as "**Supervisor / Div. Manager**" and "**Div. Director / Appointing Officer / Designees**" - Your value selections (management tiers/levels selection) must be in accordance with your department's approval process. To select, click on the magnifying glass search icon 🔍 to the right of the field and carefully select your choice from the available listing values.

Please note:

➤ Approval is sequential with "**Supervisor / Div. Manager**" being the first to receive an approval request
➤ Once an agreement is submitted for approval;
  • The approver selection/values cannot be modified
  • Approval request notification cannot be forwarded to a different user, should the original recipient/approver elect to defer the approval to another person(s) for any reasons.

Employee Acknowledgements

Read through the Employee Acknowledgements. Once done, select "**Yes**" to the acknowledgement at the top of the page.

Please note: You must mark your acknowledgement of all items listed in this section by selecting "**Yes**" from the "**I Acknowledge**" field drop-down list. Otherwise, you cannot submit your record for approval.

Figure 13

Save form/record

If you have not saved the form yet (first time saving), you can click on the "**Save**" button located at the upper right-hand corner of the form (Figure 14).

Figure 14

➢ If you are completing your telecommute agreement form in ServiceNow over time, after the first time saving, you will no longer see the "**Save**" button as depicted in Figure 14 above but an "**Update**" button. **Update** will save the record and return you to the screen from which you entered the form. Whereas "**Save**" will save the record without leaving the form view.

Figure 15
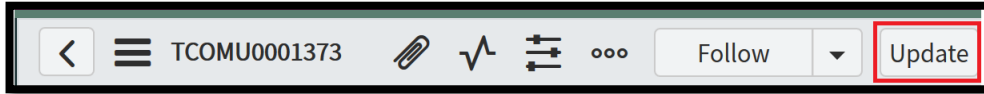
➢ Should you want to save your work and remain on the same form (saving over time/saving changes without leaving the form view), you should select the "Save" option from the "form context menu"(also called a right-click menu). You can access the form context menu by clicking an icon (≡) beside the form title as depicted in Figure 15 or by right clicking the form header.
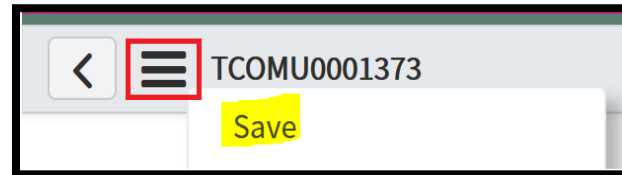

Figure 16

Submit for Approval

Following steps above, once you have completed all information, you can submit the record for approval. To submit your Telecommute Agreement for approval, click on "**Request Approval**" button (Figure 17).

Figure 17 - Note: This button will only appear once you have completed the employee Acknowledgment section

Once submitted, system will automatically route the request for approval/generates approval request notification to the first approver, "**Supervisor / Div. Manager**", as listed in the "Approval by" section. The Employee will also receive a submission receipt notification. All notifications contain a link to the record that once clicked, it will re-direct the user to the said record in ServiceNow where they can view/track request status throughout its lifecycle.

Please note: While the record is pending approval (Approval is in "**Requested**" state), all sections with the exception of "**Approval By**" still can be edited/modified by either the Employee and/or the approving parties.

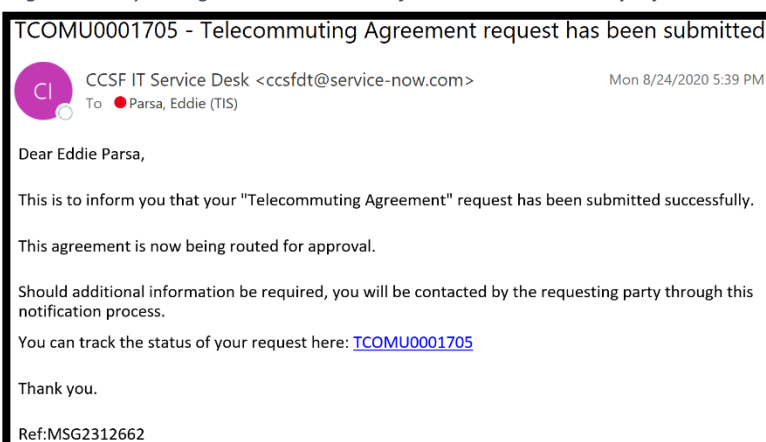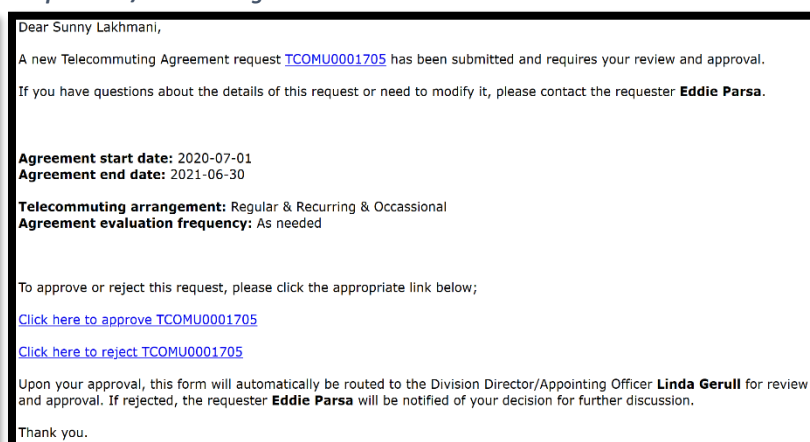*Figure 18 – System generated email notification sent to the **Employee***

*Figure 19 – Approval Request / – System generated email notification sent to the "**Supervisor / Div. Manager**"*

TCOMU0001705 - Telecommuting Agreement request has been submitted

CCSF IT Service Desk <ccsfdt@service-now.com>   Mon 8/24/2020 5:39 PM
To ● Parsa, Eddie (TIS)

Dear Eddie Parsa,

This is to inform you that your "Telecommuting Agreement" request has been submitted successfully.

This agreement is now being routed for approval.

Should additional information be required, you will be contacted by the requesting party through this notification process.
You can track the status of your request here: TCOMU0001705

Thank you.

Ref:MSG2312662

Dear Sunny Lakhmani,

A new Telecommuting Agreement request TCOMU0001705 has been submitted and requires your review and approval.

If you have questions about the details of this request or need to modify it, please contact the requester **Eddie Parsa**.

Agreement start date: 2020-07-01
Agreement end date: 2021-06-30

Telecommuting arrangement: Regular & Recurring & Occassional
Agreement evaluation frequency: As needed

To approve or reject this request, please click the appropriate link below;

Click here to approve TCOMU0001705

Click here to reject TCOMU0001705

Upon your approval, this form will automatically be routed to the Division Director/Appointing Officer **Linda Gerull** for review and approval. If rejected, the requester **Eddie Parsa** will be notified of your decision for further discussion.

Thank you.

Locate/Find Telecommute Agreements in ServiceNow
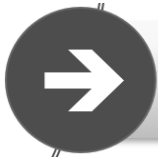
→ Find Records

After saving a draft and/or submitting a Telecommute Agreement for approval, user can view/track the status of the agreement in ServiceNow. Within the "**CCSF – Telecommute Agreement**", you will find one or more Application Modules that open a list of records. The records contained in these lists are filtered by the listing "type", record read/write security level settings (security **A**ccess **C**ontrol **L**ist), and/or combination thereof. Modules contain saved filters that cannot be modified, although the records contained within the selected list may change depending on current data in ServiceNow.

Remember, a record is viewed or created using a form. The data in the form fields are part of the record. Each row on a list represents a record. To access the corresponding form, simply click the record Number (typically displayed underlined in the first column).

Locating/Searching for your own Telecommute Agreement(s)

To locate your existing Telecommute Agreement(s) in which you are listed as the "Employee" on the record (no matter the "State"), using the "Application Navigator" (aka Left Navigation Bar), navigate to "**CCSF – Telecommute Agreement**" application module and select/click on "**My Telecommute Agreement(s)**" (Figure 20) and select/click on the desired record from the list view to the right (Figure 21).
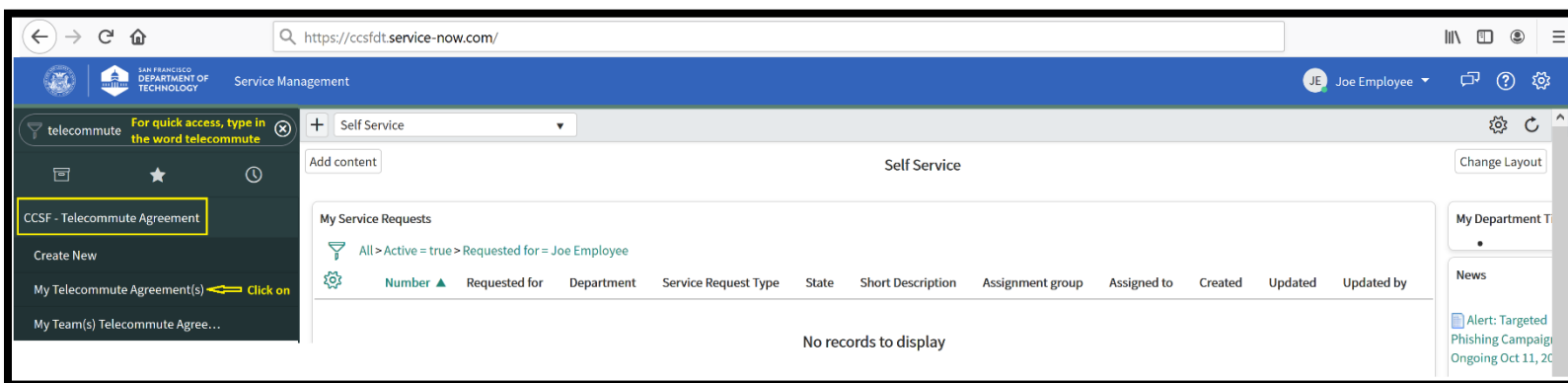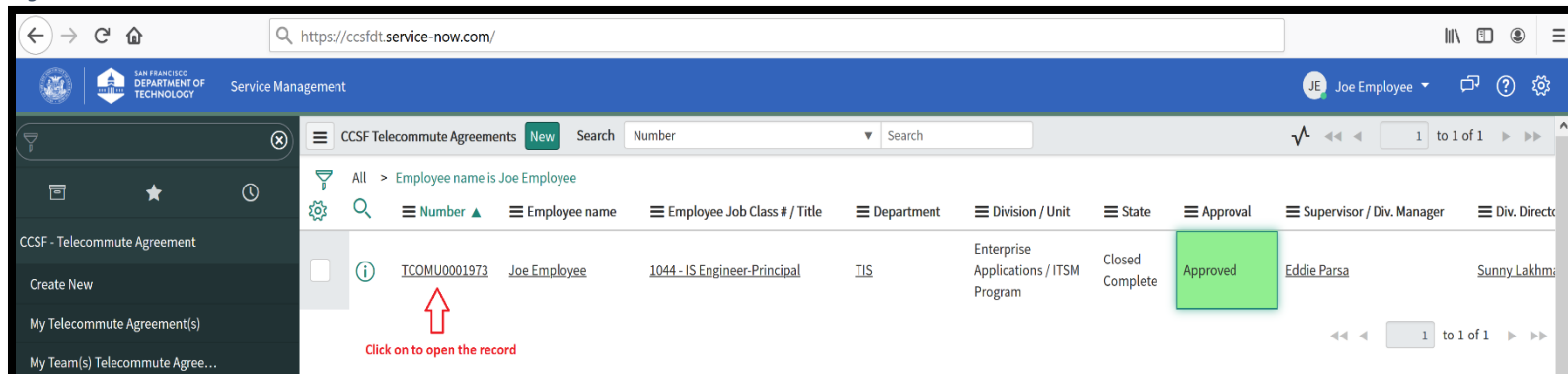
Figure 20

Figure 21

Ways to search records using a list view

You can search a list to find information quickly. The list title bar includes option for searching the list. There are two options for searching the list: for a string in a selected field, or for a text string found in any field.

- The **field** search option sorts the list 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, it finds the records that have a number ending with the number that you enter. For example, searching a list of Agreements by selecting Number and entering 4 shows records with numbers like TCOMU0000004 and TCOMU0000014.

- The **Text** search option appears when you select for text. It returns records that contain the search term in any field in the list table.

  Each option in a choice list is defined with a column label and a value. For example, the Telecommute Agreement State field contains several options, such as New and Closed Complete. These labels are column labels, and each one has an underlying value.

  Enter the column label to list matching records, for example, all Telecommute Agreements records in the "Awaiting Div. Manager" State.

In addition to searching by field or for text, you can search by one or more individual columns. There are several easy ways to search for records, keywords, and values within a list.

1. Use the Search bar at the top of the list to specify a column to be searched and a value to search for. You can also specify that you want to search *all* the columns by selecting **Record Number** (Figure 23).

To Perform the search:

Figure 22

- Navigate to a list of records and select a field or select for text (Figure 22)
- Enter the search text. Use wildcards to further refine list searches
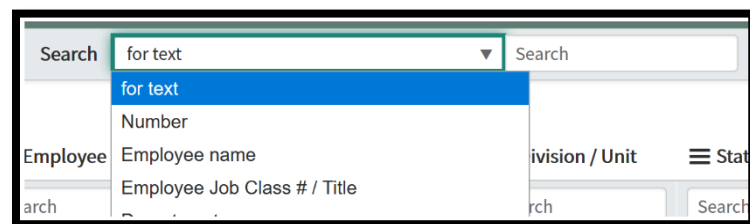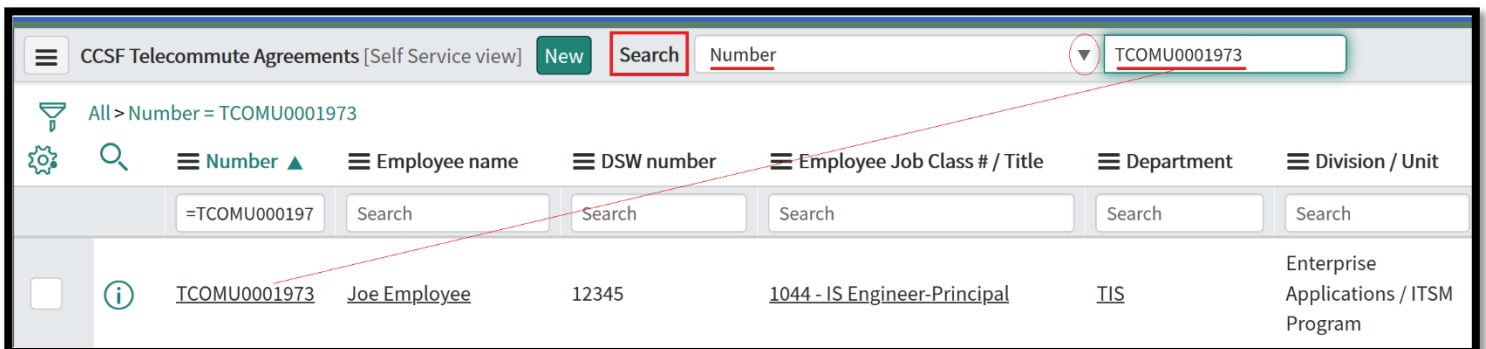- Press the Enter key to execute the search

Figure 23

2. Click the magnifying glass search icon 🔍 to the left of the column headers to open a search field at the top of each column. When you enter a search term in one of these boxes, you are searching only through the values in that column. As an example, if you wanted to search for a particular record using the **Number,** make sure you are searching within the Number column of the list. Use wildcards to further refine column searches (i.e. use the * to define a contains search).
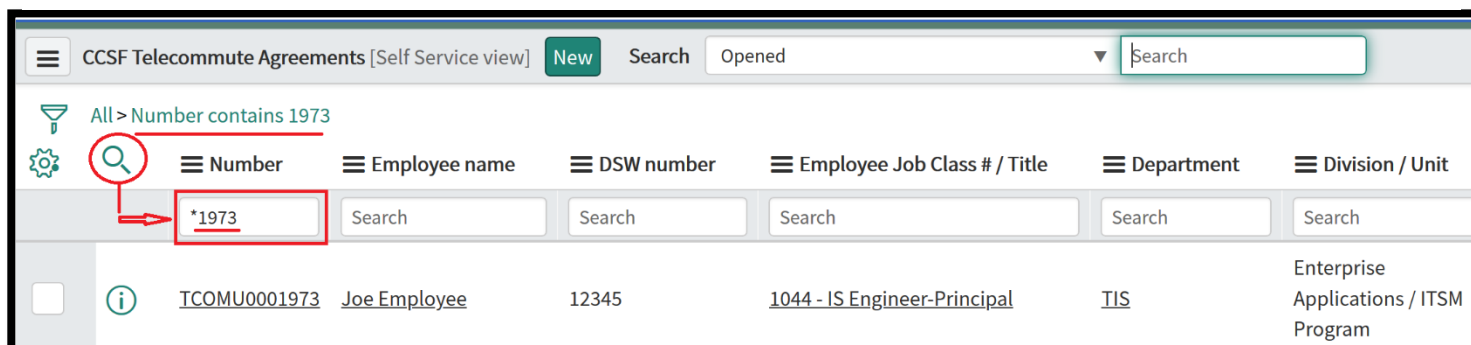
Figure 25

The platform supports several wildcard characters to expand and refine search results.

Figure 24 – Available list search wildcards

Wildcard	Description
*search-term	Search for values that contain search-term.
%search-term%	
%search-term	Search for values that end with search-term.
search-term%	Search for values that start with search-term.
=search-term	Search for values that equal search-term.
!*search-term	Search for values that do not contain search-term.
!%search-term	Search for values that do not end with search-term.
!=search-term	Search for values that do not equal search-term.

3. If you already see the value you are searching for in the list, you can easily search for records containing the same field value or even exclude those records. Right click the desired value and select **Show Matching** or **Filter Out** (Figure 26).

Figure 26
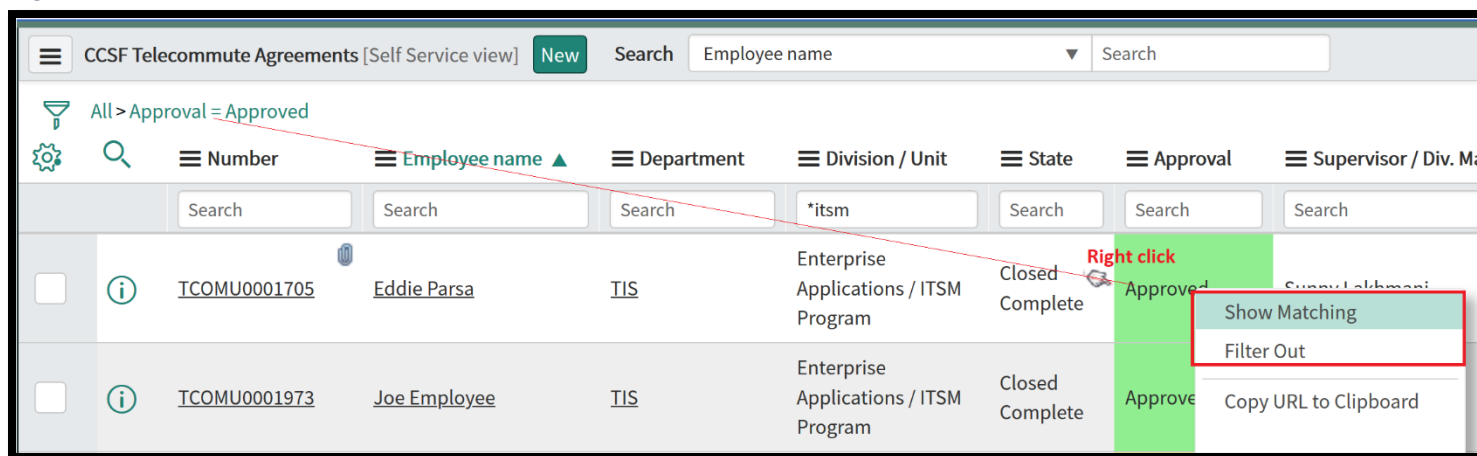
To search multiple columns, perform one of the following actions.

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

Note: When you search in a list, you are essentially creating a filter condition. These conditions are therefore reflected in the Breadcrumbs along the top of your list.

Locating/Searching for Telecommute Agreement of Team Members

To view Telecommute Agreements submitted by others, you must either be listed as one the following users on the record OR as the Employee's superior in the organizational management structure.

- **Supervisor / Div. Manager**
- **Div. Director / Appointing Officer / Designees**

To display/view Telecommute Agreements submitted by others, using the "Application Navigator/Left Navigation Bar", navigate to "**CCSF – Telecommute Agreement**" application module and select/click on "**My Team(s) Telecommute Agreements**" (Figure 27) and select/click on the desired record from the list view to the right (Figure 28). You can refine your search using one of the 3 methods listed above (Figure 23, 24, and 26).

Figure 27
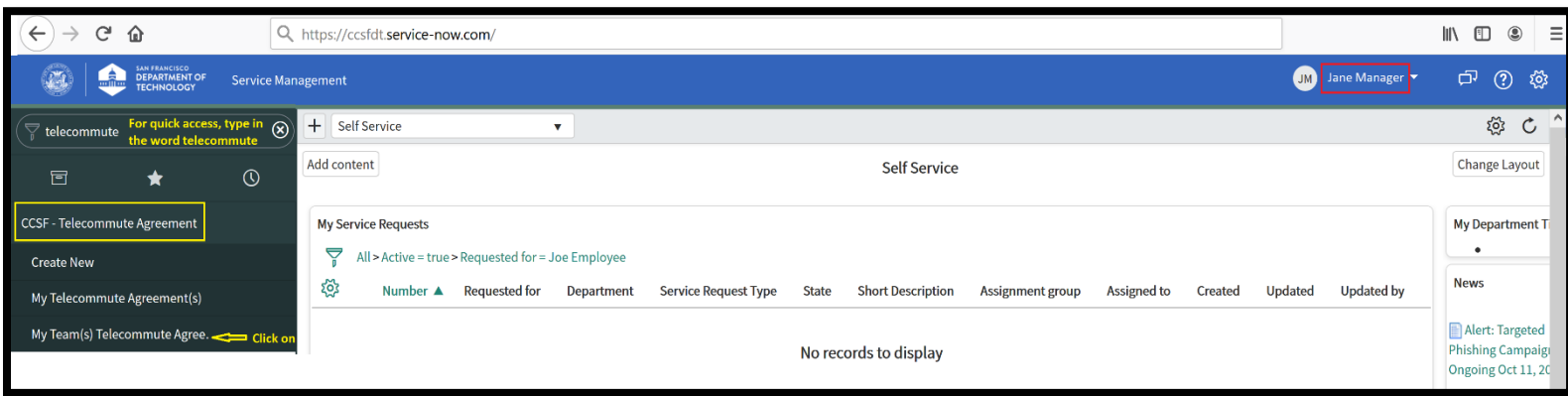
*Figure 28 - Data in ServiceNow is entered into individual **fields**, which are displayed on a **form/record**. Once saved, these forms make up lists. A **list** typically comprises forms with a common theme, such as a record type, Number or State.*

Copying a Telecommute Agreement

You can "**Copy**" your existing Telecommute Agreement following the **steps 1 – 7** below.

Please note:

- ➢ You can only Copy Agreement that are in Approved/Closed Complete state
- ➢ Copy Agreement function creates a new copy of an existing Telecommute Agreement but clears the values for the following attributes:
  - **Agreement start date**
  - **Agreement end date**
  - **I Acknowledge**

  However, you can make changes to/update any of the values that were copied from the original agreement.

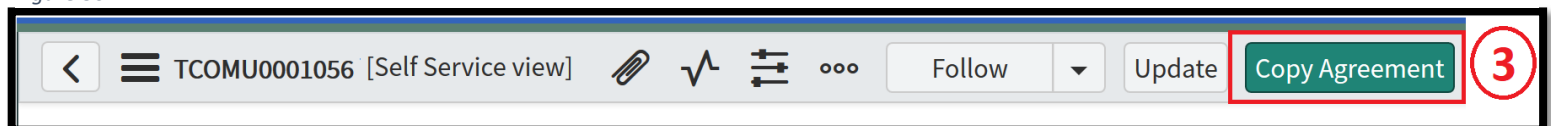**To copy an approved version of a Telecommute Agreement**:

1. Locate your existing record(s) by navigating to and clicking on "**My Telecommute Agreements**" (CCSF – Telecommute Agreement > My Telecommute Agreement(s))
2. Select/click on your desired record from the listing

Figure 29
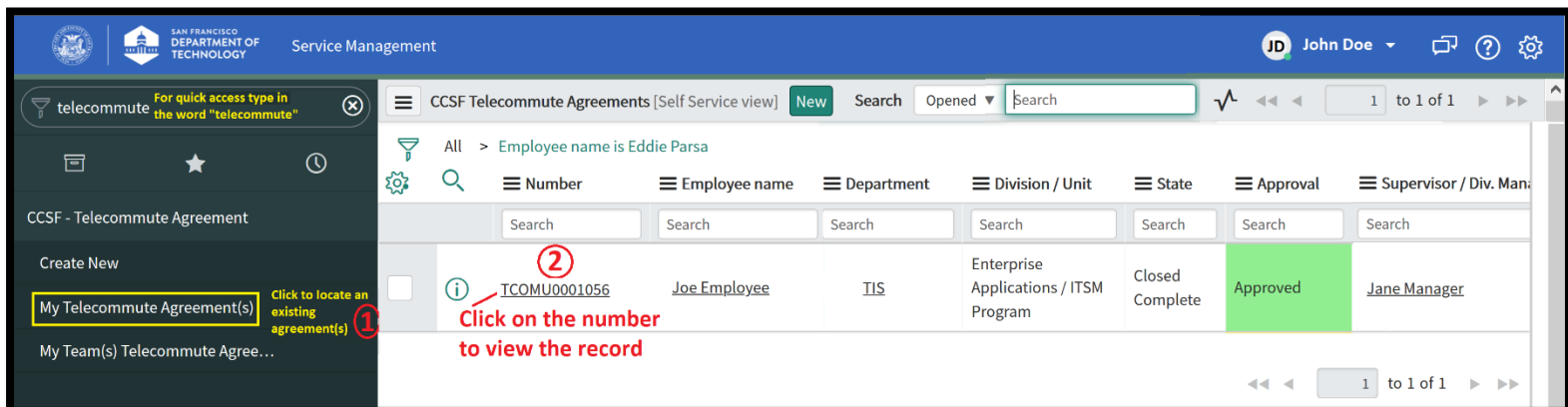
3. Click on the "**Copy Agreement**" button – This will generate a new record

Figure 30

4. In a newly created record, under "**Telecommute Information**" tab/section, enter values for "**Agreement start date**" and "**Agreement end date**" - Use the calendar function to enter new dates. To select a date, click on the calendar icon, select/click on the desired date to complete your entry

Figure 31

5. Under "**Employee Acknowledgements**" tab/section, read and acknowledge by setting the "I Acknowledge" value to "**Yes**"

Figure 32

6. **Save** the record - Click on the **Form Context Menu** icon ☰ and select Save

Figure 33

7. Submit for Approval by clicking on the "**Request Approval**" button

Figure 34

Sample Record - Approved Telecommute Agreement

Figure 35

Sample email Notifications

TCOMU0001056 - Telecommuting Agreement request has been submitted

CCSF IT Service Desk <ccsfdt@service-now.com>   11:30 AM
To ● Employee, Joe

Dear Joe Employee,

This is to inform you that your "Telecommuting Agreement" request has been submitted successfully.

This agreement is now being routed for approval.

Should additional information be required, you will be contacted by the requesting party through this notification process.

You can track the status of your request here: TCOMU0001056

Thank you.

Ref:MSG2298073

TCOMU0001056 - Telecommuting Agreement approval request for Joe Employee

CCSF IT Service Desk <ccsfdt@service-now.com>
To ● Doe, John

Dear John Doe,

A new Telecommuting Agreement request TCOMU0001056 has been submitted and requires your review and approval.

If you have questions about the details of this request or need to modify it, please contact the requester **Joe Employee**.

Agreement start date: 2020-07-01
Agreement end date: 2020-10-01

Telecommuting arrangement: Regular & Recurring
Agreement evaluation frequency: Monthly

To approve or reject this request, please click the appropriate link below;

Click here to approve TCOMU0001056   **Can approve/reject directly from "Approval request"**

Click here to reject TCOMU0001056

Upon your approval, this form will automatically be routed to the Division Director/Appointing Officer **Jane Manager** for review and approval. If rejected, the requester **Joe Employee** will be notified of your decision for further discussion.

Thank you.

TCOMU0001056 - Telecommuting Agreement approval request for Joe Employee

CCSF IT Service Desk <ccsfdt@service-now.com>
To ● Manager, Jane

Dear Jane Manager,

A new Telecommuting Agreement request TCOMU0001056 has been submitted and requires your review and approval.

If you have questions about the details of this request or need to modify it, please contact the requester **Joe Employee**.

Agreement start date: 2020-07-01
Agreement end date: 2020-10-01

Telecommuting arrangement: Regular & Recurring
Agreement evaluation frequency: Monthly

To approve or reject this request, please click the appropriate link below;

Click here to approve TCOMU0001056   **Can approve/reject directly from "Approval request"**

Click here to reject TCOMU0001056

If rejected, the requester **Joe Employee** will be notified of your decision for further discussion.

Thank you.

Approval trail

John Doe approved on 2020-10-05 11:34:59 PDT

TCOMU0001056 - Your Telecommuting Agreement request has been approved

CI   CCSF IT Service Desk <ccsfdt@service-now.com>   11:56 AM
         To   ✔ Employee, Joe

Dear Joe Employee,

This is to inform you that your Telecommuting Agreement request has been approved.

Request Details

Agreement start date: 2020-07-01
Agreement end date: 2020-10-01

Telecommuting arrangement : Regular & Recurring
Agreement evaluation frequency: Monthly

Approval trail

Jane Manager approved on 2020-10-05 11:55:27 PDT

John Doe approved on 2020-10-05 11:34:59 PDT

Ref:MSG2298092

TCOMU0001056 - Electronic filing/approval of your Telecommuting Agreement request has been completed

CI   CCSF IT Service Desk <ccsfdt@service-now.com>   11:56 AM
         To   ✔ Employee, Joe

Dear Joe Employee,

The filing of your Telecommuting Agreement request (TCOMU0001056) has been completed. For any additional information, please contact your Supervisor / Div. Manager, John Doe.
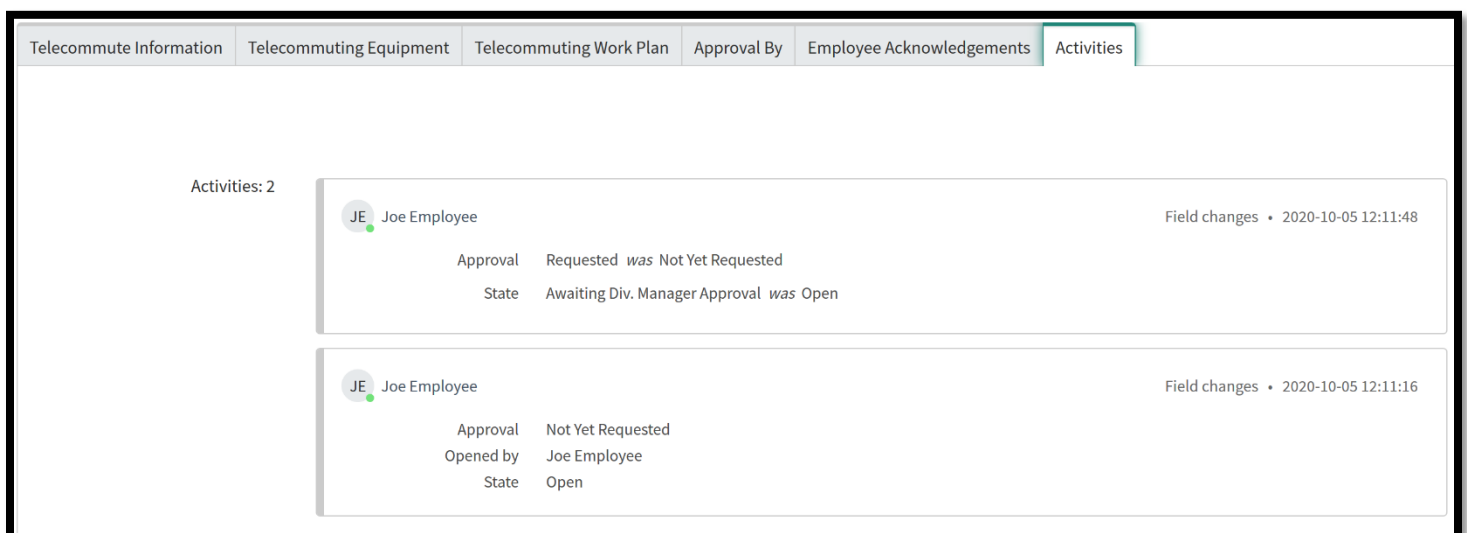
Thank you.

Ref:MSG2298093

Activities Tab

The "**Activities**" tab (activity stream) is used for tracking changes made to the record/keeping record history and they are displayed as list of entries.

Please note: Tracked fields are configurable only by the System Administrator.

Figure 39

City and County of San Francisco Department of Technology (DT)

ServiceNow Application User Guide

(Customized guide version for use with Telecommute Agreement)

Lists

Within ServiceNow CCSF Telecommute Agreement Application, you will find one or more Modules that open a **list** of records. The records contained in these lists are typically filtered by the type of record or on data contained within the record. Modules contain saved filters that cannot be modified, although the records contained within the selected list may change depending on current data in ServiceNow.

Remember, a record is viewed or created using a **form**. The data in the form fields are part of the record.

Each row on a list represents a record. Each list is made up of records from a particular record type, such as My Telecommute Agreement(s) or My Team(s) Telecommute Agreements. The record type is displayed on the top left-hand corner of the list. You can filter, sort, and search in lists to locate and organize your records.

Each list **row** represents one **record**, which can be viewed as a form. To access the corresponding form, simply click the record **Number** (typically displayed underlined in the first column).

Each list **column** represents one **field** on a particular form.

Figure 40

Figure 41

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 sub lists).

The list interface contains four main elements:

1. Title bar - displays the title of the list (table) and provides the following controls:
    -   Title menu - appears when you click the arrow beside the list title. It provides the following list controls:
        -   ❏ Refresh List - refreshes the list to show changes immediately.
        -   ❏ View - changes the columns and order of the list to a predefined layout.
        -   ❏ Group By - aggregates records by a field.
        -   ❏ Show - changes the maximum number of records per page.

2. 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.
3. Column headings - Column headings display column names and provide the following controls:
    -   ❏ **Sorting** - Click the column name to sort the list in ascending order. Click again to sort in reverse order. Sorting is not available on time fields such as Duration.
    -   ❏ **Right-click menu**, also called context menu - offers these controls:
        -   ➢ **Sort (a to z)** and **(z to a)** - sort in ascending and descending order.
        -   ➢ **Group By** - aggregates records by a field.
        -   ➢ **Bar** 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)
        -   ➢ **Personalize** (requires access rights) - provides administrative functions related to the information displayed and how it is controlled.
        -   ➢ **Export** - exports data to Excel, CSV, XML (administrators only), or PDF.
        -   ➢ **Update Selected** and **Update All** (administrators only) - change applicable field values.
    -   ❏ **Personalize List** () - customizes the list layout for the current user (Please see "Views & Filters" Slide).

Figure 42

Fields display data and provide the following functionality:
-   **Links** - Click the reference icon or first column field to open the record in form view. Links to related records are also available.
-   **Editing** - changes the information in one or more records.
-   **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. To learn more, see Reference Icon.
-   **Right-click menu, also called context 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.
    -   ❏ **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.
    -   ❏ **Assign to me**, **Approve**, and **Reject** - provide quick edit options.

List personalization

Personalize List Columns

You can personalize the appearance of your list and its contents. Each column header in a list corresponds to a field value on the record. You can choose which column headers (and, therefore, which field values) to view in your list. Click the Personalize List gear to the left of your column headers and select from the list of available fields. Move the selected fields up and down to move the columns left and right.

Column personalization is specific to the record type. For example, if you personalize your column headers on a list of My Team(s) Telecommute Agreements, the changes will not apply to a list of My Telecommute Agreement(s). Remember, you can identify the record type in the top left-hand corner of any list.

Figure 43

Sort by Column Values

You can quickly sort any column values alphabetically by selecting an option from the column control menu.

Search: Wildcards and Operators

There are several easy ways to search for records, keywords, and values within a list.

1. Use the Search bar at the top of the list to specify a column to be searched and a value to search for. You can also specify that you want to search *all* the columns by selecting **For Text.**

2. Click the magnifying glass to the left of the column headers to open a search field at the top of each column. When you enter a search term in one of these boxes, you are searching only through the values in that column. For example, if you wanted to search for a record using the **Number,** make sure you are searching within the Number column of the list.

3. If you already see the value you are searching for in the list, you can easily search for records containing the same field value or even exclude those records. Right click the desired value and select **Show Matching** or **Filter Out.**

Below are three slightly different searches within a particular column, in this case, the **Employee Name** field. The **Breadcrumbs** (in teal color) reflect the operator specified by the search term. Remember, the **Operator** is the condition that connects a field (e.g. Employee Name) and a field value (e.g. Joe).

1. By adding the wildcard asterisk (*) *before* a search term, you specify that the operator should be **contains.** In other words, the filter condition is: **Employee Name contains Joe.**

2. If you simply type a search term into the column search box, be aware that the default operator for most columns is **starts with.** In this example, the filter condition is **Employee Name starts with Joe.**

3. To search for an exact term, you need to use the operator **is**, as in, **Employee Name is Joe Employee.** This operator is denoted by an equal sign (=). Notice that in the above example, we searched for "Joe Employee" instead of "Joe" because this search is for an exact match to the column value.

Figure 44
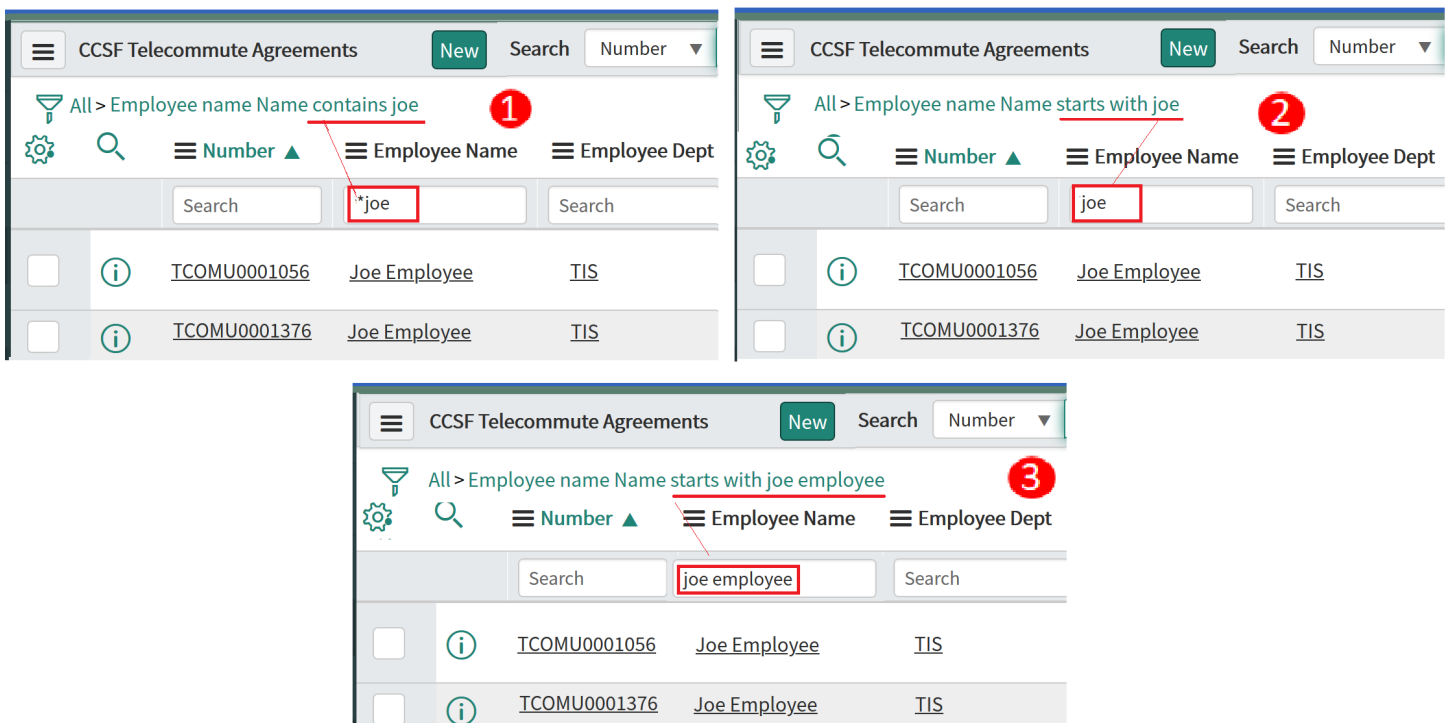
Form Icons

Each form has different fields, UI actions, and options specific to the Application under which it was created. However, all forms have certain icons and functionalities in common:

- Fill in all fields marked with an asterisk prior to saving the form. If you do not, you will see an error message when you save the form. The asterisk is red prior to filling out the field and grey once information has been entered.

- Click the **Form Context Menu** to gain access to additional actions specific to the form. Notably, you can find the **Save** button here, with which you save your form but remain on the page.

- Use the paperclip icon to attach files to your form.

- **Personalize** your form to show or hide important fields according to your personal preferences. Note: You cannot hide mandatory fields.

- Click **More options** to tag your form, employ templates, send an email, and more.

- **Show Activity Stream** to see a time-stamped history of all action taken from this form.

- Locate any **Reference field**. Click the magnifying glass to the right of the field to browse a list of possible values that can be entered in this field. Select any record to fill the Reference field.

Figure 45

You may see certain fields on your form that have a magnifying glass to the right of the blank space. These are known as **Reference** fields, because you must *refer* to an existing form in this field. For example, in the **Caller** Reference field, you cannot just free type a requester name; instead, you must select an existing record from the User list.

1. To view the list of available reference values, click the magnifying glass.
2. A list of records opens that corresponds to the particular reference field. For example, the magnifying glass in the Caller field opens a list of Users; whereas the magnifying glass in the Assignment group field opens a list of Assignment groups. Select the desired record by clicking on the underlined value in the first column.
3. The selected value now appears in the Reference field.
4. This selected value refers to another form, which you can access by clicking the Reference Icon to the right of the field value.

Hint: You don't have to open the magnifying glass to search for your reference value if you already know what you are looking for. Simply begin typing the value in the Reference field and select from the resulting list.

Filters

Filters allow you to specify exactly which records you want to see within a selected list. For example, as a manager you may start with a list of all My Team(s) Telecommute Agreements but filter those records to view only a specific "Employee Job Class / Title".

To view the filter applied to a list, click the funnel icon on the top left of the list. Here, you can add, remove, or edit filter conditions and rerun or save your filter.

The filter conditions applied to the list are summarized in the **Breadcrumbs,** shown in blue letters across the top of the list. Not only do the breadcrumbs provide an "at-a-glance" view of the filter conditions, but you can also modify conditions and save your filter as a Favorite directly from the Breadcrumbs.

Click **Run** to see the results of your filter displayed in the list. To save a filter, click **Save**. A new field will appear where you can name your filter. After naming the filter, click the **Save** button to the right of the name field. The new filter will be available by selecting **Filters** from the list Context Menu.

About Filter Conditions

The ServiceNow definition of a filter: "a set of conditions applied to a table in order to find and work with a subset of the data in that table"

Filter conditions can be created, saved, and applied only while in List View (tabular view of multiple records). Many of the actions available on the left--hand navigation panel are simply filter conditions applied to records in the tool. When a List View is presented, the current set of filter conditions being applied appear at the top of the view as a **"Breadcrumb"** sequence (conditions separated by the "**>**" character).

Hint: *You can add filter conditions to your Favorites menu simply by dragging and dropping your Breadcrumbs onto the Application Navigator*

Figure 46

Creating Filters

When a filter is applied, only items that meet the conditions are returned. A condition consists of three parts: a field, an operator, and a value. The illustration shows a filter with only one condition: "Employee Job Class #/ Title" is "1044-IS Engineer- Principal". This filter displays all Telecommute Agreements with "Employee Job Class #/ Title" equals to "1044-IS Engineer- Principal".

To create a filter:

1. Open the Smart Filter 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. To learn more, see Condition Builders.

1. Select an operator from the drop-down list.
2. Select or enter a value, if appropriate.
3. Add or remove conditions until the desired filter is constructed:
   - To add a top-level condition, click Add AND condition () or Add OR condition () on the Smart Filter 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.

4. To specify the sort order of the results, click Add Sort (), then select a field to sort by and a sort order.
5. Click Save to keep the filter for future use. To learn more, see Saving Filters.
6. 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.

Figure 47

Filtering on Multiple String Values
You can create a filter for a string field that searches for multiple values in a comma delimited list.
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.
4. The filter conditions appear as a comma-delimited string at the top the results 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 Filter**.
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. To edit your personal filters, select Edit personal filters. The sys_filter table (with the filter User = [current user]) opens. Filters created from this view are saved as personal filters for the current user.

Application Navigator

Figure 48

The setting icon ⚙ on the upper right-hand side of the Banner Frame provides access to additional settings and options for personalizing your view of the platform. Use this to change the font size, print and customize your background Theme.
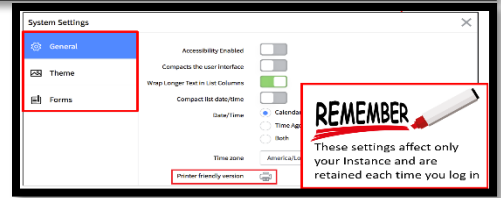

Figure 49

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.

The application navigator header provides the following tools:

Figure 50

- Navigation Filter - filters the applications and modules that appear in the navigator based on the filter text. It helps users quickly access information and services by filtering the items in the application navigator.

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.

- 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 () - collapse all applications so that only application labels appear or expand all applications so that all available modules appear.
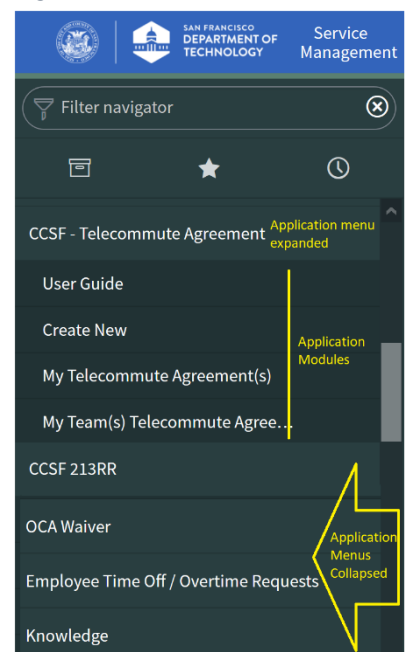
If you cannot find an item in your Application Navigator, consider the following reasons:

- 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 ServiceNow implementation.

- The application that contains the module you are looking for may be collapsed.
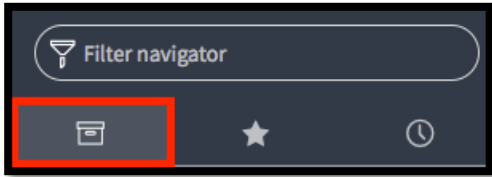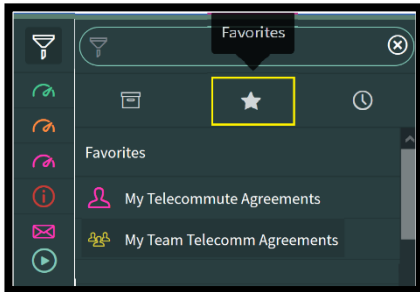
View all Applications in the expanded view of your **Application Navigator.** (Note: Depending on your permissions, you may see more or fewer Applications than your neighbor.)

Figure 51

Figure 52

Collapse/un-collapse your Application Navigator by clicking the circled arrow at the bottom of the Application Navigator.

On the collapsed Application Navigator, you can click on your Application Favorites to view Modules.

Figure 53

You can navigate to your Homepage by clicking the Home button, displayed on the collapsed Application Navigator.

Figure 54

Figure 55

The Application Navigator contains a scrolling list of your recent history within ServiceNow. For example, forms you were filling out, lists you were searching, homepages you were viewing: all these are visible within the **Your History** tab of the maximized Application Navigator. Click to open any recent activity in your Content Frame.

Your **History** provides a scrolling view of recent activities including:

- Forms and lists you accessed
- Homepages you visited

Hint: Your History is only available when the Application Navigator is in Maximized view
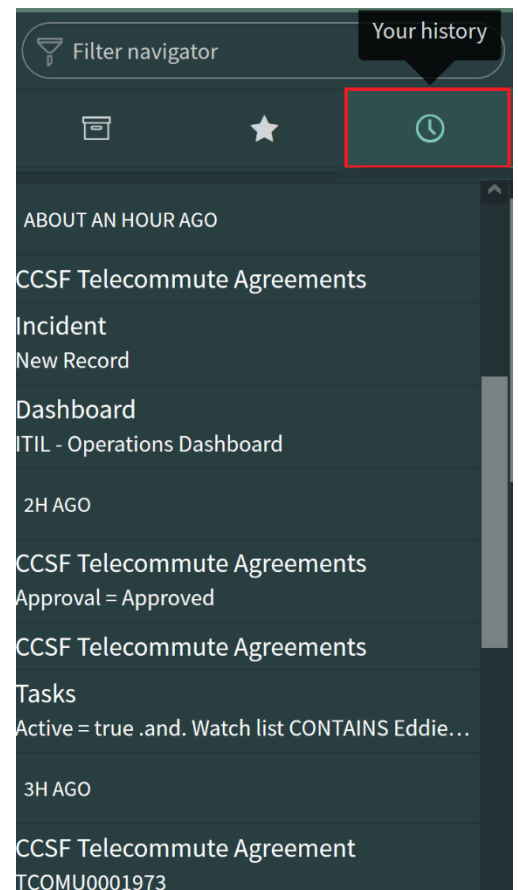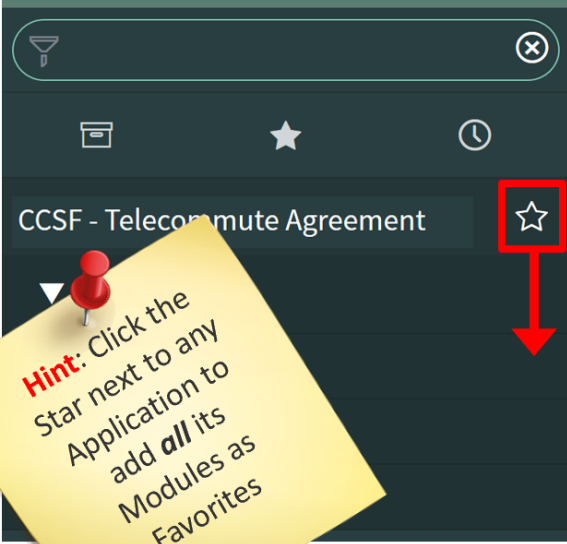
Favorites

Creating Favorites provides quick access to Applications, Modules, and records that you use frequently or want to locate easily. There are three methods for adding Favorites to your Application Navigator:

1. You can create a Favorite from an individual Module or an entire Application, including all its Modules. In the Application Navigator, hover over the Module or Application you want to add as a Favorite and click the Star that appears on the right-hand side of the Application Navigator.

2. From any list, click and drag a record hyperlink and drop it anywhere on the Application Navigator.

3. From any form, click the form Context Menu and select **Create Favorite.**
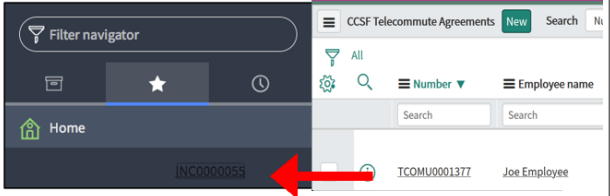
Figure 56

Star: Applications and Modules

- Click the Star that appears to the right of any Module or Application when you hover over it in the Application Navigator

CCSF - Telecommute Agreement

Hint: Click the Star next to any Application to add *all* its Modules as Favorites

Drag and Drop: Records

- From list view, drag and drop a record to Application Navigator

Form Context Menu: Records

- From any form, click the Context Menu and **Create Favorite**

CCSF Telecommute Agreements

Create Favorite

To edit your Favorites:

1. Maximize your Application Navigator and click the Favorites (Star) tab to view your list of Favorites.

2. Click **Edit Favorites** on the bottom right of the Application Navigator.

3. Click any Favorite to open the **Set up your favorites** window to the right.

4. Rename your Favorite.

5. Change the icon color that appears in the Favorites list.

6. Change the icon that appears in the Favorites list.

7. Preview how your edited Favorite will appear in the Favorites list.

8. Optionally, **Remove from Favorites** to remove a Favorite from your list.

9. To close the edit panel, click **Done.**

Hint: For a quicker way to remove a Module or Application from your Favorites list, simply deselect the star icon to the right of any Application or Module in the Application Navigator.

Figure 57