Helsinki Now Platform User Interface

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docfeedback@servicenow.com
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<td>ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.</td>
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Now Platform User Interface

The user interface (UI) is the main way to interact with the applications and information in a ServiceNow instance.

The following video provides more information on the user interface:

The following versions of the user interface are available. Each new version is intended to provide an updated look and usability improvements.

UI16

The UI16 interface provides an updated look and usability improvements. Notable features include real-time form updates, user presence, a redesigned application navigator with tabs for favorites and history, and enhanced activity streams. UI16 is the default user interface for new instances. For upgraded instances, an administrator must activate UI16.
Figure 1: UI16 user interface
UI15

Features introduced in the UI15 interface included redesigned icons, the ability to specify when related lists load with a form, other new options on the system menu, and form personalization.

Figure 2: UI15 user interface

UI11

UI11 builds on the classic user interface by adding the Edge and several features including split screen, bookmarks, and flyout windows. UI11 is activated but disabled by default.
### Figure 3: UI11 user interface

### Table 1: User interface components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner frame</td>
<td>Runs across the top of every page and contains a logo, global navigation controls, and tools. See <a href="#">UI16 banner frame</a>, <a href="#">UI15 banner frame</a>, or <a href="#">UI11 banner frame</a>.</td>
</tr>
<tr>
<td>Application navigator</td>
<td>Also called the left-navigation bar. Provides links to all applications and modules. See <a href="#">UI16 application navigator</a>, <a href="#">UI15 application navigator</a>, <a href="#">UI11 application navigator</a>.</td>
</tr>
<tr>
<td>Content frame</td>
<td>Displays information such as lists, forms, homepages, and wizards.</td>
</tr>
<tr>
<td>The Edge</td>
<td>A toolbar on the left side of the UI15 and UI11 interfaces that provides quick links to commonly used features. See <a href="#">The Edge</a>.</td>
</tr>
<tr>
<td></td>
<td>In UI16, the Favorites tab of the application navigator, represented by a star, replaces the Edge. The collapsed view of the UI16 application navigator is similar to the Edge.</td>
</tr>
</tbody>
</table>
Activate UI16

UI16 is the default user interface for new instances. For upgraded instances, you can activate the UI16 plugin (com.glide.ui.ui16) if you have the admin role.

Confirm that the instance upgrade completed successfully by visiting the upgrade monitor.

Role required: admin

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   
   If the plugin depends on other plugins, these plugins are listed along with their activation status.

   If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.

4. If available, select the Load demo data check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance.

   You can also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.

5. Click Activate.

Logging in

Each ServiceNow instance has a unique, secure web address. The base URL for each instance has the default format: https://<instancename>.service-now.com

Role required: none

Users log in to the instance from a web browser.

Note: ServiceNow does not support any methodologies before the London release to associate a custom or vanity URL. If you have a custom or vanity URL associated with an instance prior to the London release, ServiceNow recommends also providing users with the default URL. Users can access the ServiceNow instance if any issues arise from a non-supported custom URL configuration.

1. Enter the base URL in any web browser.
   
   • If your system uses external authentication, you are automatically logged in. For example, you may log in to company services when you log in to your computer.
   
   • If your system does not use external authentication, the Welcome page appears.

2. Enter your user name and password.
3. Select the Remember Me check box to remain logged in until you manually log out.
   The administrator can enable or disable this option. For more information, see Change settings for the Remember me check box and cookie.

4. Press the Enter key or click Login.
View or update your user profile

All users can enter personal information and adjust preferences in their user profile. Notification preferences can be enabled and disabled.

Role required: none

Users can add business and mobile phone information, and set their notification, date format, and time zone preferences. They can also set notification preferences.

1. Navigate to Self-Service My Profile.
   You can also click your name in the banner and select Profile.
2. Enter or update information, such as your business or mobile phone numbers.
3. To update preferences, perform any of the following steps.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change how dates display</td>
<td>Select the desired format from the Date format choice list.</td>
</tr>
<tr>
<td>Change your time zone</td>
<td>Select it from the Time zone choice list.</td>
</tr>
</tbody>
</table>

4. To review and change notifications, click the Notification Preferences related link.
   Notification categories appear on the left, with All Notifications selected. The list of all notifications appears; a notification is enabled when the switch appears green and is toggled to the right. The notification preferences that appear and are enabled are based on the groups you belong to or for other reasons. You can select a category to filter the list, or search for a category by keyword using the search box above the list.

5. Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To disable a notification</td>
<td>Move the slider to the left.</td>
</tr>
<tr>
<td>Enable a notification that is off</td>
<td>Move the slider to the right.</td>
</tr>
<tr>
<td>Set or modify the filter for the notification</td>
<td>Click Edit beside the notification name. In the popup window, select the Advanced filter check box, add filter conditions, and then click Submit.</td>
</tr>
</tbody>
</table>

6. If you enabled or disabled preferences, navigate away from the Notification Preferences page to save the changes.
7. If you made changes to your profile, click Update.

Generally supported browsers

Browser support varies for each version of the user interface (UI). Most major browsers are supported.

Some features have additional browser requirements, which are noted in the appropriate documentation. Browser versions listed in the following table are the latest public release at the time of testing.
### Table 2: Browser support for each UI version

<table>
<thead>
<tr>
<th>UI version</th>
<th>Chrome support</th>
<th>Firefox support</th>
<th>Internet Explorer support</th>
<th>Microsoft Edge support</th>
<th>Safari support</th>
<th>Tablet mobile browser</th>
<th>Phone mobile browser*</th>
</tr>
</thead>
<tbody>
<tr>
<td>UI16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9.1 and up</td>
<td>Supported</td>
<td>Not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9 and up</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UI15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9.1 and up</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9 and up</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UI11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9.1 and up</td>
<td>Limited support</td>
<td>Limited support</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9 and up</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Mobile phone browsers do not support the desktop version of the UI. Instead, mobile browsers use the [mobile browser UI](#).

### Internet Explorer web browser notes

**Important:** Due to significant performance issues, ServiceNow recommends that customers utilize a modern browser for its products and migrate away from Internet Explorer 11. For more information, refer to [KB0883275](#).

- Internet Explorer 11 is susceptible to memory leaks, which may impact performance, especially in Windows 7.
- Compatibility mode is not supported.
- Setting Security Mode to High (via Internet Options Security tab) is not supported.
- While UI16 and UI15 are supported on Internet Explorer 9, the browser may be slow when performing some operations. This slowdown does not necessarily indicate a performance degradation in the instance.

### Safari notes

- There is a security issue in some versions of Safari. User credentials may be disclosed to an unexpected site via auto-fill. For more information, see the [Apple security update](#).
- Starting with Safari 9.1 and future versions of Safari, the leave page / stay on page pop-up message only displays once.

### Switch between UI16 and UI15

You can switch between the UI16 and UI15 user interface versions.
Role required: admin

After UI16 is activated, all users see the enhanced UI16 user interface. By default, administrators see a button at the top of the System Settings window that lets them switch between UI16 and UI15. The administrator can add a system property to configure other roles that see the button.

1. Click the gear icon (⚙️) in the banner frame to open the System Settings window.
2. Click Switch to UI15 or Switch to UI16.

   The button that displays is based on which UI version you are using when you open System Settings.

   The application refreshes with the selected UI. Your homepage appears in the content frame. You can access your favorites on the Edge (UI15) or in the favorites tab of the application navigator (UI16).

Comparison of UI16 and UI15 styles

Review the basic style differences between UI16 and UI15 styles in the ServiceNow platform.

Banner frame comparison

In UI16, the banner information and controls are in different places. The search box in the UI16 header opens when you select it. The help icon is available from the banner frame, instead of being accessed from the Settings menu. Because the UI16 banner is narrower, there is no control to collapse it.

For more information about the UI16 changes, see UI16 banner frame.
Application navigator

In UI16, modules that you select are not automatically marked as favorites as illustrated by the blue stars in the UI15 image. Any menu or module can be marked as a favorite, and it appears when you click the Favorites tab represented by the star. The other tab displays items you recently accessed.

For more information, see [UI16 application navigator](#). The navigation filter works the same in both UI versions, by entering text in the navigation filter to show matching applications, modules, and favorites.

Another difference in the UI16 navigator menu is that you can no longer right-click an application menu name to edit the application menu. Navigate to **System Definition Application Menus** to add or modify modules.

The Edge

The Edge in UI15 is replaced in UI16 by the Favorites tab, represented by the star. Any item you could place on the Edge can be marked as a favorite. When you switch to UI16, all bookmarks on the edge are migrated to favorites and are listed on the Favorites tab. For more information, see [Add or edit favorites in UI16](#). The List and Form View option is no longer available in UI16.
System settings

UI16 System Settings appear in a pop-up window with subtabs to make it easier to update your settings. The Split Layout setting available in UI15 was removed. For more information, see [UI16 banner frame](#).

<table>
<thead>
<tr>
<th>General</th>
<th>Accessibility enabled</th>
<th>Compact the user interface</th>
<th>Compact list date/time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Home</td>
<td>Homepages</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Dashboards</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data/Time</td>
<td>Calendar</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Time Ago</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time zone</td>
<td>America/Los_Angeles</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Printer friendly version</td>
<td></td>
</tr>
</tbody>
</table>

Figure 5: UI16 System Settings

Basic configuration and the company logo

As the banner size and color scheme has changed significantly in UI16, there is a set of system properties for UI16 to set up your logo and branding before you switch to UI16. For more information, see [Configure logo, colors, and system defaults for UI16](#).

The banner in which your logo appears is narrow, and your logo image is scaled based on the aspect ratio. A wider image scales better than a smaller one and is more readable, as in the following example. It is also recommended that you create a logo image with a transparent background.
Configure roles allowed to switch between UI16 and UI15

After you enable UI16, users with the admin role see a button in the System Settings window that allows them to switch between UI16 and UI15. You can add a system property to configure other roles that are allowed to switch UI versions.

Role required: admin

You may need to allow users who develop or configure applications to view the changes in both versions of the user interface. You list the roles in the new system property, and users with one of the roles see the switch button at the top of the System Settings window.

1. **Add a new system property** with the following field values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>glide.ui.ui15_switch_roles</td>
</tr>
<tr>
<td>Type</td>
<td>string</td>
</tr>
<tr>
<td>Value</td>
<td>Enter a comma-separated list of roles that are allowed to switch between UI16 and UI15. If you set the value to Public, all users will be able to switch between the UI versions.</td>
</tr>
</tbody>
</table>

2. Click Submit.

Test the new system property by impersonating a user with one of the roles and verifying that the switch button appears when the user opens the System Settings window.

Switch between UI15 and UI11

You can disable UI15, which reverts the user interface to UI11.

If UI16 is enabled, you must first switch to UI15.

Role required: admin

1. Enter sys_properties.list in the navigation filter and press the Enter key.
2. Locate the glide.ui.doctype property in the System Properties list.
   The property is set to true by default, which enables UI15.
3. Set the property Value to false.
4. Log out and back in.
   This disables UI15 for the instance. The interface reverts to UI11 in individual user sessions when each user logs out and logs back in.
Installed components for UI plugins

The following components are added with the user interface plugins.

Tables

Table 3: User interface tables

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bookmarks (sys_ui_bookmark)</td>
<td>Stores user bookmarks and preferences. To access, navigate to System Definition Bookmarks.</td>
</tr>
</tbody>
</table>

Properties

Table 4: User interface properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.ui.allow_ie_compatibility_mode</td>
<td>In many cases, Internet Explorer is configured to use compatibility mode when viewing ServiceNow. However, UI15 does not display when compatibility mode is turned on. When this property is set to false, the system does not allow use of compatibility mode on UI15 pages. The default value for this property is false.</td>
</tr>
<tr>
<td>glide.ui.doctype</td>
<td>Enables or disables the UI15 interface. The default value for this property is true. After enabling or disabling this property, the administrator must log out and log back in to effect the change in the instance. When users log out and log back in, they see the change in their individual user sessions.</td>
</tr>
<tr>
<td>glide.ui.doctype.ie_version</td>
<td>Sets the minimum version of Internet Explorer required to use UI15. The default value for this property is 9. It is recommended that you do not change this value.</td>
</tr>
</tbody>
</table>

User preferences

Table 5: User interface user preferences

<table>
<thead>
<tr>
<th>User Preference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.ui.navpage_state</td>
<td>Do not edit this preference; system record of a user’s UI11 configuration.</td>
</tr>
<tr>
<td>ng.navigator_preference</td>
<td>Stores a user’s selected application navigator favorites in UI15.</td>
</tr>
</tbody>
</table>
User Preference | Description
--- | ---
glide.ui.field_style_circles | Shows field status indicators on lists as circles instead of cell backgrounds. The system administrator can set this preference for new logins. Users can make this change by navigating to a list, clicking the personalize list icon ( ), and selecting the Modern cell coloring check box.

Keyboard shortcuts

You can use keyboard shortcuts to quickly perform common actions in the user interface.

*Access keys* depend on the browser and operating system you are using. Available keyboard shortcuts are based on the UI version.

Table 6: UI16 keyboard shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Windows keyboard shortcut</th>
<th>Mac keyboard shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate global search field</td>
<td>Access key + Ctrl + G</td>
<td>Access key + G</td>
</tr>
<tr>
<td>Toggle application navigator</td>
<td>Access key + Ctrl + C</td>
<td>Access key + C</td>
</tr>
<tr>
<td>Activate navigation filter field</td>
<td>Access key + Ctrl + F</td>
<td>Access key + F</td>
</tr>
<tr>
<td>Impersonate user</td>
<td>Access key + Ctrl + I</td>
<td>Access key + I</td>
</tr>
</tbody>
</table>

Table 7: UI15 and UI11 keyboard shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Keyboard shortcut</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate global search field</td>
<td>Access key + S</td>
<td></td>
</tr>
<tr>
<td>Toggle banner frame</td>
<td>Access key + B</td>
<td>Ensure that the page focus is on the content frame</td>
</tr>
<tr>
<td>Toggle application navigator</td>
<td>Access key + N</td>
<td></td>
</tr>
<tr>
<td>Activate navigation filter field</td>
<td>Access key + F</td>
<td></td>
</tr>
<tr>
<td>Toggle list and form view</td>
<td>Access key + V</td>
<td></td>
</tr>
<tr>
<td>Toggle horizontal split</td>
<td>Access key + H</td>
<td></td>
</tr>
<tr>
<td>Maximize the current pane</td>
<td>Access key + M</td>
<td></td>
</tr>
<tr>
<td>Send email</td>
<td>Access key + S</td>
<td></td>
</tr>
<tr>
<td>Submit form</td>
<td>Enter</td>
<td></td>
</tr>
</tbody>
</table>

UI16 banner frame

The banner frame runs across the top of every page.

The banner frame for UI16 contains a logo and the following information, controls, and tools. To configure the banner frame logo, text, and colors, see *Configure logo, colors, and system defaults for UI16*. 
Table 8: UI16 banner frame controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User menu</td>
<td>Provides access to the following options:</td>
</tr>
<tr>
<td></td>
<td>• Profile: Opens your user profile, where you can edit personal details and customize your notification preferences.</td>
</tr>
<tr>
<td></td>
<td>• Impersonate User: Allows users with the impersonator role to switch user views without logging out; useful for testing security and role-specific setup functions.</td>
</tr>
<tr>
<td></td>
<td>• Elevate Roles: Allows users with elevated privilege roles to elevate to a higher security role when needed and then return to their normal role.</td>
</tr>
<tr>
<td></td>
<td>• Logout: Returns to the Welcome page for subsequent login.</td>
</tr>
<tr>
<td>Connect sidebar icon (</td>
<td>Opens the Connect sidebar to begin or continue conversations. This icon is available if Connect is enabled.</td>
</tr>
<tr>
<td>Global text search icon (</td>
<td>Global text search finds records from multiple tables.</td>
</tr>
<tr>
<td>Help icon (</td>
<td>Provides options to tour what is new in UI16 and to open the User Guide or Product Documentation.</td>
</tr>
<tr>
<td></td>
<td>• What’s New: Opens a short slide show that highlights new UI16 features.</td>
</tr>
<tr>
<td></td>
<td>• User Guide: Opens the user guide, an in-product set of documents designed to introduce users to the platform. This option is available if the User Guide plugin is activated.</td>
</tr>
<tr>
<td></td>
<td>• Search Documentation: Opens the official ServiceNow product documentation.</td>
</tr>
<tr>
<td>Gear icon (</td>
<td>Displays the system menu with additional settings and controls.</td>
</tr>
</tbody>
</table>

The gear icon, located within the banner frame, displays the system settings pop-up window. The system settings are organized by tab. At the top, administrators (admin role) see the Switch to UI15 button if UI16 is activated.

Table 9: System settings

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General tab</td>
<td></td>
</tr>
<tr>
<td>Accessibility enabled</td>
<td>Section 508 accessibility features are activated when this setting is enabled.</td>
</tr>
<tr>
<td>Compact the user interface</td>
<td>The UI is optimized to display more information in the browser window when this setting is enabled.</td>
</tr>
<tr>
<td>Control</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Compact list date/time</td>
<td>Date and time values appear in a compact format when this setting is enabled. The year is not shown for date values within the current year, and seconds are not shown for time values. This setting is not available if the Date/Time selection is Time Ago.</td>
</tr>
<tr>
<td>Home</td>
<td>Determines whether the Home module opens Homepages or Dashboards. The user must have the pa观众 role to see this setting.</td>
</tr>
<tr>
<td>Date/Time</td>
<td>The format in which dates and times appear depends on this setting. Select Calendar (for example, 2015-11-13, 15:58:58), Time Ago (for example, 11 minutes ago), or Both.</td>
</tr>
<tr>
<td>Language</td>
<td>Select a language or return to the default language ( ). This setting is available if a language plugin is activated.</td>
</tr>
<tr>
<td>Time zone</td>
<td>Select a time zone or return to the default time zone for the current session. Upon the next login, the time zone will revert to the system default or user profile setting for time zone, if present. ( ).</td>
</tr>
<tr>
<td>Domain</td>
<td>Specifies the currently selected domain for organizations that are using domain separation. The user must have the domain_admin or admin role to see this setting.</td>
</tr>
<tr>
<td>Show domain picker in header</td>
<td>Places a domain picker in the banner frame, next to the user menu, when this setting is enabled.</td>
</tr>
<tr>
<td>Printer friendly version (  )</td>
<td>Opens a printer friendly version of the current content frame.</td>
</tr>
<tr>
<td>Theme tab</td>
<td></td>
</tr>
<tr>
<td>Theme</td>
<td>Select a theme for the user interface. Select the System theme to return to the default theme.</td>
</tr>
<tr>
<td>Lists tab</td>
<td></td>
</tr>
<tr>
<td>Wrap longer text in list columns</td>
<td>Long strings wrap in list columns instead of appearing as one long line when this setting is enabled.</td>
</tr>
<tr>
<td>Striped Table Rows</td>
<td>List v3 rows alternate between contrasting shades of gray when this setting is enabled. This setting is available if List v3 is activated.</td>
</tr>
<tr>
<td>Modern Cell Styles</td>
<td>List field status indicators use modern cell styles when this setting is enabled. This setting is available if List v3 is activated, though it applies to v2 lists as well.</td>
</tr>
<tr>
<td>Forms tab</td>
<td></td>
</tr>
<tr>
<td>Tabbed forms</td>
<td>Form sections and related lists appear in tabs when this setting is enabled.</td>
</tr>
<tr>
<td>Related list loading</td>
<td>Determines when related lists load on forms. This setting applies only when List v3 is disabled for related lists. For more information, see Configure when a related list loads.</td>
</tr>
<tr>
<td>Control</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Notifications tab</strong></td>
<td></td>
</tr>
<tr>
<td>Connect mobile notifications</td>
<td>Users can receive Connect notifications on mobile devices when this setting is enabled. This setting is available if Connect is enabled.</td>
</tr>
<tr>
<td>Connect desktop notifications</td>
<td>Users can receive Connect desktop notifications when this setting is enabled. This setting is available if Connect is enabled.</td>
</tr>
<tr>
<td>Connect email notifications</td>
<td>Users can receive Connect email notifications when this setting is enabled. This setting is available if Connect is enabled.</td>
</tr>
<tr>
<td>Connect audio notifications</td>
<td>Users can receive Connect audio notifications when this setting is enabled. This setting is available if Connect is enabled.</td>
</tr>
<tr>
<td><strong>Developer tab</strong></td>
<td></td>
</tr>
<tr>
<td>Application</td>
<td>(Administrators only) Provides a link to the application picker, the Applications list ( ), and the currently selected application ( ).</td>
</tr>
<tr>
<td>Show application picker in header</td>
<td>Places an application picker in the banner frame, next to the user menu, when this setting is enabled.</td>
</tr>
<tr>
<td>Update Set</td>
<td>(Administrators only) Provides a link to the Update Sets list, the Update Set picker, and the currently selected update set.</td>
</tr>
<tr>
<td>Show update set picker in header</td>
<td>Places the update set picker in the banner frame, next to the user menu, when this setting is enabled.</td>
</tr>
<tr>
<td>JavaScript Log and Field Watcher</td>
<td>(Administrators only) Opens the client-side <a href="http://www.sciencedirect.com">JavaScript Debug window</a>.</td>
</tr>
</tbody>
</table>
The banner frame runs across the top of every page.

The banner frame for UI15 contains a logo and the following information, controls, and tools.

Table 10: UI15 banner frame controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome message</td>
<td>Shows the name of the current user and provides a link to the user’s profile.</td>
</tr>
<tr>
<td>Impersonation key icon</td>
<td>(Administrators only) Allows the administrator to switch user views without logging out; useful for testing security and role-specific setup functions.</td>
</tr>
<tr>
<td>Elevate privileges icon</td>
<td>(Elevated privilege roles only) Allows the user to elevate to a higher security role when needed and then return to their normal role.</td>
</tr>
<tr>
<td>Control</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Global text search icon (🔍)</td>
<td><em>Global text search finds records from multiple tables.</em></td>
</tr>
<tr>
<td>Collapse/Expand banner icon (🔍/🔍)</td>
<td>Alters the amount of space the banner frame occupies.</td>
</tr>
<tr>
<td>Logout</td>
<td>Returns to the Welcome page for subsequent login.</td>
</tr>
<tr>
<td>Gear icon (⚙️)</td>
<td>Displays the system menu with additional settings and controls.</td>
</tr>
</tbody>
</table>

The gear icon, located within the banner frame, displays the system menu.

Table 11: System menu controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>What’s new</td>
<td>Opens a slideshow of UI15 highlights.</td>
</tr>
<tr>
<td>Help icon (❓)</td>
<td>Opens the ServiceNow Wiki in another window or tab.</td>
</tr>
<tr>
<td>Home icon (🏠)</td>
<td>Provides links to available <a href="#">application homepages</a>.</td>
</tr>
<tr>
<td>Wrap Longer Text in List Columns</td>
<td>Long strings wrap in list columns instead of appearing as one long line when this setting is enabled.</td>
</tr>
<tr>
<td>Compact View</td>
<td>The UI is optimized to display more information in the browser window when this setting is enabled.</td>
</tr>
<tr>
<td>Accessibility Enabled</td>
<td>Section 508 accessibility features are activated when this setting is enabled.</td>
</tr>
<tr>
<td>Tabbed forms</td>
<td>Form sections and related lists appear in tabs when this setting is enabled. This setting previously appeared as an icon in the form header.</td>
</tr>
<tr>
<td>Alt/⌘+Click Opens List Links in Form Pane</td>
<td>Pressing Alt (PC) or Command (Mac) and clicking the record name in a list, opens the record in a new form pane tab when this setting is enabled.</td>
</tr>
<tr>
<td>Date/Time</td>
<td>The format in which dates and times appear depends on this setting. Select Calendar (for example, 2014-11-13, 15:58:58), Time Ago (for example, 11 minutes ago), or Both.</td>
</tr>
<tr>
<td>Compact list date/time</td>
<td>Date and time values appear in a compact format when this setting is enabled. The year is not shown for date values within the current year, and seconds are not shown for time values. This setting is not available if the Date/Time selection is Time Ago.</td>
</tr>
<tr>
<td>Split Layout</td>
<td>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. Select None to disable the split layout.</td>
</tr>
<tr>
<td>Control</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Related List Loading</td>
<td>Determines when related lists load on forms. For more information, see Configure when a related list loads.</td>
</tr>
<tr>
<td>Application</td>
<td>(Administrators only) Provides a link to the Applications list, the application picker, and the currently selected application.</td>
</tr>
<tr>
<td>Update Set</td>
<td>(Administrators only) Provides a link to the Update Sets list, the Update Set picker, and the currently selected update set.</td>
</tr>
<tr>
<td>Language</td>
<td>Select a language or return to the default language. This option is available if a language plugin is activated.</td>
</tr>
<tr>
<td>Time zone</td>
<td>Select a time zone or return to the default time zone.</td>
</tr>
<tr>
<td>Theme</td>
<td>Select a theme for the user interface or return to the system theme.</td>
</tr>
<tr>
<td>Domain</td>
<td>Specifies the currently selected domain for organizations that are using domain separation. The user must have the domain admin role for this setting to appear.</td>
</tr>
<tr>
<td>Printer friendly version</td>
<td>Opens a printer friendly version of the current content frame.</td>
</tr>
<tr>
<td>JavaScript Log and Field Watcher</td>
<td>(Administrators only) Opens the client-side JavaScript Debug window. This icon is commonly called the debug icon.</td>
</tr>
</tbody>
</table>
Figure 9: System menu
UI11 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 frame.

Figure 10: UI11 banner frame

The UI11 banner frame contains the following information, controls, and tools.

Table 12: UI11 banner frame controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome message</td>
<td>Shows the name of the current user and provides a link to the user’s profile.</td>
</tr>
<tr>
<td>Impersonation key icon (   )</td>
<td>(Administrators only) Allows the administrator to switch user views without logging out. This is useful for testing security and role-specific setup functions.</td>
</tr>
<tr>
<td>Elevate privileges icon (   )</td>
<td>(Administrators only) Allows the user to elevate to a higher security role when needed and then return to their normal role.</td>
</tr>
<tr>
<td>Global text search icon (   )</td>
<td>Global text search finds records from multiple tables.</td>
</tr>
<tr>
<td>Collapse/expand banner icon ( / )</td>
<td>Alters the amount of space the banner frame occupies.</td>
</tr>
<tr>
<td>Logout</td>
<td>Returns to the Welcome page for subsequent login.</td>
</tr>
<tr>
<td>Homepage icon (   )</td>
<td>Provides links to selectable application homepages.</td>
</tr>
<tr>
<td>Printer friendly version icon ( )</td>
<td>Opens a printable version of the current content frame.</td>
</tr>
<tr>
<td>Help icon (   )</td>
<td>Opens the ServiceNow Wiki in another window or tab.</td>
</tr>
<tr>
<td>JavaScript Debugger window icon ( )</td>
<td>(Administrators only) Opens the client-side JavaScript Debug window. This icon is commonly called the debug icon.</td>
</tr>
</tbody>
</table>

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.

The Edge

The Edge is a toolbar on the left side of the screen which provides quick access to features such as bookmarks and flyout windows.
The Edge is available in UI15 and UI11. The collapsed view of the UI16 application navigator is similar to the Edge.

**UI15 Edge buttons**

In UI15, the Edge provides the following buttons.

![Figure 11: UI15 Edge](image)

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toggle navigator</td>
<td>Shows or hides the application navigator.</td>
</tr>
<tr>
<td>List and form view</td>
<td>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 pane horizontally, click the gear icon in the banner frame and then click Split Layout Horizontal.</td>
</tr>
<tr>
<td>Tagged documents</td>
<td>Displays the <a href="#">Tagged Documents</a> page.</td>
</tr>
<tr>
<td>All bookmarks</td>
<td>Provides a list of all bookmarks in the Edge. Users can create, customize, and delete bookmarks. For more information, see <a href="#">Bookmarks</a>.</td>
</tr>
<tr>
<td>Bookmark and pane-based UI help</td>
<td>Displays the Edge help window.</td>
</tr>
</tbody>
</table>

**UI11 Edge buttons**

In UI11, the Edge provides the following buttons.
Table 14: UI11 Edge buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toggle navigator</td>
<td>Shows or hides the application navigator.</td>
</tr>
<tr>
<td>Toggle banner</td>
<td>Shows or hides the banner frame.</td>
</tr>
<tr>
<td>Toggle vertical split form pane</td>
<td>Splits the content frame into two panes, with the list pane on the left and the form pane on the right.</td>
</tr>
<tr>
<td>Toggle horizontal split form pane</td>
<td>Splits the content frame into two panes, with the list pane on the top and the form pane on the bottom.</td>
</tr>
<tr>
<td>All bookmarks</td>
<td>Provides a list of all bookmarks in the Edge. Users can create, customize, and delete bookmarks. For more information, see Bookmarks.</td>
</tr>
<tr>
<td>Bookmark and pane-based UI help</td>
<td>Displays the Edge help window.</td>
</tr>
</tbody>
</table>

Bookmarks

A bookmark is a link to information in the ServiceNow system, such as a record or a module, that is stored on the Edge.

All users create and manage their own bookmarks.

Bookmarks are available in UI15 and UI11. Favorites replace bookmarks in UI16. For more information, see Add or edit favorites in UI16.

Create a bookmark

You can create bookmarks by dragging links to the Edge.

Role required: none

You can create a bookmark from any of the following links:

- Modules in the application navigator
- Breadcrumbs
- Links in lists (including lists displayed in flyouts)
- Reports
Note: You may not be able to create bookmarks with other types of links. To request this functionality for another type of link, you can log an enhancement request with the ServiceNow customer support system.

Drag a link to the Edge.
The bookmark for the link appears on the Edge. Each bookmark includes an image and a title, both of which can be customized.

Customize a bookmark
You can customize bookmark appearance and behavior.
Role required: none

1. Open the bookmark settings window from any of the following locations in the interface.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bookmark tooltip</td>
<td>1. Point to the bookmark in the Edge.</td>
</tr>
<tr>
<td></td>
<td>2. In the tooltip window, click Edit Bookmark.</td>
</tr>
<tr>
<td>Bookmarks list</td>
<td>1. Point to the all bookmarks icon in the Edge.</td>
</tr>
<tr>
<td></td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>UI15: All Bookmarks</td>
</tr>
<tr>
<td></td>
<td>•</td>
</tr>
<tr>
<td></td>
<td>UI11: All Bookmarks</td>
</tr>
<tr>
<td></td>
<td>2. Point to a bookmark in the list.</td>
</tr>
<tr>
<td></td>
<td>3. Click the edit bookmark icon ( ) by the bookmark name.</td>
</tr>
<tr>
<td>Bookmark flyout</td>
<td>1. Open a flyout bookmark.</td>
</tr>
<tr>
<td></td>
<td>2. Click the edit bookmark icon in the corner of the flyout.</td>
</tr>
</tbody>
</table>

2. Enter a Title.
3. To open the bookmark link in a flyout window, select the Flyout check box and clear the Open in form pane check box.
   By default, the bookmark opens in the content pane. Selecting Flyout opens a window on top of the current screen without navigating away from your working panes.

Note: Homepages that are set to refresh automatically should not be added as flyout bookmarks. These homepages refresh in the background, which can slow down performance for you and other users.

4. Select the Show on edge check box to display the bookmark as a button on the Edge. Clear the check box to remove the button from the Edge; the bookmark still appears in the bookmark list.
5. To change the bookmark image, click Image and then select from the list of available images.
6. Click Update.
Open a bookmark

When you open a bookmark, it appears in the content pane or as a flyout.

Role required: none

Open a bookmark in one of the following ways.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the bookmark as defined in the bookmark settings</td>
<td>Click the bookmark</td>
</tr>
<tr>
<td>Open the bookmark in a flyout</td>
<td>Hold Ctrl (Windows) or Command (Mac) and click the bookmark</td>
</tr>
<tr>
<td>Open the bookmark in the content pane</td>
<td>Hold Shift and click the bookmark</td>
</tr>
</tbody>
</table>

Delete a bookmark

You can delete a bookmark.

Role required: none

When you delete a bookmark, it is removed from the Edge.

Delete the bookmark from either of the following locations in the interface.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Bookmark tooltip | 1. Point to the bookmark in the Edge.  
2. In the tooltip window, click Edit Bookmark.  
3. In the edit bookmark window, click Delete. |
| Bookmarks list | 1. Point to the all bookmarks icon in the Edge.  
2. Point to a bookmark in the list.  
3. Click the remove bookmark icon (Trash) by the bookmark name. |

Application navigator

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

An application is a group of modules, or pages, that provide related information and functionality in an 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.
In UI16, the application navigator also provides access to favorites and recently viewed items. Administrators can customize the application navigator to provide different modules by user role, modify or define applications and modules, and change its appearance.

The following video provides more information on the application navigator:

**UI16 application navigator**

The UI16 application navigator appears at the left of the interface and provides access to all available applications and modules, favorites, and recently viewed items.

Use the application navigator to quickly find information and services.

The application navigator consists of a navigation filter and the following tabs.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All applications</td>
<td>Displays all application menus 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.</td>
</tr>
</tbody>
</table>

![Figure 13: All applications tab](image)
<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorites</td>
<td>Displays items you have added as favorites. If you upgrade to UI16 from a previous interface, any bookmarks you created are automatically converted to favorites.</td>
</tr>
</tbody>
</table>

![Favorites tab](image)

Figure 14: Favorites tab
Enter text in the navigation filter to show matching applications, modules, and favorites. Matching favorites appear at the top of the results. You can also use the navigation filter to quickly access a specific table. For more information, see [Navigate directly to a table](#).

**Collapse or expand information in the UI16 application navigator**

You can collapse or expand information in the application navigator to display only what you want to see.

**Role required:** none

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse or expand an application or application section</td>
<td>Click the application or application section label.</td>
</tr>
<tr>
<td>Collapse or expand all applications</td>
<td>Double-click the all applications tab icon (🗑️).</td>
</tr>
</tbody>
</table>
Add or edit favorites in UI16

You can add, edit, or delete favorites for frequently accessed items in the application navigator.

Role required: none

Items you add as favorites appear in the favorites tab of the application navigator, which is represented by a star icon.
Add a favorite in one of the following ways.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a module as a favorite</td>
<td>In the application navigator, click the star icon by a module.</td>
</tr>
<tr>
<td>Add all the modules under an application as favorites</td>
<td>In the application navigator, click the star icon by an application.</td>
</tr>
<tr>
<td>Add a list as a favorite using the list context menu</td>
<td>1. Open a list.</td>
</tr>
<tr>
<td></td>
<td>2. Click the list context menu icon ( ) by the list title.</td>
</tr>
<tr>
<td></td>
<td>3. Select Create Favorite.</td>
</tr>
<tr>
<td></td>
<td>4. In the flyout, edit the name and icon as needed.</td>
</tr>
<tr>
<td>Add a list as a favorite by dragging and dropping</td>
<td>1. Open a list.</td>
</tr>
<tr>
<td></td>
<td>2. Drag a breadcrumb to the favorites tab of the application navigator.</td>
</tr>
</tbody>
</table>

Note: Any bookmarks you created in a previous version of the UI are automatically converted to UI16 favorites. However, UI15 favorites are not converted to UI16 favorites and must be recreated manually.
## Option Description

### Add a record as a favorite using the form context menu
1. Open a record.
2. Click the form context menu icon (⋮) by the form title.
3. Select Create Favorite.
4. In the flyout, edit the name and icon as needed.

### Add a record as a favorite by dragging and dropping
1. Open a record.
2. Drag the record title to the favorites tab of the application navigator.

### Add a different type of link as a favorite
Drag a supported link type to the favorites tab of the application navigator. You can drag any of the following links:
- Breadcrumbs
- Links in lists
- Reports

Note: You may not be able to create bookmarks with other types of links.

### Add a knowledge base article as a favorite
1. Open a knowledge article.
2. In the header at the top left, click the star icon.
3. In the Create Favorite dialog box, edit the name and icon as needed.
4. Click Done.

---

You can add a different favorite for each view of a list or form. The favorite is added to the favorites tab of the application navigator.

You can edit your favorites later.

## Edit favorites in the UI16 application navigator

You can edit or delete favorites in the UI16 application navigator.

Role required: none

1. In the application navigator, click the favorites tab, which is represented by a star.
2. Do one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reorder favorites in the list</td>
<td>1. At the bottom of the application navigator, click Edit Favorites.</td>
</tr>
<tr>
<td></td>
<td>2. Drag and drop a favorite to a new location in the list.</td>
</tr>
<tr>
<td></td>
<td>3. Click Done or Edit Favorites.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Customize the name or icon for a favorite | 1. At the bottom of the application navigator, click Edit Favorites.  
2. Click a favorite.  
3. Customize the name and icon as needed.  
4. Click Done or Edit Favorites. |
| Delete a favorite                    | 1. Point to the favorite.  
2. Click the remove favorite icon ( расположен в правом верхнем углу). |

View your navigation history

In UI16, you can view your navigation history in the application navigator.

Role required: none

Items you have accessed recently appear in the history tab of the application navigator, which is represented by a clock icon. Items appear in chronological order from most to least recently accessed.

Figure 16: History tab
History entries are stored on the Navigator History (sys_ui.navigator.history) table. The system creates history entries for many types of content, including lists, records, and homepages. Some content types are not tracked in the history, such as UI pages and other non-standard interfaces.

1. In the application navigator, click the history tab, which is represented by a clock.
2. Click an item to open it.

Configure the number of history entries displayed in the application navigator

A system property sets the maximum number of history entries displayed in the history tab of the application navigator.

Role required: admin

By default, the application navigator shows 30 history entries. You can configure the property to change this value.

1. Navigate to sys_properties.list.
2. Locate the glide.ui.nav.history_length property.
3. Edit the property Value.

UI15 application navigator

The application navigator appears at the left of the interface and provides access to all available 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.
Enter text in the navigation filter to show matching applications and modules. You can also use the
navigation filter to quickly access a specific table. For more information, see Navigate directly to a table.

In the UI15 application navigator, a star appears by each module. For more information, see Use
favorites in UI15.

Collapse or expand information in the UI15 application navigator

You can collapse or expand information in the application navigator to display only what you want to see.

Role required: none

Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse or expand an application or application section</td>
<td>Click the application or application section label</td>
</tr>
<tr>
<td>Collapse all applications</td>
<td>Click the application menu icon and select Collapse All Applications</td>
</tr>
</tbody>
</table>
Option | Description
--- | ---
Expand all applications | Click the application menu icon and select Expand All Applications
Collapse or expand the application navigator | In the edge, click Toggle Navigator

Switch perspectives in the UI15 application navigator

You can switch role perspectives to show different views of the application navigator.

A perspective 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.

Note: Administrators can customize which perspectives are available and who can access them. For more information, see [Create or modify a menu list](#).

1. In the application navigator, click the menu icon ( ).
2. Select Roles.
   This option is available only if you have access to more than one role perspective.
3. Select a perspective.

Use favorites in UI15

In UI15 you can select modules as favorites to quickly filter out modules you do not use often.

Role required: none

Each module in the application navigator has a star icon to the left of the module name that can be selected ( ) or deselected ( ).

Note: If you upgrade to UI16, you must recreate any UI15 favorites manually.

1. Click the star icons to select and deselect modules as favorites.
2. Click the filter favorites icon ( ) next to the navigation filter to toggle between showing only the favorite modules and showing 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.

UI11 application navigator

The application navigator appears at the left of the interface and provides access to all available 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.
Enter text in the navigation filter to show matching applications and modules. You can also use the navigation filter to quickly access a specific table. For more information, see Navigate directly to a table.

In the UI11 application navigator, an icon appears by each module. Administrators can customize the icons.

**Collapse or expand information in the UI11 application navigator**

You can collapse or expand information in the application navigator to display only what you want to see.

Role required: none

You can collapse or expand information in the application navigator to display only what you want to see.

**Perform one of the following actions.**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse or expand an application or application section</td>
<td>Click the application or application section label</td>
</tr>
<tr>
<td>Collapse all applications</td>
<td>Click the collapse all applications icon (−)</td>
</tr>
<tr>
<td>Expand all applications</td>
<td>Click the expand all applications icon (+)</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Collapse or expand the application navigator</td>
<td>In the Edge, click the toggle navigator icon</td>
</tr>
</tbody>
</table>

Switch perspectives in the UI11 application navigator

You can switch role perspectives to show different views of the application navigator.

A perspective 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.

Note: Administrators can customize which perspectives are available and who can access them. For more information, see Create or modify a menu list.

1. In the application navigator, click the switch perspectives icon (🗑).
   This icon is available only if you have access to more than one perspective.
2. Select a perspective.

Module icons

Modules in the UI11 application navigator have icons in addition to names.

Administrators can modify the icons for existing modules and define icons for new modules.
Modify a module icon

You can modify the icon that represents a module in UI11.

Role required: admin

Note: If you change the icon for a base system module, your change is preserved during software updates.

1. Navigate to System Definition Modules.
2. Select the module for which you wish to modify the icon.
3. In the Image field, click the reference lookup icon (🔍).
4. Select the desired image file from the existing images.
5. Click Update.

Create a new module icon

You create your own image and use it as a module icon in UI11.

Role required: admin

1. Use a graphics software program to create an icon file with the following specifications.

<table>
<thead>
<tr>
<th>Size</th>
<th>16 x 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>File type</td>
<td>.png, .gif, or .jpg</td>
</tr>
</tbody>
</table>

2. Upload the new icon to the database.
3. In the application navigator, right-click the application name and select Edit Application.
4. Personalize the Modules related list to add the Image field.
5. Use the list editor to enter the file name (example, my_image.png).
Navigate directly to a table

You can use commands in the navigation filter to navigate directly to the list or form view of a table.

Role required: none

The commands work only for tables you are permitted to access.

1. In the navigation filter of the application navigator, enter one of the following commands.

<table>
<thead>
<tr>
<th>Command</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;table name&gt;.list</code></td>
<td>Opens the list view of the table in the same window or tab.</td>
</tr>
<tr>
<td><code>&lt;table name&gt;.LIST</code></td>
<td>Opens the list view of the table in a new window or tab.</td>
</tr>
<tr>
<td><code>&lt;table name&gt;.form</code> or <code>&lt;table name&gt;.do</code></td>
<td>Opens the form view of the table in the same window or tab.</td>
</tr>
<tr>
<td><code>&lt;table name&gt;.FORM</code></td>
<td>Opens the form view of the table in a new window or tab.</td>
</tr>
</tbody>
</table>

For example, enter `change_request.form` to open a new change request.

2. In UI16, press the Enter key.

Create or modify a menu list

In UI15 and UI11, it is possible to switch menu lists, providing different perspectives of the applications and modules. You can create or edit these menu lists using the Menu List table.

Role required: admin

Menu lists are not used in UI16.

1. Navigate to System UI Menu Lists.
2. Select a menu list to modify, or click New to create a new menu list.

   The applications that appear on the form are listed in the Applications field, one per line. Note that applications use the name of the application record, not the human-readable record that appears in the left navigation bar.

   The roles that are able to see the form are listed in the Roles field.
   - Specifying no roles will create a global menu list.
   - A menu list will display only the applications and modules the role has permissions to see.
   - If a role is specified to see a menu list, but role cannot view any of the applications within it, they will not see the menu list.

3. Adjust the information in the menu list as desired.
4. Click Update.

Enable or disable an application menu or module

You can enable (show) or disable (hide) an application menu or module in the application navigator.

Role required: admin

1. Navigate to System Definition Application Menus.
2. If you are enabling an application menu, click All in the breadcrumbs to display both active and inactive application menus (remove the default filter condition).

3. Click the desired title. The application menu record opens and the Modules related list shows the modules that appear in the application navigator.

4. Enable or disable the application menu and modules as desired.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Enable or disable a specific module in the application | 1. Double-click the Active field beside the module name in the Modules related list.  
2. Set Active to true (show) or false (hide). |
| Enable or disable multiple modules at the same time | 1. Select the check boxes next to the module names.                              
2. Select Change active state from the Actions choice list. |
| Enable or disable the entire application menu (for example, Incident or Service Catalog) | Select or clear the Active check box.                                       |
| Restrict the application menu to specific roles   | Use the Roles field.                                                        |

5. Click Update.

When you change application menus or modules, the application navigator automatically refreshes to display the changes.

Define a menu category in UI15

Menu categories allow administrators to change the appearance of application menu labels. Use menu categories to make certain application menus stand out.

Role required: admin

1. **Add a property** with the following specifications.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>glide.ui14.navigator.use_border_color</td>
</tr>
<tr>
<td>Type</td>
<td>true</td>
</tr>
<tr>
<td>Value</td>
<td>true</td>
</tr>
</tbody>
</table>

2. Navigate to System Definition Menu Categories.

3. Click New or open an existing menu category.

4. In the Style field, define the border-color using an HTML color name, hexadecimal (hex) value, or RGB color value. For example, enter border-color: blue.

5. Enter a Default order.

If you create an application without specifying an order, the default order of the category is used to determine the relative position in the application navigator.

Note: You may need to clear the instance cache and refresh the page after saving the menu category to see CSS changes.
Define a menu category in UI11

Menu categories allow administrators to change the appearance of application menu labels with CSS styles. Use styles to make certain application menus stand out.

Role required: admin

1. Navigate to System Definition Menu Categories.
2. Click New or open an existing menu category.
3. In the Style field, define CSS styles such as border-color, text color, and background-color. For example, enter border-color: blue; background-color: #e3f3ff; color: white.
4. Enter a Default order.

If you create an application without specifying an order, the default order of the category is used to determine the relative position in the application navigator.

---

Note: You may need to clear the instance cache and refresh the page after saving the menu category to see CSS changes.

Add an application menu to a category

There are two methods for adding an application menu to a category.

Role required: admin

---

Note: Menu categories are deprecated in UI16. The following procedure has no effect in UI16.

Use one of the following methods to add an application menu to a menu category.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| In the menu category record, add the application menu to the Application Menus related list. | 1. Navigate to System Definition Menu Categories.
2. Open a menu category.
3. In the Application Menus related list, click Edit.
4. Use the slushbucket to add the application menu to the category.
5. Click Save. |

In the application menu record, enter the menu category in the Category field. | 1. Navigate to System Definition Application Menus.
2. Open an application menu.
3. In the Category field, select the menu category.
4. Click Submit. |

Create an application menu

Application menus define the main content that users can access in the application navigator. You can configure which applications appear in the application navigator.
Role required: admin
1. Navigate to System Definition Application Menus.
2. Click New.
3. Complete the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Defines the display name of the application menu.</td>
</tr>
<tr>
<td>Roles</td>
<td>Restricts access to the specified roles. All users can view the application menu when it is active.</td>
</tr>
<tr>
<td>Category</td>
<td>Specifies the menu category that defines the navigation menu style (default value is Custom Applications).</td>
</tr>
<tr>
<td>Hint</td>
<td>Defines the text that appears in a tooltip when a user points to this application menu.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate the application menu. Only active application menus appear in the application navigator.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide a more detailed explanation of what this application does.</td>
</tr>
<tr>
<td>Order</td>
<td>Defines the relative position of the application menu in the application navigator. If you do not specify an order, the default order of the menu category is used.</td>
</tr>
<tr>
<td>Default device type</td>
<td>This field is not used. You can define application menus for mobile devices in a separate table. See Define a new smartphone application menu.</td>
</tr>
</tbody>
</table>

Note: You may need to configure the form to see all fields.

4. Click Submit.
5. Create modules to appear in the application menu.
   Only application menus that contain modules appear in the application navigator.

   Note: You might need to configure the form to see all fields.

Create a module

Modules are the children, or the second tier navigation options to the applications in the application navigator. Modules often link to other pages or records in the platform. You can configure which modules appear in the application navigator using Application Menus module.

Role required: admin
1. Open the application menu record using one of the following methods.
   - Navigate to System Definition Application Menus and select the application menu from the list.
   - In UI15 or UI11, you can also right-click the application label in the application navigator and select Edit Application.
Figure 20: Two methods for creating a module

Make your life easier, create a dashboard!

Did you know you can create a dashboard version of this homepage? Dashboards are like homepages, but easier to use. Dashboards have a drag-and-drop canvas that lets you easily add, move, and resize widgets. You can also add multiple tabs. Flexible sharing lets any user view and collaborate on dashboards with you!

Don’t ask me again  Remind me later

Create dashboard version

Guided Setup
Guided Setup tools to help you set up ServiceNow

System Administration
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

SystemNow, Helsinki, Now Platform User Interface
2. Scroll down to the Modules related list and click New.
3. Define the module by completing the fields on the form.

Table 16: Module form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Defines the module name. Choose a title that clearly identifies the module.</td>
</tr>
<tr>
<td>Application menu</td>
<td>Specifies the name of the application menu under which the module appears.</td>
</tr>
<tr>
<td>Image</td>
<td>Specifies an icon to appear next to the module title in the navigator. Module images are supported in UI11 only. Favorites replace module images in UI16 and UI15.</td>
</tr>
<tr>
<td>Hint</td>
<td>Defines the tool tip that appears when a user points to the module name. Note: Module Hints are deprecated in UI16.</td>
</tr>
<tr>
<td>Visibility</td>
<td></td>
</tr>
<tr>
<td>Roles</td>
<td>Restricts module access to the specified roles. If this field is left blank, the module is visible to all users who have access to the application menu.</td>
</tr>
<tr>
<td>Active</td>
<td>Defines whether the module appears in the application navigator.</td>
</tr>
<tr>
<td>Override application menu roles</td>
<td>Allows users to access this module even if they do not have permission to view the containing application menu. Users must still meet the role requirements for this module.</td>
</tr>
<tr>
<td>Link Type</td>
<td></td>
</tr>
<tr>
<td>Link type</td>
<td>Specifies what type of link this module opens. You must specify additional information based on the link type. See Module link types.</td>
</tr>
<tr>
<td>Table</td>
<td>Specifies the table used by the module. Note: The list shows only tables and database views that are in the same scope as the module.</td>
</tr>
<tr>
<td>Order</td>
<td>Specifies the order in which the modules appear under the application.</td>
</tr>
</tbody>
</table>

Module link types

The Link type field on the Module form specifies what type of link the module opens.
<table>
<thead>
<tr>
<th>Link Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment</td>
<td>Links to the assessment-based survey you select in the Assessment reference field. See <a href="#">Create a survey module</a>.</td>
</tr>
<tr>
<td>Content Page</td>
<td>Displays the content page you select in the Content page reference field. See <a href="#">Create a content page</a>.</td>
</tr>
<tr>
<td>Documentation Link</td>
<td>Links to a documentation page and opens in a new tab or window. This link type is used with embedded metadata in documentation topics. To open an internal document from a module, use the URL (from Arguments) module link type.</td>
</tr>
<tr>
<td>Homepage</td>
<td>Displays the homepage you select in the Homepage reference field.</td>
</tr>
<tr>
<td>HTML (from Arguments)</td>
<td>Places HTML in the application navigator. This link type is used for more complicated links, where a flat URL is not customizable enough.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong></td>
</tr>
<tr>
<td></td>
<td>• The HTML (from Arguments) link type is supported in UI15 and UI11 only. In UI16, use the URL (from Arguments) link type instead.</td>
</tr>
<tr>
<td></td>
<td>• You must enter a value for the Arguments field.</td>
</tr>
<tr>
<td>List Filter</td>
<td>Displays an unpopulated list view for the table you select in the Table field. Allows users to specify a filter without loading the list first. Use the Filter field to define the default filter for the list. Use the View name field to specify a view.</td>
</tr>
<tr>
<td>List of Records</td>
<td>Displays the list view for the table you select in the Table field. Use the Filter field to define the default filter for the list. Use the View name field to specify a view.</td>
</tr>
<tr>
<td>Map Page</td>
<td>Displays the map page you select in the Map page reference field.</td>
</tr>
<tr>
<td>New Record</td>
<td>Displays a form for creating a new record in the table you select in the Table field. Use the View name field to specify a view. Use the Arguments field to apply a template. See <a href="#">Create a module for a template</a>.</td>
</tr>
<tr>
<td>Run a Report</td>
<td>Runs the saved report you select in the Report field.</td>
</tr>
<tr>
<td>Script (from Arguments)</td>
<td>Runs a script, as defined in the Arguments field.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must enter a value for the Arguments field.</td>
</tr>
<tr>
<td>Link Type</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Search Screen</td>
<td>Link that displays a blank form for searching records in the table. Use the View name field to specify a view.</td>
</tr>
<tr>
<td></td>
<td>Note: Use the parameter &amp;sysparm_result_view=view_name to define the view the results are rendered in.</td>
</tr>
<tr>
<td></td>
<td>Note: All searches use a (starts with) query to search for matching text. Other query types are not supported in search screens.</td>
</tr>
<tr>
<td>Separator</td>
<td>Creates a division between modules. Enter a name in the Title field to add a section name that users can collapse or expand.</td>
</tr>
<tr>
<td>Single Record</td>
<td>Displays a form for a single record on the table. Use the View name field to specify a view.</td>
</tr>
<tr>
<td>Survey</td>
<td>Links to the legacy survey you select in the Survey reference field. Use the Survey overwrite check box to determine whether the survey can be taken multiple times.</td>
</tr>
<tr>
<td></td>
<td>Note: The Survey link type is for use with legacy surveys only, which assessment-based surveys replace. Select the Assessment link type to link the module to an assessment-based survey.</td>
</tr>
<tr>
<td>Timeline Page</td>
<td>Displays the timeline page you select in the Timeline Page reference field. See Timeline pages.</td>
</tr>
<tr>
<td>URL (from Arguments)</td>
<td>Opens any URL, as defined in the Arguments field. (Optional) Use the Window name field to define a link that opens in a new window.</td>
</tr>
<tr>
<td></td>
<td>Note:</td>
</tr>
<tr>
<td></td>
<td>• For internal links, always use a relative link such as ./catalog_home.do? sysparm_view=catalog_default or catalog_home.do? sysparm_view=catalog_default. Do not use an absolute link to a ServiceNow instance. It creates problems when you move an update set from a development instance to a production instance because the URL still references the development instance.</td>
</tr>
<tr>
<td></td>
<td>• You must enter a value for the Arguments field.</td>
</tr>
</tbody>
</table>
Additional queries

For List of Records module link types, you can append additional queries to the module to further define the filter for the returned list.

For example, to filter active incidents that are assigned to the currently logged in user, use the following argument query:

```
active=true\^assigned_to=javascript:gs.user_id()
```

Example URL module that opens in a new window

You can configure a module to open an external URL in a new browser window.

Role required: admin

1. Open the application menu record using one of the following methods.
   - Navigate to System Definition Application Menus and select the application menu from the list.
   - Right-click the application label in the application navigator and select Edit Application. This is possible in UI15 and UI11 only.

2. Scroll down to the Modules related list and click New.
3. If the Window name field is not displayed, configure the form and add this field.
4. Select URL (from Arguments) from the Link type list.
5. Add the complete web address to the Arguments field.
6. Select an icon for the module in the Image field.
7. Enter _blank in the Window name field.
   
   If this field is empty, the page opens in the content frame, which is the default behavior.

Example URL module that opens a list with a custom filter URL

To create a module that opens a list with a custom filter, sort order, and grouping, use a link type of URL (from Arguments) and create a link to a custom URL.

Role required: admin

Use the following shortcut to determine the arguments for your custom URL.

1. Navigate to the list by URL, without loading it in the standard interface.
For example, navigate to the Incident list by entering `<base URL>/incident_list.do.

2. Apply the desired filter, sort order, and grouping.

3. Copy the resulting URL from the browser address bar.

For example, if you apply a filter of active=true with an ascending sort on priority, a descending sort on opened_on, and grouped by assignment_group, the address bar reads: incident_list.do?
sysparm_query=active=true^EQ^ORDERBYpriority^ORDERBYDESCopened_at^GROUPBYassignment_group

Note: Do not copy the base URL (the http://instance_name.service-now.com/ portion). Always use a relative link to prevent problems when you move an update set from a development instance to a production instance.

4. Define a module with a Link type of URL (from Arguments).

5. Paste the custom URL from step 3 into the Arguments field.

6. Click Submit.

The module now opens the custom list in the content frame.

URL schema

Users can navigate to a record or module directly by using a URL. This topic explains the URL schema by which the system renders pages.

The basic schema for a system URL is:


The URL schema consists of the following elements.

- **base URL:** unique, secure Web address for each instance. The default format is: https://<instancename>.service-now.com.

To display a custom base URL in email notifications, you can set the glide.email.override.url property. For more information, see Additional email properties.

- **nav_to.do?uri=** (optional): loads the page in the standard interface, with the banner frame on top and the application navigator on the left.

- **<page name>.do?:** where the page name is the form, list, UI page, or other page to open. To view a list, use <table name>_list.do.

- **sys_id=<sys_id>** (optional): where `<sys_id>` is the sys_id of the record to open in form view. To create a new record, specify a sys_id of -1.

- **<page parameters>** (optional): may specify a query, view, redirection page, and more. Sample parameters include the following.

  - **sysparm_view=ess:** specifies a view (ess).
  - **sysparm_query=number=INC00040:** specifies a query (number is INC00040).
  - **sysparm_query=priority=2^active=true:** specifies a complex query with two terms (priority is 2 and active is true).
  - **sysparm_query=priority=2^active=true^EQ^GROUPBYcategory:** groups query results (by category).
  - **sysparm_order=number:** specifies the field by which to sort (number).
  - **sysparm_order_direction=desc:** specifies a sort order (descending).
  - **sysparm_force_row_count=5:** limits the maximum number of results (5 records).
  - **sysparm_result_view=viewname:** specifies the view for search results.
  - **CSV:** specifies a file format, can be CSV, XML, PDF, or UNL (Unload).
  - **&:** separates page parameters.
  - **^(carat):** builds multiple term queries or specifies multiple field values.
Forms vs. lists (sysparm_query)

The `sysparm_query` page parameter behaves differently for a list versus a form.

- **List**: returns records that match the query conditions.
- **Form (with sys_id=-1 specified)**: applies the values to the new record.

**Note**: If you are using the default table templates where the template name matches the table name, such as change_request or incident, using `sysparm_query` for that form does not work.

Enable tiny URL support

The default URLs by which the system renders pages may exceed the character limit of Microsoft Internet Explorer, resulting in an error message. To prevent this error, you can enable tiny URL support, which generates shortened internal URLs.

**Role required**: admin

The Tiny URL Support plugin is activated automatically but is not enabled. Activate this plugin if Microsoft Internet Explorer displays failure to open page errors during routine operations in the ServiceNow platform.

**Note**: The system does not convert all URLs to tiny URLs. Only some URLs the system generates as redirects are converted. For example, a URL the browser generates when a user opens a record is not converted to a tiny URL.

1. Navigate to **System Properties System**.
2. Select the **Use tiny URLs when a redirect URL becomes too large**. This ensures that URLs that are too large for IE (greater than 2083) are not used. Instead, they are converted to a tiny URL to work around the IE issue. (**glide.use_tiny_urls** property).
3. Update the value in the **Minimum length of a redirect URL that is turned into a tiny URL** (default=1024) (**glide.tiny_url_min_length** property), if desired.
4. Click Save.

Examples of navigating by URL

A list of example URLs that demonstrate ways to open pages in the ServiceNow application.

**Open a form with preset values**

**Schema**: `https://<baseURL>/nav_to.do?uri=<table name>.do?sys_id=-1%26sysparm_query=<field=value>`

<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opens a new Incident form in the standard interface with a priority of 1 and an incident state of Awaiting Problem.</td>
<td><code>https://&lt;instance name&gt;.service-now.com/nav_to.do?uri=incident.do?sys_id=-1%26sysparm_query=priority=1^incident_state=3</code></td>
</tr>
<tr>
<td>You can also use JavaScript to access GlideSystem methods. The following example creates the same type of incident as above, and also populates the caller ID with the current user ID.</td>
<td><code>https://&lt;instance name&gt;.service-now.com/nav_to.do?uri=incident.do?sys_id=-1%26sysparm_query=priority=1^incident_state=3^caller_id=javascript:gs.getUserID()</code></td>
</tr>
</tbody>
</table>
Open an existing record with preset values


<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opens the incident record with the sys_id 966c9a414f5593001f6eac118110c75c</td>
<td>https://&lt;instance name&gt;.service-now.com/incident.do?sys_id=966c9a414f5593001f6eac118110c75c</td>
</tr>
<tr>
<td>Opens the incident record with the number INC0010001</td>
<td><a href="https://demonightlyus.service-now.com/incident.do?sysparm_query=number=INC0010001">https://demonightlyus.service-now.com/incident.do?sysparm_query=number=INC0010001</a></td>
</tr>
</tbody>
</table>

View a list of incidents

Schemas for the following examples:
- https://<baseURL>/nav_to.do?uri=(table name)_list.do
- https://<baseURL>/(table name)_list.do

<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opens a list of all incidents with (example 1) the navigation frame.</td>
<td>https://&lt;instance name&gt;.service-now.com/nav_to.do?uri=incident_list.do</td>
</tr>
<tr>
<td>Opens a list of all incidents without the navigation frame.</td>
<td>https://&lt;instance name&gt;.service-now.com/incident_list.do</td>
</tr>
</tbody>
</table>

View a list of attachments

Schema: https://<baseURL>/nav_to.do?uri=(table name)_list.do

<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opens the Attachments table in list view.</td>
<td>https://&lt;instance name&gt;.service-now.com/sys_attachment_list.do</td>
</tr>
</tbody>
</table>

View a filtered list

Schema: https://<baseURL>/nav_to.do?uri=(table name)_list.do?sysparm_query=(field=value)

<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returns a list of active incidents with high escalation in the standard interface.</td>
<td>https://&lt;instance name&gt;.service-now.com/nav_to.do?uri=incident_list.do?sysparm_query=active=true^escalation=2</td>
</tr>
</tbody>
</table>

Return a file

Schema: https://<baseURL>/nav_to.do?uri=(table name)_list.do?sysparm_=sysparmTypeOrField=value%26CSV
### Lists

A list displays a set of records from a table.

Users can search, sort, filter, and edit data in lists. Lists may be embedded in forms and may be hierarchical (have sublists).

The list interface consists of a title bar, filters and breadcrumbs, columns of data, and a footer. Each column in a list corresponds to a field on the table.

A response time indicator (⚠️ in UI16 and UI15, ⌛️ in UI11) may appear at the bottom right of some lists to indicate the processing time required to display the list.

There are two versions of lists available. For more information, see [Comparison of List v2 and List v3](#).
The following video provides additional information on lists.

List features and actions

The list interface consists of a title bar, filters and breadcrumbs, and columns of data. Each of these components provides features and lets you take action on the list and the displayed records. There are two list versions: List v2 and List v3.
<table>
<thead>
<tr>
<th>Number</th>
<th>Short description</th>
<th>State</th>
<th>Assignment group</th>
<th>Assigned to</th>
<th>Configuration Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRB0000011</td>
<td>Unknown source of SAP outage</td>
<td>Open</td>
<td></td>
<td>David Loo</td>
<td>SAP Enterprise Services</td>
</tr>
<tr>
<td>PRB0000010</td>
<td>Oracle Down</td>
<td>Open</td>
<td></td>
<td>ITIL User</td>
<td>Application Server PeopleSoft</td>
</tr>
<tr>
<td>PRB0000008</td>
<td>Hang when trying to print VISIO document</td>
<td>Open</td>
<td></td>
<td>ITIL User</td>
<td></td>
</tr>
<tr>
<td>PRB0000007</td>
<td>Router Down</td>
<td>Open</td>
<td></td>
<td>ITIL User</td>
<td></td>
</tr>
<tr>
<td>PRB0000005</td>
<td>Please remove this hotfix</td>
<td>Open</td>
<td></td>
<td>ITIL User</td>
<td>Windows XP Hotfix (SP2) 081766</td>
</tr>
<tr>
<td>PRB0000003</td>
<td>Request for a Blackberry</td>
<td>Open</td>
<td></td>
<td>ITIL User</td>
<td></td>
</tr>
</tbody>
</table>

Figure 22: List v2 view features, menus, and actions
The following topics provide more information about list components and the features and actions you can perform.

Comparison of List v2 and List v3

There are a number of differences between List v2 and List v3.

List v2 is the default version of lists and is supported in all versions of the UI. Users with the admin role can activate List v3, which is supported in UI16 only. Even when List v3 is activated, some UI16 lists may display in List v2. For details, see List v3 compatibility.
List v3 performance is different from performance in List v2. Based on your instance configuration and the complexity of the query, List v3 may load records more slowly than List v2.

In List v2, the list editor does not enforce client scripts or UI policies. In List v3, the list editor enforces UI policies and mandatory dictionary attributes, but not client scripts. Allowing list editing with client scripts running on fields in a form can result in incorrect data being saved to the record. For more information on list administration and using business rules and client scripts, see List editor administration.

Visual differences between v2 and v3 lists

If you are unsure whether a list is v2 or v3, look for the following identifiers.

- The personalize list gear icon appears in the upper left corner of v2 lists. The personalize list option is located in the list title menu in List v3.
- Page controls appear in the list title bar of v2 lists.
- The list mode toggle appears in the list title bar of v3 lists. You can switch between the standard list mode, called Grid mode, and a Split list and form mode.
- Avatars appear by user names in v3 lists.
- Page controls appear in a footer at the bottom of the page for v3 lists.
- The response time indicator does not appear on the bottom, right of v3 lists. You can create a property to display the response time in milliseconds (ms) on the lower left in the List v3 footer.
Figure 24: List v2 identifiers
List features

Most List v2 features are supported in List v3 as well, with the following exceptions.
Table 18: Features that are not supported in List v3

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hierarchical lists</td>
<td>Tables that have hierarchical lists enabled display in List v2.</td>
</tr>
<tr>
<td>Embedded lists</td>
<td>Embedded lists display in List v2.</td>
</tr>
<tr>
<td>List reports</td>
<td>List reports display in List v2.</td>
</tr>
<tr>
<td>Customizing list title or list column heading menus</td>
<td>Options added to list context menus using the Context Menu (sys_ui_context_menu) table do not appear in List v3. Because it is only possible to customize the list title menu or list column heading menu by editing records on the Context Menu table, it is not possible to customize these menus in List v3. Administrators can customize list field menu options by editing UI actions.</td>
</tr>
<tr>
<td>Detail rows</td>
<td>Detail rows do not appear in List v3.</td>
</tr>
<tr>
<td>Pop-up form editing</td>
<td>Holding the Shift key while clicking the reference icon in List v3 opens the standard record preview. Holding the Shift key while clicking a field link in List v3 opens the associated record in a new window or tab.</td>
</tr>
<tr>
<td>Composite fields</td>
<td>Links do not display in composite fields, and the different field values may appear on the same line in List v3.</td>
</tr>
<tr>
<td>Limiting access to list column personalization</td>
<td>Administrators cannot disable list column personalization or control which user roles can personalize list columns in List v3.</td>
</tr>
<tr>
<td>Administering certain list editor capabilities</td>
<td>Administrators cannot configure which field types are editable and cannot enable single-click list editing for v3 lists. In List v3, the list editor enforces UI policies and mandatory dictionary attributes.</td>
</tr>
<tr>
<td>Configuring when related lists load</td>
<td>When List v3 is enabled for related lists, all related lists load asynchronously after the form loads, even if there are no v3 related lists on the form.</td>
</tr>
<tr>
<td>Creating default filters for related lists</td>
<td>The Set as Default Filter button is not available in the filter interface for v3 related lists.</td>
</tr>
</tbody>
</table>

List title menu

The list title menu contains several options related to the list.

Some of the options displayed in the list title menu depend on the list version, the user role, and the installed applications. The List v3 list title menu contains several options that appear in the list column context menu in List v2.

To open the list title menu in UI16 or UI15, click the menu icon (☰) by the list title. In UI11, simply click the list title.

List title menu in List v2

You can click the title of the list to access options related to viewing and filtering the entire list.
Figure 26: List title menu in List v2

Note: Administrators can customize which options appear in the list title menu.

Table 19: Context menu list title

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Changes the view of the list by presenting different information.</td>
</tr>
<tr>
<td>Filters</td>
<td>Changes the values in the filter. Some of the choices are: None, Active, and Edit personal filters.</td>
</tr>
<tr>
<td>Group by</td>
<td>Groups records in a list by the values in a selected field from that table. Any field from the table can be used as a group filter, whether or not it appears in the list.</td>
</tr>
<tr>
<td>Show</td>
<td>Changes the number of rows shown on each page of the list.</td>
</tr>
<tr>
<td>Refresh List</td>
<td>Refreshes the list to show changes immediately.</td>
</tr>
<tr>
<td>Create Favorite</td>
<td>Adds a link to this list to your favorites.</td>
</tr>
</tbody>
</table>

List title menu in List v3

You can click the title of the list to access options related to viewing and configuring the entire list.
The options that appear are based on the user's role. Pictured are the options that administrators see. Administrators can customize which options appear in the list title menu.

Table 20: List title menu options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize List Columns</td>
<td>Configures which columns appear and the order in which they appear for a user.</td>
</tr>
<tr>
<td>Change View</td>
<td>Changes the view of the list by presenting different information.</td>
</tr>
<tr>
<td>List Layout</td>
<td>Configures the list view for all users (requires access rights).</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>List Calculations</td>
<td>Configures list calculations for columns, which calculate column totals, minimums, maximums, and averages (requires access rights).</td>
</tr>
<tr>
<td>List Control</td>
<td>Configures list controls, such as buttons and filters (requires access rights).</td>
</tr>
<tr>
<td>Configure</td>
<td>Provides administrative functions related to the information displayed and how it is controlled (requires access rights).</td>
</tr>
<tr>
<td>Import</td>
<td>Import data from an Excel template file.</td>
</tr>
<tr>
<td>Export</td>
<td>Exports data to Excel, CSV, XML (administrators only), or PDF.</td>
</tr>
<tr>
<td>Create Favorite</td>
<td>Adds a link to this list to your favorites.</td>
</tr>
<tr>
<td>Update All</td>
<td>Perform updates to multiple records at once.</td>
</tr>
<tr>
<td>Update Selected</td>
<td></td>
</tr>
<tr>
<td>Create Application Files</td>
<td>Creates demo data from the current list of records that can be included when you install or update the application on another instance (administrators only). Used with custom application development.</td>
</tr>
<tr>
<td>Import XML</td>
<td>Imports a set of records that were exported from a source instance, for example, a developer instance (administrators only).</td>
</tr>
</tbody>
</table>

### Column headings

Column headings appear at the top of each list column.

These headings display column names and provide some list actions. The available actions are different for v3 and v2 lists. In List v3, several of the actions are moved to the list title menu.

### Column headings in List v2

Column headings appear at the top of each column in List v2.

These headings display column names and provide some list options. Column headings are stationary at the top of the list and do not scroll with list content, except in UI11.

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

### Table 21: Column heading controls

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting</td>
<td>Click the column name to sort the list in ascending order. Click again to sort in reverse order. An arrow by the column name indicates the column currently being sorted as well as the sort direction. A downward pointing arrow indicates the column is sorted in descending order.</td>
</tr>
<tr>
<td>Title</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>List column context menu</td>
<td>Access this menu, also called a right-click menu, by clicking the menu icon (≡) at the top of a list column (UI16/UI15) or by right-clicking the column heading (any UI version). The list context menu offers the following controls.</td>
</tr>
<tr>
<td></td>
<td>• Sort (a to z) and (z to a): Sort in ascending or descending order.</td>
</tr>
<tr>
<td></td>
<td>• Show Visual Task Board: Create a Visual Task Board based on the current list.</td>
</tr>
<tr>
<td></td>
<td>• Group By: Aggregate records by a field. For more information, see Use a grouped list in List v2.</td>
</tr>
<tr>
<td></td>
<td>• 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).</td>
</tr>
<tr>
<td></td>
<td>• Configure (requires access rights): Provides administrative functions related to the information displayed and how it is controlled. For more information, see List configuration.</td>
</tr>
<tr>
<td></td>
<td>• Import (administrators only): Import data from an Excel template file.</td>
</tr>
<tr>
<td></td>
<td>• Export: Exports data to Excel, CSV, XML (administrators only), or PDF. For more information, see Export data.</td>
</tr>
<tr>
<td></td>
<td>• Update Selected and Update All: Perform updates to multiple records at once. For more information, see Edit multiple records in a list using the list editor. These options require the list_updater role.</td>
</tr>
<tr>
<td></td>
<td>• Create Application Files (administrators only): Creates demo data from the current list of records that can be included when you install or update the application on another instance. Used with custom application development.</td>
</tr>
<tr>
<td></td>
<td>• Import XML (administrators only): Imports a set of records that were exported from a source instance, for example, a developer instance. For more information, see Import a single XML file containing one or more records.</td>
</tr>
</tbody>
</table>

Administrators can customize which options appear in this menu.

Column headings in List v3

Column headings appear at the top of each column in List v3. These headings display column names and provide some list options. Column headings are stationary at the top of the list and do not scroll with list content.

Note: Some of the options displayed in the list context menu depend on the user role and the installed applications.
Table 22: Column heading controls

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting</td>
<td>Click the column name to sort the list in ascending order. Click again to sort in reverse order. An arrow by the column name indicates the column currently being sorted as well as the sort direction. A downward pointing arrow indicates the column is sorted in descending order.</td>
</tr>
<tr>
<td>List column context menu</td>
<td>Access this menu, also called a right-click menu, by clicking the menu icon ( ) at the top of a list column or by right-clicking the column heading. The list context menu offers the following controls.</td>
</tr>
<tr>
<td></td>
<td>• Sort (a to z) and (z to a): Sort in ascending or descending order.</td>
</tr>
<tr>
<td></td>
<td>• Group By: Aggregate records by a field. For more information, see Use a grouped list in List v3.</td>
</tr>
<tr>
<td></td>
<td>• 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).</td>
</tr>
<tr>
<td></td>
<td>• Show Visual Task Board: Create a Visual Task Board based on the current list.</td>
</tr>
<tr>
<td>Search ()</td>
<td>Enables the column search. For more information, see Search by one or more columns in a list.</td>
</tr>
</tbody>
</table>

List fields

Fields display data and provide certain functions.

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

Table 23: Field functions

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links</td>
<td>Open the associated record in form view. Click the 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 record.</td>
</tr>
<tr>
<td>Editing</td>
<td>Changes the information in one or more records. For more information, see Methods for list edits.</td>
</tr>
<tr>
<td>Title</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Reference icon ( in UI16 and UI15, in UI11)</td>
<td>Provides a preview of the record. In List v3, click the icon to open a preview, which stays open until you click elsewhere. The preview contains a button to open the record. In List v2, point to the reference icon to open a preview, which closes when you move the cursor unless you hold the Shift key (or the Alt key on some UK keyboards). Click the reference icon to open the record in form view.</td>
</tr>
</tbody>
</table>

Context menu

Also called a right-click menu, offers several options, including:

- **Quick filter** options, such as Show Matching and Filter Out.
- The option to copy the record URL to the clipboard.
- The option to copy the sys_id of the record to the clipboard (administrators only).
- **Quick edit** options, such as Assign to me, Approve, and Reject.
- The option to edit the record **tags**, which provide quick access to frequently referenced or urgent information. When a tag is assigned to a record in UI16 or UI15, the record is displayed on the Tagged Documents page. In UI11, a link to the record is displayed in the application navigator under the assigned tag.
- Options specific to features such as **Live Feed** and **Visual Task Boards**.

Detail rows

Detail rows, when enabled, appear below the field row for each record and display a specified field’s value.

For example, the detail row might display the short description for each incident in a list. Detail rows support the same functionality as fields, including links, editing capabilities, and access to the context menu.
Administrators can enable detail rows and add them to v2 lists (UI15 or later required). For more information, see Administer detail rows. Detail rows are not supported in List v3.

Note: When a field is designated as the source for the list detail rows, the system hides the list column for that field.

List field status indicators

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

• In UI16 and UI15, field status indicators on lists are displayed with modern cell coloring, as a colored circle on the left side of the field. You can revert to using a field background color by disabling modern cell coloring.

Figure 29: Modern cell coloring on

• In UI11, field status indicators on lists are displayed using a field background color.

Figure 30: Modern cell coloring off

All UI versions display field status indicators for mandatory fields only.

You can select the style of the field status indicator in UI16 or UI15.

Configure List v3 field status indicators

You can enable or disable modern cell coloring for list field status indicators in List v3. This setting is available in your system settings.

Role required: none

1. In the banner frame, click the gear icon.
The System Settings window opens.
2. Click the Lists tab.
3. Toggle the Modern Cell Styles switch to enable or disable modern cell coloring.

**Configure List v2 field status indicators**
You can enable or disable modern cell coloring for list field status indicators in UI16 or UI15. In List v2, this setting is available when you personalize a list.

Role required: none
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 UI16/UI15 style field status indicator. Clear this check box to use the UI11 style.
3. Click OK.
   For more information, see *Creating Personal Lists*.

**Pop-up forms**
Pop-up forms enable you to edit records without leaving a v2 list in UI16 or UI15.
To display a pop-up form, press Shift and click a field link or point to the reference icon for a record.
You can edit the pop-up form like any other form.
Figure 31: Pop-up form for editing records

Note: Pop-up forms are not supported in List v3 or UI11. Holding the Shift key while clicking the reference icon in List v3 or UI11 opens the standard record preview. Holding the Shift key while clicking a field link in List v3 or UI11 opens the associated record in a new window or tab.

Note: Related lists do not appear on forms opened in the pop-up window.

Action check boxes

Action check boxes enable you to perform actions on selected items in a list.
1. Select the check boxes beside the records you want to affect.
   To select all records on the page in List v3, select the check box at the top of the list just under the list filter. To select all records on the page in List v2, select the check box at the bottom of the list.
2. Apply the desired action.
   • List v2: In the column context menu, select Update Selected to update all the selected records.
   • List v3: In the list title menu, select Update Selected to update all the selected records.
   • UI11: in the column context menu, Update Selected records using an editing form.
   • In the action choice list below the list, select an action such as Delete (administrators only), or Add to Visual Task Board. The available actions vary depending on the list and which plugins are activated. In List v3, the action choice list appears after you select one or more check boxes.

Hierarchical lists

Hierarchical lists allow users to view records from related lists directly from a v2 list without navigating to a form.

Note: Hierarchical lists are not supported in List v3. Tables that have hierarchical lists enabled always display in List v2.

Lists can have sublists in a hierarchy that can also be accessed in list view. To expand or collapse the related lists on a record in a hierarchical list, click the arrow (↑) beside the reference icon.
Administrators can enable hierarchical lists for a table. For more information, see [Enable a hierarchical list](#).

Use embedded lists

Some lists may be embedded in forms.

Role required: none

Note: Embedded lists are not supported in List v3. Embedded lists always display in List v2.

Changes to embedded lists are saved when the form is saved. For more information, see [Edit a form](#).

Use the following 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 [Use the list editor](#).
- To delete a row, click the delete icon (❌) beside the row.

New rows are removed immediately and existing rows are designated for deletion when the record is saved. To clear this designation, click the delete icon again.
Customize the number of list rows per page

You can customize the number of records, or rows, to display on each page of a list. The default is 20 rows per page.

Role required: none

When you customize the number of rows, it applies to all lists that you can access.

For information about the performance impact of displaying more rows, see the blog post Improve performance by displaying “just enough” data by a ServiceNow employee in the ServiceNow Community.

1. Open a list.
2. Perform the appropriate action for the list version.
<table>
<thead>
<tr>
<th>Version</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v3</td>
<td>In the list footer, click the <code>&lt;Number&gt;</code> rows per page button and select the number of rows you want to display.</td>
</tr>
<tr>
<td>List v2</td>
<td>Right-click the list title and select Show <code>&lt;Number&gt;</code> rows per page.</td>
</tr>
</tbody>
</table>

The list refreshes to display the number of records selected, or the total number of records if there are fewer than the number of rows you are displaying. The page control is updated to show your selected number of records (1 to 50 of 59).

**Activity streams in list view**

You can stream live activity information for all records on the current list if UI16 or UI15 is enabled.
Figure 35: Activity stream window
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 activity stream information appears in a flyout window, and is the same information that appears in the activity formatter for a record. The short description appears as the title for the entry. Activity stream items on the task table use the task number as the title. The information in the flyout window updates automatically with audit and journal entries. Click the ▶▶ icon at the top to close the activity stream.

You can add a comment to any item in the activity stream. When you point to the item with your cursor, a Comment button appears.

Switch between list views

A view defines the elements that appear when a user opens a list.

Role required: none

You can switch between list views to which you have access.

1. Open the list.
2. Select the view to configure by performing the appropriate action for your list version.

<table>
<thead>
<tr>
<th>Version</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>List V2</td>
<td>Open the list title menu and select View (view name)</td>
</tr>
<tr>
<td>List v3</td>
<td>Open the list title menu and select Change View, and then click the name of the view.</td>
</tr>
</tbody>
</table>

The page refreshes with in the selected view.

Search a list

You can search a list to find information quickly. The list title bar includes options for searching the list. Administrators can enable text searches for any list.

Role required: none

There are two options for searching the list: for a string in a selected field, or for a text string found in any field. In List v2, these options are labeled Go to and Search. In List v3, the search fields appear with no label.

- The Go to 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 incidents by selecting Number and entering 4 shows records with numbers like INC0000004 and INC0000014.
- The Search option appears when you select for text. It returns records that contain the search term in any field.

Note: In UI11, the Go to and Search options are displayed side-by-side in the header.

Each option in a choice list is defined with a column label and a value. For example, the incident State field contains several options, such as New and Closed. These are column labels, and each label has an underlying value. For incidents, the default value for New is 1 and the default value for Closed is 7. You can search a column for either the column label or the value with the following results.
• Enter the column label to list matching records, for example, all incident records in the New state.
• Enter the value to find records that have a state greater than or equal to (=>) the specified value. For example, enter 6 to list incident records in the Resolved and Closed states.

1. Navigate to a list of records.
2. If necessary, personalize the list to add the desired fields.
3. Select a field or select for text.

4. Enter the search text. Use wildcards to further refine list searches.
5. Press the Enter key to execute the search.

In UI11, you can press the Enter key or click the search icon ( ).

Search by one or more columns in a list

In addition to searching by field or for text, you can search by one or more individual columns in a UI16 or UI15 list.

Role required: none

Figure 36: Column search (List v2)
This search supports queries that include AND, but does not support OR. You cannot search in a column that uses the List field type, for example, watch lists.

1. Click the search icon to expand the column headers and add a search field to each column.

2. To search a single column, enter the search text in the desired column search field and press the Enter key.
   Use wildcards to further refine column searches. For example, use the * to define a contains search.

3. 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.

The search returns records that match the search term.

To clear a column search, complete one of the following actions.

- Delete the text in the search field for the desired column and press the Enter key. 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.

### Available list search wildcards

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

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*search-term</td>
<td>Search for values that contain search-term.</td>
</tr>
<tr>
<td>%search-term%</td>
<td></td>
</tr>
<tr>
<td>%search-term</td>
<td>Search for values that end with search-term.</td>
</tr>
<tr>
<td>search-term%</td>
<td>Search for values that start with search-term.</td>
</tr>
<tr>
<td>=search-term</td>
<td>Search for values that equal search-term.</td>
</tr>
<tr>
<td>!*searchterm</td>
<td>Search for values that do not contain search-term.</td>
</tr>
<tr>
<td>!%searchterm</td>
<td>Search for values that do not end with search-term.</td>
</tr>
<tr>
<td>!=searchterm</td>
<td>Search for values that do not equal searchterm.</td>
</tr>
</tbody>
</table>

Configure the default search behavior

The default search behavior in a list is to search for values that are greater than or equal to the value you enter. Administrators can add a property to change the search behavior to use a contains search by default, instead of a greater than search.

If you enter text in the search box without using a wildcard, the search is performed for values greater than or equal to the value you enter. For text data-type-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 data-type-fields, this means that the search finds all records where the number field ends with the entered number.
Role required: admin

1. Navigate to the list of system properties by typing sys_properties.list into the navigation filter.
2. Add the following property. For more information on adding a property, see Add a property.

Table 25: Default search behavior property

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>glide.ui.goto_use_contains</td>
</tr>
<tr>
<td>Type</td>
<td>true</td>
</tr>
<tr>
<td>Value</td>
<td>true</td>
</tr>
</tbody>
</table>

3. Click Submit.

Sort a list

You can quickly find information in a list by sorting the list. The method that the system uses to sort a list depends on the type of record in the sort column.

Role required: none

Consider the example record: Label=Requested Item; Value=sc_req_item. Field types other than choice list types are sorted based on the label. The example record label, Requested Item, would be sorted with records whose labels start with ”r.”

A choice list field lets the user select from a pre-defined set of choices. Choice list fields are sorted by the underlying dictionary entry value of the field, not by the label. The example record value, sc_req_item would be sorted with records whose values start with ”s.”

Sorting by value can be useful. For example, choices for the State of tasks are ordered New Work in Progress Closed . Based on the label, the sort would be Closed New Work in Progress . The current sort order is indicated by an arrow next to the column name. A downward pointing arrow indicates the column is sorted in descending order. Only the primary sort order is indicated.

Note: The following sorting rules apply to lists:

- In a translated instance, only translated_text, translated_field, and translated_html type columns support sorting.
- The column label should be created in English first then translated accordingly.
- You cannot sort a list by an array-based field, such as a Glide 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).
Grouped lists

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.

![Figure 37: List grouped by caller (List v2)](image)

- Groups are named for the values of the field selected for grouping. For example, if you group by the assigned user, each group is a user’s name.
- The record count for each group appears next to the group name.
- The total number of items in the list (all groups combined) appears near the paging controls in the list. This displays only when the list is grouped on a field.

List v3 provides extended grouping capabilities.

Use a grouped list in List v2

You can find information by grouping a list by a particular field. After grouping items in a list, several options let you focus on a particular group or set of groups.

Role required: none

1. Use one of the following methods to group and ungroup items in a list.
• 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.

For example, this picture shows active incidents grouped by caller.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To expand or collapse a group</td>
<td>Click the arrow (↑) next to the group name.</td>
</tr>
<tr>
<td>To expand or collapse all groups</td>
<td>Click the arrow at the top of the list.</td>
</tr>
<tr>
<td>To open the full list for a group</td>
<td>Click the group name.</td>
</tr>
<tr>
<td>To see all records for a given group</td>
<td>Open the full list.</td>
</tr>
</tbody>
</table>

Note: The maximum number of records shown per group is the number of records per page in list view.

Use a grouped list in List v3

You can find information by grouping a list by a particular field. In the grouped by list view, you can change the grouped list focus, hide the visualization panel, or switch the graph view.

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Role required: none

1. Right-click the column heading for the column to group by, and then select Group By (column name).

   To undo a grouping, click Ungroup in the list footer.

   The system groups the list by the column values and opens the grouping panel.

2. Use any of the following actions to work with grouped records.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show or hide a group</td>
<td>In the Show All tab of the grouping panel, clear or select the check box by a group.</td>
</tr>
<tr>
<td>Focus on specific groups</td>
<td>In the Show Selected tab of the grouping panel, clear the check boxes of any groups you do not want to see.</td>
</tr>
<tr>
<td>Switch the graph view between a pie graph and a bar graph</td>
<td>In the grouping panel, use the graph toggle.</td>
</tr>
<tr>
<td>Show or hide the grouping panel</td>
<td>In the list footer, click Toggle group by.</td>
</tr>
</tbody>
</table>

Note: The maximum number of records shown per group is the [number of records per page](#) in list view.

Filters and breadcrumbs

A filter is a set of conditions applied to a table to help you find and work with a subset of the data in that table.

You can apply, modify, create, and save filters. A hierarchical list of conditions at the top of the table — breadcrumbs — indicates the current filter.

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

By default, a user with no roles cannot see the breadcrumbs or filter. Administrators can configure the ESS portal to allow unauthenticated users to see breadcrumbs and filters by using a script include. For more information on using script includes to suppress breadcrumbs and filters, see [Use script includes to suppress filters and breadcrumbs](#).

Note: In List v3 split mode, you cannot edit the filter from the breadcrumb. Click the filter icon in the left pane to open the filter conditions in the right pane for editing.

![Breadcrumbs, List v2](image-url)
Examples:

- Clicking Priority = 2 removes the condition Category = Software and returns all active incidents with a priority of 2.
- Clicking the condition separator (>) before Priority = 2 removes the condition Priority = 2 and returns all active incidents in the software category.
- Clicking All removes all conditions and returns all incidents in the system.

Click a breadcrumb to refresh the list of records and show the latest information for those records.

Note: Clicking the New button in a filtered list automatically applies the same filter to the new record. For example, clicking New in the Resolved Incidents list opens a new record preset with State set to Resolved. 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.

Additional navigational functions are available when you right-click a breadcrumb.

Table 26: Breadcrumb right-click options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open new window</td>
<td>Opens the results list for the breadcrumb in a new tab or window.</td>
</tr>
<tr>
<td>Copy URL</td>
<td>Copies the URL to the clipboard for the results list of the breadcrumb. Follow browser instructions if browser security measures restrict this function.</td>
</tr>
</tbody>
</table>
### ServiceNow Helsinki Now Platform User Interface

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy query</td>
<td>Copies the encoded query to the clipboard 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 <code>active=true^impact=1^ORimpact=2</code>. You can append this query to the end of the instance URL as follows: <code>https://{instance_name}/incident_list.do?sysparm_query=active=true^impact=1^ORimpact=2</code> This selection is not available for the All breadcrumb.</td>
</tr>
</tbody>
</table>

### 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 to the right in the breadcrumb of the current filter.

![Quick filter](image)

In this example, right-clicking In Progress and selecting Show Matching adds the condition `State = In Progress` as the most specific condition of the filter. By contrast, right-clicking In Progress and selecting Filter Out adds the condition `State != In Progress` 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.

### 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 the following parts:

- **Field**: Each field contains data from a particular column in the 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 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 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 separately evaluates each condition line linked with an OR connector.

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 ( in UI16 and UI15, and in UI11). This functionality is not supported in List v3.

Create a filter in List v2

You can create a filter in List v2.

Role required: none

1. Open the condition builder in one of the following ways.
   • Click the show / hide filter icon ( beside the breadcrumbs in UI16 or UI15.
   • Click the arrow ( ) beside the breadcrumbs in UI11.

2. Select a field from the list.
   The field type determines the available operators and values. For example, the Active field can have a value of true, false, or empty, while a text field can 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 builder.

3. Select an operator from the list.

4. Select or enter a value, if appropriate.

5. Add or remove conditions to construct the desired filter by completing one or more of the following steps.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To add a top-level condition</td>
<td>Click AND or OR on the condition builder tool bar, above the conditions</td>
</tr>
<tr>
<td>To add a dependent condition</td>
<td>Click AND or OR beside the condition.</td>
</tr>
<tr>
<td>To remove a condition</td>
<td>Click x beside the condition.</td>
</tr>
</tbody>
</table>

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).

6. To specify the sort order of the results, click Add Sort and 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 Save and use filters in a list view.

8. Click Run to apply the filter.

Create a filter in List v3

You can create a filter in List v3.
Role required: none

1. Click the show / hide filter icon ( ) beside the breadcrumbs in UI16 or UI15.
2. Select a field from the first drop-down list.
   You can dot-walk to a field on a referenced table, as shown in the following example. An arrow icon appears beside each reference field. Click the arrow to open additional reference fields to the right to find the field to use.

3. Select an operator from the next drop-down list.
   The field type determines the available operators and values. For example, the Active field can have a value of true, false, or empty, while a text field can 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 builder.
4. Select or enter a value, if appropriate.
5. Add or remove conditions to construct the desired filter by completing one or more of the following steps.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To add a top-level condition</td>
<td>Click New Criteria below the condition builder.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>To add a dependent condition</td>
<td>Click AND or OR beside the condition.</td>
</tr>
<tr>
<td>To remove a condition</td>
<td>Click the remove condition icon (#) beside the condition.</td>
</tr>
</tbody>
</table>

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].

6. To specify the sort order of the results, click Sort Filter, and complete the following steps.
   a) Select a field to sort by and select a sort order.
   b) Click the add condition icon (+) beside the sort condition to add an additional level of sorting.
      For example, you might want to sort a list of incidents by state, then sort incidents of the same state by date opened.
   c) Click the remove condition icon (-) beside a sort condition to remove it.
   d) Click Run Sort.

7. Click Save Filter to keep the filter for future use. For more information, see Save and use filters in a list view.

8. Click Run to apply the filter.

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). When you have an OR condition in the query, the magnifying glass is no longer available. The conditions you put in the quick search headers are ANDed together. Having an OR makes it ambiguous as to where the new condition should go, for example before the OR, or after the OR.

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).
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\}\}\} OR \{(Active) \{is\} \{false\} AND \{(Category) \{is\} \{Software\}\}\}
• (Active) (is) (false) AND (Category) (is) (Software)

Figure 43: Top level OR List v2

In List v3, select the New Criteria button in the condition builder to create a new 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.

Filter 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.

Note: Do not use the \(\text{is one of}\) operator on fields that contain commas, as the query does not return the expected set of records. Instead, create a filter using multiple \(\text{or}\) statements.

1. Create the filter with the \(\text{is one of}\) or \(\text{is not one of}\) operator.
   Depending on the selected field, a choice list or a text box appear.
2. Select one or more of the options by using multiple selection key commands.
   The choice list remains visible.
Alternatively, for text or number fields, type your search options. Separate the options by commas or put each option on a separate line, and do not enclose the selections in brackets.

3. Click Run to filter the list.
   The filter conditions appear as a comma-delimited string at the top of the results list.
Dynamic operators

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

The following dynamic filter options are available by default.

Note: Administrators can create new dynamic filter options.

Table 27: Default dynamic filter options

<table>
<thead>
<tr>
<th>Target table of reference field</th>
<th>Option label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User [sys_user]</td>
<td>Me</td>
<td>The reference field contains the current user.</td>
</tr>
<tr>
<td></td>
<td>One of My Assignments</td>
<td>The reference field contains the current user or someone for whom the current user is a delegate for assignments.</td>
</tr>
<tr>
<td></td>
<td>One of My Approvals</td>
<td>The reference field contains the current user or someone for whom the current user is a delegate for approvals.</td>
</tr>
<tr>
<td></td>
<td>Users With Roles</td>
<td>The reference field contains users that have any role.</td>
</tr>
</tbody>
</table>
The following table contains examples and descriptions of dynamic filter conditions.

Table 28: Example of using the dynamic operator

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Dynamic filter option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caller</td>
<td>is (dynamic)</td>
<td>Me</td>
<td>Computes the value of Caller based on the current user viewing the list.</td>
</tr>
<tr>
<td>Assignment group</td>
<td>is (dynamic)</td>
<td>One of My Groups</td>
<td>Computes the value of Assignment group based on the current user viewing the list.</td>
</tr>
</tbody>
</table>

Save and use filters in a list view

Depending on your access rights, you may save filters for everyone, a user group, or yourself. You can apply saved filters and edit or delete them.

Role required: varies depending on action. See procedure.

1. Create or modify a filter in the filter interface.
2. Click Save... (or Save Filter in List v3).
3. Enter a name for the filter.
4. Select one of the following visibility options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Me</td>
<td>Creates a personal filter, which only you can access. This option is available to all users.</td>
</tr>
<tr>
<td>Everyone</td>
<td>Creates a global filter, which all users can access. This option is available to users with the filter_global role.</td>
</tr>
<tr>
<td>Group</td>
<td>Creates a group filter, which only members of the user group you select can access. This option is available to users with the filter_group role.</td>
</tr>
</tbody>
</table>

5. Click Save (or Submit in List v3).

Note: In UI15, click the Save button that appears to the right of the visibility options, as opposed to the Save... button at the top.

6. To use a saved filter, select the filter name in the list title menu (List v2) or open the filter interface and select Load Filter (List v3).
   The filter runs and the breadcrumbs appear.
7. To edit or delete personal filters, complete the appropriate action for your list version.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v2</td>
<td>Select Edit personal filters from the title menu.</td>
</tr>
<tr>
<td>List v3</td>
<td>Select the edit filter icon, click Load Filter, and then click Manage Filters.</td>
</tr>
</tbody>
</table>

8. Complete the following steps.
   a) Click the title of the filter to edit.
   b) Update the filter title or add or remove conditions.
   c) To delete the filter, click Delete and confirm deletion.
   d) If you edited the filter, click Update.

Filter admin functions

Administrators can work with filters in the Filters table (`sys_filter`), including creating, editing, and deleting filters.

Administrators can also create scripted filters that cannot be created in the condition builder. Scripted filters required a knowledge of JavaScript. Scripted filters can be used to create additional dynamic filter options.

Create and edit filters

Administrators can create and edit any saved filter.

Role required: admin

1. Navigate to System Definition Filters.
2. To create a filter, complete the following steps.
   a) Enter a Title and select the Table.
   b) Add filter conditions.
c) Click Submit.

3. To edit a saved filter, select the filter to edit and complete the following steps.
   a) Modify the Filter conditions as necessary.
   b) Click Update.

Delete filters
You can delete any saved filter, including global, group, or personal filters.
Role required: admin
1. Navigate to System Definition Filters.
2. To see who created the filter and when, personalize the list to add the created by and created fields to the list.
3. To see who has access to the filter, configure the list to add the user, group, or domain fields.
   Filters that are not assigned to a user or group are global.
4. Select the filter to delete.
5. Click Delete and confirm the deletion.

Create scripted filters
The condition builder alone cannot create some filters, such as displaying a record set that is dependent on an unrelated table. You can create JavaScript functions for use in advanced filters if you have a knowledge of JavaScript.
Role required: admin
1. Create a new script include.
2. In the Script field of the script include, 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.

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, 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 using the condition builder for customers who are under intensive care.

The solution is to write a JavaScript function that uses a GlideRecord query to build an array of user sys_ids in the Intensive Care table, as shown in the sample code below. Call the function from the condition builder in the Incident table (Caller is [javascript:myFunction()]).

```javascript
function myFunction () {
  var arrUsers = [
  ];
  gr = new GlideRecord ( 'u_intensive_care' );
  gr. query ();
  while (gr. next ( ) ) {
    arrUsers. push (gr. u_customer. toString ( ) );
  }
}```
Create a dynamic filter option

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.

Role required: admin

All dynamic filter options use the is (dynamic) operator and call a particular scripted filter.

Note: Dynamic filters are not supported in scoped applications or UI policy conditions.

Figure 47: Dynamic operands

For more information about using dynamic operators, see Dynamic operators.

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. Complete the form.

Table 29: Dynamic filter options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Enter the text you want to appear as an option when a user selects the is (dynamic) operator.</td>
</tr>
<tr>
<td>Script</td>
<td>Enter the name of the function you created.</td>
</tr>
<tr>
<td>Field type</td>
<td>Select Reference.</td>
</tr>
<tr>
<td>Referenced table</td>
<td>Select the table this filter option applies to.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to designate the placement of this option in the filter option choice list.</td>
</tr>
</tbody>
</table>
5. Click Submit.

Encoded query strings

An encoded query string represents a complex filter on a list of records.

Use encoded query strings to include a filter as part of a URL parameter, such as the `sysparm_query` URL parameter, or as a `reference qualifier` to restrict the data that is selectable for a reference field.

You can create encoded query strings manually or copy them from list filters.

Table 30: Encoded query string examples

<table>
<thead>
<tr>
<th>Title</th>
<th>Example</th>
</tr>
</thead>
</table>
| Referring to Boolean or string values      | To create a query string on Boolean fields, use this syntax: field=true or field=false. For example, to return only active records in a table, use: active=true  
To create a query string with a field that has a specific string value, use this syntax: field=value. For example, to return incident records where the category is network, use: category=network |
<p>| Referring to reference fields              | To create a query string that refers to a reference field in another table, use this syntax: field in referenced table=value. For example, to return users with the itil role in the Assigned to reference field on the Incident form, use: roles=itil |</p>
<table>
<thead>
<tr>
<th>Title</th>
<th>Example</th>
</tr>
</thead>
</table>
| Referring to choice list values | To create a query string that refers to a choice list option, use the value of the choice list, not the label, with this syntax: choice list field=value. For example, to return configuration items (CIs) with the status Installed, which has a value of 1 in the choice list, use:  

\[
in\text{stall\_status}=1\]

See [Values to associate with choice labels for scripting](#) to find the options for the values. |
| Using multiple conditions | To use two conditions joined together by an AND operator, use the carat ^ symbol in this syntax: field1=value1^field2=value2. For example, to return all active users with the "itil" role, use:  

\[
\text{active}=\text{true}^\text{\textbar\textit{roles}}=\text{itil}
\]

To use two conditions joined together by an OR operator, use the carat symbol with OR with this syntax: field1=value1^ORfield1=value2. For example, to return all users with either the "itil" or "admin" roles, use:  

\[
\text{roles}=\text{itil}^\text{OR\textbar\textit{roles}}=\text{admin}
\]

To add multiple conditions where one condition is a JavaScript function, use this syntax: javascript:'field=value^' + function(). The function must return a string that can be concatenated with the first string to produce a valid query string. For example, to return all active users and meet the conditions of the getGroupQualifier() function, use:  

\[
javascript:'\text{active}=\text{true}^' + \text{getGroupQualifier()}
\]
| Listing values in order | To sort data by a specific field, use the ORDERBY condition with the following syntax: field1=value^ORDERBYfield2. For example, to return the days of the week in order from the Day of the Week [sys_cal_unit] table, use:  

\[
\text{unit\_name}=\text{day}^\text{ORDERBYvalue}
\]

In the Day of the Week table, unit_name is the field that specifies day, week, or month, and value is a numerical value for each day from 1 (Monday) to 7 (Sunday). The query string returns a list of the days of the week in order from the lowest value, which represents Monday, to the largest value, which represents Sunday. |

Note: Reference qualifiers do not support the ORDERBY condition. In reference qualifiers, you can sort the reference lookup list by using standard list controls. To specify the order of an auto-complete list for a reference field, use the ref_ac_order_by dictionary attribute.
Generate an encoded query string through a filter

You can generate an encoded query string through a filter on any list and paste the string into a URL query or a reference qualifier.

Role required: none

1. Open a list of records.
2. **Construct the filter.**
3. Click Run.
4. Right-click the end of the filter breadcrumb and select Copy query from the context menu.

![Filter Breadcrumb](image)

**Figure 48: Copy the query from the breadcrumb**

5. Copy the query to your system clipboard.
6. Use the query string to **construct a URL** or an **advanced reference qualifier**.

   When you use the `CONTAINS` operator on a list filter, the system translates the filter to a LIKE query. For example, if you filter for active records with numbers that contain 123, the URL is `https://InstanceName.service-now.com/incident_list.do?sysparm_query=active=true%5EGOTOnumberLIKE123`.

**Methods for list edits**

Users can edit data in lists using various methods.

**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, places 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.

Assign tag

For records you want to track based on a user-defined label, lets you select an existing tag or add a tag.

List editor

The list editor lets you edit field values in a list without opening a form. Administrators can configure the list editor. By default, list editing is disabled for some tables. Fields of certain types cannot be edited from lists.

Multiple record edits

You can edit more than one record at the same time using the list editor or an editing form.

Use the list editor

The list editor allows you to edit field values directly from a list without navigating to a form.

Role required: none

The list editor lets you edit field values in a list without opening a form. Administrators can configure the list editor. By default, list editing is disabled for some tables. Fields of certain types cannot be edited from lists.

Before the list editor opens, access rights to edit the field are verified. A loading indicator appears if this process takes longer than expected. In List v2, 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.

1. Double-click in an empty area of the field. The appropriate editor for the field type opens.
2. Enter the appropriate values.
3. Save the records by performing the appropriate action for your list version.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v2</td>
<td>Click the save icon</td>
</tr>
<tr>
<td></td>
<td>![Checkmark]</td>
</tr>
<tr>
<td></td>
<td>Click the cancel icon</td>
</tr>
<tr>
<td></td>
<td>![X]</td>
</tr>
<tr>
<td></td>
<td>or press the Escape key to retain the original value.</td>
</tr>
<tr>
<td>List v3</td>
<td>Click Save. Press the Escape key or click outside the dialog box to retain the original value.</td>
</tr>
</tbody>
</table>
4. To use keyboard navigation in List v2, press the Tab key until the first field in the list is selected, and then select the field to edit in one of the following ways.
   - 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.

5. Press the Enter key to open the list editor.

6. Enter a new value. To add another line in a multi-line text field, press Shift + Enter.

7. Save or cancel your changes in one of the following ways:
   - Press the Enter key. The new value is saved and the field below the edited field becomes selected.
   - Press the Tab key. 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 check mark icon beside the row.
   - Press Ctrl + Enter keys. 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 the Esc key. The list editor closes without saving changes and the field remains selected.

Note: Certain browsers use different key combinations to edit certain field values. For example, to edit a choice list using Chrome, press the Spacebar.

Create a new record

Users can create new records by inserting a new row in the list.

Role required: any role required to create records on the table

Administrators can configure the list editor to enable this feature for lists.
Note: This feature is not supported in List v3. When this feature is enabled for a list, the list displays in List v2.

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.

![Figure 50: Insert a new row (record)](image)

**Edit multiple records in a list using the list editor**

You can edit multiple records at the same time using the list editor. If you want to update a single field on multiple records to have the same value, the list editor is the quickest method.

Role required: none

1. Select the records you want to edit by performing one of the following actions.
   - 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 you are editing is indicated. If any rows cannot be edited due to security constraints, that is indicated.
3. Enter the appropriate values and click Save.

Edit multiple records in a list using an editing form

You can edit multiple records at the same time using an editing form. If you want to edit multiple fields or fields that do not appear in the list view, use an editing form.

Role required: list_updater

Depending on your ACL settings some of these options might not be available even with the right role. For example, if the list is task.list and users try to select multiple incident records from that task list, the form uses the task form and not the incident form so ACLs on task are enforced instead. Since users would not have access to task specifically, the form would not show any fields.

1. Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update selected records</td>
<td>1. Select the check box by each row you want to edit.</td>
</tr>
<tr>
<td></td>
<td>2. Perform the appropriate action for the list version:</td>
</tr>
<tr>
<td></td>
<td>• List v3: Open the list title menu and select Update Selected.</td>
</tr>
<tr>
<td></td>
<td>• List v2: Right-click any column header and select Update Selected.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Update all records in the list     | 1. Filter the list so it contains only the rows you want to edit.  
2. Perform the appropriate action for the list version:  
• List v3: Open the list title menu and select Update All.  
• List v2: Right-click any column header and select Update All. |

An editing form opens.  
2. Enter appropriate values in any of the fields and click Update to save your changes in all selected records.

Personal lists

Users can create personal lists to customize which columns appear and the order in which they appear. Personal lists modify a specific list view according to individual preferences. Personal list customizations do not affect what other users see in their lists. Administrators can manage the personal lists function.

Note: In List v2, some general list preferences are available in the list personalization interface. The List v3 list personalization interface does not contain these preferences. Some of the preferences are located in the Lists section of the system settings. Others do not apply to List v3 or are not supported.

Personalize a v2 list

In List v2, you can personalize a specific list view based on individual preferences.  
1. Open the list.  
2. Click the personalize list icon (⚙️) in the upper left corner. The Personalize List Columns window opens.
3. Use the slushbucket to select the columns and the desired order. Values in the first column appear as links. If the first column is not a reference field, the link opens the record from the list, as expected. If the first column is a reference field, the link opens the record from the referenced table. This behavior can be confusing. For this reason, avoid using a reference field as the first column.

4. Select display options.

Note: These options apply to all v2 lists, not just the view you are personalizing.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display long text on more than one line</td>
<td>Select the Wrap column text check box. Clear the check box to display text on one line. In UI16, this option is also available in the Lists section of the system settings.</td>
</tr>
</tbody>
</table>
ServiceNow Helsinki Now Platform User Interface

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condense the vertical space between rows</td>
<td>Select the Compact rows check box. Clear the check box to use standard row spacing.</td>
</tr>
<tr>
<td>Highlight list rows as the cursor passes over them</td>
<td>Select the Active row highlighting check box. Clear the check box to restore the static, alternate row highlighting.</td>
</tr>
</tbody>
</table>
| Use updated field status indicators available in UI16 and UI15 | Select the Modern cell coloring check box. Clear the check box to use field status indicators available in UI11.  
In UI16, this option is also available in the Lists section of the system settings. |

5. **Select list editing options (requires you to configure the list editor).**

   Note: These options apply to all v2 lists, not just the view you are personalizing.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow the list editor to open for the list</td>
<td>Select the Enable list edit check box. Clear the check box to prevent the list editor from opening for the list.</td>
</tr>
<tr>
<td>Open the list editor with a double-click</td>
<td>Select the Double click to edit check box. Clear the check box to open the list editor using a single click.</td>
</tr>
</tbody>
</table>

6. **Click OK.**

   The list reloads to show the changes. If you personalized the columns, an indicator appears on the personalize list icon (🌟).

   To reset a list to the default layout, click the personalize list icon and click the Reset to column defaults button.

**Personalize a v3 list**

In List v3, you can personalize a specific list view based on individual preferences.

Role required: none

1. Open the list.
2. Click the list title menu icon and select Personalize List Columns.

   The Personalize Columns window appears.
3. Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add columns</td>
<td>In the Available section, select the check box by each column you want to add. Use the search field to find a specific column.</td>
</tr>
<tr>
<td>Remove columns</td>
<td>In the Available section, clear the check box by each column you want to remove. Alternatively, in the Selected section, point to a column and click the delete icon (X).</td>
</tr>
<tr>
<td>Rearrange columns</td>
<td>In the Selected section, drag and drop columns in the desired order.</td>
</tr>
</tbody>
</table>
Values in the first column appear as links, which open the record from the list. If the first column is a reference field, the open reference value icon ( ) appears by the value. Click the icon to open the record from the referenced table.

4. Click Save.
   The list reloads to display the changes.

To reset a list to the default layout, open the list personalization interface and click the Reset Columns button.

List v3 split mode

In List v3, split mode lets users view a list and form side by side, in a split pane layout. Split mode differs from the standard list mode, called grid mode. In grid mode, lists display records in a table view, with several columns. An administrator can activate List v3.

List v3 split mode is similar to the list and form view available in UI15. However, List v3 split mode consolidates information from multiple columns into a single row. List v3 split mode does not support multiple form tabs.

Note: Users with the personalize_control role can make split mode the default view for a list, by configuring the list control and setting the Default view mode field to Split.

When you open a record in split mode, Display type business rules are evaluated twice, once for each pane. This double evaluation might have an impact on performance. Consider this impact when creating business rules.

List pane configuration

![List pane in split mode](image)

Figure 52: List pane in split mode

In split mode, the title of the list card is either a default value or it is configured in System Mobile UI Table Titles.
Important: Table title records are used in the mobile application as well as in the list pane. You can change the title for any table or add a title record for a different table, however, the change affects the mobile user interface (UI).

For example, in split mode the default title for the Departments (cmn_department) table is the department Name. If you create a table title record to display the Description field as the Department list card title, the Departments list appears in the mobile application.

Other fields that appear in the list card are specified in the base system and cannot be modified.

Use List v3 split mode

In List v3, you can view lists and forms side by side in split mode.

Role required: none

In split mode, you can select a record from a compact view of the list, to open it in the adjacent form pane.

1. Open a v3 list.
2. In the list title bar, select Split in the list mode toggle.

Note: The list mode toggle is not available in grouped or related lists.

The list reloads in split mode.
3. Perform any of the following actions to filter the list.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit the filter conditions</td>
<td>1. Click the filter icon ( ) to open the Edit Filter window.&lt;br&gt;2. Add, remove, or edit conditions as you would in the standard List v3 filter interface. For more information, see Create a filter in List v3.&lt;br&gt;3. Click Run.</td>
</tr>
<tr>
<td>View all breadcrumbs</td>
<td>1. Click the filter icon ( ) to open the Edit Filter window.&lt;br&gt;2. Add or remove conditions using the breadcrumbs. For more information, see .&lt;br&gt;3. Right-click a breadcrumb to access the breadcrumb context menu. For more information about breadcrumbs and conditions, and the breadcrumb context menu, see Filters and breadcrumbs.</td>
</tr>
<tr>
<td>View additional filter options</td>
<td>1. Click the more options icon ( ) by the filter.&lt;br&gt;2. Select any of the following options.&lt;br&gt;• Sort Filter: Edit the sort order for the list.&lt;br&gt;• Load Filter: Apply a previously saved filter.&lt;br&gt;• Save Filter: Save the current filter for future use.</td>
</tr>
<tr>
<td></td>
<td>4. Right-click a record in the list to access the following options.&lt;br&gt;• Copy URL&lt;br&gt;• Copy sys_id&lt;br&gt;5. Click a record in the list to open it in the adjacent form pane.</td>
</tr>
</tbody>
</table>

**Forms**

A form displays information from one record in a data table.<br>The specific information depends on the type of record displayed. Users can view and edit records in forms. Administrators can configure what appears on forms.
Table 31: Form elements

<table>
<thead>
<tr>
<th>Form element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form header</td>
<td>Provides navigation tools and actions related to the record.</td>
</tr>
<tr>
<td>Fields</td>
<td>Store specific data about the record.</td>
</tr>
<tr>
<td>Sections</td>
<td>Group related information on the form. Users can collapse or display sections using tabs.</td>
</tr>
<tr>
<td>Related links</td>
<td>Provide access to additional functions based on record type and system setup. Administrators</td>
</tr>
<tr>
<td></td>
<td>can add related links to forms using UI actions.</td>
</tr>
<tr>
<td>Related lists</td>
<td>Display records in other tables that have relationships to the current record.</td>
</tr>
<tr>
<td>Embedded lists</td>
<td>Allow for editing related lists without having to navigate away from the form. Changes are</td>
</tr>
<tr>
<td></td>
<td>saved when the form is saved.</td>
</tr>
<tr>
<td>Response time</td>
<td>Appears at the bottom of some forms to indicate the processing time required to display the</td>
</tr>
<tr>
<td>indicator</td>
<td>form.</td>
</tr>
</tbody>
</table>

Form headers for UI versions

Each UI version, UI16, UI15, and UI11, has a different form header that offers different navigation icons.

To learn about form header navigation, select the form header topic that corresponds to the UI version your organization uses.

**UI16 form header**

![UI16 form header](image)

**UI15 form header**

![UI15 form header](image)

**UI11 form header**

The UI11 form header can have a blue background, but the icons are as pictured in this image.

![UI11 form header](image)

**UI16 form header**

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

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The UI16 form header includes the following controls.

Table 32: UI16 form header controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>🔄</td>
<td>Navigates to the previously viewed page without saving changes.</td>
</tr>
<tr>
<td>Form context menu</td>
<td>❓</td>
<td>Appears when a user clicks the menu icon beside the form title or right-clicks the form header. This is also called a right-click menu.</td>
</tr>
<tr>
<td>Attachments</td>
<td>📄</td>
<td>Allows users to view and add attachments to the record. For more information, see Add an attachment.</td>
</tr>
<tr>
<td>Show activity stream</td>
<td>📊</td>
<td>Moves focus to the journal entry section of the form.</td>
</tr>
<tr>
<td>Personalize form</td>
<td>🌟</td>
<td>Opens the form personalization menu. For more information, see Personalize a form.</td>
</tr>
<tr>
<td>More options</td>
<td>⚙</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>✉</td>
<td>Opens an email window.</td>
</tr>
<tr>
<td>Template bar</td>
<td>′</td>
<td>Opens a bar at the bottom of the form and lists available templates.</td>
</tr>
<tr>
<td>Annotations</td>
<td>🤔</td>
<td>Displays on-form annotations. For more information, see Form annotation.</td>
</tr>
</tbody>
</table>

Figure 54: Form header UI16
UI15 form header

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

The UI15 form header includes the following controls.

![UI15 form header controls](image)

**Figure 55: Form header UI15**

**Table 33: UI15 form header controls**

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>🔄</td>
<td>Navigates to the previously viewed page without saving changes.</td>
</tr>
<tr>
<td>Control</td>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Form context menu</td>
<td>![icon]</td>
<td>Appears when a user clicks the menu icon beside the form title or right-clicks the form header. This is also called a right-click menu.</td>
</tr>
<tr>
<td>Edit tags</td>
<td>![icon]</td>
<td>Displays the Add tag field below the form header, which allows users to create custom tags and categorize documents. For more information, see <a href="#">Tags</a>.</td>
</tr>
<tr>
<td>Attachments</td>
<td>![icon]</td>
<td>Allows users to view and add attachments to the record. For more information, see <a href="#">Add an attachment</a>.</td>
</tr>
<tr>
<td>Annotations</td>
<td>![icon]</td>
<td>Displays on-form annotations. For more information, see <a href="#">Form annotation</a>.</td>
</tr>
<tr>
<td>Email</td>
<td>![icon]</td>
<td>Opens an email window.</td>
</tr>
<tr>
<td>Show activity stream</td>
<td>![icon]</td>
<td>Opens the document feed for this record in a flyout window.</td>
</tr>
<tr>
<td>Personalize form</td>
<td>![icon]</td>
<td>Opens the form personalization menu. For more information, see <a href="#">Personalize a form</a>.</td>
</tr>
<tr>
<td>Submit or Update</td>
<td>![icon]</td>
<td>Saves changes and returns to the previously viewed page.</td>
</tr>
<tr>
<td>Related actions</td>
<td>![icon]</td>
<td>Provides standard actions in the form header for some tables, such as Close Incident or Resolve Incident in incident.</td>
</tr>
<tr>
<td>Delete</td>
<td>![icon]</td>
<td>Deletes the record from the list.</td>
</tr>
<tr>
<td>Previous and Next</td>
<td>![icon]</td>
<td>Opens the previous and next record on the list from which the record was accessed. These controls save changes to the record.</td>
</tr>
</tbody>
</table>

**UI11 form header**

The form header displays the title of the form (table) and provides a number of controls. The form header for UI11 includes the following controls.
Table 34: UI11 form header controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>![left arrow]</td>
<td>Navigates to the previously viewed page without saving changes.</td>
</tr>
<tr>
<td>Form context menu</td>
<td>![vertical ellipsis]</td>
<td>Appears when a user points to the arrow beside the form title or right-clicks the form header.</td>
</tr>
<tr>
<td>Submit or Update</td>
<td></td>
<td>Saves changes and returns to the previously viewed page.</td>
</tr>
<tr>
<td>Related actions</td>
<td></td>
<td>Provides standard actions in the form header for some tables, such as Close Incident or Resolve Incident in incident.</td>
</tr>
<tr>
<td>Delete</td>
<td></td>
<td>Deletes the record from the list.</td>
</tr>
<tr>
<td>Attachments</td>
<td>![attachment]</td>
<td>Allows users to view and add attachments to the record.</td>
</tr>
<tr>
<td>Email</td>
<td>![email]</td>
<td>Opens an email window.</td>
</tr>
<tr>
<td>Show live feed</td>
<td>![picture]</td>
<td>Opens the document feed for this record in a flyout window.</td>
</tr>
<tr>
<td>Previous</td>
<td>![up]</td>
<td>Opens the previous record on the list from which the record was accessed. This control saves changes to the record.</td>
</tr>
<tr>
<td>Next</td>
<td>![down]</td>
<td>Opens the next record on the list from which the record was accessed. This control saves changes to the record.</td>
</tr>
<tr>
<td>Toggle tabs</td>
<td>![tab]</td>
<td>Toggles between tabbed and sequential arrangements of form sections and related lists.</td>
</tr>
<tr>
<td>Collapse all sections</td>
<td>![collapse]</td>
<td>Collapse all form sections.</td>
</tr>
<tr>
<td>Expand all sections</td>
<td>![expand]</td>
<td>Expand all form sections.</td>
</tr>
<tr>
<td>Collapse</td>
<td>![rotate]</td>
<td>Collapse the main form section.</td>
</tr>
</tbody>
</table>
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 beside the form title or by right-clicking the form header.

- UI16 and UI15 menu icon (⋮)
- UI11 arrow icon
The form context menu includes the following options.

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

Table 35: Form context menu options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Saves changes without leaving the form view.</td>
</tr>
<tr>
<td>Related actions</td>
<td>Provides standard actions in the form context menu for some tables, such as Add to Visual Task Board or Create Change in incident.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Insert</td>
<td>Saves the data as a new record and returns to the previously viewed page. For more information, see <a href="#">Insert a record</a>.</td>
</tr>
<tr>
<td>Insert and Stay</td>
<td>Saves and displays the new record. For more information, see <a href="#">Insert a record</a>.</td>
</tr>
<tr>
<td>Configure</td>
<td>Provides administrative functions, such as configuring forms.</td>
</tr>
<tr>
<td>Templates</td>
<td>(UI11 only) Provides administrative functions, such as creating templates. For more information, see <a href="#">Save a form as a template in UI11</a>.</td>
</tr>
<tr>
<td>Toggle Template Bar</td>
<td>(UI15 only) Shows or hides the template bar. For more information, see <a href="#">Toggle the template bar</a>.</td>
</tr>
<tr>
<td>Export</td>
<td>Exports data to PDF. Administrators can also export to XML. For more information, see <a href="#">Export data</a>.</td>
</tr>
<tr>
<td>View</td>
<td>Changes fields to a predefined layout. Note that switching views submits the form, which saves all changes. Administrators can customize views.</td>
</tr>
<tr>
<td>Create Favorite</td>
<td>(UI16 only) Adds the current record to your favorites list, represented by a star icon on the tab.</td>
</tr>
<tr>
<td>Assign Tag</td>
<td>(UI15 only) Allows the user to assign a new or existing tag to a record, which provides quick access to frequently referenced or urgent information. When tag is assigned to a record, the record is displayed on the Tagged Documents page. For more information, see Tags.</td>
</tr>
<tr>
<td>Copy URL</td>
<td>Copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.</td>
</tr>
<tr>
<td>Copy sys_id</td>
<td>Administrators only. Copies to the clipboard the sys_id of the record. Follow browser instructions if browser security measures restrict this function.</td>
</tr>
<tr>
<td>Show XML</td>
<td>Administrators only. Displays record data in XML format.</td>
</tr>
<tr>
<td>History</td>
<td>Administrators only. Displays audit history for the record, which must be enabled for the table. For more information, see <a href="#">Enable auditing for a table</a>.</td>
</tr>
<tr>
<td>Reload Form</td>
<td>Reloads information from the database to refresh the form view.</td>
</tr>
</tbody>
</table>

### Form fields

A field represents an individual item of data on a record.

Users can view and modify field data on a form. For more detailed information, see [Introduction to fields](#).

### UI16 and UI15 field status indicators

Indicators are used on some fields to denote a special field type.
A field status indicator is a colored asterisk that may appear to the left of mandatory fields. Field status indicators change colors to represent different states of mandatory fields.

Table 36: Field status indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unpopulated</td>
<td>Required field is empty. The user must enter a value to save the form. Default color is red.</td>
</tr>
<tr>
<td>Populated - saved</td>
<td>Required field contains a value that was saved or needs to be saved. Default color is grey.</td>
</tr>
<tr>
<td>Populated - unsaved</td>
<td></td>
</tr>
</tbody>
</table>

Figure 58: UI16/UI15 field status indicators

UI11 field status indicators

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

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

Table 37: UI11 field status types

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory</td>
<td>A required field that is empty. The user must enter a value to save the form. Default color is red.</td>
</tr>
<tr>
<td>Populated Mandatory</td>
<td>A required field for which a value has already been saved. Default color is light red. If the user enters a new value, the field status indicator changes to Modified (default green).</td>
</tr>
<tr>
<td>Modified</td>
<td>Contains data that has not been saved. Default color is green.</td>
</tr>
<tr>
<td>Read-only</td>
<td>User cannot edit on the form. Default color is orange.</td>
</tr>
</tbody>
</table>
Configure the activity filter

The activity formatter header contains a filter that lets users select which of the available fields to show in the activity list.

Role required: none

All fields on the activity list display in alphabetical order.

Use the activity filter in UI16 and UI15

Use the activity filter to show or hide fields that you want to display activity.

1. Open the filter by clicking the activity filter icon ( ) in the Activity header.
2. Select the fields for which you want to display activity.
   Fields are added or removed dynamically as the selection is made.
3. Click the activity filter icon again to close the filter.

Use the activity filter in UI11

Use the activity filter in UI11 to show or hide specific fields.

1. Open the filter by clicking the show/hide filter icon ( ) in the Activity header.
2. Select the fields for which you want to display activity. Fields are added or removed dynamically as the selection is made.
3. Click the show/hide filter icon again to close the filter.
   A filter icon appears on the Activity header to indicate that a filter is in effect.
4. Click the filter icon to toggle the filter on (display only the selected fields) or off (display all fields).
   When the activity filter is on, the filter icon has a blue border. The activities list shows the history of only those fields selected in the filter and the Activity header indicates how many of the available fields are selected, such as (4 of 5).
   When the activity filter is off, the blue highlight is removed from the filter icon and the form shows all available fields. If all fields are checked, the filter icon is not displayed.

Form sections

Form sections organize fields into logical groupings.
You can use icons to collapse or expand form sections. When you collapse or expand a form section, your selection is saved as a user preference. The next time you access a record that uses the same form, the same sections are collapsed or expanded.

Table 38: Displaying form sections

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>(UI16 and UI15) + (UI11)</td>
<td>Expands a form section. This icon is visible only when tabbed forms are disabled.</td>
</tr>
<tr>
<td>(UI16 and UI15) - (UI11)</td>
<td>Collapses a form section. This icon is visible only when tabbed forms are disabled.</td>
</tr>
</tbody>
</table>
| (UI11) | Toggles between a tabbed and sequential arrangement of sections. Not: This icon is removed from the form header in UI16 and UI15. To enable or disable form tabs, click the gear icon in the banner frame (
and toggle the Tabbed forms option. |

Embedded lists

Some forms may show related lists as embedded. Changes to embedded lists are saved when the form is saved.

Note: Embedded lists are not supported in List v3. Embedded lists always display in List v2.

Use these controls to work with an embedded list. For more information, see Edit a form.

Table 39: Working with embedded lists

<table>
<thead>
<tr>
<th>Task</th>
<th>Icon</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand an embedded list</td>
<td>+</td>
<td>Click the expand icon in the list header.</td>
</tr>
<tr>
<td>Collapse an embedded list</td>
<td>-</td>
<td>Click the collapse icon in the list header.</td>
</tr>
<tr>
<td>Insert a new row</td>
<td></td>
<td>Double-click Insert a new row…</td>
</tr>
<tr>
<td>Edit a row</td>
<td></td>
<td>Double-click in an empty area of that field. See Use the list editor.</td>
</tr>
<tr>
<td>Delete a row</td>
<td>X</td>
<td>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.</td>
</tr>
</tbody>
</table>
Related lists

Related lists appear on forms and show records in tables that have relationships to the current record. Users can view and modify information in related lists like any other list. Administrators can configure related lists to appear on forms and in hierarchical lists. Related lists do not have a size limit.

Note: Related lists are not designed to work in situations where the relationship between two records is defined with a List field (for example a Watch list).

By default, all related lists display in List v2, even when List v3 is activated. An administrator can enable List v3 for related lists. The same List v3 compatibility rules apply to related lists as to standard lists.

Select related records

You can select records for a related list.

Role required: none

1. Open the record for which you are selecting related records, such as a problem record.
2. Locate the related list, for example, Incidents.
3. Click Edit.
4. Using the slushbucket, select the records to associate with the current record.
   When you select a record, information about it appears below the Collection list to help you identify
   the record to select.
5. Click Save.

Create a new related record

You can add a new record to the database from a related list.

Role required: You must have at least one role that lets you create a record in the related table.

1. Open the record to which you are adding a related record, for example, a change request.
2. Locate the related list, for example, Change Tasks.
3. Click New.
   A new form for the related table opens, for example, the Change Task form.
4. Complete the form and click Submit.
   The new record is added to the related table and to the related list of the record.

Configure when a related list loads

If there are many related lists on a form or many records in the related lists, the form may load slowly.
In UI16 and UI15, you can improve form response times by configuring related lists to load manually,
on demand, or automatically, after the rest of the form loads.

Role required: none

Note: This functionality applies only when List v3 is disabled for related lists, which is the default
setting. When List v3 is enabled for related lists, all related lists load asynchronously after the
form loads, even if there are no v3 related lists on the form.

1. Click the settings icon (⚙️) in the banner frame to open the system settings menu.
2. Select one of the following options under Related List Loading.
   In UI16, click the Forms tab to see this setting.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>With the Form</td>
<td>Related lists load as soon as you open the form. This is the default setting.</td>
</tr>
<tr>
<td>After Form Loads</td>
<td>Related lists load after the rest of the form loads.</td>
</tr>
<tr>
<td>On-demand</td>
<td>Related lists load on demand. When this option is selected, a Load Related Lists button appears at the bottom of each form that contains related lists. You must click the button to load related lists.</td>
</tr>
</tbody>
</table>
3. Close the system settings menu.

Create a default filter for a related list

You can create a default filter that is applied to a related list when a form loads.

Role required: admin
Note: This functionality is not supported in List v3 related lists.

1. Navigate to the related list (example, Incidents on a problem record).
2. Create the desired filter using the condition builder (example, \(\text{Active} \text{ is} \text{ true}\)).

3. Click Set as Default Filter.

### Configure the edit option

You can configure the edit option that allows users to add records to related lists in forms.

**Role required**: admin

The Edit button is available for related lists that represent many-to-many and one-to-many relationships. Defined related lists may not have an Edit button as related records are added to these lists automatically based on the relationship between the records.

1. Navigate to the related list, such as the Incidents related list on a problem record.
2. Perform the appropriate action for the list version.

<table>
<thead>
<tr>
<th>Version</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v2</td>
<td>Right-click any column heading and select Configure List Control.</td>
</tr>
<tr>
<td>List v3</td>
<td>Open the list title menu and select List Control.</td>
</tr>
</tbody>
</table>

3. Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show the Edit option</td>
<td>Clear the Omit edit button check box.</td>
</tr>
<tr>
<td>Hide the Edit option</td>
<td>Select the Omit edit button check box.</td>
</tr>
<tr>
<td>Show the Edit option if the check box is cleared and the button does not appear</td>
<td>Click Enable Edit.</td>
</tr>
</tbody>
</table>

4. If the list represents a one-to-many relationship (example, incidents can be associated with only one problem, but problems can be associated with many incidents), complete the following steps.
   a) Open a record in the target table (example, Incident).
   b) Right-click the header and select Configure Dictionary.
c) Open the dictionary entry for the reference field (example, Problem ID on Incident).

d) In the Reference Specification section, select the Reference floats check box.

5. Click Update.

Create defined related lists
You can add default related lists to the form for all users to see when viewing records.
Role required: admin

For example, you may include a list of related incidents at the bottom of a problem record, or a list of members at the bottom of a group record. This functionality is dependent on reference fields or many-to-many table relationships. If two tables are related via the system dictionary, one can appear as a related list on the other.

Defined related lists allow relationships between arbitrary tables to be expressed as a related list. Any two tables that can have a logical relationship can appear as a parent/child pair via a related list. The following are some examples.

- On an incident record, show all incidents opened by the same caller.
- On a user record, show the last 20 transactions that user has made.
• On an incident record, show all problems opened on the reported CI.

These relationships are beyond the relationships normally defined in the system dictionary through reference fields and many-to-many relationships.

Every related list requires a relationship record. Before creating a new relationship, verify that there is not an existing relationship record that already provides the needed information. Use the following steps to create a new relationship record.

1. Click System Definition Relationships.
2. Click New.
3. Specify the relationship record fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type the name of the related list. The form configuration page displays this name in the list of available lists.</td>
</tr>
<tr>
<td>Advanced</td>
<td>Select this check box to use JavaScript in place of the Applies to table and Queries from table fields.</td>
</tr>
<tr>
<td>Applies to table</td>
<td>Select the table on which the related list appears. This field is hidden in Advanced relationship records.</td>
</tr>
<tr>
<td>Queries from table</td>
<td>Select the table from which this related list retrieves data. This field is hidden in Advanced relationship records.</td>
</tr>
<tr>
<td>Apply to</td>
<td>Type a script to specify the table on which the related list appears. This field is only visible with the Advanced check box selected.</td>
</tr>
<tr>
<td>Query from</td>
<td>Type a script to specify the table from which this related list retrieves data. This field is only visible with the Advanced check box selected.</td>
</tr>
<tr>
<td>Query with</td>
<td>Type a script to specify the records to include from the table the relationship queries.</td>
</tr>
<tr>
<td>Insert Callback</td>
<td>Type a script to run after a successful insert action. This field is only visible with the Advanced check box selected.</td>
</tr>
</tbody>
</table>

4. Click Submit.

Add incidents by same caller related list

This example adds the existing relationship, Incidents by Same Caller, to incident forms.

• Applies to table: This list appears as an available related list when viewing an incident record.
• Queries from table: This list displays a list of incidents.
• Query with: This script selects records where the caller_id matches the caller_id of the parent record (the incident you are viewing).
1. Open an incident.
2. Right-click the header and select Configure Related Lists. The name of the existing relationships appear in your list of available lists.
3. Move the Incidents by Same Caller list to the Selected list.
4. Click Save.
Notes and limitations:

- If you click the New button on one of these new relationships, the system attempts to ensure that the new record matches the list conditions. For example, clicking New on our example list results in an incident where the caller_id is pre-populated with Bud Richman.
- When scripting your condition, current is the record to which you want to add queries while parent is the main record being displayed.
- These relationships do not refresh until you update a form. In the example, if you changed the caller from Bud Richman to Fred Luddy, the list at the bottom of the screen still displays Bud Richman’s incidents until you save the incident.
- You are not limited to a single query condition. It is, for example, possible to have a related list of all incidents opened by the same caller in the last week, or all open incidents opened by the same caller.
- The current and parent objects cannot be used with the Queries from field. Instead, the gs object is available for GlideSystem calls.
- The Edit button is not available on defined relationships, as the relationship is completely scripted.

Add transactions by user related list

This example adds a new relationship, Last 20 transactions, to the user form.

Role required: admin

The new relationship creates a list of task records opened by the current user.

1. Navigate to System Definition Relationships.
2. Click New.
3. Create a new relationship with the following values.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Last 20 transactions</td>
</tr>
<tr>
<td>Applies to</td>
<td>User (sys_user)</td>
</tr>
<tr>
<td>table</td>
<td></td>
</tr>
<tr>
<td>Queries from</td>
<td>Task (task)</td>
</tr>
<tr>
<td>table</td>
<td></td>
</tr>
<tr>
<td>Queries with</td>
<td>current.addQuery('opened_by', parent.sys_id);</td>
</tr>
</tbody>
</table>

4. Click Submit.
5. Navigate to User Administration Users.
6. Select any user.
7. For example, select David Loo.
8. Configure the related lists for the user form and add the related list Last 20 transactions.
10. Select any user.
    For example, select David Loo.
11. The Last 20 transactions related list displays all task records opened by the current user.

Notes and limitations:

- This query returns all task records opened by the user. The related list defaults to displaying 20 task records per page.
- The parent variable refers to the Applies to table. In this case, it applies to the User (sys_user) table.
- Querying against a record sys_id is a common query method for relationships.
Add fields to selections in a related list

When you click Edit in a related list and select an item, information about the item appears below the list. You can expand the fields that appear for the item to provide more information.

Role required: admin
### Figure 61: Fields listed for selected record

#### Groups

<table>
<thead>
<tr>
<th>Groups (1)</th>
<th>Delegates</th>
<th>Visibility domains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groups</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### User = Arlette Honeywell

- **Add Filter**
- **Run Filter**

#### Collection

- **Collection**
- **Groups List**
  - Arlette Honeywell
    - **Amsterdam**

#### Edit Members

- **Name**: Boston
- **Active**: True

---

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To add fields to selections in a related list, record the exact field name, or element, not the label name. This example demonstrates adding fields to the Groups related list (sys_user_group) as illustrated.

1. Navigate to System UI Views.
2. Select sys_ref_list.
3. To add fields from the Group table, in the Lists related list, select sys_user_group.
4. In the List Elements related list, click New.
5. Enter the field name and its relative position when it appears in the description.
   Fields appear from top to bottom, lowest to highest number.
6. Click Submit.

Create a default related record selection filter for a related list

You can set a default filter to restrict which related records users can select. Default filters are simple to set up but lack a dynamic filtering element, which prevents the end user from changing the default filter.

Role required: personalize_list

A filter is used to restrict the records that are listed in the slushbucket that displays when a user clicks Edit in a related list.
1. Perform the appropriate action for the list version.

<table>
<thead>
<tr>
<th>Version</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v2</td>
<td>Right-click any column heading and select Configure List Control.</td>
</tr>
<tr>
<td>List v3</td>
<td>Open the list title menu and select List Control.</td>
</tr>
</tbody>
</table>

2. Configure the List Control form to add the Edit default filter field, if necessary.

3. In the Edit default filter field, use the condition builder to create a default filter.

4. Click Update.

When users click the Edit button in the related list, the list of records they can select is filtered according to the default filter.
Edit a form

You can edit a record in the form view.

Role required: none

1. Navigate to the form.
   
   If another user is looking at the same record, you see their avatar with a green dot in the form header. If more than one user is viewing the record, the avatar is a number, and you can point your cursor to it to see the names.

2. Enter appropriate data.

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

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. For more information, see Insert a record.

On UI16 forms, fields update dynamically and display a field update icon to indicate changes made by other users. You can point to the field update icon to see which user made the update. This dynamic indication helps to prevent users from accidentally overwriting each other's work.

Note: If you entered a different value from the value saved by the other user, the system does not update the field automatically. Change your value manually to match value entered by the other user. Otherwise, you overwrite the change when you save the record.
Insert a record

Insert provides a method for creating multiple similar items, such as email notifications, users, groups, or business rules.

Role required: none

Administrators can enable the Insert function for task records.

1. Open a similar item.
2. Edit the item and give it a new Name.
3. Right-click the form header and select one of the following options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert</td>
<td>Saves the item as a new record and returns to the previously viewed page.</td>
</tr>
<tr>
<td>Insert and Stay</td>
<td>Saves and views the new record.</td>
</tr>
</tbody>
</table>
Apply a template in a form

Your organization may use templates to help with frequently requested tasks. A template contains prepopulated fields that default when the template is selected.

Role required: none

This option is not available in UI11.

1. Navigate to the form.
2. Do the appropriate action for your version of the UI.

| UI16 | 1. Click the more options icon ( ) in the form header.  
|      | 2. Select Toggle Template Bar. |
| UI15 | 1. Right-click the form header.  
|      | 2. Select Toggle Template Bar. |

3. Select the template to apply.

If there is a conflict between the selected template and the form, a conflict message appears with a link to view the details of the conflict. For example, if a field that does not appear on the form is populated in the template, the conflict message details identify the missing field and the value is not set. If you have a conflict message, review the details and notify your administrator if necessary.

Specific fields are populated with values from the template.

4. Complete the form.

You can change any value that was populated from the template.

5. Click Submit to create the record.

Cancel changes to a form

Cancel changes to a form by navigating away from the form without saving.
Role required: none
1. Navigate away from the form view without saving the record.

2. 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.

Use form pane tabs

When using the split screen feature, you can open multiple forms in the form pane. Form pane tabs are available in UI15 only.

Form pane tabs appear above the form header. The current tab is highlighted.
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 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.
5. To remove a tab, select the tab to be deleted and click the x.

Form personalization

When the form personalization feature is activated, users can personalize fields to appear on a specific form view according to individual preferences. Form personalization is available in UI16 and UI15.

Personal form customizations do not affect what other users see on their forms.

In contrast to configuring a form, personalizing a form does not enable users to perform the following actions:

- Change the order of fields on the form.
- Add fields that are not configured to appear on the form.
- Hide mandatory fields.
Personalize a form

You can personalize fields to appear on a specific form view.

Role required: itil, personalize_form, or admin

1. Open any record.
2. In the form header, click the personalize form icon. The Personalize Form menu appears and hide field icons appear on the form.

![Figure 64: Personalize the form](image)

Fields you previously hid are indicated by a cleared gray check box.

Note: Only the fields that the form is configured to display are available in the Personalize Form menu. To add fields to the form, you must configure the form layout.

3. Clear a check box or click the hide field icon by a field.

Note: Personalizing a form in this way modifies the form for you only. To make changes to a form that are visible to all users, you must configure the form.
Some check boxes are gray and selected. These check boxes indicate fields that cannot be hidden because they are required or are already hidden by UI policies or client scripts.

4. Click outside the Personalize Form menu to save your changes.

   If you navigate away from the form, the next time you personalize the form you must reset your customizations to show fields that you have hidden.

5. To restore the default form view, personalize the form and click Reset.

Add an attachment

You can upload a file as an attachment to an incident, a knowledge article, a change request, or to another type of record.

Administrators can configure attachments and how they work in the system. For more information, see Attachment administration.

Attachment file size is not limited by default. However, uploading large attachments can cause issues with the user’s active session on the instance. Empty attachments (file size of 0 kb) are not supported.

---

Note: Do not use the Upload File module in the System Definition application. It is not compatible with multi-node instances.

1. Navigate to the record (example, an incident record).

2. Click the attachments icon (.attachment).

3. Click Choose Files or Browse, depending on your browser, and navigate to a file.

4. Upload multiple files in one of the following ways.
   - Select multiple files at the same time in the file browser. This feature is not supported by Internet Explorer.
   - Add each file on a separate line by clicking Add Another Attachment, and then clicking Choose Files on the next line. Repeat until all desired files are selected. This feature is available in all supported browsers.

5. Click Attach.

Attached files appear in the Current file attachments list and at the top of the form. A message appears if a file is not attached because it is too large or is a restricted file type. Administrators can configure these limits.
6. Close the pop-up window to return to the form.

Manage attachments
You can view, rename, and remove the attachments on a record, and add additional attachments.
1. Navigate to the record (example, an incident record).
2. Click the attachments icon (_attach) or the Manage Attachments link if files are already attached. The number of attachments for a record is listed on the Manage Attachments link.
3. To rename an attachment, complete the following steps.
   a) Click [rename] beside the file name at the top of the form or in the pop-up window.
   a) Edit the file name and press the Enter key.

   Note: Press the Esc key instead of the Enter key to undo your changes and cancel rename.

4. To remove attachments, click the Manage Attachments link and complete the following steps.
   a) Select the check boxes next to the attachments to delete.
   b) Click Remove.
      The attachment disappears and the pop-up window remains open.

5. To add additional attachments, complete the following steps.
   a) Click Choose Files.
   b) Select the file to attach and click Open.
   c) Click Attach.

6. Close the pop-up window to return to the form.

Attach files with drag-and-drop

You can drag files from your computer to a form to upload them.
This functionality is supported in Firefox 3.6 or later and Chrome. Support will be added for other web browsers as they implement the HTML5 specification.

1. Navigate to the record.
2. On your computer, browse to the files to attach.
3. Select the files in the file browser, and then drag them over the form.
4. Release the mouse button to begin the upload.

When the upload is complete, the file name is added to the attachments header. Upload speed depends on the file size and the speed of your network connection.

Warning: Do not navigate away from the record while an upload is in progress. The upload must be completed for the file to be attached.

Checklists

Checklists provide a simple way to track the progress of tasks without creating additional records. Checklists can be added to the form view of any table that extends Task (task).

For example, if a support agent is assigned an incident task to investigate a wireless issue, a checklist can be used to document the individual steps taken.

Checklists are added to records after they are submitted. You cannot add a checklist as you create a record.
Enabling checklists in forms

To enable checklists, navigate to the form and add the Checklist formatter. For instructions, see Add a formatter.
Using checklists

You can add, remove, or rearrange checklist items. You can also save a checklist as a template for future use on other records. Any user can create or edit a checklist and check off completed items.

Activate checklists

Checklists are active by default on new instances. For instances upgrading from a previous version, the Checklist plugin must be activated.

Role required: admin

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.
   If the plugin depends on other plugins, these plugins are listed along with their activation status.
   If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.
4. If available, select the Load demo data check box.
   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance.
   You can also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.
5. Click Activate.

Create a new checklist

You can create a unique checklist for each task record.

Have a user with the personalize_form role enable checklists for the form.

Role required: none

1. Navigate to a record that does not already contain a checklist.
2. Click the down arrow beside the Checklist formatter.
3. Select Create new.
4. Click Add Item.
5. Enter text for the checklist item.
6. Press the Enter key to add the checklist item.
7. Create as many additional checklist items as desired.
8. Click the minus (-) icon to delete a checklist item.
9. Click the drag icon
    and drag a checklist item to a different position in the list.
10. Save the checklist as a template for easy reuse.
    a) Click the down arrow beside the Checklist formatter.
    b) Select Save as Template.
A dialog box appears.

c) Enter a descriptive template name to identify the checklist.
When a user creates a checklist from a template, all templates are listed in alphabetical order and there is no way to filter which templates appear. To provide a better user experience, consider implementing a naming system for checklist templates. For example, include the name of the table or another identifier to clarify how the checklist should be used.

d) Click Save.

11. Save the form.

Create a checklist from a template

You can quickly create a checklist from a previously created template.
The Checklist formatter must be added to the form by a user with the personalize form role.

Role required: none

A template saves time by creating checklist items automatically. You can add, edit, or remove checklist items without impacting the template. You can use any checklist template, even if it was created on a different table.

1. Navigate to a record that does not already contain a checklist.
2. Click the down arrow beside the Checklist formatter.
Figure 67: Checklist with a template selection

3. Under Create from template, select a template.
The checklist items appear.
Delete a checklist

You can remove a checklist from a record.

Role required: none

1. Navigate to a record that contains a checklist.
2. Click the down arrow beside the Checklist formatter.
3. Select Remove Checklist.
   A confirmation dialog box appears.
4. Click Delete.

Delete a checklist template

You can delete checklist templates you no longer need.

Role required: none

Deleting a checklist template has no effect on checklists created from that template.

1. In the navigation filter, enter checklist_template.list.
2. Select the check box by the checklist template you want to delete.
3. In the actions choice list, select Delete.
4. In the confirmation dialog box, click Delete.

User presence

User presence is a UI16 feature that lets you see who is online when you are working in an instance.

Your avatar appears in the form header next to your name, and in multiple other places such as in activity streams, Visual Task Boards, live feeds, and Connect conversations. Online status is represented by a dot on the user’s avatar.

- Green dot if the user is logged in.
- No dot if the user is not logged in.
- Orange dot if the user recently logged out.

The user avatar is the image uploaded to the user record (sys_user). If no image is uploaded, the avatar is the user’s initials.

Note: Users can add an avatar image to their live feed profile. The system uses the live feed avatar if no image is uploaded to the user record.

When you are viewing a record in a form, such as an incident, you can see if other users are viewing the same record.
If multiple users are viewing the record, the avatar is represented by the number of users. Point your cursor to the number to see the names and avatars of the users.

When you are in a Connect conversation or entering comments in an activity stream, you can see information about the other participant’s activity, for example if they are viewing or typing.
An administrator can disable user presence globally.

**Disable user presence**

You can disable user presence globally by enabling a system property.

Role required: admin

Enabling the property turns off all user presence features.

1. Navigate to `sys.properties.list`.
2. Locate the property named `glide.ui.presence.disabled`.
3. Set the Value to true.
Disable live form features

User presence includes several new live form features. You can show or hide these features using the glide.ui16.live_forms.enabled property.

Role required: admin

The glide.ui16.live_forms.enabled property is included automatically with UI16 as part of the com.glide.ui.form_presence plugin. It controls the following form features:

- Live form updates
- Form presence
- Activity formatter appearance
- Attachments displaying in the activity stream

1. Enter sys_properties.list in the Navigation filter.
2. In the system properties list, search for the glide.ui16.live_forms.enabled property.
3. In the Value field, type false.

Activity stream mentions

Get someone’s attention on a record by mentioning them with the @ character in an activity stream. UI15 or UI16 is required to use activity stream mentions.

Any user can use activity stream mentions in the following places:

- On a form, in the activity formatter (UI16 only).
- In a list, in the activity stream for a specific record.
- On a Visual Task Board card, in the card details.
- In a Connect record conversation.

To mention someone, enter the @ character in a supported activity stream. Next, select a user from the suggestion list, which allows you to select any user in the instance. You can see which users have access to the record and, if presence is enabled, who is online. Enter any other text, as needed, and post to the activity stream.
By default, you receive an email notification when someone mentions you. You can disable this behavior by unsubscribing from the Activity Stream @Mention Email notification on your notification preference page.

If Connect is enabled, you can receive additional notifications, depending on whether you follow the record in Connect. When someone mentions you in a record you do not follow in Connect, you receive whichever Connect notifications you enabled globally, as well as the Activity Stream @Mention Email notification. If you do follow the record in Connect, you only receive notifications according to your notification preferences for the record conversation. In this case, you do not receive the Activity Stream @Mention Email notification.

Note: The system creates a record on the Notification [live_notification] table each time a user is mentioned. The record stores the information required to generate notifications.
Common UI elements

This page lists common UI elements for the standard user interface.

Dot-walking

Dot-walking provides access to fields on related tables from a form, list, or script.

If the current table contains a reference to another table, any field on the referenced table can be accessed using dot-walking.

Dot-walking references a field by building a chain of field names separated by dots (periods). For instance, `incident.assigned_to.company` references the company of the user assigned to an incident. The recommended limit for chain length is three levels.

Dot-walking in tree pickers

The tree picker interface presents an expandable, hierarchical view that may be used when selecting fields.

For example, this Users glide list field has a select fields icon ( ):

![Figure 71: List field](image)

Clicking this icon presents a list of fields available on the current record:
Reference fields have + icons next to their name. Clicking the + expands a list of the fields on that referenced field. In this example, expanding the Assigned To field shows the User fields for that record:
Selecting the Manager field adds the variable `@{assigned_to.manager}`:

Dot-walking in choice list fields

Users can dot-walk to related fields in a choice list, such as the field list in a filter.

This example demonstrates how to filter the incident table by the company of the caller who registered the incident.

First, open the choice list of fields to filter by. This presents a list of the fields that are present on the Incident (incident) table. Reference fields are followed by related fields, which are presented in blue. For instance: Caller is followed by Caller User fields. This means that Caller is a reference field, and
the related fields are User fields on the Caller record. If the blue related fields are not present in the list, select Show Related Fields in blue at the bottom of the list:

![Image of related fields]

Figure 75: Show related fields

When the related fields are present, select a set of related fields.
After the related field is selected, the menu reloads with the related table’s fields.
The new field is: `caller.company`.

When looking at the list, it is easy to see where in the dot-walk the user currently is. Each selected reference is stored at the top, and the number of dots in front indicate how many dots from the initial record the user has reached.
In this picture, the user is currently at incident.caller.company. It is possible to return to higher levels in the hierarchy by selecting the blue records. For instance, selecting Incident fields returns to the list of incident fields.

The related fields can be dismissed by selecting Remove Related Fields in blue at the bottom of the list:

![Figure 79: Remove related fields](image)

**Dot-walking in list collectors**

When selecting a list of fields from a list collector (for example, when you are configuring a form), it is also possible to dot-walk to fields from other forms.

To see which fields are reference fields and can be dot-walked, look for green fields with a plus symbol.
Figure 80: Reference fields for dot-walking

Once a reference field is highlighted, the expand icon appears above the add icon.
Selecting the expand icon opens the list of fields from the related list in the Available pane. In this picture, the user has opened the Assigned to fields. As in other examples, the previous lists of fields appear at the top of the list in blue.
Figure 82: Lists of fields

Once the field is added to the Selected pane, it appears with its full dot-walked syntax. In the next picture, the user has selected Assigned_to.active.
Dot-walking in scripts

You can dot-walk within a script by invoking the dot-walk syntax.

This functionality requires a knowledge of JavaScript.

For scripts that run on the server side, such as business rules, it is necessary to add current.

The following script, for example, is a scripted approval rule that requests an approval from the manager of the user who opened the ticket.

```javascript
try {
  current.opened_by.manager;
} catch (err) {} 
```

For scripts that run on the client side, such as client scripts, current is not necessary. For instance, the following Highlight VIP Caller script runs on the client side.

```javascript
function onChange (control, oldValue, newValue, isLoading) {
  //wait until there is a valid record in the field if (newValue) {

    //get the caller object so we can access fields var caller = g_form.
    getReference ('caller_id');

    var callerLabel = document.getElementById('label.incident.caller_id');
    var callerField = document.getElementById('sys_display.incident.caller_id')
```

Figure 83: Dot-walked field
//check for VIP status if (caller. vip == 'true') {

//change the caller label to red background //style object is CSSStyleDeclaration, style names are not standard css names if (callerLabel) document.getElementById('label.incident.caller_id').style.backgroundColor = 'red';

//change the caller's name field to red text if (callerField) document.getElementById('sys_display.incident.caller_id').style.color = 'red'; } else { //not a VIP, remove temporary styles if (callerLabel) document.getElementById('label.incident.caller_id').style.backgroundColor = ''; if (callerField) document.getElementById('sys_display.incident.caller_id').style.color = ''; } }

Dot-walking in variables

Often, you can add variables into templates, notifications, or other forms where a value is being called from the form.

For example, ${assigned_to} is the variable for the Assigned to field.

As illustrated above, it is possible to dot-walk to fields on any reference field’s original record. In the case above, it is possible to dot-walk to any field on the assigned_to record, for example, ${assigned_to.manager}.

As is always the case with dot-walking, this can be a longer chain if needed, as in this example: ${assigned_to.department.manager.mobile_phone}.

Sometimes this variable can be selected from a tree picker.

Use a slushbucket

Slushbuckets allow you to select multiple items from a list of available items and to remove items from a list of selected items.

Slushbuckets are used in many operations, such as personalizing lists, adding items to related lists, and Service Catalog list collector variables.

The slushbucket interface has two columns: the available items on the left and the selected items on the right.

• To add items to the selection, double-click an available item on the left or select an item and click the add icon (>). The new item is added at the bottom of the selected items column on the right.
• To remove items from the selection, double-click the item on the right, or select the item and click the remove icon (\).  
• To select multiple consecutive items, hold the Shift key and click the first and last item.
• To select multiple non-consecutive items, hold the Ctrl key (Command key on Mac) and click the desired items.

Arrange slushbucket selections

Some slushbuckets allow users to customize the order of selections, such as when you are configuring a form or list.

Follow one of the two methods below to move an item.

• To move items one position, select the items and click the up or down icon.
To move an item multiple positions, select consecutive items above or below the item then click the up or down icon. In this example, to move Assigned to to the top of the selections order, complete the following steps.

a) Hold the Shift key and click Short description then Number.

b) Click the down icon.

![Diagram of item arrangement](image)

**Figure 84:** Arrange items

**Find available slushbucket items**

Some slushbuckets provide filter and search controls for available items, such as adding items to related lists.

Information fields for the highlighted available item appear beneath some slushbuckets. The information fields are the same as the reference lookup for a reference field on a form. To modify which fields appear, configure the reference lookup list.

- To filter available items, create conditions using the condition builder and click Run filter.
- To search available items, enter text in the Search field. The list of available items is filtered as you type.
Set the number of slushbucket items visible in the available column

You can modify the glide.xmlhttp.excessive property to change the number of items that appear in the Available column of the slushbucket.

Role required: admin
1. Add the property to the System Properties (sys_properties) table.
2. Change the Type to Integer.
3. Enter a number in the Value field. The default value is 100.

**Warning:** Selecting a number significantly higher than 100 can lead to performance issues on your instance as the data is loaded into the slushbucket.

4. Save the property.

Tree picker

The tree picker is a special reference lookup that you can add as an attribute to a form.
The tree picker is a special reference lookup for the following items.

- Configuration Items (CIs) for a field that is dependent on another CI field.
- Reference elements for any hierarchical table. A hierarchical table is any table that has a parent field pointing back at itself.
- Values for a user reference that is dependent on the group.

Add the tree picker attribute

A limit of 1000 has been placed on the number of nodes returned to the tree picker. This limit is configurable with the glide.ui.group_heirarchy.max_nodes property.

Role required: personalize_dictionary

1. Modify the dictionary entry for the field.
2. Add tree_picker=true to the Attributes field.
   If there are multiple attributes, use a comma to separate them without any spaces between.

   ![Attributes: tree_picker=true]

Tree picker examples

The sections below include tree picker examples.

Assignment Group

By default, the Assignment group field uses the tree picker attribute.
This presents a hierarchical tree view of the reference field’s options, which in this case is groups. If a group has sub-groups, they appear in the tree structure. It is possible to expand a group to see its members, but members cannot be selected.

Note: You cannot customize the label names used in the tree picker. The label names are taken from the values in the table. For example, the Assignment group choices come from the group names in the Name column of the Groups table.

Simple dependent fields

It is also possible to add the tree-picker attribute on a reference field that is dependent on a reference field of a different type. For example, if Assigned to is dependent on Assignment group, it is possible to add the tree picker attribute on Assigned to. The result is a one-node tree for the group and its members.
Dependent fields

In this example, there are two CI reference fields, and one is dependent on the other. The dependent one has the tree_picker attribute:

For this example, the configuration item is Bond Trading. The tree picker for the Dependent CI field shows all downstream and upstream relationships for that CI. The small orange square icon above a
relationship indicates that the CI, lawson, already has an open task against it. Pointing to the orange square displays a pop-up window with information about the open task.

Note: Dependencies for CIs are enforced only when the dictionary entry for the reference field has tree_picker=true in the Attributes field.

Condition builder
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 can include fields on related tables by dot-walking.
- Operator: a choice list based on the field type. For example, in the Incident (incident) table, the greater than operator does not apply to the Active field but it does apply to the Priority field.
- Value: a text entry field or a choice list, depending on field type. For example, in the Incident (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.

Condition builder actions
You can add a dependent condition by clicking AND or OR next to the condition. You can add a top-level condition by clicking AND or OR on the condition builder toolbar above the conditions.
You can remove a condition by clicking the delete icon (X) next to the condition.

Figure 89: Example AND condition
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, complete the following steps.

1. Create the filter condition (Assignment group) [is] [Hardware].
   
   Note: 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.

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, such as Today, This week, Last 3 months, and so on.

For example, at 12 P.M. 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 and the current day and time. For example, if you choose the Last 3 months filter on April 15th, the results show records created since January 1st up until April 15. A filter for Last 12 months returns records created from midnight on the first of the month twelve months ago and the current day and time.

The at or before and at or after filters use midnight as a start or end point. For example, if you filter a list of incidents created (at or after) (Yesterday), the resulting list shows all incidents created at midnight yesterday or later. If it is Thursday, August 7, and you filter a list of incidents created (at or before) (Last week), the resulting list shows all incidents created at and before midnight on Sunday August 3, which is the end of last week.
Operators available for filters and queries

The system provides a set of operators for use with filters, condition builders, and encoded queries. A field’s data type determines what operators are available for it.

Table 41: Operators available for condition builders

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>(Active) (is) True AND (Caller) (is not empty)</td>
<td>^</td>
<td>active=true^CallerISNOTEMPTY</td>
</tr>
<tr>
<td>OR condition</td>
<td>(Short description) (is empty) OR (Description) (is empty)</td>
<td>^OR</td>
<td>short_descriptionISEMPTY^ORdescriptionISEMPTY</td>
</tr>
<tr>
<td>OR filter</td>
<td>All of these conditions must be met</td>
<td>^NQ</td>
<td>short_descriptionISEMPTY^NQdescriptionISNOTEMPTY</td>
</tr>
<tr>
<td></td>
<td>OR all of these conditions must be met</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Description) (is not empty)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 42: Operators available for string fields

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>starts with</td>
<td>(Short description) (starts with) (SAP)</td>
<td>STARTSWITH</td>
<td>short_descriptionSTARTSWITHSAP</td>
</tr>
<tr>
<td>ends with</td>
<td>(Short description) (ends with) (outage)</td>
<td>%</td>
<td>short_descriptionENDSWITHoutage</td>
</tr>
<tr>
<td></td>
<td></td>
<td>ENDSWITH</td>
<td></td>
</tr>
<tr>
<td>contains</td>
<td>(Short description) (contains) (SAP)</td>
<td>*</td>
<td>short_descriptionLIKESAP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>LIKE</td>
<td></td>
</tr>
<tr>
<td>does not contain</td>
<td>(Short description) (does not contain) (SAP)</td>
<td>!*</td>
<td>short_descriptionNOT LIKESAP</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NOTLIKE</td>
<td></td>
</tr>
<tr>
<td>is</td>
<td>(Short description) (is) (Network storage unavailable)</td>
<td>=</td>
<td>short_description=Network storage unavailable</td>
</tr>
<tr>
<td>is not</td>
<td>(Short description) (is not) (Network storage unavailable)</td>
<td>!=</td>
<td>short_description!=Network storage unavailable</td>
</tr>
<tr>
<td>is empty</td>
<td>(Short description) (is empty)</td>
<td>ISEMPTY</td>
<td>short_descriptionISEMPTY</td>
</tr>
<tr>
<td>is not empty</td>
<td>(Short description) (is not empty)</td>
<td>ISNOTEMPTY</td>
<td>short_descriptionISNOTEMPTY</td>
</tr>
<tr>
<td>is anything</td>
<td>(Short description) (is anything)</td>
<td>ANYTHING</td>
<td>short_descriptionANYTHING</td>
</tr>
</tbody>
</table>
### Operators available for reference fields

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is empty string</td>
<td>(Short description) [is empty string]</td>
<td>EMPTYSTRING</td>
<td>short_descriptionEMPTYSTRING</td>
</tr>
<tr>
<td>less than or is</td>
<td>(Short description) [less than or is] (s)</td>
<td>(&lt;)</td>
<td>short_descriptionlt;(=)s</td>
</tr>
<tr>
<td>greater than or is</td>
<td>(Short description) [greater than or is] (s)</td>
<td>(\ge)</td>
<td>short_description(\ge)s</td>
</tr>
<tr>
<td>between</td>
<td>(Short description) [between] (q) and (t)</td>
<td>BETWEEN</td>
<td>short_descriptionBETWEENq(\le)t</td>
</tr>
<tr>
<td>is same</td>
<td>(Short description) [is same] as [Description]</td>
<td>SAMEAS</td>
<td>short_descriptionSAMEASdescription</td>
</tr>
<tr>
<td>is different</td>
<td>(Short description) [is different] from [Description]</td>
<td>NSAMEAS</td>
<td>short_descriptionNSAMEASdescription</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>(Caller) [is] [Don Goodliffe]</td>
<td>=</td>
<td>caller_id=9ee1b13dc6112271007f9d0efdb69cd0</td>
</tr>
<tr>
<td>is not</td>
<td>(Caller) [is not] [Don Goodliffe]</td>
<td>!=</td>
<td>caller_id! =9ee1b13dc6112271007f9d0efdb69cd0</td>
</tr>
<tr>
<td>is empty</td>
<td>(Caller) [is empty]</td>
<td>IEMPTY</td>
<td>caller_idIEMPTY</td>
</tr>
<tr>
<td>is not empty</td>
<td>(Caller) [is not empty]</td>
<td>ISNOTEMPTY</td>
<td>caller_idISNOTEMPTY</td>
</tr>
<tr>
<td>starts with</td>
<td>(Caller) [starts with] [Don]</td>
<td>STARTSWITH</td>
<td>caller_idSTARTSWITHDon</td>
</tr>
<tr>
<td>ends with</td>
<td>(Caller) [ends with] [liffe]</td>
<td>ENDSWITH</td>
<td>caller_idENDSWITHliffe</td>
</tr>
<tr>
<td>contains</td>
<td>(Caller) [contains] [on]</td>
<td>(\cdot)</td>
<td>caller_id(\cdot)LIKEon</td>
</tr>
<tr>
<td>does not contain</td>
<td>(Caller) [does not contain] [on]</td>
<td>(!\cdot)</td>
<td>caller_id(!\cdot)LIKEon</td>
</tr>
<tr>
<td>is anything</td>
<td>(Caller) [is anything]</td>
<td>ANYTHING</td>
<td>caller_idANYTHING</td>
</tr>
<tr>
<td>is same</td>
<td>(Caller) [is same] as [Assigned to]</td>
<td>SAMEAS</td>
<td>caller_idSAMEASassigned_to</td>
</tr>
<tr>
<td>is different</td>
<td>(Caller) [is different] from [Assigned to]</td>
<td>NSAMEAS</td>
<td>caller_idNSAMEASassigned_to</td>
</tr>
<tr>
<td>is empty string</td>
<td>(Caller) [is empty string]</td>
<td>EMPTYSTRING</td>
<td>caller_idEMPTYSTRING</td>
</tr>
<tr>
<td>is (dynamic)</td>
<td>(Caller) [is (dynamic)] [Me]</td>
<td>DYNAMIC</td>
<td>caller_idDYNAMIC54635e965f510100a9ad2572f2b477c</td>
</tr>
</tbody>
</table>

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Note: Not all operators are available for all reference types. Depending on the reference you select, you may see a shorter list of operators.

Table 44: Operators available for choice fields containing strings

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>(Subcategory) (is) (Email) =</td>
<td>subcategory=email</td>
<td></td>
</tr>
<tr>
<td>is not</td>
<td>(Subcategory) (is not) (Email) !=</td>
<td>subcategory!=email</td>
<td></td>
</tr>
<tr>
<td>is one of</td>
<td>(Subcategory) (is one of) (DB2, MS SQL Server, Oracle) IN</td>
<td>subcategoryIN db2, sql server, oracle</td>
<td></td>
</tr>
<tr>
<td>is not one of</td>
<td>(Subcategory) (is not one of) (DB2, MS SQL Server, Oracle) NOT IN</td>
<td>subcategoryNOT IN db2, sql server, oracle</td>
<td></td>
</tr>
<tr>
<td>contains</td>
<td>(Subcategory) (contains) (Em) LIKE</td>
<td>subcategoryLIKE em</td>
<td></td>
</tr>
<tr>
<td>starts with</td>
<td>(Subcategory) (starts with) (Em) STARTSWITH</td>
<td>subcategorySTARTSWITH em</td>
<td></td>
</tr>
<tr>
<td>ends with</td>
<td>(Subcategory) (ends with) (il) • % ENDSWITH</td>
<td>subcategoryENDSWITH il</td>
<td></td>
</tr>
<tr>
<td>does not contain</td>
<td>(Subcategory) (does not contain) (Em) NOT LIKE</td>
<td>subcategoryNOT LIKE em</td>
<td></td>
</tr>
<tr>
<td>is anything</td>
<td>(Subcategory) (is anything) ANYTHING</td>
<td>subcategoryANYTHING</td>
<td></td>
</tr>
<tr>
<td>is same</td>
<td>(Subcategory) (is same) as (Category) SAMEAS</td>
<td>subcategorySAMEAS category</td>
<td></td>
</tr>
<tr>
<td>is different</td>
<td>(Subcategory) (is different) from (Category) NSAMEAS</td>
<td>subcategoryNSAMEAS category</td>
<td></td>
</tr>
</tbody>
</table>

Table 45: Operators available for choice fields containing integers

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>(Impact) (is) (1 - High) =</td>
<td>impact=1</td>
<td></td>
</tr>
<tr>
<td>is not</td>
<td>(Impact) (is not) (1 - High) !=</td>
<td>impact!=1</td>
<td></td>
</tr>
<tr>
<td>is one of</td>
<td>(Impact) (is one of) (1 - High, 2 - Medium) IN</td>
<td>impactIN 1,2</td>
<td></td>
</tr>
<tr>
<td>is not one of</td>
<td>(Impact) (is not one of) (1 - High, 2 - Medium) NOT IN</td>
<td>impactNOT IN 1,2</td>
<td></td>
</tr>
<tr>
<td>is empty</td>
<td>(Impact) (is empty) EMPTY</td>
<td>impactISEMPTY</td>
<td></td>
</tr>
<tr>
<td>is not empty</td>
<td>(Impact) (is not empty) NOTEMPTY</td>
<td>impactISNOTEMPTY</td>
<td></td>
</tr>
<tr>
<td>less than</td>
<td>(Impact) (less than) (2 - Medium) &lt;</td>
<td>impact&lt;2</td>
<td></td>
</tr>
<tr>
<td>Operator label</td>
<td>Example condition</td>
<td>Equivalent query operator</td>
<td>Example query</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------</td>
<td>---------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>greater than</td>
<td>(Impact) (greater than) (2 - Medium)</td>
<td>&gt;</td>
<td>impact&gt;2</td>
</tr>
<tr>
<td>less than or is</td>
<td>(Impact) (less than or is) (2 - Medium)</td>
<td>&lt;</td>
<td>impact&lt;=2</td>
</tr>
<tr>
<td>greater than or is</td>
<td>(Impact) (greater than or is) (2 - Medium)</td>
<td>&gt;=</td>
<td>impact&gt;=2</td>
</tr>
<tr>
<td>between</td>
<td>(Impact) (between) (1 - High) and (2 - Medium)</td>
<td>BETWEEN</td>
<td>impactBETWEEN1@2</td>
</tr>
<tr>
<td>is anything</td>
<td>(Impact) (is anything)</td>
<td>ANYTHING</td>
<td>impactANYTHING</td>
</tr>
<tr>
<td>is same</td>
<td>(Impact) (is same as (Urgency)</td>
<td>SAMEAS</td>
<td>impactSAMEASurgency</td>
</tr>
<tr>
<td>is different</td>
<td>(Impact) (is different from (Urgency)</td>
<td>NSAMEAS</td>
<td>impactNSAMEASurgency</td>
</tr>
</tbody>
</table>

Note: The operators 'less than or is' and 'greater than or is' are not supported for integer fields in the condition builder. Use a scripted condition instead.

Table 46: Operators available for date-time fields

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>on</td>
<td>(SLA due) (on) (Today)</td>
<td>ONToday</td>
<td>sla_dueONToday@javascript:gs.daysAgoStart(0)@javascript:gs.daysAgoEnd(0)</td>
</tr>
<tr>
<td>not on</td>
<td>(SLA due) (not on) (Today)</td>
<td>NOTONToday</td>
<td>sla_dueNOTONToday@javascript:gs.daysAgoStart(0)@javascript:gs.daysAgoEnd(0)</td>
</tr>
<tr>
<td>before</td>
<td>(SLA due) (before) (Today)</td>
<td>&lt;</td>
<td>sla_due(javascript:gs.daysAgoStart(0))</td>
</tr>
<tr>
<td>at or before</td>
<td>(SLA due) (at or before) (Today)</td>
<td>&lt;=</td>
<td>sla_due(=javascript:gs.daysAgoEnd(0))</td>
</tr>
<tr>
<td>after</td>
<td>(SLA due) (after) (Today)</td>
<td>&gt;</td>
<td>sla_due(javascript:gs.daysAgoEnd(0))</td>
</tr>
<tr>
<td>at or after</td>
<td>(SLA due) (at or after) (Today)</td>
<td>&gt;=</td>
<td>sla_due(=javascript:gs.daysAgoStart(0))</td>
</tr>
<tr>
<td>between</td>
<td>(SLA due) (between) (Yesterday) and (Today)</td>
<td>BETWEEN</td>
<td>sla_dueBETWEENjavascript:gs.daysAgoStart(1)@javascript:gs.daysAgoEnd(0)</td>
</tr>
<tr>
<td>trend (on or after)</td>
<td>(SLA due) (trend) (on or after) (Monday)</td>
<td>DATEPART</td>
<td>sla_dueDATEPARTMonday@javascript:gs.datePart('dayofweek','monday','GE')</td>
</tr>
<tr>
<td>trend (on or before)</td>
<td>(SLA due) (trend) (on or before) (Monday)</td>
<td>DATEPART</td>
<td>sla_dueDATEPARTMonday@javascript:gs.datePart('dayofweek','monday','LE')</td>
</tr>
<tr>
<td>trend (after)</td>
<td>(SLA due) (trend) (after) (Monday)</td>
<td>DATEPART</td>
<td>sla_dueDATEPARTMonday@javascript:gs.datePart('dayofweek','monday','GT')</td>
</tr>
<tr>
<td>trend (before)</td>
<td>(SLA due) (trend) (before) (Monday)</td>
<td>DATEPART</td>
<td>sla_dueDATEPARTMonday@javascript:gs.datePart('dayofweek','monday','LT')</td>
</tr>
<tr>
<td>trend (on)</td>
<td>(SLA due) (trend) (on) (Monday)</td>
<td>DATEPART</td>
<td>sla_dueDATEPARTMonday@javascript:gs.datePart('dayofweek','monday','EE')</td>
</tr>
</tbody>
</table>
Table 47: Operators available for numeric fields

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>relative (on or after)</td>
<td>[SLA due] (relative) (on or after) [1] (Hours) ago</td>
<td>RELATIVEGE</td>
<td>sla_dueRELATIVEGE@hour@ago@1</td>
</tr>
<tr>
<td>relative (on or before)</td>
<td>[SLA due] (relative) (on or before) [1] (Hours) ago</td>
<td>RELATIVELE</td>
<td>sla_dueRELATIVELE@hour@ago@1</td>
</tr>
<tr>
<td>relative (after)</td>
<td>[SLA due] (relative) (after) [1] (Hours) ago</td>
<td>RELATIVEGT</td>
<td>sla_dueRELATIVEGT@hour@ago@1</td>
</tr>
<tr>
<td>relative (before)</td>
<td>[SLA due] (relative) (before) [1] (Hours) ago</td>
<td>RELATIVELT</td>
<td>sla_dueRELATIVELT@hour@ago@1</td>
</tr>
<tr>
<td>relative (on)</td>
<td>[SLA due] (relative) (on) [1] (Hours) ago</td>
<td>RELATIVEEE</td>
<td>sla_dueRELATIVEEE@hour@ago@1</td>
</tr>
<tr>
<td>is empty</td>
<td>[SLA due] (is empty)</td>
<td>IEMPTY</td>
<td>sla_dueISEMPTY</td>
</tr>
<tr>
<td>is not empty</td>
<td>[SLA due] (is not empty)</td>
<td>ISNOTEMPTY</td>
<td>sla_dueISNOTEMPTY</td>
</tr>
<tr>
<td>is anything</td>
<td>[SLA due] (is anything)</td>
<td>ANYTHING</td>
<td>sla_dueANYTHING</td>
</tr>
<tr>
<td>is same</td>
<td>[SLA due] (is same) as (Activity due)</td>
<td>SAMEAS</td>
<td>sla_dueSAMEASactivity_due@day</td>
</tr>
<tr>
<td>is different</td>
<td>[SLA due] (is different) from (Activity due)</td>
<td>NSAMEAS</td>
<td>sla_dueNSAMEASactivity_due@day</td>
</tr>
<tr>
<td>is more than</td>
<td>[SLA due] (is more than) [1] (Days) (before) (Activity due)</td>
<td>MORETHAN</td>
<td>sla_dueMORETHANactivity_due@day@before@1</td>
</tr>
<tr>
<td>is less than</td>
<td>[SLA due] (is less than) [3] (Days) (before) (Activity due)</td>
<td>LESSTHAN</td>
<td>sla_dueLESSTHANactivity_due@day@before@3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>(Reassignment count) (is) [0]</td>
<td>=</td>
<td>reassignment_count=0</td>
</tr>
<tr>
<td>is not</td>
<td>(Reassignment count) (is not) [0]</td>
<td>!=</td>
<td>reassignment_count!=0</td>
</tr>
<tr>
<td>is empty</td>
<td>(Reassignment count) (is empty)</td>
<td>EMPTY</td>
<td>reassignment_count!SEMPTY</td>
</tr>
<tr>
<td>is not empty</td>
<td>(Reassignment count) (is not empty)</td>
<td>NOTEMPTY</td>
<td>reassignment_count!SNOTEMPTY</td>
</tr>
<tr>
<td>less than</td>
<td>(Reassignment count) (less than) [2]</td>
<td>&lt;</td>
<td>reassignment_count&lt;2</td>
</tr>
<tr>
<td>greater than</td>
<td>(Reassignment count) (greater than) [2]</td>
<td>&gt;</td>
<td>reassignment_count&gt;2</td>
</tr>
<tr>
<td>less than or is</td>
<td>(Reassignment count) (less than or is) [2]</td>
<td>&lt;=</td>
<td>reassignment_count&lt;=2</td>
</tr>
<tr>
<td>greater than or is</td>
<td>(Reassignment count) (greater than or is) [2]</td>
<td>&gt;=</td>
<td>reassignment_count&gt;=2</td>
</tr>
<tr>
<td>between</td>
<td>(Reassignment count) (between) [1] and [2]</td>
<td>BETWEEN</td>
<td>reassignment_countBETWEEN1@2</td>
</tr>
<tr>
<td>Operator label</td>
<td>Example condition</td>
<td>Equivalent query operator</td>
<td>Example query</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------</td>
<td>---------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>is anything</td>
<td>(Reassignment count) (is anything)</td>
<td>ANYTHING</td>
<td>reassignment_countANYTHING</td>
</tr>
<tr>
<td>is same</td>
<td>(Reassignment count) (is same) as (Reopen count)</td>
<td>SAMEAS</td>
<td>reassignment_countSAMEASreopen_count</td>
</tr>
<tr>
<td>is different</td>
<td>(Reassignment count) (is different) from (Reopen count)</td>
<td>NSAMEAS</td>
<td>reassignment_countNSAMEASreopen_count</td>
</tr>
<tr>
<td>greater than field</td>
<td>(Reassignment count) (greater than field) (Reopen count)</td>
<td>GT_FIELD</td>
<td>reassignment_countGT_FIELDreopen_count</td>
</tr>
<tr>
<td>less than field</td>
<td>(Reassignment count) (less than field) (Reopen count)</td>
<td>LT_FIELD</td>
<td>reassignment_countLT_FIELDreopen_count</td>
</tr>
<tr>
<td>greater than or is field</td>
<td>(Reassignment count) (greater than or is field) (Reopen count)</td>
<td>GT_OR_EQUALS_FIELD</td>
<td>reassignment_countGT_OR_EQUALS_FIELDreopen_count</td>
</tr>
<tr>
<td>less than or is field</td>
<td>(Reassignment count) (less than or is field) (Reopen count)</td>
<td>LT_OR_EQUALS_FIELD</td>
<td>reassignment_countLT_OR_EQUALS_FIELDreopen_count</td>
</tr>
</tbody>
</table>

Table 48: Operators available for boolean fields

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>(Active) (is) (true)</td>
<td>=</td>
<td>active=true</td>
</tr>
<tr>
<td>is not</td>
<td>(Active) (is not) (true)</td>
<td>!=</td>
<td>active!=true</td>
</tr>
<tr>
<td>is empty</td>
<td>(Active) (is empty)</td>
<td>ISEMPTY</td>
<td>activelSEMPTY</td>
</tr>
<tr>
<td>is not empty</td>
<td>(Active) (is not empty)</td>
<td>ISNOTEMPTY</td>
<td>activelISNOTEMPTY</td>
</tr>
<tr>
<td>is anything</td>
<td>(Active) (is anything)</td>
<td>ANYTHING</td>
<td>activelANYTHING</td>
</tr>
<tr>
<td>is same</td>
<td>(Active) (is same) as (Made SLA)</td>
<td>SAMEAS</td>
<td>activelSAMEASmade_sla</td>
</tr>
<tr>
<td>is different</td>
<td>(Active) (is different) from (Made SLA)</td>
<td>NSAMEAS</td>
<td>activelNSAMEASmade_sla</td>
</tr>
</tbody>
</table>

Table 49: Operators available for email notifications

<table>
<thead>
<tr>
<th>Operator label</th>
<th>Example condition</th>
<th>Equivalent query operator</th>
<th>Example query</th>
</tr>
</thead>
<tbody>
<tr>
<td>changes</td>
<td>(State) (changes)</td>
<td>VALCHANGES</td>
<td>stateVALCHANGES</td>
</tr>
<tr>
<td>changes from</td>
<td>(State) (changes from) (Awaiting User Info)</td>
<td>CHANGESFROM</td>
<td>stateCHANGESFROM4^EQ</td>
</tr>
<tr>
<td>changes to</td>
<td>(State) (changes to) (Awaiting User Info)</td>
<td>CHANGESTO</td>
<td>stateCHANGESTO4^EQ</td>
</tr>
</tbody>
</table>
Response time indicator

A response time indicator may appear at the bottom right of forms and in List v2 list views. This indicator provides the processing time, including the total time and the time for each step, for a completed transaction. In List v3, the administrator can add the `glide.ui.list_v3.client.timings.roles` property to allow specified roles to see the response time.

The following example shows the response time for retrieving a filtered v2 list in a demo instance.

![Response time in v2 lists](image)

The response time text is:

Response time (ms): 968, Network: 3, server: 548, browser: 417

In this example, the transaction took the following amount of processing time.

- 968 milliseconds total time
- 3 milliseconds moving data across the network
- 548 milliseconds on the server
- 417 milliseconds in the browser, rendering the HTML and parsing and executing JavaScript

In List v3, the response time appears on the lower left for users whose role is specified in the system property.

![Response time in v3 lists](image)

Response time appears on most pages. However, it does not appear for simple operations, such as paging through a set of records or changing the sort order of a list, or for the first transaction in a session.

To hide the response time in List v2 or forms, click the clock icon. Click the clock icon again to show the response time.
Point to the clock to view a tool tip with the response time.

To view a detailed breakdown of the browser processing time on forms, click browser.

Figure 93: Detailed response time information

Administrators can disable the response time by setting the glide.ui.response_time property to false.

Add a property to display response time in List v3

The response time indicator that displays in List v2 is not supported in List v3. You can add a property to show the display time in milliseconds (ms).

You determine which roles can view the response time. It appears in the lower left corner of the list footer.

Figure 94: Response time in ms in List v3 footer

1. **Add a property** with the following settings.

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>glide.ui.list_v3.client.timings.roles</td>
</tr>
<tr>
<td>Description</td>
<td>For specified roles, show in milliseconds the length of time it takes for the list to load in List v3. Separate each role with a comma.</td>
</tr>
<tr>
<td>Type</td>
<td>string</td>
</tr>
<tr>
<td>Property</td>
<td>Value</td>
</tr>
<tr>
<td>----------</td>
<td>-------</td>
</tr>
<tr>
<td>Value</td>
<td>Enter a comma-separated list of roles.</td>
</tr>
</tbody>
</table>

Note: This property does not apply to the response time indicator in forms.

2. Click Submit.

Tags

Tags allow the grouping and organizing of records.

Tags can be visible to any user (global), visible only to specific groups or users, or visible to a single user.

Tag assignment

There are several ways to assign tags to records.

Assign a tag from the list view using inline field editing

You can assign one or more tags to a record directly from the list view.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to a list.
2. Personalize the list to display the Tags column.
3. In List v2, complete the following steps.
   a) Click in the Add Tag field.
   b) To assign an existing tag, begin typing the tag name, select the tag from the drop-down choices, and press the Enter key.
   c) To create a new tag, enter a new tag name and press the Enter key.

4. In List v3, complete the following steps.
   a) Double-click in the Tag field.
      The Edit Tags dialog opens.
   b) To assign an exist tag, select one of the recent tags or click the lookup icon and select the tag.
   c) To create a new tag, enter a new tag name and press the Enter key.
   d) Click X to close the dialog.

The tag is added to the record.

Assign a tag from a list using the action menu

You can assign one or more tags to a record using the action menu in a list.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to a list.
2. Select the check box beside one or more records.
3. Click Actions on selected rows and complete the appropriate steps for the list version.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| List v2 | 1. Scroll to the Assign tag listing.  
        2. To assign an existing tag, select the tag listed.  
        3. To create a new tag, select New, enter the tag name, select the sharing level, and then click Save. |

| List v3 | 1. Select Assign a tag to open the Edit Tags dialog.  
        2. To assign an existing tag, select one of the recent tags or click the lookup icon and select the tag.  
        3. To create a new tag, enter a new tag name and press the Enter key.  
        4. Click x to close the dialog. |

Note: In List v3, the sharing level defaults to Me. To change the sharing level, edit the tag from the form view or edit the tag record directly.

The tag is added to the record.

Assign a tag from the list context menu

You can assign one or more tags from the list context menu.

| Note:  Tag names are case-insensitive and must not include punctuation. |

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List v2</td>
<td>Select Assign Tag [Tag Name].</td>
</tr>
</tbody>
</table>
| List v3 | 1. Select Edit Tags and select one of the recent tags or click the lookup icon and select the tag.  
      2. Click x to close the dialog. |

4. To create a new tag, complete the appropriate steps for the list version.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| List v2 | 1. Select Assign Tag New Tag.  
       2. Enter a new tag name and select the appropriate sharing level.  
       3. Click Save. |
### Assign a tag using the edit tags icon

You can assign one or more tags to a record using the edit tags icon in the form header.

**Note:** Tag names are case-insensitive and must not include punctuation.

1. Navigate to a form.
2. Perform the appropriate action for your version of the UI.

<table>
<thead>
<tr>
<th>UI 16</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the more options icon (⋯) in the form header.</td>
<td></td>
</tr>
<tr>
<td>2. Select Add Tag.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UI 15</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the edit tags icon ( ).</td>
<td></td>
</tr>
</tbody>
</table>

3. Click in the Add Tag field.
4. Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign an existing tag</td>
<td>Begin typing the tag name and select the tag.</td>
</tr>
<tr>
<td>Create a new tag</td>
<td>Enter a new tag name and press the Enter key.</td>
</tr>
</tbody>
</table>

The tag is added to the record.

### Configure tags to assign automatically

You can configure the system to automatically assign a tag to records that match conditions defined in the tag record.

**Role required:** tags_admin

For example, you can create tags that group high urgency incidents, overdue incidents, canceled changes, or any other set of records. The system automatically assigns the tag to records that match the criteria and removes the tag from records that no longer match the criteria.

1. Navigate to System Definition Tags.
2. Open the tag that you want to assign automatically.
3. Configure the form to add the Conditions for Labels embedded list.
4. Create a row in the Conditions for Labels list.
5. Click the reference icon in the Table column. The Label Table list opens in a pop-up window.
6. Click New.
7. Enter a Name, select a Table, and add conditions for the automatic assignment of the tag.
8. Click Submit.
9. Click the check mark icon to save the new row.
10. Click Update.

Edit tags from the list view

In the list view, you can edit tags that you created.
Personalize the list to display the Tags column.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to a list that contains records you have previously tagged.
2. Click the edit tag audience icon ( jamaiso ) beside the tag name. The Tag Details dialog box opens.
3. Edit the Name field as necessary.
4. Select an option for the Viewable by field to set the sharing level.
5. Click Save.
   All records associated with the tag are updated to reflect the change.

Edit tags from the form view

From the form view, you can edit tags that you created.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to a record you have tagged.
2. Perform the appropriate action for your version of the UI.

<table>
<thead>
<tr>
<th>UI16</th>
<th>UI15</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>Click the more options icon ( ) in the form header.</td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>Click the edit tag audience icon ( ) beside the tag name.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>Click the edit tags icon ( ).</td>
</tr>
<tr>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>Click the edit tag audience icon ( ) beside the tag name.</td>
</tr>
</tbody>
</table>

The Tag Details dialog box opens.
3. Edit the Name field as necessary.
4. Edit the Viewable by field to set the sharing level.
5. Click Save.
   All records associated with the tag are updated to reflect the change.
Edit tags from the My Tags module

From the My Tags module, you can edit tags you created.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to Self-Service My Tags.
2. Open a tag.
3. Make the necessary changes.
4. Click Update.
   All records associated with the tag are updated to reflect the change.

Edit tags from the Tags module

From the Tags module, you can edit all tags.

Role required: tags_admin

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to System Definition Tags.
2. Open a tag.
3. Make the necessary changes.
4. Click Update.

Edit tags from the Tagged Documents page

You can edit tags from the Tagged Documents page.

Note: Tag names are case-insensitive and must not include punctuation.

1. Navigate to Self-Service My Tagged Documents.
   Alternatively, in UI15 you can click Tagged Documents in the Edge.
2. Click Edit Tags.
   A list of tags you have created appears.
3. Open a tag.
4. Make the necessary changes.
5. Click Update.
   All records associated with the tag are updated to reflect the change.

Tag sharing levels

You can set the tag sharing level so other users can use the tag.

The Viewable by field that appears when you edit a tag controls the sharing level. The following sharing levels are available.
Table 50: Tag sharing levels

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Me</td>
<td>Private tag, visible only to the owner.</td>
</tr>
<tr>
<td>Groups and Users</td>
<td>Shared tag, visible to the owner and specific groups or users.</td>
</tr>
<tr>
<td>Everyone</td>
<td>Shared tag, visible to everyone. This option is available to users with the admin or tags_admin role.</td>
</tr>
</tbody>
</table>

Tag name conflict

Conflicts can occur if multiple tags have the same name.

If a private tag and a shared tag have the same name, the system appends (private) to the name of the private tag. For example, Sample tag (private). For definitions of private and shared tags, see Tag sharing levels.

There cannot be more than one shared tag with the same name. If a user attempts to create a shared tag with a name that is already in use, an error message appears and the system prevents the tag from being saved.

Filter records by tag

You can filter records on a table by tags you have access to.

Filter records by tag in any of the following ways.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter from the form view</td>
<td>Perform the appropriate action for your version of the UI.</td>
</tr>
<tr>
<td>• UI16: Click the more options icon ( ), and then click the tag in the menu that opens. A new tab or window opens and displays a list of records that contain the tag.</td>
<td></td>
</tr>
<tr>
<td>• UI15: Click the edit tags icon ( ), and then click the tag.</td>
<td></td>
</tr>
<tr>
<td>Filter from the list view using the Tags column</td>
<td>With the Tags column visible, click the tag name. Clicking two or more tags filters the tags together with the AND operator and shows records containing all of the selected tags. This functionality is not available in List v3.</td>
</tr>
<tr>
<td>Filter from the list view using the list filter</td>
<td>Click the show/hide filter icon ( ), select Tags from the field choice list and enter the tag name.</td>
</tr>
</tbody>
</table>

View tagged documents

The Tagged Documents page displays recently viewed documents or user-tagged documents in the content frame.
Role required: none

An administrator can configure the fields that appear on the tagged document cards by configuring the mobile view of the task, for example, the mobile view of the Incident form. If there is not a mobile view available for the page, the record reverts to the default view. For more information, see Create and delete views.

1. Navigate to Self-Service My Tagged Documents.
   Alternatively, in UI15 you can click Tagged Documents in the Edge.
A sidebar displays all the tags you have access to. A preview area displays tagged documents.

2. Click Show Global Tags to display global tags.

3. Perform one of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display most recently viewed documents</td>
<td>Click Most Recent in the sidebar.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Display documents associated with a tag</td>
<td>Click the tag name in the sidebar.</td>
</tr>
<tr>
<td>Remove a tag from a record</td>
<td>Click the x in the corner of the document preview.</td>
</tr>
<tr>
<td>Open the form for a tagged document</td>
<td>Click the title of the document preview.</td>
</tr>
</tbody>
</table>

**Remove a tag from a record**

There are many ways to remove a tag from a record.

Perform any of the following actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove a tag from a record in the list view using the Tags column</td>
<td>Perform the appropriate action for your list version.</td>
</tr>
<tr>
<td></td>
<td>• List v2: Ensure that the Tags column is visible and click the remove tag icon (x) beside the tag name.</td>
</tr>
<tr>
<td></td>
<td>• List v3: Double-click the tag in the column to open the Edit Tags dialog. Click the remove tag icon (x) beside the tag name.</td>
</tr>
<tr>
<td>Remove a tag from one or more records in the list view using the action menu</td>
<td>Select the check box for one or more records, then click Actions on selected rows Remove Tag: [Tag name].</td>
</tr>
<tr>
<td></td>
<td>This functionality is not available in List v3.</td>
</tr>
<tr>
<td>Remove a tag from a record in the form view</td>
<td>Perform the appropriate action for your version of the UI.</td>
</tr>
<tr>
<td></td>
<td>• UI16: Click the more options icon ( ) in the form header, then click the remove tag icon (x).</td>
</tr>
<tr>
<td></td>
<td>• UI15: Click the edit tags icon ( ), then click the remove tag icon (x).</td>
</tr>
<tr>
<td>Remove a tag from a record in the Tagged Documents page</td>
<td>Click the remove tag icon (x) in the corner of the document preview.</td>
</tr>
</tbody>
</table>

If a tag is automatically applied to a record based on specific conditions, the tag is automatically removed when those conditions no longer apply. For more information, see [Configure tags to assign automatically](#).

**Merge tags**

You can merge one or more tags with another tag. For example, when you merge Tag A with Tag B, Tag A is deleted and all associated records are reassigned Tag B.

Role required: A user with the admin or tags_admin role can merge any tag into any other tag. All other users can merge tags they created into tags that are visible to them.

1. Navigate to Self-Service My Tags .
2. Select the check box for each tag you want to merge with another tag.
3. Select Actions on selected rows Merge Tags .
4. Enter the tag to merge other tags with.
5. Click OK.

Create a tag from the Tags list

You can create a tag directly from the Tags list.
Role required: tags_admin

1. Navigate to System Definition Tags or Self-Service My Tags.
2. Click New.
3. Enter a name for the tag in the Name field.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Specifies the owner of the tag. Users are allowed to change the ownership of the tag to someone else.</td>
</tr>
<tr>
<td>Type</td>
<td>Specifies the type of tag.</td>
</tr>
<tr>
<td></td>
<td>• Standard: is controlled by users who have access to the tag. These users can add or remove records from the tag.</td>
</tr>
<tr>
<td></td>
<td>• Most Active: displays the most frequently accessed modules and is automatically maintained by the system. There is no maximum duration a module can remain as most active.</td>
</tr>
<tr>
<td></td>
<td>• Most Recent: displays the most recently accessed modules and is automatically maintained by the system.</td>
</tr>
<tr>
<td></td>
<td>• Most Active Record: displays the most frequently viewed records and is automatically maintained by the system. There is no maximum duration a record can remain as most active.</td>
</tr>
<tr>
<td></td>
<td>• Most Recent Record: displays the most recently viewed records and is automatically maintained by the system.</td>
</tr>
<tr>
<td></td>
<td>Only tags of the Standard or Most Recent Record types appear on the Tagged Documents page. You can view other types of tags by adding them to a homepage. For more information, see Add a tag to a homepage.</td>
</tr>
<tr>
<td>Viewable by</td>
<td>Specifies the sharing level. By default tags are visible only to the user (Me), but you can share tags with Groups and Users. Users with the tags_admin role are the only users who can create global tags shared with Everyone.</td>
</tr>
<tr>
<td>Active</td>
<td>Specifies whether the tag is enabled or disabled.</td>
</tr>
</tbody>
</table>

Configure Zing tag indexing for text search

Zing text indexing is available for tags on records.
Role required: admin
No tags are indexed by default. You can enable text indexing of tags on a table-by-table basis. Private tags are never indexed.

1. Navigate to the dictionary entry for the table you want to turn on indexing for. For more information, see Modify Dictionary Entries from the Dictionary module
2. In the Attribute related list, click New.
3. Click the reference icon to see available attributes.
4. Select the Text Index Tags attribute (text_index_tags).
5. For the attribute value, enter one of the following options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>everyone_only</td>
<td>Only tags shared with everyone will be indexed.</td>
</tr>
<tr>
<td>all_shared</td>
<td>All shared tags (Everyone, Groups and Users) will be indexed.</td>
</tr>
</tbody>
</table>

6. Click Submit.
7. Under Related Links, click Generate Text Index to reindex the table.

After you turn on text indexing for tags on records, records are reindexed when any of the following actions occurs.
- When you add or remove tags.
- When you modify a tag, provided that fewer than 100 records are affected. If there are more records, you must manually reindex.
- When you manually reindex an entire table (required after initial tag indexing setup).

Configure notifications for tagged records

You can enable the system to send a notification when a record with a certain tag is updated.
Role required: tags_admin
1. Navigate to System Definition Tags.
2. Open a tag.
3. In the Label Entries related list, open the record for which you want notifications.
4. Select the Notify on change check box to be notified any time the record is modified.
5. Use the Notify when condition builder to specify the conditions that must be true to trigger the notification.
6. Select a business rule in the Notify script field.
7. Save the record.

Add a tag to a homepage

You can add a tag to a homepage to view records to which the tag has recently been assigned.

You might want to do this for tags of a Type other than Standard or Most Recent Record, as they do not appear on the Tagged Documents page.
1. Open a homepage to which you have permission to add content.
2. Click the add content icon (+).
3. Select Labels in the left column of the Add content window.
4. Select the tag you want to show on the homepage.
5. Click the appropriate Add here button.
6. Close the Add content window.

History of recently viewed records

You can see the history of an ITIL user’s recently viewed records, and it can display an ITIL user’s most viewed items.

The system offers a viewable history of an ITIL user’s recently viewed records, and it can display an ITIL user’s most viewed items. Both are implemented as tags, and once activated they appear in the application navigator in UI11.

![Welcome: SNC ITIL]

Note: In UI16, a similar feature is available. For more information, see View your navigation history.

Activate Most Active and Most Recent tags

To activate Most Active and Most Recent tags in UI11, you must first have viewed some records within the platform.

Role required: itil

After this has happened, perform the following steps to activate Most Active and Most Recent tags.

1. Navigate to your homepage.
2. Click Add content.
3. Select Labels from the first pane.
4. Select Most Recent from the second pane to activate that tag. It is not necessary to click Add.
5. Select Most Active from the second pane to activate that tag. It is not necessary to click Add.
6. After selecting the tags you want to activate, refresh your browser (F5).
The tags should now be visible in the application navigator. Items in the Most Recent tag are listed chronologically in reverse order, as you would expect from a history list.

Deactivate Most Active and Most Recent tags

If you do not wish to see the Most Active and Most Recent tags after they have activated them, they can be deactivated.

Role required: itil

1. Click Most Active or Most Recent in the application navigator. The Tag form appears.
2. Clear the Active check box.
3. Click Update.

Upon browser refresh, the tag will no longer be displayed.

Remove the Most Active and Most Recent tags

In UI11, if you do not want to use Most Active and Most Recent tags, you can remove them.

Role required: tags_admin

1. From the left navigation pane, select System Definition Tags.
2. Delete everything with a name of Most Active or Most Recent.
3. From the left navigation pane, select System UI Widgets, and deactivate the Labels widget. This prevents it from showing up in the Add Content part of homepages.

User interface configuration

Change appearance, navigation menus, CSS, and utilize cutting edge interface tools.

Navigation stack

The navigation stack is the portion of the ServiceNow suite of applications that determines where a user is redirected after the update of a record.
It is also possible to cause page references to be manually inserted into the Navigation Stack when a link in the Navigation Page is clicked. This is done by modifying a module definition to include an argument of sysparm_stack with a string value equal to the URL reference to the page that should be inserted into the stack. Finally it is also possible to override the redirection determined by the stack entirely by creating a business rule or editing an existing one to include gs.setRedirect("http://redirect_page.com").

Operating parameters of the navigation stack

The Navigation Stack can be thought of a user’s navigation history in the ServiceNow system. It is updated every time a user views a new page. The Navigation Stack is referenced when users press the ServiceNow back button. It is also referenced when a user updates a record, at which point the user is redirected to their last page in the Navigation Stack.

![Figure 96: Back and Submit or Update](image)

Inserting pages to the navigation stack

It is also possible to cause page references to be manually inserted into the Navigation Stack when a link in the Navigation Page is clicked. This is done by modifying a module definition to include an argument of sysparm_stack with a string value equal to the URL reference to the page that should be inserted into the stack. The following screen shot shows the system definition for the Create New Incident Module. By passing an argument of "sysparm_stack=incident_list.do", the page "incident_list.do" (the list view of incidents) is added to the stack so that after creating an incident, users are directed to this page.
Override the redirection behaviors of the Navigation Stack with onEvent business rules

The redirection behaviors that occur as a result of Navigation Stack behaviors can be overridden using onEvent business rules. This override is done using the Glide System function gs.setRedirect. Doing so overrides the redirection as determined by the Navigation Stack, when the particular event specified occurs. The function gs.setRedirect takes a string argument that is a URL for the page that it is desired that the user be redirected to. This can be an external URL such as http://www.Google.com.

Navigation action cancellation

The Request Manager allows users to cancel any navigation action they select from the application navigator by clicking another application navigator link.

This allows users to cancel slow loading transactions without having to wait for the previous transaction to complete.
One of the following conditions must be true for the Request Manager to cancel a transaction.

- Both the original transaction and new transaction are cancelable (both transactions have the setting sysparm_cancelable=true).
- The original transaction is a member of the always cancelable white list (the module is listed in the glide.request_manager.always_cancel system property) and the new transaction is cancelable (has the setting sysparm_cancelable=true).
- Both the original and new transaction produce an auto-completer query in a reference field.

Cancellation workflow

The Request Manager uses the following workflow to determine whether to cancel a transaction.
Figure 98: Cancel navigation actions

1. Is the property `glide.request.manager.cancel_other_transaction` set to true?
   - No
   - Yes

2. Do both the original transaction & new transaction have the cancelable `sysparm`?
   - No
   - Yes

3. Is the original transaction on the `glide.request.always_cancel` white list & the new transaction cancelable?
   - No
   - Yes

Cancel transaction

Stop

Allow transaction to continue
Add sites to the always cancel white list

You can add UI pages or other links to the always cancel white list so that users can cancel actions on these pages by navigating to another module or link.

Role required: admin

Items on the white list can always be canceled by user actions. It is recommended that you only add items to the white list that provide read-only data to the user, such as a homepage or a report.

1. Enter sys_properties.list in the navigation filter and press the Enter key.
2. In the Go to field, select Name, enter glide.request_manager.always_cancel, and click Go.
3. Click the property name to open it.
4. In the Value field, add a comma-separated list of URIs you want to allow users to cancel.
5. Click Update.

**Prevent users from canceling module transactions**

You can explicitly prevent users from canceling a module’s activity by updating the module definition.

**Role required:** admin

1. Perform the appropriate action for your version of the UI:

<table>
<thead>
<tr>
<th>UI16</th>
<th>UI15 or UI11</th>
</tr>
</thead>
</table>
| 1. Navigate to System Definition Application Menus.  
2. Open the application menu to which you want to add the survey module.  |
| Right-click the application menu you want to add the module to and select Edit Application Menu. |

2. In the Modules related list, click the module you want to prevent users from canceling.
3. **Configure the form** layout and add the field Uncancelable by Other Modules.
4. Select the check box for Uncancelable by Other Modules.

5. Click Update.
Navigation cancellation system properties

Administrators can control automatic cancellation behaviors with the following system properties.

Table 51: System Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.request_manager.cancel_other_transaction</td>
<td>Enables or disables automatic cancellation behaviors. When true, users can</td>
</tr>
<tr>
<td></td>
<td>cancel one navigation action with another navigation action.</td>
</tr>
<tr>
<td></td>
<td>Type: true</td>
</tr>
<tr>
<td></td>
<td>Default value: true</td>
</tr>
<tr>
<td></td>
<td>Location: sys_properties table</td>
</tr>
<tr>
<td>glide.request_manager.always_cancel</td>
<td>A comma-separated list of URIs that users can always cancel by clicking</td>
</tr>
<tr>
<td></td>
<td>another navigation action. Typically items on this list are modules that</td>
</tr>
<tr>
<td></td>
<td>provide read-only data such as homepages, reports, or knowledge articles.</td>
</tr>
<tr>
<td></td>
<td>Type: string</td>
</tr>
<tr>
<td></td>
<td>Default value: home,sys_report_template</td>
</tr>
<tr>
<td></td>
<td>Location: sys_properties table</td>
</tr>
<tr>
<td>glide.request_manager.cancel_reference_completer</td>
<td>Cancels a user query in a reference field when the user enters more</td>
</tr>
<tr>
<td></td>
<td>information. For example, if the user starts an AJAX search in the Problem</td>
</tr>
<tr>
<td></td>
<td>number field by entering PRB and then enters PRB000, the second query</td>
</tr>
<tr>
<td></td>
<td>cancels the first query.</td>
</tr>
<tr>
<td></td>
<td>Type: true</td>
</tr>
<tr>
<td></td>
<td>Default value: true</td>
</tr>
<tr>
<td></td>
<td>Location: sys_properties table</td>
</tr>
</tbody>
</table>

Use cases

There are three use cases where administrators can control user cancellation actions.

1. A user clicks on a module, such as the homepage (home.do), and while waiting for the module to load decides to navigate to another module, such as the list of open incidents (incident_list.do). The system property glide.request_manager.cancel_other_transaction controls this use case.

2. A user clicks on a module that displays read-only data, such as a report (sys_report_template.do? sysparm=sysid), and while waiting for the module to load decides to navigate to another module, such as the list of open incidents (incident_list.do). The system properties glide.request_manager.cancel_other_transaction and glide.request_manager.always_cancel control this use case.

3. A user starts typing a query in a reference field, such as entering PRB in the related Problem field and while waiting for the auto-completer to display results, decides to enter more information, such as PRB000. The system properties glide.request_manager.cancel_other_transaction and glide.request_manager.cancel_reference_completer control this use case.
Context-sensitive help

By default, the help link available in the product opens the welcome page of the help system, allowing you to enter search criteria for the information you want to find.

The ServiceNow system provides several preconfigured help contexts connected to this link that display the exact information you need for the current list, form, or record. You can define your own help topics and configure them to appear when you click the help icon in a ServiceNow record.

Users click the help icon to open the default help pages provided in the base system. For any page that does not have context-sensitive help defined, the instance displays the help system welcome page. Users can use the search feature or the index to find the correct help topic.

Alternatively, administrators can create custom context-sensitive help to suit the needs of their organizations. Create a help context that links the help icon to a topic describing a list, form, or specific record. You may initially want to set a base URL to direct to a help system other than the default ServiceNow help system.

Access context-sensitive help

The location of the help icon depends on the user interface version you are using.

UI 15

Click the gear icon in the banner frame to open the menu containing the help icon. The appearance of the menu and icons might be different, depending on the UI scheme you have configured for your instance.

Figure 99: Context help access in UI 15

UI 16

Click the help icon in the right corner of the header bar and select Search Product Documentation from the menu.
Create a new help context

You can create new help contexts to supplement or replace the default help contexts. For example, if your organization has heavily customized a form, you might create a new help context for that form. The customized help context could link to more relevant information, such as a company knowledge base article.

1. Navigate to System UI Help Contexts.
2. Click New.
3. Complete the Help Context form from the fields in the table.

Table 52: Help context form

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select Form, List, or Record. If you select Record, the Table name field is replaced by the Document field.</td>
</tr>
<tr>
<td>Table name</td>
<td>Select the table for which the help context is being defined. If the Type is Record, this field is replaced by the Document field.</td>
</tr>
</tbody>
</table>

Note: The list shows only tables and database views that are in the same scope as the help context.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document</td>
<td>Click the reference lookup icon (🔍) to open the document selection dialog box (pictured). Select the table and document (record) for this help context.</td>
</tr>
<tr>
<td></td>
<td>This field is only visible if you have selected Record as the Type.</td>
</tr>
<tr>
<td>Language</td>
<td>Select the language of the help page to which you are linking. The choices available depend on the internationalization plugins active on your instance. This field allows you to create multiple help contexts for the same form, list, or record, each directing to a help page in a different language. For example, you might have two help contexts for Form X: one for English and the other for Spanish. If a user whose language is set to Spanish clicks the help icon while viewing Form X, the help page defined in the Spanish help context opens.</td>
</tr>
<tr>
<td>Active</td>
<td>Select this check box to have the system use the help context. This check box is selected by default for new help contexts.</td>
</tr>
<tr>
<td>ServiceNow Product Documentation</td>
<td>Indicates if this help was created by a customer or was provided by ServiceNow. Clear this check box to create custom help for your organization. Do not attempt to modify existing help topics provided by ServiceNow for your own use. The system is configured to use your custom records rather than the default help contexts, even when they are created on the same table.</td>
</tr>
</tbody>
</table>
Field | Description
--- | ---
URL or page name | Identifies the topic to display when a user clicks the help icon while viewing a form, list, or record.

You can enter the complete URL of the help page or just the target file name if you set a base URL in the help.base.default system property.

Note: If you reconfigure the fields on the form, you see the available fields Plugin ID and System Property Base URL. Do not use these fields. They are for internal use only.

4. Click Submit.

Context-sensitive help properties

The context-sensitive system properties define the base URLs for the default and custom help systems. To access the context-sensitive help properties, navigate to sys_properties.list and filter by Name. You can edit a property value from the list or by opening the property record.

Table 53: Context-sensitive help properties

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.help.default.page</td>
<td>The default URL the help icon directs to when no help context is specified. This is the base URL of the ServiceNow help system and opens to the welcome page. Do not change this value.</td>
<td><a href="http://docs.servicenow.com/">http://docs.servicenow.com/</a></td>
</tr>
<tr>
<td>help.base.default</td>
<td>The base URL for custom help contexts in which the ServiceNow Product Documentation check box is cleared, and an absolute URL is not specified. When the base URL is set, the system creates the address of a help context record by appending the target page or file name to the base URL. Custom help contexts using this base URL overwrite the help provided by default in your instance for the same table. For details, see Set Base URLs.</td>
<td><a href="http://docs.servicenow.com/?context=">http://docs.servicenow.com/?context=</a></td>
</tr>
<tr>
<td>help.base.servicenow</td>
<td>The base URL for help contexts in which the ServiceNow Wiki check box is selected. This is the base URL for the help provided in your instance by default. Do not change this value. For details, see Create a new help context.</td>
<td><a href="http://docs.servicenow.com/?context=">http://docs.servicenow.com/?context=</a></td>
</tr>
</tbody>
</table>
Set base URLs

With context-sensitive help, you can set a base URL for an external help system.

If you want to create numerous help contexts that direct to a single server other than the ServiceNow help system, enter the base URL in the help.base.default property.

![Image of System Property]

Figure 101: Base URL for custom help contexts

On the Help Context form, when the ServiceNow Product Documentation check box is cleared and you enter a value in the URL or page name field that does not contain the string ://, that value is appended to the base URL defined by help.base.default property.

Note: When the ServiceNow Product Documentation check box is cleared and the URL or page name field contains an absolute URL (distinguished by the string :// in the value), the value in the help.base.default property is ignored. This allows you to create help contexts that link to a variety of different servers.
Help context types

You can create a help context with the type Form, List, or Record, and link it to a particular table in your ServiceNow instance.

When a user clicks the help icon, the system analyzes the relevant help contexts to determine which help page to display.

- **Record-level help** applies to only one specific record, not the list or form for that table.
  
  For example, if a Record type help context exists for the Validate Number record in the Business Rule table, the help icon only directs to the page specified when a user views that record.

- **List-level help** applies to the list for a table. If no form-level help is defined, list-level help also applies to the form for the same table.
  
  For example, if a List type but not a Form type help context exists for the Business Rule table, the help icon directs to the page specified by the List type help context when a user views any list or record (if record-level help is not defined for it) in the Business Rule table.

- **Form-level help** applies to the form for a table. If no list-level help is defined, the form-level help also applies to the list for the same table.
  
  For example, if a Form type but not a List type help context exists for the Business Rule table, the help icon directs to the page specified by the Form type help context when you view any record (if record-level help is not defined for it) or list in the Business Rule table.

- If both list- and form-level help are defined for a table, the appropriate help is displayed for the list and the form.

  For example, if a List type and a Form type help context exist for the Business Rule table, the help icon directs to the page specified by the List type help context when a user views the Business Rules list. The help icon directs to the page specified by the Form type help context when a user views any record (if record-level help is not defined for it) in the Business Rule table.

---

**Important:** If you create a help context for a base table list or record, the help system opens that target topic for any list or record in a table that extends the base table if no other help context is created in that extended table.

---

Help context prioritization

Sometimes multiple help contexts may apply to what a user views.

When there are several matching help context records, the following rules determine which help context is used, in descending order of priority.

1. A customer-created help context is used instead of a default help context provided in the instance for the same table.
   
   Consider the case of the Linux Server (cmdb_ci_linux_server) table, which has the following parentage:
   
   cmdb_ci → cmdb_ci_hardware → cmdb_ci_computer → cmdb_ci_server → cmdb_ci_linux_server. If help contexts exist for both the cmdb_ci_server table and the cmdb_ci table, the help icon directs to the page specified by the cmdb_ci_server help context when you view a record in the cmdb_ci_linux_server table.
   
   cmdb_ci_linux_server. If help contexts exist for both the cmdb_ci_server table and the cmdb_ci table, the help icon directs to the page specified by the cmdb_ci_server help context when you view a record in the cmdb_ci_linux_server table.

2. A help context that matches the user’s language setting is used instead of a help context in the default language of the instance. See the Language field on the Help Context form.

3. A help context for a closer table in an extended table hierarchy is used instead of a help context for a further table.

   Consider the case of the Linux Server (cmdb_ci_linux_server) table, which has the following parentage:
   
   cmdb_ci → cmdb_ci_hardware → cmdb_ci_computer → cmdb_ci_server → cmdb_ci_linux_server. If help contexts exist for both the cmdb_ci_server table and the cmdb_ci table, the help icon directs to the page specified by the cmdb_ci_server help context when you view a record in the cmdb_ci_linux_server table.

   cmdb_ci_linux_server. If help contexts exist for both the cmdb_ci_server table and the cmdb_ci table, the help icon directs to the page specified by the cmdb_ci_server help context when you view a record in the cmdb_ci_linux_server table.
System user guide

The system user guide enables you to create end user help documentation that is specific to the policies and procedures of your organization. A default help page is provided in the base system that displays UI16 help documents for system navigation and other basic operations.

The user guide provides the tools for designing help portal pages containing feature-specific help documents. You can create custom help pages and deploy them in various ways using controls in the system. User guide documents are grouped in relevant sections on a help page, using a two column format. You can display the sections and the documents within them in any order. You can display a section on more than one help page. The user guide is supported in UI16, UI15, and UI11.

A default help page is provided in the base system that displays help documents for system navigation and other basic operations. This page is accessible from the help icon in the header bar for UI16 users. To make this page available to users of other supported UI versions, you must create a programmatic entry point.
Activate the system user guide on an upgraded instance

The User Guide (com.glide.user_guide) plugin is active by default for all new instances, but must be activated by a system administrator on upgraded instances.
Role required: admin

Before you activate the User Guide plugin on an upgraded instance, you must also activate the UI16 (com.glide.ui.ui16) plugin. Use this procedure to activate each plugin.

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.

   If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.

4. If available, select the Load demo data check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance.

   You can also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.

5. Click Activate.

Tables installed with the system user guide

These tables are installed with the User Guide plugin (com.glide.user_guide).

These tables extend the Application File (sys_metadata) table.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Page (sys_product_help_page)</td>
<td>Stores all the help documents and their section assignments.</td>
</tr>
<tr>
<td>Help Section (sys_product_help_section)</td>
<td>Stores all the help sections for the user guide.</td>
</tr>
<tr>
<td>Help (sys_product_help)</td>
<td>Identifies a help page and provides the entry point for linking to it.</td>
</tr>
<tr>
<td>Page to Section (sys_product_help_p2s)</td>
<td>Stores the relationship of the sections in a page to one another.</td>
</tr>
</tbody>
</table>

Create a user guide help page

A user guide help page is a portal displayed to the end user that contains links to related help documents.

Role required: admin

2. Complete the form.
### Table 55: Help page field definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Page identification used by the system to create a help URL.</td>
</tr>
<tr>
<td>Application</td>
<td>Application scope for this help page. This field is read-only and defaults to the Global scope.</td>
</tr>
<tr>
<td>Title</td>
<td>Display title for this page.</td>
</tr>
</tbody>
</table>

3. Click Submit.

![Help Page](image)

---

**Create a user guide section**

The sections in a system user guide page are the category containers for the individual help documents.

**Role required:** admin

Create your help page sections separately and then associate them to the page you created.

2. Give your section a unique and concise title, and then click Submit.
   The view returns to the list of sections.
3. Create additional sections for your help page.

Create user guide help documents

User guide help documents are grouped in appropriate sections on the page and listed in a configurable order.

Create all your help documents from within the section record. This allows you to refine their titles, adjust their placement, and decide if they are appropriate for the section.

Role required: admin
2. Open a section record you created.
3. In the Help related list, click New to create a help document for that section.
4. Complete the form.

Table 56: Help document field definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>Document number generated automatically by the system.</td>
</tr>
<tr>
<td>Section</td>
<td>Section in which this document appears.</td>
</tr>
<tr>
<td>Order</td>
<td>Listing order for this document in the selected section.</td>
</tr>
<tr>
<td>Published</td>
<td>Date this document was created.</td>
</tr>
<tr>
<td>Updated</td>
<td>Date this document was last updated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Short description</td>
<td>Brief description of the content of this document. This description is used as the title for the document on the help page.</td>
</tr>
<tr>
<td>Text</td>
<td>Document content, including graphics and tables. You can format your entry, create bulleted or numbered lists, and attach images.</td>
</tr>
</tbody>
</table>
To view your queue and take a survey:

1. Navigate to Self-Service > My Assessments & Surveys.
2. Click Take Survey on a survey card to open the questionnaire.
5. Click Submit.
   The view returns to the section record.
6. Repeat the process to create the necessary help documents for that section.

Configure the help page

After creating the sections and help documents for your user guide, arrange the sections on the help page.

Role required: admin

2. In the Page to Sections related list, click New.
3. Complete the form.

Table 57: Page to Section field definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column</td>
<td>Column location on the page for this section. The first column is designated as 0 and the second column is designated as 1. There must be at least one entry for column 0 for the sections to display.</td>
</tr>
</tbody>
</table>
### Table 58: URL entry points for displaying user help

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Provides</th>
</tr>
</thead>
<tbody>
<tr>
<td>$h.do</td>
<td>Processor that renders the banner frame at the top of the page.</td>
</tr>
<tr>
<td>$sys_product_help.do</td>
<td>Displays a page containing links to all the help in the user guide. This includes the basic help system and any custom help pages you have created. An example URL would be <a href="https://myinstance.servicenow.com/$sys_product_help.do">https://myinstance.servicenow.com/$sys_product_help.do</a>.</td>
</tr>
</tbody>
</table>
Creating a change password module

To allow users to change their own password, you can create a simple module in Self-Service.

Prerequisites

Role required: admin

Create a module in the Self-Service application called Change Password, give it a Type of URL, and give it an Argument of login_cpw.do. The module presents the user with a password change form and has them validate the new password by typing it twice.
Figure 103: Change password module
Define locations

Locations are used by various applications to locate users, facilities, or configuration items (CI).

You can configure different levels of location in a parent-child hierarchy. For example, an email server might be associated with a location of Second Floor, whereas the email business service might be associated with New York City.

Each level of this hierarchy contains a separate location record, with the next higher level specified as a parent. In this example each location is selectable as a hierarchy from reference fields:
The location is also used to generate a full identifier in the Full name field, which is available by configuring the form as follows.

![Full name: Earth/Americas/New York/New York City/New York Datacenter/Second Floor](image)

Figure 106: Location Full name

Locations are stored in the Location (cmn_location) table.

Define a location

To create a location, navigate to User Administration Locations and click New.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the location. This name is the display value that the system uses when referencing this location on a form.</td>
</tr>
<tr>
<td>Street</td>
<td>The street address of the location.</td>
</tr>
<tr>
<td>City</td>
<td>The city of the location.</td>
</tr>
<tr>
<td>State / Province</td>
<td>State or province of the location.</td>
</tr>
<tr>
<td>Zip / Postal Code</td>
<td>The zip or postal code of the location.</td>
</tr>
<tr>
<td>Country</td>
<td>The country of the location.</td>
</tr>
<tr>
<td>Contact</td>
<td>Name of a user who is the contact for this location.</td>
</tr>
<tr>
<td>Phone</td>
<td>The phone number for the location.</td>
</tr>
<tr>
<td>Fax phone</td>
<td>The fax number for the location.</td>
</tr>
<tr>
<td>Parent</td>
<td>Name of the parent location for this location. Location hierarchies are described above.</td>
</tr>
<tr>
<td>Latitude</td>
<td>The latitude of the location. This field and the Longitude field described below are populated automatically by the get_lat_long business rule when the form contains enough information, such as an address or city name and a postal code. Deactivate this business rule to prevent the system from overwriting any values entered manually into these fields.</td>
</tr>
<tr>
<td>Longitude</td>
<td>The longitude of the location.</td>
</tr>
</tbody>
</table>

Fields that can be added by configuring the form:

- **Company**: A reference field to the Company (cmn_company) table.
- **Full name**: A read-only, calculated field that assembles the parent hierarchy of the location into a full name.
- **Stock room**: A boolean field that identifies whether the location is being used as a stock room.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time zone</td>
<td>The location’s time zone. By default, the location uses the system time zone.</td>
</tr>
</tbody>
</table>

**Map location**

The latitude and longitude fields are populated by a business rule (get_lat_long) which queries the Google Map service. The more specific the location is, the more accurate the latitude and longitude are.

After the latitude and longitude are populated, Map Pages can be defined that display locations in an interactive map. For more information, see [Map pages](#).

- Latitude and longitude are expressed as a floating point data type. Previous releases expressed this information as a string. During an upgrade, the system converts the data where possible.

**Database storage for audio files**

Administrators and users with the image_admin role can upload and store audio files in the database. These audio files can then be referenced in HTML.

An administrator must activate this feature.

**Activate database storage for audio files**

You can activate the Database Storage for Audio Files (com.glide.db_audio) plugin.

**Role required**: admin

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.

   If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.

4. If available, select the Load demo data check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance.

   You can also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.

5. Click Activate.

**Upload an audio file**

You can upload .mp3 or .ogg audio files.
Role required: image_admin
1. Navigate to System UI Audio Files.
2. Click New.
3. Enter a Name for the audio file, including the file extension.
4. Add the Audio file.
5. Save the record.

Audio file references in HTML
You can use HTML to reference audio files you have uploaded.
Use the <audio> HTML tag and set the src attribute to the name of the file as set by the Name field of the Audio record. You must use the controls attribute to display the audio controls. For example, use the following HTML.

<audio src="Beep.mp3" title="Beep" control="control"/>

Storing images in the database
Administrators and users with the image_admin or content_admin role can upload and store images in the database.
These images are saved in the Images (db_image) table. Uploading an image to the database allows it to be referenced from HTML fields and by appending the name of the image to the URL of the instance.

Note: The db_image table is a public table that does not have any security restrictions. Unauthenticated users have full access to images uploaded to the db_image table.

Images vs attachments
If you want to access an image from a record, or if you want to prevent users from appending the image name to the URL of the instance, upload it as an attachment instead. When you upload an image as an attachment, the image is saved in the Attachments (sys_attachment) table. See Attachment administration and Add an attachment for more information.

Uploading Images
Navigate to System UI Images to see the list of images stored in the database. Click New to add a new image.

The following fields are available:
• Name: Enter the file name by which to reference the image in HTML.
• Active: Select the check box to allow the image to be referenced in HTML.
• Category: Select a category in which to organize the image file.
• Image: Select Click to add... to upload an image. If an image is already uploaded, click (Update) to upload a new version of the image or (Delete) to remove the image.
• Format, Size bytes, Height, and Width: View current image metadata. This information is automatically populated when the image is uploaded.
Figure 107: Upload image

Acceptable image file types

Upload image files with the following extensions:

- .gif
- .jpg
- .png
- .bmp

Note: The system does not support uploading zip files that contain .bmp images.
If you upload an image that may not be supported in Internet Explorer browsers, a warning message appears. For example, Internet Explorer does not support JPEG images that are encoded in CMYK format.

![Image warning](image.png)

The system does not support uploading images in the .ico format through this interface. Microsoft Internet Explorer requires the .ico format for favorite icons. To upload an .ico image, attach the .ico image to a record instead of using the standard image upload interface.

To understand how to insert an image into a form record, see the [Insert an image into your article, incident, or other form record](https://community.service-now.com) blog post in the ServiceNow Community.

Referencing an image in HTML

To reference an image in HTML, append an “x” to the file extension.

For example:

- browser_controls.gifx
- browser_controls.jpgx
- browser_controls.pngx

```html
<img src="browser_controls.pngx" title="Browser controls screenshot" alt="Browser controls"/>
```

Updating an existing image

You can change an existing image to an updated version.

Role required: image_admin or content_admin

1. Navigate to System UI Images.
2. In the Images list, click the name of the image to be replaced.
3. In the Image field, click the [Update] link.
4. Click Browse and navigate to the desired image file.
5. Click Open, and then click OK.
The new file is uploaded into the instance database, replacing the previous file. It will be used in all locations that reference the file name.

Note: If the new image does not appear as expected, clear the browser cache.

Upload multiple images

You can upload multiple images at one time.

Role required: image_admin or content_admin

1. Create a .zip file that contains only acceptable image file types.

   Note: The system does not support uploading zip files that contain .bmp images.

3. Click Choose File then select the file.
4. Click Upload.
A message indicates that the files are uploaded to the database, and the images list is sorted by updated date in descending order (the uploaded images appear first).

Note:

- If the .zip file contains a folder structure, the resulting image names are the path name with underscores in place of the slashes. For example, if the .zip contains myimages/image1.gif then the resulting image is named myimages_image1.gif.
• Image names cannot exceed 100 characters in length, including folder structure. Files with excessively long names are rejected.
• Uploads are logged in the system. View system logs to see whether files are uploaded or rejected.

User preferences

Individual users can configure many UI features, such as the number of rows per page in a list or whether the response time displays at the bottom of a list or form.

These user customizations are stored as records in the User Preference (sys_user_preference) table, and are updated each time the user changes the setting.

The UI displays according to each user’s preferences.

For example, by default the response time may appear at the bottom of lists and forms. If a user hides the response time, a user preference record is created showing the response time indicator as hidden. During the user’s future sessions, the response time indicator is hidden. If the same user later displays the response time, the user preference record is updated appropriately and future sessions open with the response time indicator visible.

Navigate to User Administration User Preferences for a list of user preference records. Click a preference name to display that preference in form view.

Note: Having more than 10,000 user preferences causes system degradation and UI performance issues.
Each user preference record includes these fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the feature or functionality.</td>
</tr>
<tr>
<td>Description</td>
<td>An optional short description of the feature or functionality.</td>
</tr>
<tr>
<td>System</td>
<td>Shows whether this record indicates the system-wide default (TRUE), or not (FALSE).</td>
</tr>
<tr>
<td>Type</td>
<td>Shows the data type of entry accepted for the Value. For example, you can select string or integer.</td>
</tr>
<tr>
<td>User</td>
<td>Shows the name of the user for whom the setting is customized. If User is blank, the record is for a system-wide default.</td>
</tr>
<tr>
<td>Value</td>
<td>The current setting for this record. Compare this to the User field and System field to determine whether the value shown is a system-wide default or a specific user’s preference.</td>
</tr>
</tbody>
</table>

Records for the system-wide value, which applies to users who have not customized the feature, have these values: System=True and User=blank. For each user who customizes the features, a separate record is created with these values: System=False and User=<username>. As a result, the same customizable UI feature may have multiple user preference records.

For some features, the system-wide record does not appear in the User Preferences module initially. The system-wide record may be added to the User Preferences list when a user record is created for the same feature.

When an administrator manually changes a user’s preference value through this module, the user’s next session uses the administrator’s setting. However, the user can customize the features again through the UI, which updates their user preference record. If the administrator deletes the user preference record for a particular user, that user’s next session uses the system-wide value for that feature. When the user later customizes the feature, the system creates a user preference record for the user.

User preference settings

User preferences primarily track the way individual users interact with various features so that new sessions activate the user’s last settings. For example, user preferences track whether the user activates the tabbed or scrolling interface for multi-section forms. Other user preference records allow administrators to adjust certain feature settings.

View settings

To view the user preference settings, navigate to User Administration User Preferences.

User preference list

This list describes user preference records in the base system. It provides the default value and a description for each. The Updated By column indicates how the preference is set.
<table>
<thead>
<tr>
<th>User preference record</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Only</td>
<td>The value is set and updated by user action. Manual changes through the User Preference record do not affect the user experience.</td>
</tr>
<tr>
<td>Admin Only</td>
<td>The administrator can change the value through the User Preference record to modify the user experience.</td>
</tr>
<tr>
<td>Admin or User</td>
<td>The value is set and updated by user action, but the administrator can change the user experience by manually updating the User Preference record.</td>
</tr>
<tr>
<td>System Only</td>
<td>The value is set and updated by the system. Administrators should not modify these records.</td>
</tr>
</tbody>
</table>

Table 60: User preferences

<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
</table>
| (table).autocomplete.contains | Search    | Admin Only  | If the glide.ui.ref_ac.startswith property ( System Properties All Properties ) is set to false, autocomplete.contains determines whether reference fields for the named table use a contains or a starts with search to provide auto-complete text.  
True = use a contains search to auto-complete reference fields.  
False = use a starts with search to auto-complete reference fields.  
Type: True/False  
Default value: False |
| (table).db.order    | List Sort   | Admin or User | For the identified table, indicates which column is used to sort the records in a list. This record updates automatically each time the user changes the sort order for the table.  
Type: String  
Default value: User selection or the Number column if the user does not select a column. If the Number column is empty, the Name field is used to sort the records. |
<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>{table}.db.order.direction</code></td>
<td>List Sort</td>
<td>Admin or User</td>
<td>For the identified table, indicates whether the list shows records in ascending (ASC) or descending (DESC) order by the field identified in <code>{table}.db.order</code>. This record updates each time the user changes the sort direction for the table. Type: String Default value: None</td>
</tr>
<tr>
<td>bsm_map.default_ci</td>
<td>BSM</td>
<td>User Only</td>
<td>Contains the sys_id of the last configuration item the user viewed in the business service management (BSM) map. This record updates automatically each time the user views a new configuration item in the BSM map. Type: String Default value: None</td>
</tr>
<tr>
<td>ci_manage_relationships_filter.cmdb_ci</td>
<td>CMDB</td>
<td>Admin Only</td>
<td>Constrains what appears in the Available CIs side of the slush bucket when defining a relationship for a configuration item. The value is in the format of an encoded query string. Type: String Default value: locationANYTHING^operational_statusANYTHING</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------</td>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ci_manage_relationships_filter</td>
<td>CMDB, sys_user_group</td>
<td>Admin Only</td>
<td>Constrains what appears in the Available Groups side of the slush bucket when defining a relationship for a configuration item. The value is in the format of an encoded query string. Type: String Default value: active=true</td>
</tr>
<tr>
<td>collapse.\langle related table\rangle.\langle related field\rangle</td>
<td>Forms</td>
<td>User Only</td>
<td>Indicates that a related list is collapsed. The same related list will be collapsed when the user’s next session begins. This record updates automatically whenever the user expands or collapses the same related list. True = collapse the identified related list. False = expand the identified related list. Type: String Default value: None</td>
</tr>
<tr>
<td>collapse.\langle sys_id\rangle</td>
<td>Forms</td>
<td>User Only</td>
<td>Indicates the sys_id of a form section that is collapsed. The same form section will be collapsed when the user’s next session begins. This record updates automatically whenever the user expands or collapses the same section of the same form. True = collapse the identified section False (or blank) = expand the identified section. Type: True/False Default value: False or blank</td>
</tr>
</tbody>
</table>
### Preference | Category | Updated by | Details
---|---|---|---
| glide.ui11.use | UI11 | Admin or User | Indicates whether UI11 is active for this user. This record updates automatically when the user clicks the Switch to the new UI or the Switch to the old UI link near the top right of the screen. Manual changes made by the administrator through User Administration User Preferences are implemented in the user’s next session.
True = UI11 is active.
False = UI11 is not active.
Type: True/False
Default value: False
| glide.ui.navpage_state | Menus | System Only | DO NOT MODIFY. Indicates the user’s UI11 configuration.
Type: String
Default value: None
| glide.ui.javascript_editor | UI | Admin or User | Indicates whether the JavaScript editor and formatting controls are enabled or disabled for the user. The JavaScript editor icon and formatting controls are available only in instances where the Syntax Editor plugin is active. This record updates automatically when a user clicks the icon to enable or disable script editing. For more information, see Syntax editor.
True = enable script editor.
False = disable script editor.
Type: True/False
Default value: True (if syntax editor feature is active)
<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.ui.response_time</td>
<td>UI</td>
<td>Admin or User</td>
<td>Determines whether the response time information is expanded or collapsed at the bottom of a list or form. This record updates automatically whenever the user clicks the response time indicator icon (clock) at the bottom of a list or form. True = expand the response time information. False = collapse the response time information. Type: String</td>
</tr>
<tr>
<td>homepage</td>
<td>Homepages</td>
<td>Admin or User</td>
<td>Indicates which homepage appears when a user first logs in to the instance or clicks the homepage icon. The value indicates the sys_id of the selected homepage. For more information, see <a href="#">Homepage administration</a>. Type: String</td>
</tr>
<tr>
<td>knowledge.search.sort.field</td>
<td>List Sort</td>
<td>Admin or User</td>
<td>Determines the sort order for results when searching the knowledge base. This record updates each time the user selects a different Sort by option in the search results header. Available options are: Number of Views (views), Relevancy (relevancy), and Last Modified (sys_updated_on). Type: String</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------</td>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| list_edit_double  | Lists    | Admin or User | Indicates what action opens the list editor in List v2. This record updates automatically when the user personalizes any v2 list and changes the Double click to edit setting. For more information, see *List editor administration*. Note that this preference does not apply to v3 lists. Single-click list editing is not supported in List v3.  
  True = open the list editor when the user double-clicks a field in a v2 list.  
  False = open the list editor when the user single-clicks a field in a v2 list.  
  Type: True/False  
  Default value: True |
| list_edit_enable  | Lists    | Admin or User | Indicates whether the list editor is available for editing fields directly in a list. This record updates automatically when the user personalizes any list (gear icon above the first column in the list) and changes the Enable list edit setting. Note that this preference does not apply to v3 lists.  
  True = enable use of the list editor.  
  False = disable use of the list editor.  
  Type: True/False  
  Default value: True |
<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>live_message.feed.last_display</td>
<td>Admin or User</td>
<td>Stores the last feed the user viewed: My Feed (sysparm_feed_type=myfeed) or Company Feed (sysparm_feed_type=company_feed). This record updates automatically each time the user selects a different feed.</td>
<td></td>
</tr>
<tr>
<td>live_tag.feed.order</td>
<td>Admin or User</td>
<td>Tracks the user’s choice of sorting for tag display. This record updates automatically when a user selects a different Tag Option in Live. Available options are Order by Created(sys_created_on) and Order by Last Activity (last_activity).</td>
<td></td>
</tr>
<tr>
<td>menu.&lt;identifier&gt;.expanded</td>
<td>User Only</td>
<td>Indicates the sys_id of a section of the application navigator menu that is open (expanded) for the user. The same section will be open when the user’s next session begins. This record updates automatically each time the user expands or collapses the same section of the application navigator.</td>
<td></td>
</tr>
<tr>
<td>mobile_rowcount</td>
<td>Admin or User</td>
<td>Indicates the number of rows displayed in a list on a mobile device. This record updates automatically each time the user chooses a different number of rows per page from the mobile screen.</td>
<td></td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------</td>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>mobile_use_full.android</td>
<td>Mobile</td>
<td>Admin or User</td>
<td>Indicates which user interface appears on the user’s Android mobile device. This record updates automatically each time the user clicks the gear icon above the mobile homepage to display the full desktop interface or clicks the cell phone icon in the welcome bar to display the mobile interface. True = display the full desktop interface on Android mobile devices. False = display the mobile interface on Android mobile devices. Type: True/False Default value: False</td>
</tr>
<tr>
<td>mobile_use_full.iphone</td>
<td>Mobile</td>
<td>Admin or User</td>
<td>Indicates which user interface appears on the user’s iPhone mobile device. This record updates automatically each time the user clicks the gear button above the mobile homepage to display the full desktop interface or clicks the cell phone icon in the welcome bar to display the mobile interface. True = display the full desktop interface on an iPhone mobile device. False = display the mobile user interface on an iPhone mobile device. Type: True/False Default value: False</td>
</tr>
<tr>
<td>module</td>
<td>Menus</td>
<td>User Only</td>
<td>Records the sys_id of the last module the user accessed. Type: String Default value: sys_id</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------------</td>
<td>------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>owned_by_indicator.form</td>
<td>Update Sets</td>
<td>Admin Only</td>
<td>Shows or hides the update indicator icon in form headers when customer updates to that form are being tracked by update sets. True = show the customer updates indicator icon. False = hide the customer updates indicator icon. Type: True/False Default value: False</td>
</tr>
<tr>
<td>recent.impersonations</td>
<td>Administration</td>
<td>User Only</td>
<td>DO NOT MODIFY. Shows who the administrator most recently impersonated. For more information, see Impersonate a user. Type: String Default value: None</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------</td>
<td>----------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>report.expanded</td>
<td>Reporting</td>
<td>Admin or User</td>
<td>Works in combination with the UI property List of roles (comma-separated) that can expand the report header to determine whether the report header is open when viewing a report. For users whose role permits them to access the report header, the report.expanded user preference indicates whether reports open with the header expanded or collapsed. Expanding the report header reveals the report builder which is used to modify the report definition. This user preference record updates automatically each time the user expands or collapses the report header. If the user's role does not have permission to view the report header, the report header is never accessible, regardless of this user preference setting. True = expand the report header when displaying a report. False = collapse the report header when displaying a report. Type: String Default value: True</td>
</tr>
<tr>
<td>rowcount</td>
<td>Lists</td>
<td>User Only</td>
<td>Indicates the maximum number of rows that display on a single page in a list. This value also determines the maximum number of records that display in a list report on a homepage. This record updates automatically when a user chooses a different number. Type: Integer Default value: 20</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
<td>------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>sys_update_set</td>
<td>Update Sets</td>
<td>User Only</td>
<td>DO NOT MODIFY. Indicates the update set that is currently active. This value updates automatically when a user selects a different update set.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Type: GUID</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Default value: sys_id of default update set</td>
</tr>
<tr>
<td>tabbed.forms</td>
<td>Forms</td>
<td>User Only</td>
<td>Indicates whether forms that contain more than two sections use a tabbed interface or a scrolling list of sections. This setting applies</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>to all forms; it is not set on a form-by-form basis. This record updates automatically when a user clicks the Toggle Tabs icon in the</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>banner bar. For more information, see Tabbed forms.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>True = display multi-section forms as tabs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>False or blank = display multi-section forms as a scrolling list of sections.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Type: True/False</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Default value: False</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>---------------</td>
<td>----------</td>
<td>------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| table.compact | Lists    | User Only  | Indicates whether lists appear with more or less blank space above and below each row. This setting applies to all lists; it is not set on a list-by-list basis. This record updates automatically when a user personalizes any list and changes the Compact rows option.  
True = reduce the blank space above and below each row in a list to show more rows on the screen at one time.  
False = add blank space above and below each row in a list to improve readability.  
Type: True/False  
Default value: False  |
| table.wrap    | Lists    | User Only  | Indicates whether long text in a list is wrapped onto multiple lines or truncated. This setting applies to all lists; it is not set on a list-by-list basis. This record updates automatically when a user changes the Wrap column text option in the List v2 personalization interface or the Wrap longer text in list columns option in the UI16 system settings.  
True = wrap long text in a list. All text is seen in list view, but each row may occupy more vertical space.  
False = do not wrap the long text in a list. Text is truncated in list view, but each row takes less vertical space. Full text can be seen in form view.  
Type: True/False  
Default value: True  |
<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>top_searches.period</td>
<td>Homepages</td>
<td>User Only</td>
<td>Indicates the default time period (hour, day, week, or month) covered by top searches widgets on a homepage. When this record exists for individual users, it indicates the current time period for the Top Searches - All widget. The time period setting for top searches widgets on individual tables is stored in the top_searches.period.&lt;table&gt; user preference. For more information, see Top Searches homepage. Type: String Default value: Day</td>
</tr>
<tr>
<td>top_searches.period.&lt;table&gt;</td>
<td>Homepages</td>
<td>User Only</td>
<td>Indicates the time period (hour, day, week, or month) covered by top searches widgets for the specified table. This record updates automatically when a user chooses a different time period in a top searches widget for the specified table. If no record exists for a specific table, top searches widgets for that table use the time period set in the top_searches.period user preference where System=true. Type: String Default value: Day</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>------------</td>
<td>----------------</td>
<td>------------</td>
<td>---------</td>
</tr>
<tr>
<td>ts.match</td>
<td>Text Search</td>
<td>Admin or User</td>
<td>Indicates whether the task record should be returned by a global text search in which the search text exactly matches a task number. This record updates automatically when a user clicks the Search tips and preferences link on the search results page and changes the Return task record if searching for exact number setting. For more information, see <a href="#">Global text search finds records from multiple tables.</a> True = return the task record. A link is provided for full search results. False = return full search results, even if the search term matches a task number. Type: True/False Default value: True</td>
</tr>
<tr>
<td>Preference</td>
<td>Category</td>
<td>Updated by</td>
<td>Details</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------</td>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| ts.remember.expanded        | Text Search    | Admin or User     | Indicates whether to remember which search groups were expanded and collapsed during the previous search. The search groups available depend on the user’s access rights and selections. This record updates automatically when the user clicks the Search tips and preferences link on the search results page and changes the Use remembered expand / collapse preferences setting.  
True = remember the expand/collapse setting and use it for subsequent searches.  
False = do not remember the expand/collapse setting. Expand all groups for subsequent searches.  
Type: String  
Default value: True                                                                                                                                                                                                                                                                                                                                 |
| ts.show_empty_groups        | Text Search    | Admin or User     | Indicates whether global text search results include groups with no matches. The search groups available depend on the user’s access rights. This record updates automatically when the user clicks the Search tips and preferences link on the search results page and changes the Show groups with no search matches setting.  
True = include empty groups when displaying global text search results.  
False = hide empty groups when displaying global text search results.  
Type: String  
Default value: True                                                                                                                                                                                                                                                                                                                                 |
<table>
<thead>
<tr>
<th>Preference</th>
<th>Category</th>
<th>Updated by</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>ts.show_negative_result_info</td>
<td>Text Search</td>
<td>Admin or User</td>
<td>Indicates whether group headers in the global text search results page should identify tables that had no matches. The search groups available depend on the user’s access rights. This record updates automatically when the user clicks the Search tips and preferences link on the search results page and changes the In search group header, list tables with no search matches setting. True = show tables that returned no matches in the group header. False = hide tables that returned no matches in the group header. Type: String Default value: True</td>
</tr>
<tr>
<td>ts.show_search_groups</td>
<td>Text Search</td>
<td>Admin or User</td>
<td>Indicates whether the global text search results page includes check boxes that let the user indicate which groups to search and display. The search groups available depend on the user’s access rights and settings. This record updates automatically when the user clicks the Search tips and preferences link on the search results page and changes the Show selectable search groups setting. True = show the check boxes for enabling or disabling individual search groups. False = hide the check boxes for enabling or disabling individual search groups. Type: String Default value: True</td>
</tr>
</tbody>
</table>
### preference records for system-wide values, also called the default or global values, are stored in update sets.

Any changes are implemented when you import the update set and affect all users who have not customized the feature. User preference records for specific users are not stored in update sets, so user customizations are retained when you import an update set.

### Remove the welcome splash screen

You can create a user preference to turn off visibility to the welcome splash screen that introduces a new version of the ServiceNow® platform. This is useful if you are waiting to roll out features that are described in the welcome content.

Role required: admin

1. Navigate to User Administration User Preferences.
2. Click New.
3. Enter the following values.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Remove the welcome splash screen</td>
</tr>
<tr>
<td>Name</td>
<td>overview_help.visited.helsinki</td>
</tr>
<tr>
<td>System</td>
<td>Select this field</td>
</tr>
<tr>
<td>Type</td>
<td>string</td>
</tr>
<tr>
<td>Value</td>
<td>true</td>
</tr>
</tbody>
</table>

4. Click Submit.  
The welcome splash screen is marked as Visited for every user.

**Troubleshooting user-specific UI differences**

If an individual user encounters an unexplained behavior in the user interface, you can check their user preferences.

**Role required:** admin

1. Navigate to User Administration > User Preferences.
2. Search for the user name to find all that user’s records.
3. Delete the record that affects the behavior in question.

   The system-wide preference is active during the user’s next session. If the user customizes the behavior, a new user preference record is created and used for subsequent sessions.

**View management**

A view defines the elements that appear when a user opens a form or a list.

Administrators and users with the personalize role can define views for any list and form, which view should be visible by default, and which views pertain to specific user roles. Users with the admin or view_changer roles can change views.

For example, this is the Incident form in the Self-Service View:
Figure 110: Self service view

This is the Incident form in the Metrics View:
Figure 111: Metrics view

Note: Views can be used to define base views. UI Policies can modify those views based on context. For more information, see Create a UI policy.
Administer views

Several views are included with the base system, including the Default view and Advanced view.

⚠️ Warning: Do not delete any of the base system views.

All view records are saved in the UI View (sys_ui_view) table. Every list and form either has a view associated with it or uses the Default view if no other view is assigned. Administrators can create additional views or modify the base system views.

Switch views

You can switch the view from the default for lists and forms.

To switch between list views, click the table name at the top left corner of the list, and then select Views [Desired View]:

![List view dropdown](image)

Figure 112: List view dropdown

To switch between form views, click the table name at the left side of the form header, and then select Views [Desired View]:

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Switching views submits the form, which saves all changes and triggers any onSubmit client scripts that apply. You cannot switch form views on a new form that has not been saved yet.

When a user switches views, the selected view is saved as a user preference so the user sees the same view by default when the form opens. When a user has a view saved as a user preference and then opens a URL to a record that specifies another view, the form displays in the view saved in the user preference, not the URL. For example, if a user selects the Mobile view on an Incident record and then tries to open the following link, which specifies the visual task board view, the form still opens in the Mobile view: https://{instance}/nav_to.do?uri=incident.do?sys_id={sys_ID}sysparm_view=vtb

The sysparm_view parameter specifies the view to be used for a list or a form, and can be overwritten by a user’s stored preference for a view. You can override this behavior by setting the sysparm_view_forced parameter to true.

Create a view

You can create views to force all users to use a certain view, despite the view specified by the user’s preference.

Role required: admin

1. Navigate to the list or form that you want to create the view for.
2. If you are creating a view for a list, perform the appropriate action for your list version.
Version | Action
---|---
List v2 | Right click the header and select Configure List Layout or Configure Form Layout.
List v3 | Open the context menu and select List Layout.

3. If you are creating a view for a form, right-click the header and select Configure Form Layout.
4. Under the List View section, select the view on which you want to base your new view. The fields visible for that view appear in the Selected list.
5. From the choice list, select New. The Create New View form appears.
6. Enter the descriptive name of the view. View names should be unique and cannot use special characters or spaces, only the characters A-Z, a-z, 0-9 and _.
7. Click OK. The fields in the Available column are the same as the first view you based the new view on.
8. Select the fields to appear in this view by adding or removing the fields from the Selected column. You can also adjust the order they appear on the form by moving the fields up or down. If you are creating a view for a form, you can select a form section and configure the fields for that section. You can also create views in the same manner when you configure a related list.

Delete a view

You can delete any view that you created.
Role required: admin
Do not delete the base system views.
1. Navigate to System UI Views.
2. Click the view to delete.
3. Click Delete on the form header.

Create a view rule

When a user switches views, the selected view is saved as a user preference so the user sees the same view by default when the form opens. You can override this functionality to force a specified view to be used.
Role required: admin
View rules do not apply to users who have no role.
1. Navigate to System UI View Rules.
2. Click New.
3. Complete the form.

Table 61: View rule form

<table>
<thead>
<tr>
<th>Field</th>
<th>Input value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Specify an identifying name for the rule. This field is case-sensitive and must match exactly the view name.</td>
</tr>
</tbody>
</table>
### View rule form

The View Rule `[sysrule_view]` table contains the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Input value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Specify an identifying name for the rule. This field is case-sensitive and must match exactly the view name.</td>
</tr>
<tr>
<td>Active</td>
<td>Select this option to apply the view rule according to the conditions you specified. If unchecked, the view rule is not applied.</td>
</tr>
<tr>
<td>Advanced</td>
<td>Select this option to specify a code-based condition instead of using the condition builder. Selecting this option displays the Script field and hides the Match conditions, Conditions, and View fields.</td>
</tr>
<tr>
<td>Match Conditions</td>
<td>Select whether Any or All of the conditions need to be met. The system hides this field when you create an advanced View Rule.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Use the condition builder to determine when the view is applied. The system hides this field when you create an advanced View Rule.</td>
</tr>
<tr>
<td>Application</td>
<td>Displays the application to which the View Rule record belongs.</td>
</tr>
<tr>
<td>Table</td>
<td>Select the table on which this view rule will be applied. The list shows only tables and database views that are in the same scope as the view rule</td>
</tr>
<tr>
<td>Device type</td>
<td>Select which interface this view rule applies to.</td>
</tr>
<tr>
<td>View</td>
<td>Enter the name of the View you are creating a rule for. The system hides this field when you create an advanced View Rule.</td>
</tr>
<tr>
<td>Script</td>
<td>Enter a script to determine when to display a particular view. The system only displays this field when you create an advanced View Rule.</td>
</tr>
</tbody>
</table>

4. Click Submit.
Restrict view by role

You can use a script to control the form view used by different roles.

Caution: The customization described here was developed for use in specific instances, and is not supported by ServiceNow Customer Support. This method is provided as-is and should be tested thoroughly before implementation. Post all questions and comments regarding this customization to our community forum.

Name: Restrict View by Role
Type: System UI View Rules
Table: Any
Description: Generally the view used on a form is controlled by either specifying the sysparm.view parameter in the url or module properties, or by inheriting the view from the previous form or list. In some cases this does not apply, such as opening a referenced field form from a record producer. In this case you may want to control the view of the form based on roles. This script assumes there is a view called ess available to the current table.
Parameters:
• view - A string containing the name of the current view.
• is_list - A Boolean value indicating whether this is a list view.

Script:

(function overrideView(view, is_list) {
  //Force non-itol users to use the ess view
  if (gs.hasRole("itol")){return;}
  if (view.startsWith("ess")){return;}
  // do not change view if it starts with sys_ (e.g. sys_ref_list)
  if (view.startsWith("sys_")){return;}
  answer = "ess"; // set the new view to answer
  )(view, is_list);
Navigation Handler

A Navigation Handler is essentially a scripted View Rule and runs each time data from the specified table is requested in the form view.

The following script, which is a navigation handler included with the HR plugin, forces the ESS view for users with no roles, and uses the default view for all other users.

```javascript
var gr = new GlideRecord(hr.TABLE_CASE);
if (gr.get(g_uri.get('sys_id'))) {
    if (!gs.getUser().hasRoles())
        g_uri.set('sysparm_view', 'ess');
    else
        g_uri.set('sysparm_view', '');
}

answer = g_uri.toString('hr_case.do');
```

Use the glide.ui.view_rule.check_after_nav_handler system property to control the order in which View Rules and Navigation Handlers are applied. Set the property value to True to process view rules after navigation handlers. If the system property does not exist in your instance, the navigation handler always takes precedence.

The system property only overrides the Navigation Handler if the Navigation Handler scripted function does not return an answer. In the example script above, the property will have no effect as the Navigation Handler will always return an answer due to the answerline being outside of the if statement.

To force the Navigation Handler Script above to honor View Rules for the table, add the property above, set it to true, and update the code to only return an answer when the view needs to be changed or forced.

```javascript
var gr = new GlideRecord(hr.TABLE_CASE);
if (gr.get(g_url.get('sys_id'))) {
    if (!gs.getUser().hasRoles()) {
        g_url.set('sysparm_view', 'ess');</n    answer = g_url.toString('hr_case.do');
}
```

Welcome page content

The ServiceNow ITSA Suite login page content is completely customizable by the administrator of the system.

The login page should contain instructions and any other important information you would like to convey to your customers each time they use the system.

Login language selection

Users can select their language on the login page.

This enables them to start their user session in the language of their choice.
Create company-specific welcome page content

You can create company-specific welcome page content.

Role required: admin

1. Navigate to System UI Welcome Page Content.
2. To create a new section, click New.
3. Enter the following in the Condition field, where Company is the name of the company whose users see this section.
   
   ```javascript
   gs.getUser().getCompanyRecord().name.toString() == "Company"
   ```
4. Complete the form.
5. Click Submit.
Welcome page sections

View and configure the welcome page elements by navigating to  System UI  Welcome Page Content . You may need to enable the module if it is not visible. If any of the sections are not needed, they may be removed. You can edit any item by clicking its short description.

- **Demonstration**: Information about logging in to a ServiceNow ITSA Suite demo system
- **Welcome**: General information
- **Using**: Some tips and tricks for using the system
- **More Information**: A link to the ServiceNow wiki
- **Login**: Login information

Google Maps API support

Map pages enable you to graphically display data on a Google map page based on location data. Maps can be generated using basic JavaScript, but are flexible enough to display even the most complicated of queries. The maps you generate use standard Google Maps API mapping features, including various link types to records in your instance. This feature requires the Google Maps plugin.

![Figure 115: Map page](image)

Google Maps setup

Before using the Google Maps API, users may need to enter a Google license key in system properties, and configure other options.

You may need to obtain a Google Maps for Work license key to cover development use of the Google Maps API. See the [Getting Started Guide](#) on the Google web site for details on obtaining a key, using the API, and relevant terms of service.

When you receive your key, enter it in the  System Properties Google Maps  property form, and configure your maps using the configuration options in this screen.

After you complete the configuration, you can create map pages or use the default pages included with the plugin. Map pages define what data is displayed on the map and the appearance of the links. When
you have the map pages you need, you can create modules in your application navigator to display your maps.

For a tutorial on how to display all markers that link to your records, see the Display Map Markers on Google Maps blog post on the ServiceNow Community.

Google Maps plugin properties

The Google Maps Plugin provides the following configurable properties in System Properties Google Maps.

Table 63: Google Maps system properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>google.maps.auto_close</td>
<td>If true, automatically closes a map information window before opening a new one.</td>
</tr>
<tr>
<td></td>
<td>• Type: true/false</td>
</tr>
<tr>
<td></td>
<td>• Default value: true</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.client</td>
<td>Client ID for Google Maps API for Work.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: gme-servicenow</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.private.key</td>
<td>Private key for Google Maps API for Work. This key activates the geolocation feature, which locates users in the system precisely, using data from their mobile devices.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: empty</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.version</td>
<td>Version number of the current installation of Google Maps API.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: current version number</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.key</td>
<td>The Google Maps API key that is tied to the URL of the server. This key authorizes development use of Google Maps API.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: empty</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.latitude</td>
<td>Starting latitude of the map. This value determines the starting position displayed in Google Maps.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: 36.008522</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>google.maps.longitude</td>
<td>Starting longitude of the map. This value determines the starting position displayed in Google Maps pages.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: -95.221764</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.max_items</td>
<td>Maximum number of items to display on the map.</td>
</tr>
<tr>
<td></td>
<td>• Type: integer</td>
</tr>
<tr>
<td></td>
<td>• Default value: 500</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.table</td>
<td>Table used by the map. The table needs the following fields: name, longitude, latitude.</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: cmn_location</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
<tr>
<td>google.maps.zoom</td>
<td>Starting zoom level of the map (1 is the lowest)</td>
</tr>
<tr>
<td></td>
<td>• Type: string</td>
</tr>
<tr>
<td></td>
<td>• Default value: 4</td>
</tr>
<tr>
<td></td>
<td>• Location: System Properties Google Maps</td>
</tr>
</tbody>
</table>

Map pages

Map pages display ServiceNow data graphically on a Google map page based on location data that you provide.

You can create as many map pages as required to define the types of data to display, the links to show, and the appearance of the map. After creating the map pages, you can create modules to display the map pages.

Note: Map pages are subject to the non-production access limitations. See Google Maps API support.

Create a map page

Your ServiceNow instance provides several default map pages. You can also create custom map pages with the script examples described in this page.

Role required: admin

The default map page record displays critical incidents on a Google map page.
1. Navigate to System UI Map Pages.
2. Click New.
3. Complete the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a unique name to identify the map.</td>
</tr>
<tr>
<td>Center map on</td>
<td>Enter the location for centering the map using the decimal form of latitude and longitude. For example, to center the map on the statue of liberty, enter 40.689865, -74.045235.</td>
</tr>
<tr>
<td>Initial zoom</td>
<td>Set the map’s zoom level on opening.</td>
</tr>
<tr>
<td>Controls size</td>
<td>Select whether the Google navigation icons on the map should be large or small.</td>
</tr>
<tr>
<td>Type</td>
<td>Select a map background style: Satellite, Hybrid, Normal, or Terrain.</td>
</tr>
<tr>
<td>Type selection</td>
<td>Select which type of Google icons to display on the map: Buttons or Menu.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Map overview</td>
<td>Enable or disable a wide view map window for navigation.</td>
</tr>
<tr>
<td>Script</td>
<td>Create a script to define the type of data to display on this map. For more information, see Scripting for map pages.</td>
</tr>
</tbody>
</table>

#### Fields you can add by configuring the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center latitude</td>
<td>The latitude the map page will center on. This field is populated by the business rule Geocode Address.</td>
</tr>
<tr>
<td>Center longitude</td>
<td>The longitude the map page will center on. This field is populated by the business rule Geocode Address.</td>
</tr>
</tbody>
</table>

4. Save the record.

### Map page modules

You can create a new application module for desktop or smartphone users to display a Google map page.

You can create a desktop application module for a Google map page using either of the following methods.

- Map page link
- URL link

#### Create a desktop map page module using a map page link

You can create a custom desktop application module that links directly to a map page.

**Role required:** admin

1. Select the appropriate application for the module.
   
   For example, if you are planning to display critical incidents, add a module to the Incident application menu.

2. Perform the appropriate action for your version of the UI:

   **UI16**
   1. Navigate to System Definition Application Menus.
   2. Open the application menu to which you want to add the module.

   **UI15 or UI11**
   Right-click the application menu in the application navigator and select Edit Application Menu.

3. In the Modules related list, click New.

4. Complete the form, as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Enter a name for the module in the application navigator.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to define the sequence this condition should be evaluated if more than one matching condition exists. The order is evaluated from the lowest value to the highest value.</td>
</tr>
<tr>
<td>Application menu</td>
<td>Select the application menu where you want this module to appear. By default, this field displays the application menu that you opened to create the module.</td>
</tr>
<tr>
<td>Hint</td>
<td>Enter a brief description to display when a user points to the module name in the application navigator.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate this module. Only active modules appear in the application menu.</td>
</tr>
<tr>
<td>Image</td>
<td>Select an icon to display with this module in the application navigator. If this field is blank, a default icon is used.</td>
</tr>
<tr>
<td>Link type</td>
<td>Select Map Page from the list. This selection changes the available fields in the form.</td>
</tr>
<tr>
<td>Map page</td>
<td>Select the pre-configured map page to use for this module. For example, Critical Incidents.</td>
</tr>
<tr>
<td>Roles</td>
<td>Select the roles that are permitted to access this module. If this field is blank, all roles can access the module.</td>
</tr>
</tbody>
</table>

5. Click Submit.

Create a desktop map page module using a URL link

You can create a desktop module that links to a map page via a URL.
Role required: admin

1. Select the appropriate application for the module.
   For example, if you are planning to display critical incidents, add a module to the Incident application menu.

2. Perform the appropriate action for your version of the UI:

| UI16                     | 1. Navigate to System Definition Application Menus.  
|                         | 2. Open the application menu to which you want to add the module. |
| UI15 or UI11            | Right-click the application menu in the application navigator and select Edit Application Menu. |

3. In the Modules related list, click New.
4. Select a Link type of URL (from Arguments:).
   This selection displays the Arguments field.
5. Enter the URL in this format: map_page.do?sysparm_name=<map page name>.
   Note: If the map page title has a space in it, replace the space with %20 for the correct syntax. For example, a map page called Critical Incidents becomes Critical%20Incidents %20 in a URL.

6. Click Submit.
Create a smartphone map page module

You can create a custom smartphone module that links directly to a map page.

Role required: admin

1. Obtain the sys_id of the map page.
   The sys_id is required when you create the module.
2. Navigate to System Mobile UI Navigator Apps.
3. Open the application menu where you want the new module to appear.
4. In the Modules related list, click New.
5. Complete the form, as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the module.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to specify the order of the module within the application menu. For example, an entry of 100 would place this module before one with an Order entry of 200.</td>
</tr>
<tr>
<td>Application menu</td>
<td>Select the application menu where you want this module to appear. By default, this field displays the application menu that you opened to create the module.</td>
</tr>
<tr>
<td>Table</td>
<td>Do not select a table.</td>
</tr>
<tr>
<td>Updated</td>
<td>Displays the date and time when the module record is updated.</td>
</tr>
<tr>
<td>Roles</td>
<td>Select the roles that are permitted to access this module. If this field is blank, all roles can access the module.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate this module. Only active modules appear in the application menu.</td>
</tr>
<tr>
<td>Filter</td>
<td>Do not add a filter condition.</td>
</tr>
<tr>
<td>Path</td>
<td>Enter map/ followed by the sys_id of the map page. For example: map/c86c5feac0a80a6600706f0102968196</td>
</tr>
</tbody>
</table>

6. Click Submit.

Scripting for map pages

In the Script field on the Map Page form, you can use the available attributes or custom code to define map characteristics, such as marker appearance for items on the map, what information to display when someone clicks a marker, and more.

You can use the isMobile variable to set custom behavior for the smartphone view of the map.

To create an item on the map, use the map.addItem(glideRecord) method. You must pass a valid GlideRecord to addItem().

The following attributes are available.
Table 64: Scripting map item attributes

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>Name used for identification.</td>
</tr>
<tr>
<td>latitude</td>
<td>Latitude is not necessary if you define an address.</td>
</tr>
<tr>
<td>longitude</td>
<td>Longitude is not necessary if you define an address.</td>
</tr>
<tr>
<td>icon</td>
<td>URL of the icon to display for the marker. The default Google marker is used if a custom icon is not specified.</td>
</tr>
<tr>
<td>icon_width</td>
<td>Width of the icon. The default is 32.</td>
</tr>
<tr>
<td>icon_height</td>
<td>Height of the icon. The default is 32.</td>
</tr>
<tr>
<td>table_name</td>
<td>Table whose records display when the marker icon is clicked. Used in conjunction with the sys_id attribute.</td>
</tr>
<tr>
<td>sys_id</td>
<td>Sys_id of the record that will display when the marker icon is clicked. Used in conjunction with the table_name attribute.</td>
</tr>
<tr>
<td>view</td>
<td>View of the form displayed in the dialog box when the marker icon is clicked.</td>
</tr>
<tr>
<td>dialog_title</td>
<td>Title of the dialog box containing the record information.</td>
</tr>
<tr>
<td>html</td>
<td>Arbitrary HTML code for the pop-up window. If used, this value overrides the dialog box.</td>
</tr>
<tr>
<td>marker_label</td>
<td>Optional marker icon label text. For an example, see Map page marker label script.</td>
</tr>
<tr>
<td>label_offset_left</td>
<td>Optional attribute that is used with marker_label to define the horizontal position of the marker label. The default is 0.</td>
</tr>
<tr>
<td>label_offset_top</td>
<td>Optional attribute that is used with marker_label to define the vertical position of the marker label. The default is 0.</td>
</tr>
</tbody>
</table>

Scripting custom map page behavior for smartphone interfaces

If you plan to access the map page from a smartphone, you may want to set custom smartphone interface behavior using the isMobile variable.

For example, you might set different values for the icon_width and icon_height attributes when isMobile is true.

Basic map page script

This script is used to display all active, critical incident locations.

```javascript
var gr = new GlideRecord("incident");
gr.addQuery("priority", '1');
gr.addActiveQuery();
gr.query();
```

//loop through the list of incidents returned by the query
while (gr.next()) {

    //create a new map item to display - linked to the current incident record
    var item = map.addItem(gr);
    //add the latitude value from the incident's location
    item.latitude = gr.location.latitude;
    //add the longitude value from the incident's location
    item.longitude = gr.location.longitude;
    //add the incident number to the dialog title
    item.dialog_title = gr.getDisplayValue();
    //link to the icon image
    item.icon = "http://maps.google.com/mapfiles/kml/pal3/icon51.png";
    //set the icon size
    item.icon_width = "16";
    item.icon_height = "16";
}

isMobile map page script

This script is used to display all active, critical incident locations with custom settings for smartphone users.

//setup new GlideRecord query on the incident table
var gr = new GlideRecord("incident");
//add condition for priority 1
gr.addQuery('priority', '1');
//add condition for active incidents
gr.addActiveQuery();
//execute the query
gr.query();

//loop through the list of incidents returned by the query
while (gr.next()) {

    //create a new map item to display - linked to the current incident record
    var item = map.addItem(gr);
    //add the latitude value from the incident's location
    item.latitude = gr.location.latitude;
    //add the longitude value from the incident's location
    item.longitude = gr.location.longitude;
    //add the incident number to the dialog title
    item.dialog_title = gr.getDisplayValue();
    //link to the icon image
    item.icon = "http://maps.google.com/mapfiles/kml/pal3/icon51.png";
    //set the icon size (use smaller icons for smartphone users)
    if (isMobile) {
        item.icon_width = "12";
        item.icon_height = "12";
    }
    else {
        item.icon_width = "16";
        item.icon_height = "16";
    }
}

Advanced map page script

This script is used to display the number of open incidents by location.

This script varies the size of the icon based on the number of open incidents for the location. Using the html parameter, it also displays the location name and number of incidents, as well as a link to the list of related incidents.

//get the instances url so we can link back to it
var uri = gs.getProperty("glide.servlet.uri");
//create an aggregate query on the incident table
var count = new GlideAggregate('incident');
//set condition for active incidents
count.addQuery('active', 'true');
//set aggregate field to location to get count by location
count.addAggregate('COUNT', 'location');
//execute the query
count.query();

//loop through the results
while (count.next()) {

  //get the current record's location
  var loc = count.location;
  //get the count of incidents for this location
  var locCount = count.getAggregate('COUNT', 'location');
  //only display location is there are active incidents
  if (locCount > 0) {
    //create new new map item for this location
    var item = map.addItem(count);
    //set lat/long from the location record
    item.latitude = loc.latitude;
    item.longitude = loc.longitude;
    //build the link to the list of incidents for the location
    var link = 'href=' + uri + 'incident_list.do?sysparm_query=active%3Dtrue^location%3D' + loc;
    //build the html value to be displayed when you click the map icon
    item.html='<a ' + link + '>'+ loc.getDisplayValue() + ' (' + locCount + ')</a>;
    //link to the icon image
    item.icon = "http://maps.google.com/mapfiles/kml/pal3/icon51.png";
    //set the size of the icon based on the number of active incidents
    if (locCount < 5) {
      item.icon_width = "12";
      item.icon_height = "12";
    } else if (locCount < 15) {
      item.icon_width = "16";
      item.icon_height = "16";
    } else {
      item.icon_width = "32";
      item.icon_height = "32";
    }
  }
}

Map page marker label script

Marker labels allow you to add dynamic text to markers.
This example displays the active incident count at each location.
var uri = gs.getProperty("glide.servlet.uri");
var count = new GlideAggregate('incident');
count.addQuery('active', 'true');
count.addAggregate('COUNT', 'location');
count.query();

while (count.next()) {
  var loc = count.location;
  var locCount = count.getAggregate('COUNT', 'location');
  if (locCount > 0) {
    var item = map.addItem(count);
    item.latitude = loc.latitude;
    item.longitude = loc.longitude;
    item.marker_label = locCount;
    item.label_offset_left = -4;
    item.label_offset_top = -20;

    var link = 'href=' + uri + 'incident_list.do?sysparm_query=active
               ^location%3D' + loc + ';
    var html = '<a ' + link + '>'+ loc.getDisplayValue() + ' (' + locCount + ')</a>';
//link to the icon image
item.icon = "images/red_marker.png";
//set the size of the icon based on the number of active incidents
item.icon_width = 24;
item.icon_height = 24;

}

Theming an instance
An administrator may want to change the styles throughout the instance to change the look and feel of
the usual instance interface.
This theming can be done in several different places, often using global CSS or system properties.
Other information on theming can be found in the following sources.
• To create a themed interface for users, see Content Management System.
• To find out how to modify the banner image and text, see Modify the banner.
• For styles of individual fields, see Define field styles.

Beyond theme controls, it is also possible to customize the UI using customized scripts.

Configure logo, colors, and system defaults for UI16
You can use the Basic Configuration UI16 module to brand your instance with your company logo and
colors and set basic system defaults. This is the best place to start if you are setting up your instance
for the first time or if you have recently enabled UI16.
To prepare for completing basic configuration, gather the following information.
• Obtain the company banner image to use in the header. The image can be high resolution, but when
  it displays it is scaled based on the aspect ratio. It scales to a maximum of 20px high.
• Get your company’s brand color hex or RGB numbers, typically from your marketing department.
  Use them to decide how to configure the UI background colors.
Role required: admin
Each color selection option provides a color picker to select a color. The text box beside the color picker
lets you enter the value of the color as any of the following CSS formats.
• Name: predefined color names, such as red, green, blue
• RGB decimal: RGB(102, 153, 204)
• RGB hex: #223344
Refer to HTML Color Names (W3CSchools) for information about HTML color names.
1. Navigate to System Properties Basic Configuration UI16
2. Complete the configuration by changing any of the following settings.

<table>
<thead>
<tr>
<th>Table 65: Basic system configuration properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
</tr>
<tr>
<td>Page header caption</td>
</tr>
<tr>
<td>Browser tab title</td>
</tr>
<tr>
<td>Label</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>System timezone for all users unless overridden in the user’s record</td>
</tr>
<tr>
<td>Banner image</td>
</tr>
<tr>
<td>Date format</td>
</tr>
<tr>
<td>Time format</td>
</tr>
<tr>
<td>Header background color</td>
</tr>
<tr>
<td>Banner text color</td>
</tr>
<tr>
<td>Header divider stripe color</td>
</tr>
<tr>
<td>Navigation background color</td>
</tr>
<tr>
<td>Navigation background color for expanded items</td>
</tr>
<tr>
<td>Label</td>
</tr>
<tr>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Navigation selected tab background color</td>
</tr>
<tr>
<td>Navigation highlight background color</td>
</tr>
<tr>
<td>Navigation separator color</td>
</tr>
<tr>
<td>Label</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Background for Favorites list, history list, and Connect list background</td>
</tr>
<tr>
<td>Module text color for UI16</td>
</tr>
<tr>
<td>Currently selected Navigation tab icon color for UI16</td>
</tr>
</tbody>
</table>
For most of the settings, as you make changes, the page refreshes with a preview of the change. Only you see these changes.

3. Click Save at the top or bottom of the page.

After you save the configuration changes, all users who select the System theme in their UI personalization options see the new configuration colors.

**Configure logo, colors, and system defaults**

You can use the Basic Configuration module to brand your instance with your company logo and colors and set basic system defaults. This is the best place to start if you are setting up your instance for the first time.

To prepare for completing basic configuration, gather the following information.

- Obtain the company banner image to use in the header. The image can be high resolution, but when it displays it is scaled based on the aspect ratio. It scales to a maximum of 50px high.
- Decide whether to change the banner and list header background color, and the banner text color. If you plan to do so, obtain your company’s brand color hex or RGB numbers. Typically, these come from your marketing department.

Role required: admin

This procedure applies to configuring UI15 and UI11.

1. Navigate to System Properties Basic Configuration
2. Complete the configuration by changing any of the following settings.

**Table 66: Basic system configuration properties**

<table>
<thead>
<tr>
<th>Label</th>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Border color for UI16</td>
<td>css.$navpage-nav-border</td>
<td>Select or enter the color. Also affects the border of the Filter conversations search box in the Connect Chat sidebar.</td>
</tr>
<tr>
<td>Page header caption</td>
<td>glide.product.description</td>
<td>Change the text that appears next to your logo.</td>
</tr>
<tr>
<td>Label</td>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Banner and list caption background color</td>
<td>css.base.color</td>
<td>Click the color picker and select the color to use. You can also enter the name, RGB decimal, or RGB hex number of the color. Refer to <a href="https://www.w3schools.com/html/html_colornames.asp">HTML Color Names (W3CSchools)</a> for information about HTML color names.</td>
</tr>
<tr>
<td>Browser tab title</td>
<td>glide.product.name</td>
<td>Change the text that appears on the browser tab</td>
</tr>
<tr>
<td>Banner image</td>
<td>glide.product.image</td>
<td>Click + next to the image and upload your logo.</td>
</tr>
<tr>
<td>System timezone for all users unless overridden in the user’s record</td>
<td>glide.sys.default.tz</td>
<td>Select the timezone in the choice list. Click Configure available time zones to select the time zones that your users can select from in user preferences.</td>
</tr>
<tr>
<td>Date format</td>
<td>glide.sys.date_format</td>
<td>Select the date and time formats from the choice lists.</td>
</tr>
<tr>
<td>Time format</td>
<td>glide.sys.time_format</td>
<td></td>
</tr>
<tr>
<td>Banner text color</td>
<td>css.banner.description.color</td>
<td>Click the color picker and select the color to use. You can also enter the name, RGB decimal, or RGB hex number of the color.</td>
</tr>
</tbody>
</table>

As you make changes, the page refreshes with a preview of the change. Only you see these changes.

3. Click Save at the top or bottom of the page.

After you save the configuration changes, all users who select the System theme in their UI personalization options see the new configuration colors.

**Menu categories**

Menu categories let you put CSS styles on application labels to make them stand out from other applications.

You navigate to System Definition Menu Categories to view existing menu categories. This CSS style can include border color, text color, background color, and other options.

The base system includes the following menu categories.

- **Administration**
  - Applications in this category have a light blue background.
  - Style: border-color: #a7cded; background-color: #e3f3ff;

- **Custom Applications**
  - Applications in this category have a light gray background.
To add an application to a category, add it in the related list of applications at the bottom of the category record, or specify the category on the application record.

Business service map properties

Administrators can edit the Business Service Map look and feel in the module BSM Map Properties.

The following properties can be changed.

- How many child nodes to display when too many children exist for parent CI.
- Color used for the collapsed node when too many children exist for parent CI.
- Text style used for collapsed node when too many children exist for parent CI.
- The color of any of the following items.
  - Affect neighbor node
  - Node with an open change request
  - Node with an outage
  - Node with an open incident
  - Recently expanded nodes

Change survey question header colors

All of the lists and forms draw the color of their headers from the base color, which allows theming from the CSS properties.

One notable exception is the survey, which has its own CSS. It is possible to change the CSS by adding a property.

1. Enter sys_properties.form into the navigation filter and press the Enter key.
   A new Property form displays.
2. Name the new property css.list.row.survey.background.color.
3. Enter the hexadecimal value of the desired color into the Value field.
4. Click Submit.
   The survey should now use the desired color.
CSS properties

Some theming properties may be customized by navigating to System Properties CSS.

Colors are specified using predefined color names, RGB decimals, or RGB hexadecimals. The following properties are available through CSS Properties.

- Banner text color
- Banner and list caption background color
- Font used in forms and lists (this is a global font setting)
- Base font size (UI11)
- Button styles (background color, border color, border width, text color)
- Field status indicator colors (including the indicators for Changed, Mandatory Populated, Mandatory Unpopulated, and Read-only)
- List cell vertical alignment
- Navigator menu styles (text font size, background color, text color)
- Header font name and size
- List and form caption color override
- Global text search background color (both for catalog results and knowledge base results)

CSS theme support

Themes give the user interface a specific look and feel by using different color combinations.

System administrators can create themes or customize the existing themes for an instance. To see existing themes, navigate to System UI Themes.

Activating CSS theme support

There are different plugins that activate CSS themes support.

Activate one of the following plugins to use themes, based on the version of the UI you use.

- UI16: CSS Theme support - UI15 is activated automatically with UI16
- UI15: CSS Theme support - UI14 is activated automatically with UI15
- UI11: CSS Theme support

See Activate a plugin.

Enable the theme picker (UI15)

The theme picker adds a field to the system menu that allows the user to quickly switch between CSS themes during the current browser session.

Role required: admin

You can enable the theme picker by activating the ui_theme_changer UI macro.

1. Navigate to System UI UI Macros.
2. Locate the ui_theme_changer UI macro.
3. Set the Active field to true.

Select a theme

You can switch between different themes for the user interface.
Themes are user specific. Each user can select a different theme and the selection is stored as a user preference.

Select a theme by performing the appropriate action for your version of the UI.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UI16</td>
<td>Click the gear icon (⚙️) in the banner frame to access the System Settings window. Select the Theme tab, and then select the theme.</td>
</tr>
<tr>
<td>UI15</td>
<td>Click the gear icon (⚙️) in the banner frame to access the system menu. Then select a theme from the Theme picker.</td>
</tr>
<tr>
<td>UI11</td>
<td>Select a theme from the Theme picker in the banner frame.</td>
</tr>
</tbody>
</table>

Configure a company theme

You can configure a default CSS theme for a particular company in UI15. The theme appears for all users associated with the company unless they select a different theme.

Role required: personalize_form

Specify a company theme on the company record.

Note: In UI16, the basic configuration is used instead of the theme selected in the company record.

1. Navigate to System Properties My Company.
2. Configure the form and add the Theme field.
3. In the Theme field, select a theme.
4. Click Update.

Users in this company will see the selected theme the next time they log in, unless they have selected a different theme.

Create or customize a theme

You can create themes or customize existing themes.

Role required: admin

1. Navigate to System UI Themes.
2. To create a new theme, click New. To customize an existing theme, click the theme name.
3. Enter a name for the theme in the Name field.
4. Add any of the default CSS styles in the CSS field.

   In some cases the default style is not the only style definition for an object. In such cases, you can use the CSS important rule format to override any other style definitions with the default definition. For example, this definition overrides the text color in the main navigation: $navpage-nav-color-sub: #fff !important.

5. Select the Active check box.
6. Select one of the following from the Device choice list to identify the user interface version for the theme.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browser</td>
<td>Identifies a UI11 theme.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>Doctype</td>
<td>Identifies a UI15 theme.</td>
</tr>
<tr>
<td>Concourse</td>
<td>Identifies a UI16 theme.</td>
</tr>
</tbody>
</table>

7. **Click** Submit.

You must refresh the page to see the new theme in the theme picker. The theme picker displays only themes that are compatible with the current version of the UI.

**Default CSS styles**

You can use CSS styles to control the appearance of elements in a theme.

Your version of the UI determines which CSS styles you can use.

**Default CSS styles for UI16**

```css
$SEARCH-TEXT-COLOR: #e7e9eb
$NAVPAGE-HEADER-BG: #303a46
$NAVPAGE-HEADER-COLOR: #ffffff
$NAVPAGE-HEADER-DIVIDER-COLOR: #455464
$NAV-HIGHLIGHT-MAIN: #3D4853
$SUBNAV-BACKGROUND-COLOR: #455464
$NAV-PAGE-BG: #303a46
$NAV-PAGE-BG-SUB: #455464
$NAV-PAGE-COLOR-SUB: #bec1c6
$NAV-PAGE-MOD-TEXT-HOVER: #ffffff
$NAV-HR-COLOR: #303a46
$NAV-HIGHLIGHT-BAR-ACTIVE: #278efc
$NAV-HIGHLIGHT-BAR-INACTIVE: #828890
$NAV-PAGE-SELECTED-BG: #4B545F
$NAV-PAGE-SELECTED-COLOR: #ffffff
$NAV-PAGE-UNSELECTED-COLOR: #bec1c6
$CONNECT-LATEST-MESSAGE: #cfd4d8
$NAV-TIMEAGO-HEADER-COLOR: #303a46
$NAV-PAGE-APP-TEXT: #cfd4d8
$NAV-PAGE-APP-TEXT-HOVER: #ffffff
$NAV-PAGE-BORDER: #ddd
$NAV-PAGE-BUTTON-COLOR: #fff
$NAV-PAGE-BUTTON-COLOR-HOVER: #7EC24F
```

**Default CSS styles for UI15**

```css
base.color: rgb(102, 153, 204)
base.font-family: arial

$COLOR-DARKEST: #343d47
$COLOR-DARKER: #485563
$COLOR-DARK: #81878e
$COLOR-LIGHT: bdc0c4
$COLOR-LIGHTER: #e6e8ea
$COLOR-LIGHTTEST: #ffffff
$COLOR-POSITIVE: ${color-green}
$COLOR-WARNING: ${color-orange}
```
$color-negative: ${$color-red}
/color-info: ${$color-blue}
/color-text: ${$color-darkest}
/color-accent: ${$color-blue}
/color-accent-light: ${$color-blue-lighter}
/color-primary: ${$color-accent}

# Banner branding styles
banner.background.attachment: scroll
banner.background.color: #FFF
banner.background.image:url("../images/s.gifx")
banner.background.position: center bottom
banner.background.repeat: repeat-x

# UI15 with Bootstrap
$navbar-default-bg: #f8f8f8
$navbar-default-color: #777777
$brand-warning: #df8a13
$brand-primary: #428bca
$brand-info: #5bc0de
$jumbotron-bg-color: #428bca
$panel-bg: #ffffff

$state-success-text: ${g_darken($color-positive, 25%)}
$state-success-bg: ${g_lighten($color-green-lighter, 20%)}
$state-success-border: ${g_lighten($color-positive, 30%)}

$state-info-text: ${g_darken($color-info, 25%)}
$state-info-bg: ${g_lighten($color-blue-lighter, 8%)}
$state-info-border: ${g_lighten($color-info, 30%)}

$state-warning-text: ${g_darken($color-warning, 25%)}
$state-warning-bg: ${g_lighten($color-orange-lighter, 10%)}
$state-warning-border: ${g_lighten($color-warning, 30%)}

$state-danger-text: ${g_darken($color-negative, 25%)}
$state-danger-bg: ${g_lighten($color-red-lighter, 8%)}
$state-danger-border: ${g_lighten($color-negative, 30%)}

Default CSS styles for UI11

base.color: rgb(102, 153, 204)
base.font-family: arial
base.font-size: 10pt
# application font size
menu.font-size: smaller

mobile.font-family: ${base.font-family}
mobile.font-size: ${base.font-size}

mobile.touch.font-family: ${base.font-family}
mobile.touch.font-size: 13pt

button.action.text.color: ${base.text.color}
button.action.background.color: ${base.color}
button.action.border.color: #666666
button.action.border.width: 1px
button.login.text.color: ${base.text.color}
button.login.background.color: ${base.color}
button.login.border.color: #666666
button.login.border.width: 1px

banner.title.color: ${base.color}
banner.description.color: #808080
text-caption.color: ${base.color}

# Banner branding styles
banner.background.attachment: scroll
banner.background.color: #FFF
banner.background.image:url("../images/s.gifx")
banner.background.position: center bottom
banner.background.repeat: repeat-x

body.background.color: ${base.background.color}
table.background.color: ${base.background.color}
table.column.head.background.color: ${base.color}
table.column.head.text.color: ${base.text.color}

button.header.text.color: ${base.text.color}
button.header.background.color: ${table.column.head.background.color}
button.header.border.color: white
button.header.border.width: 1px

label.text.color: black
label.background.color: #ddddd
generic.mandatory.text.color: ${base.text.color}
generic.mandatory.background.color: #cc0000
generic.mandatory_populated.text.color: ${base.text.color}
generic.mandatory_populated.background.color: #cc7777
generic.read_only.background.color: orange
generic.changed.background.color: #00cc00
generic.foreign.background.color: black
generic.foreign.background.color: silver
generic.error.text.color: black
generic.error.background.color: khaki
label.debug.text.color: black
label.debug.background.color: khaki
label.debug.success.text.color: black
label.debug.success.background.color: #99FF33
label.debug.failure.text.color: black
label.debug.failure.background.color: #FF9933

list.base.text.color: black
list.row.even.background.color: #EEEEEE
list.row.highlight.background.color: #EEE

list.row.even.text.color: ${list.base.text.color}
list.row.odd.background.color: ${base.background.color}
list.row.odd.text.color: ${list.base.text.color}
list.row.low.background.color: khaki
list.row.low.text.color: ${list.base.text.color}
list.row.medium.background.color: orange
list.row.medium.text.color: ${list.base.text.color}
list.row.high.background.color: tomato
list.row.high.text.color: ${list.base.text.color}
list.row.success.background.color: khaki
list.row.success.text.color: ${list.base.text.color}
drag.section.hilight.neighbors.border: #ff9900
drag.section.top.background.color: #eeeeee
drag.section.header.background.color: #eeeeee
drag.section.header.active.background.color: #ccddff
table.white-space: normal
table.cell.padding: 2px
input.disabled.text.color: #444444
input.disabled.background.color:#f6f6f6
input.ref_dynamic.border.color: #00CC00
input.ref_invalid.border.color: #DC143C
textsearch.kb.background.color: #f0f7f9
textsearch.catalog.background.color: #ffffdd
questionset.text.width: 250px
questionset.reference.width: 157px
user_image.max.height: 250px
user_image.max.width: 250px

# All the properties needs to be moved in a new Table_UI_Properties file

# Tablet header and footer background
tablet.gradient.start: #666666
tablet.gradient.end: #111111

# Tablet header footer text color
tablet.headerfooter.text.color: #ffffff

script.editor.width: 80%

#mobile
m.label.color: #666
m.separator.color: #DDD
m.border-box: -moz-box-sizing: border-box; box-sizing: border-box;
m.context_menu.background: background: none repeat scroll 0 0 #FF0000;
m.context_menu.border: border: 1px solid darkgrey; border: 1px solid rgba(0, 0, 0, 0.2); border-radius: 4px;
m.context_menu.element.font: font-weight: bold; color: #000;
m.context_menu.element.padding: padding: 5px;
m.one-line-clipped: white-space: nowrap; text-overflow: ellipsis; overflow: hidden;
m.message.background.error: #F2DEDE
m.message.error: background-color: {m.message.background.error}; border-color: #EED3D7; color: #B94A48;
m.message.arrow.error: ${m.message.background.error}
m.message.background.info: #D9EDF7
m.message.info: background-color: {m.message.background.info}; border-color: #BCE8F1; color: #3A87AD;
m.message.arrow.info: ${m.message.background.info}

m.message.background.warning: #FCE8E3
m.message.warning: background-color: {m.message.background.warning}; border-color: #FBEE55; color: #C09853;
m.message.arrow.warning: ${m.message.background.warning}
UI properties
You can customize the following theming properties by navigating to System Properties UI Properties.

- Icons used in the activity formatter
- Background colors for Additional Comments and Work Notes
- Button placement on forms
- Icons used in the Task Activity formatter
- Background colors for Incident Additional Comments and Work Notes

Helsinki CSS class support
In UI16, CSS properties and how they affect the platform UI change depending on the release.

Table 67: CSS classes and what they do

<table>
<thead>
<tr>
<th>CSS class</th>
<th>Description</th>
<th>How to configure</th>
<th>Affected area</th>
</tr>
</thead>
<tbody>
<tr>
<td>$navpage-header-bg</td>
<td>Header background color</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>$navpage-header-color</td>
<td>Color for header text and the global search icon, as well as the Application and Update set list icons (these lists must be enabled in the header)</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>$navpage-header-button-color</td>
<td>Color for logged in user name text and Connect, Help, and settings icons</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see Create or customize a theme.</td>
<td></td>
</tr>
<tr>
<td>$navpage-header-divider-color</td>
<td>Header divider color</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>$navpage-button-color</td>
<td>Color for the following icons in the sidebars: • Expand/collapse • Create a conversation (in the Connect sidebar) • Open Connect workspace • Clear text icon in the navigation filter</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see Create or customize a theme.</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
</tbody>
</table>
| $navpage-button-color-hover | Color for the following icons when a user points to the control:  
  • Global search  
  • Expand/collapse  
  • Create a conversation (in the Connect sidebar)  
  • Open Connect workspace  
  • Clear text icon in the navigation filter | Add the CSS property to the CSS field of a theme. For more information, see [Create or customize a theme](#).                                                                                       | ![Example Image](image1.png)                  |
<p>| $search-text-color         | Color of the search text, both in the navigation filter and the global search fields                                                                                                                      | Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.                                                                                       | <img src="image2.png" alt="Example Image" />                  |
| $navpage-nav-border       | Border color for the navigation filter                                                                                                                                                                   | Navigate to System Properties Basic Configuration UI16                                                                                                                                                    | <img src="image3.png" alt="Example Image" />                  |
| $nav-highlight-main       | Highlights the module after the user has clicked it and in the Connect workspace, highlights the selected conversation.                                                                                 | Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.                                                                                       | <img src="image4.png" alt="Example Image" />                  |</p>
<table>
<thead>
<tr>
<th>CSS class</th>
<th>Description</th>
<th>How to configure</th>
<th>Affected area</th>
</tr>
</thead>
<tbody>
<tr>
<td>$subnav-background-color</td>
<td>Background for expanded navigation items</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$navpage-nav-bg</td>
<td>Header and footer for navigator and sidebars</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------</td>
<td>-------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>$navpage-nav-bg-sub</td>
<td>Background for navigator and sidebars</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>$navpage-nav-color-sub</td>
<td>Text color in main navigation</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see Create or customize a theme.</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>$navpage-nav-mod-text-hover</td>
<td>Text color when hovering over items in the main navigation</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$nav-hr-color</td>
<td>Navigator separator color</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>$nav-highlight-bar-active</td>
<td>Line under the active tab in the application</td>
<td>Add the CSS property to the CSS field of a theme.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>navigator</td>
<td>For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$nav-highlight-bar-inactive</td>
<td>Line under the inactive tabs in the application</td>
<td>Add the CSS property to the CSS field of a theme.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>navigator</td>
<td>For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$navpage-nav-selected-bg</td>
<td>Navigation selected tab background color</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>$navpage-nav-selected-color</td>
<td>Currently selected Navigation tab icon color</td>
<td>Navigate to System Properties Basic Configuration UI16</td>
<td></td>
</tr>
<tr>
<td>$navpage-nav-unselected-color</td>
<td>Unselected navigation tab icon and favorite icons color</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$connect-latest-message</td>
<td>Color of the latest message in the Connect workspace</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td><strong>CSS class</strong></td>
<td><strong>Description</strong></td>
<td><strong>How to configure</strong></td>
<td><strong>Affected area</strong></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td><code>$nav-timeago-header-color</code></td>
<td>Timestamp header backgrounds in History tab</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>CSS class</td>
<td>Description</td>
<td>How to configure</td>
<td>Affected area</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>$navpage-nav-app-text</td>
<td>Core content text color</td>
<td>Add the CSS property to the CSS field of a theme. For more information, see <a href="#">Create or customize a theme</a>.</td>
<td></td>
</tr>
<tr>
<td>$navpage-nav-app-text-hover</td>
<td>Core content text color when a user points to the text</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
</tbody>
</table>

Create a company profile

To customize the ServiceNow® instance for your company, you can enter information such as contact phone numbers, street address, and additional notes. You can also customize the company logo and banner text your end users see at the top of each page.

Role required: admin

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Much of the company information that you enter is reference information that administrators can view. All users see the company logo and banner text. To see all company information, verify that you are in the My Company view.

![My Company view selection](image)

1. Navigate to System Properties My Company.
2. To change the banner text, update the Banner text field.
3. Select the Primary check box to indicate if this company is the primary company.
   If needed, configure the form to add the Primary check box. Designate only one company in your system as the primary company.
4. To upload your company logo, complete one of the following steps for your version of the UI.
   ![Option Description](image)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UI16</td>
<td>Click Click to add or Update beside UI16 Banner Image.</td>
</tr>
<tr>
<td>UI15 or UI11</td>
<td>Click Click to add or Update below the Banner image field.</td>
</tr>
</tbody>
</table>

   If you leave the banner image blank for either UI16 or UI15, the system uses the image used in System Properties Basic Configuration Banner image (glide.product.image) as the default.
5. Click Choose file and select the file, and then click OK.
6. Complete the form with remaining company information.
7. Click Update.
Define the company profile Apple icon

When viewing an instance on an Apple device, users can save a bookmark to the home screen that navigates directly to the instance. The icon that the bookmark uses can be defined in the company profile.
1. Navigate to System Properties My Company.
2. If necessary, *Configure the form* and add the Apple Icon field.
3. Use the Apple Icon field to upload the desired image.
   This should be a 57x57 px image in .png format:
   When users save the bookmark to the home screen, it will display the new icon.
Banner logo link

Properties are available to control the URL and target frame used when clicking the banner logo.

- glide.banner.image.url: URL used when clicking the banner image
- glide.banner.image.url_target: Target frame used when clicking the banner image
  - gsft_main for the main frame
  - _top to replace the current browser window
  - _blank for a new window/tab

Customize the logo in system properties

The banner text and banner image defined for the company that a user is assigned to may be used to override the glide.product.image and glide.product.description.

Role required: admin

The banner text, if specified, is used instead of the glide.product.description property. The banner image, if specified, is used instead of the glide.product.image property.

To update the banner image in the System Properties page, you must first upload the image.

Note: Setting a banner image in the company profile overrides the image selected in System Properties.

1. To upload the image, complete the following steps.
   a) Navigate to System UI Images and click New.
   b) Enter a Name for your image.
      Valid names must end in .gif, .png, .jpg, or .bmp.
   c) Click the Click to add link in the Image field, and select and upload the image.
   d) Click Update.

2. To set the uploaded image to the banner image, complete the following steps.
   a) Navigate to System Properties.
   b) In the Banner image field, enter the file name of the uploaded image.
   c) Click Save.

Note: The system limits banner images to 50px.

Customize the favicon

Use the glide.product.icon property to change the icon that appears in bookmarks and the browser address bar.

Before you can update the favicon, you need to upload the image into the database.

Role required: admin

1. To upload the image, complete the following steps.
   a) Navigate to System UI Images and click New.
   b) Enter a Name for your image.
Valid names must end in .gif, .png, .jpg, .ico or .bmp.

c) Click the Click to add link in the Image field, then select and upload the image.

d) Click Update.

2. To set the uploaded image to the favicon, complete the following steps.
   a) Navigate to System Properties System.
   b) In the Icon image displayed in the bookmarks and browser address bar field, enter the file name of the uploaded image.
   c) Click Save.

The favicon appears in the bookmarks and browser address bar for the platform or the Content Management System (CMS). For more information on how to change the favicon for Service Portal, see Create a portal.

Examples of how to modify the banner

There are various ways that you can modify the banner on your instances.

Label multiple instances differently

- On all instances, leave glide.product.description 〈blank〉
- On PROD instance, set glide.product.name to 〈My Company〉
- On DEV instance, set glide.product.name to 〈My Company - DEV〉

Control the window title

Since the window title is composed of glide.product.name and glide.product.description, the following gives you complete control over the banner and the window title.

- glide.product.name set to 〈Window Title that you want〉
- glide.product.name.style set to 〈display: none〉
- glide.product.description set to 〈blank〉

The company record Banner Image and Banner Text are used to set the banner image and text since the company banner text is not used in the window title.

Use HTML in the banner text

- glide.product.name set to 〈My Company〉
- glide.product.name.style set to 〈display: none〉
- glide.product.description set to 〈Some text <a href="some_url">Click here</a>〉

Position banner text over the banner image

- glide.product.name set to 〈My Company〉
- glide.product.name.style set to 〈display: none〉
Apply a background image to the banner

Often corporate guidelines require more in-depth branding of the ServiceNow interface. Using the tiling technique, you can modify your logo image to have a transparent background, so that you can apply another image to the banner beneath the logo.

Upload an image to the image manager and then create a new property named css.banner.background.image, so that you can call the image. The value should look like this.

- css.banner.background.image value url('./images/MasterBG.jpgx')

Write CSS rules that apply this change

```css
/** BACKGROUND - These properties allow you use to add a background tile to
the header of the instance ***************************/
TD.bannerLeft, TD.bannerCenter, TD.bannerRight, TR#banner_row{background-color: ${banner.background.color};
background-image: ${banner.background.image};
background-position: ${banner.background.position};
background-repeat: ${banner.background.repeat};}
```

Note: The banner image and banner text associated with the primary company or specific companies may be used instead of the glide.product.image and glide.product.description properties to get the same effect.

Modify the banner

The banner is displayed at the top of the page and is rendered using certain system properties.

- glide.product.image
- <div>glide.product.name</div>
- <div>glide.product.description</div>

The DIV that contains the glide.product.name property is only shown if the property contains a value, otherwise, it is not used when rendering the banner. Also, the property glide.banner.image.title controls the tool tip that appears when the cursor is over the banner.

Note: The My Company record overrides the properties.
Window title

These properties are used to set the window title as follows:

- glide.product.name
- glide.product.description

If glide.product.name is blank, then the ServiceNow name is used as the product name for the window title.

My Company

The banner text and banner image defined for the Company that a user is assigned to may be used to override the glide.product.image and glide.product.description. The banner text, if specified, is used instead of the glide.product.description property. The banner image, if specified, is used instead of the glide.product.image property.

Style the banner in UI15

The glide.product.description property and the company banner text field may contain HTML if necessary to allow links, color, and so on, to be shown in the banner.

Role required: admin

- Use the glide.product.name.style property to set CSS properties for the DIV used to display the product name in the banner. Often, this style is set to display: none so that the product name is not displayed, but is still used as part of the window title.

- Use the glide.product.description.style property to set CSS properties for the DIV used to display the product description in the banner, or company banner text.

You can also use CSS properties to change the banner background and text color by completing the following steps.

1. Navigate to System Properties CSS.
2. In the Banner and list caption background color field, enter the color you want to apply to the banner.
3. In the Banner text color field, enter the color you want to apply to the banner text.
4. Click Save.

Comparing field values

Field comparison allows users to evaluate equality between fields on the same table or on related tables by using operators in the condition builder.

Additionally, you can compare date type fields to determine if the values are within a certain range of each other. For example, you can compare the planned start date of a task to the actual start date. You can use field comparisons in a list view and to generate reports.

The primary function of field comparison is evaluating whether two fields on a record or related record have identical values. For example, you can create a filter to display all incidents whose Caller field references the same user record as the Closed by field.

Available operators

Field comparison provides several filter operators for comparing field values.
• `(is same)` evaluates to true if two field values are the same.
• `(is different)` evaluates to true if two field values are not the same.
• `(is less than)` evaluates to true if two date values are within a user-defined range of each other.
• `(is more than)` evaluates to true if two date values are not within a user-defined range of each other.

Comparing choice list values

Field comparison compares the dictionary Value field of a choice list, not the Label value. For example, a high priority incident has a priority value of 1, not 1 - High. To find the Value of a choice, right-click the field label and select Configure Dictionary. The Choices related list shows the Value for each choice.

Comparing empty fields

By default, most filter operations do not return empty fields in their result set. To include records with empty fields in a result set, add a filter condition for the left operand with an operator of `(is empty)`. For more information, see Filtering on empty fields.

Using operators and operands

When comparing fields, the two fields being compared are called the left operand and right operand. The type of field selected in the left operand, and the operator selected, determine which right operands are available. When using the `(is same)` or `(is different)` operators, the right operand choices include only fields of the same field type, such as String or Integer, as the left operand.

For example, a filter on the Task (task) table with a left operand of `(Opened by)` and an operator of `(is same)`, only allows you to choose user reference fields, such as the `(Closed by)` field, in the right operand.

The `(is more than)` and `(is less than)` operators are only available with date type fields.

This example filter returns records where the user who opened the record also closed the record.

![Example filter](image)

Figure 120: Example filter

Comparable fields

Field comparison supports the comparison of several fields.

The fields that are comparable include the following types:
• String, choice, integer, and boolean fields: Return true if both values match.
• Reference fields: Return true if both reference fields refer to the same record.
• Date and time fields: Can match date values based on hour, day, week, month, quarter, or year. Also, you can evaluate whether two dates fall within a certain range of each other.

Note: Field comparison does not support journal, keyword, script, duration, list, or HTML fields.

Comparing dates

Field comparison allows you to evaluate equality between two components of the date, such as the hour of the day or the date within a month. Also, you can evaluate if two dates fall within a certain range of each other.

Date comparisons are based on the active user’s time zone. For example, as a user in the PST time zone, a filter of (Created) (is same) (Day) as (Closed) evaluates true for an incident created at 6 AM PST and closed at 3:00 PM PST as both times are within the same day. However, a user in the GMT time zone would not see this same incident record in response to the example filter; in GMT those times do not fall on the same date.

Evaluate equality between date values

Date comparison evaluates a match for one of several date increments.

You can specify granularity to the hour, day, week, month, quarter, or year. For example, the filter (Created on) (is same) (Week) as (Closed) returns records that were closed in the same week that they were opened. When you run this type of filter, be sure to specify the year in an additional filter condition of (Created) (is same) (Year) as (Closed) to eliminate records that were created a year before they were closed.

![Figure 121: Date field comparison](image)

1. In the condition builder, create a new condition.
2. Select a date field from the left operand choice list.
3. Select (is same) or (is different) from the operator choice list.
   An additional choice list appears.
4. Select the granularity from the date range choice list.

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hour</td>
<td>Filters on the hour of the day.</td>
</tr>
</tbody>
</table>
### Date Range

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>Filters on the day of the month, not the date. For example, a Day value of the 1st of August matches with a Day value of the 1st of September.</td>
</tr>
<tr>
<td>Week</td>
<td>Filters on the week of the year. ServiceNow defines a week as Sunday through Saturday for the purposes of Field Comparison.</td>
</tr>
<tr>
<td>Month</td>
<td>Filters on the month of the year. For example, any date within December returns the 12th month of the year.</td>
</tr>
<tr>
<td>Quarter</td>
<td>Filters on the quarter of the year.</td>
</tr>
<tr>
<td>Year</td>
<td>Filters on the year.</td>
</tr>
</tbody>
</table>

5. Select a different date field from the right operand choice list.
6. Click Run.

### Evaluating unequal dates within a range

You can compare unequal date field values by evaluating whether two dates fall within a certain range of each other.

For example, you can create a filter of (Created on) (is more than) 3 (Months) (before) Closed to display all records that were created at least three months before they were closed. The numerical value specified, such as the value 3 in the example, must be an integer of no more than two digits. If you need to evaluate a difference larger than 99 units, select a less granular unit of time, such as Months instead of Days.

![Figure 122: Unequal dates field comparison](image)

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Table 69: Choice field date comparison choices

<table>
<thead>
<tr>
<th>Choice field</th>
<th>Date Comparison Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>is more than, is less than</td>
</tr>
<tr>
<td>Unit of time</td>
<td>Hours, Days, Weeks, Months, Quarters, Years</td>
</tr>
<tr>
<td>Relative position of dates</td>
<td>before, after, before or after</td>
</tr>
</tbody>
</table>

Add help to a field label on a form

You can create field-level help in forms by placing help icons in individual fields and converting the field labels to links to external or internal URLs.

Role required: personalize_dictionary

You can link to any type of file, document, or Wiki, and open it in a separate browser window. The following is an example of a form with field label help enabled.

Figure 123: Field label help enabled

1. Open the form.
2. Right-click the label for the field and select Configure Label .

The Field Label form appears. The fields in the top portion of the form are pre-populated. The Help field is not currently used.
3. Complete the form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Input value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hint</td>
<td>Type text to use as a tooltip that appears when a user places the cursor on the field label.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the URL of the target file to open when the field label or icon is clicked. This can be a complete URL to a file outside the instance, or a relative URL to a target on the instance.</td>
</tr>
<tr>
<td>URL target</td>
<td>(UI11 only) Type _blank to have the help file open in a new tab, or leave the field blank to have the help file replace the instance in the browser. In UI16 and UI15, the help file opens in a new tab regardless of the URL target value.</td>
</tr>
</tbody>
</table>

4. Click Update.
Mobile navigation and configuration

Take the system on the go with mobile device support.

Get started with a ServiceNow instance on your mobile device

Use your smartphone or tablet to access an instance in a web browser or the native app.

Before you begin

You can access your instance from a web browser on your mobile device or from the native mobile app. Depending on your device, go to the iTunes store or the Google Play store and search for ServiceNow to download the native mobile app. If you do not have access to the mobile platform, contact your administrator.

What to do

Access an instance on your mobile device

To open an instance on a mobile device:

• open an instance in your mobile app
• open an instance in your mobile browser

For mobile web access, add a shortcut to an instance browser page on your mobile device.

Set up homepage favorites

Use the application navigator to find modules and applications.

Create and edit favorite modules or applications to appear as icons on your homescreen.

In the native mobile app, add a visualization to the favorites on your homepage.

Use lists on a mobile device

View a list on your mobile device by tapping a homescreen favorite or by opening a module from the application navigator.

Search for specific records in a mobile list.

Use mobile lists on a tablet.

Use Service Catalog, Connect Chat, location, and barcode scanning

Use Service Catalog to order materials.

Collaborate and stay connected with other users using Connect Chat.

Allow the ServiceNow app to access your location and camera to check in or scan barcodes.

Next steps

The mobile UI varies depending on your device, the way your administrator configured the mobile UI for your company, and whether you access your instance from the native app or mobile browser.
Mobile app UI

Access an instance from a mobile device using the native mobile app.

Download the mobile app from the iTunes store for devices running iOS 9 and above or from the Google Play store for Android phones running version 4.4 (KitKat) and above.

Use the native mobile app to do the following:

- Access lists and forms.
- Save favorite lists and records to the app homescreen.
- Access the service catalog from your mobile device.
- Communicate with other users within the platform using Connect Chat for mobile.
- Share your location.

Supported devices for the mobile app

Certain devices and operating systems are supported by the mobile app.

Table 70: Devices supported by the mobile app interface

<table>
<thead>
<tr>
<th>Device</th>
<th>Supported versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple® iPhone®</td>
<td>Version 6.0 and higher of the iOS app requires iOS 10 and above for all models of iPhone. Previous versions of the iOS app support all models of iPhone running iOS 9 and above.</td>
</tr>
<tr>
<td>Apple® iPod® touch</td>
<td>Version 6.0 and higher of the iOS app requires iOS 10 and above for all models of iPod. Previous versions of the iOS app support all models of iPod running iOS 9 and above.</td>
</tr>
<tr>
<td>Apple® iPad®</td>
<td>Version 6.0 and higher of the iOS app requires iOS 10 and above for all models of iPad. Previous versions of the iOS app support all models of iPad running iOS 9 and above.</td>
</tr>
<tr>
<td>Android™ mobile devices</td>
<td>All models of Android phone or tablet running KitKat (4.4) and above.</td>
</tr>
</tbody>
</table>

Limitations

The platform does not have a native Blackberry or Windows phone app. Use the mobile web experience on these devices.

The mobile apps do not give access to dashboards as dashboards are not optimized for mobile screen sizes. You can access dashboards on a tablet using the standard web interface.

Features with limited mobile support

Some features are not supported in the native mobile app.

Not supported

- E-signature
- Knowledge v2
- Connect Support
- Custom buttons
- Custom app configuration parameters
- Formatters
- Form Templates
- Internal distribution
- Knowledge v2
- Connect Support
- UI Scripts
- UI macro variables in the mobile Service Catalog

Limited support

- List filtering: Several fields listed below have limited support on mobile devices. You can still create a complex filter in a desktop instance and open it in the mobile app. However, you won’t be able to edit any of the limited fields.
  - between
  - dates
  - tags
  - related fields
- Visualizations are specific to a device. If you set up a visualization in the app on your iPhone then view the app on an iPad, the visualization may not be the same.

iOS and Android UI comparison

The native mobile app has the same functionality across platforms.

Android and iOS mobile apps are similar with a few minor differences to make the experiences unique to each platform. Any differences between the two platforms are designed to make the app accessible to a user on either device. For example, the location of the Navigation Menu varies between the two platforms to stay consistent with the platform-specific UI.
Access an instance from the mobile app

Access an instance using the mobile app for supported devices.

1. After you download the app from the iTunes store or the Google Play store, tap the icon on the homepage.

You do not need to include service-now.com at the end of the instance name.

2. Use your regular login to sign in to the app.
After you log in, the app remembers your information. As long as you do not log out, the app opens the last screen you used when you open it again.

If you do log out, the app remembers your instance. Select the instance from the History list to log back in.

Note: The native mobile app does not have a screen for multi factor authentication (MFA). If your organization uses MFA, append the MFA code to your password on the login screen. For example, P@ssw0rd642135, where 642135 is the MFA code.

Mobile app UI home

From the homepage, access favorited items, the application navigator, and your profile.

Favorites are the basis of the mobile homepage. Your homepage appearance depends on what favorites you have in your instance.
Table 71: Elements of the mobile UI home

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>User profile button</td>
<td>Displays the current profile record.</td>
</tr>
<tr>
<td>2</td>
<td>Favorites</td>
<td>Links to records in the instance, sometimes with visualizations.</td>
</tr>
<tr>
<td>3</td>
<td>Application navigator button</td>
<td>Displays the list of menus and modules available to the current user.</td>
</tr>
</tbody>
</table>

Mobile app favorites

Mobile favorites provide links to records in the system. Favorites display as icons on the homepage in the mobile app.

Create favorites for list filters or records.
Long press a favorite to edit the following properties.

- Label
- Text and icon color
- Icon image
- Enable visualizations for some favorites

Favorites automatically synchronize between the mobile UI and the desktop UI for your instance.
Add a home page favorite

Make any list, record, or module a favorite to add it as an icon to the mobile app homepage.
1. Navigate to the screen that you want to add as a favorite.
2. Tap the star icon.
3. From the Customize Favorite page, give the favorite a name, tag color, and icon. Then tap Save.

Edit a home page favorite

Change the appearance of favorites in the app home page.
1. On the app home page, long press a favorite icon.
2. From the icon customization screen, change the icon name, color, or icon.
3. To delete a favorite, long press the icon then on iOS tap Delete or on Android tap the delete icon.

Add a Visualization to a favorite

Add visualizations to mobile favorites.

Visualizations are specific to your device. If you add a visualization to a list on one mobile device, it won’t display the same way on another device.

1. In the mobile app homepage, long press the favorite you want to add a visualization to.
2. Tap the Visualizations tab.
3. Select a visualization from the available options. Visualization options vary depending on the type of favorite you select.
Figure 125: Visualizations tab
Visualization options

Visualizations allow users on the mobile app UI to see relevant table information directly from the home page favorite icon.

Use the following visualizations to customize the appearance of favorites on the mobile app homepage.

Table 72: Favorite visualization options

<table>
<thead>
<tr>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorite icons displays the number of records returned by the list filter.</td>
<td>Figure 126: Count</td>
</tr>
<tr>
<td>Favorite icons displays the number of records with a particular field value.</td>
<td>Figure 127: Bar chart</td>
</tr>
<tr>
<td>Select the field values you want to display when you set up the visualization.</td>
<td></td>
</tr>
</tbody>
</table>

Use the application navigator

Use the application navigator to access different modules in the mobile interface.
To open the application navigator, tap the menu icon ( for iPhone and for Android).

Scroll the navigator up or down using one or two fingers. To expand an application, tap the application name. To hide the navigator, tap Close or the back arrow.
Mobile lists

Lists appear as a single column of records on the mobile app UI display. Each row represents a separate record.

Live list updates are not available on mobile devices. Mobile lists only automatically reload when a record change is made by the currently logged in user. The list does not automatically update when other users make changes.
### Mobile UI lists for iPhone

<table>
<thead>
<tr>
<th>Incident Description</th>
<th>Incident ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network storage unavailable</td>
<td>INC00000049</td>
</tr>
<tr>
<td>My desk phone does not work</td>
<td>INC00000041</td>
</tr>
<tr>
<td>Rain is leaking on main DNS Server</td>
<td>INC00000016</td>
</tr>
<tr>
<td>JavaScript error on hiring page of corporate website</td>
<td>INC00000040</td>
</tr>
<tr>
<td>Can't access SFA software</td>
<td>INC00000046</td>
</tr>
<tr>
<td>SAP Financial Accounting application appears to be down</td>
<td></td>
</tr>
</tbody>
</table>

### Mobile UI lists for Android

<table>
<thead>
<tr>
<th>Incident Description</th>
<th>Incident ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable to get to network file shares</td>
<td>INC0000002</td>
</tr>
<tr>
<td>Wireless access is down in my area</td>
<td>INC0000003</td>
</tr>
<tr>
<td>Need access to sales DB for the West</td>
<td>INC0000007</td>
</tr>
<tr>
<td>I can't launch my VPN client since the last software update</td>
<td>INC0000015</td>
</tr>
<tr>
<td>Rain is leaking on main DNS Server</td>
<td>INC0000016</td>
</tr>
<tr>
<td>How do I create a sub-folder</td>
<td>INC0000017</td>
</tr>
</tbody>
</table>
Mobile lists consist of the following elements.

Table 73: Elements of the mobile UI: Lists

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List name</td>
<td>Displays the name of the list favorite.</td>
</tr>
<tr>
<td>2</td>
<td>Back button</td>
<td>Navigates back to the home page.</td>
</tr>
<tr>
<td>3</td>
<td>UI actions</td>
<td>Displays buttons to display the list activity stream for iPhone and add a record.</td>
</tr>
<tr>
<td>4</td>
<td>Application search</td>
<td>Displays records that match the search string. On Android, search is located in the List options menu.</td>
</tr>
<tr>
<td>5</td>
<td>Current filter</td>
<td>Displays the conditions filtering the list.</td>
</tr>
<tr>
<td>6</td>
<td>Records</td>
<td>Displays one row for each record in the list.</td>
</tr>
<tr>
<td>7</td>
<td>List options</td>
<td>Displays list options to add to favorites, share, and sort the list.</td>
</tr>
</tbody>
</table>

Mobile activity streams

List activity streams appear as a single column window with a separate row for each record update in the mobile UI.

Access a list activity stream by pressing the activity stream icon. Activity streams open on a new page. Use the List options menu to open the Activity Stream on Android.

Rendering HTML text in activity streams is not supported for the mobile apps.
Figure 128: iPhone list activity stream
Activity stream updates consist of the following elements.

Table 74: Mobile UI elements: activity stream

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back button</td>
<td>Return to the list.</td>
</tr>
<tr>
<td>User</td>
<td>Displays the user photo and name of the user who made the activity update.</td>
</tr>
<tr>
<td>Record details</td>
<td>Displays the record number and relative time since the update was made.</td>
</tr>
<tr>
<td>Activity details</td>
<td>Displays the most recent activity update.</td>
</tr>
</tbody>
</table>

Swipe up or down to see more activity stream updates.
Mobile filters
Construct complex filters with the mobile app UI.

Mobile filters consist of the following elements.
Table 75: Mobile UI filters

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Current set</td>
<td>Displays the current condition set and the number of records returned by the condition set.</td>
</tr>
<tr>
<td>2</td>
<td>Current rule</td>
<td>Displays the type of rule set that applies to the current filter.</td>
</tr>
<tr>
<td>3</td>
<td>Conditions</td>
<td>Displays the conditions that are part of the current condition set.</td>
</tr>
<tr>
<td>4</td>
<td>Add rule button</td>
<td>Displays a pop-up to add a rule.</td>
</tr>
<tr>
<td>5</td>
<td>New filter button</td>
<td>Creates a condition set.</td>
</tr>
<tr>
<td>6</td>
<td>Delete set</td>
<td>Deletes the current condition set.</td>
</tr>
</tbody>
</table>

Not all filters are available on the mobile app.

**Mobile condition sets**

Condition sets generate a list by combining the results of multiple sets of conditions. Use condition sets to create complex filters.

Each set specifies whether a record must match all conditions or whether a record can match any condition.

In general, condition sets requiring matching to all conditions return fewer records than sets that allow matching on any condition within a set.

For example, consider the following filter consisting of two condition sets.

Figure 131: Sample list filter with two condition sets
In this example, set 1 requires matching all the conditions and returns 8 results. Set two allows matching to any condition and returns 29 results. Total results return 37 records for the combination of record results from the individual condition sets.

View or modify a mobile list

Modify a list on a mobile interface.

When you create a favorite list, it automatically appears on the mobile homepage. To see the details of a list or selection, tap its icon on the home page.

To modify a list:
1. Tap the list you want to modify.
2. Tap the filter.
3. To add an “And” rule, tap Add an All Rule. On an Android device, tap the add button and tap ‘All’ Rule.
   a) In the Add All section, click Add New Condition.
   b) Select a condition from the list.
   c) From the Select Operator list, select a condition qualifier.
   d) Click Save.

4. To add an “Or” rule, tap Add an Any Rule. On an Android device, tap the add button and tap ‘Any’ Rule.
   a) In the Add Any Rule section, tap Add New Condition.
b) Select a condition from the list.
c) From the Select Operator list, select a condition qualifier.
d) Click Save.

Both sets of conditions appear in the condition filter.

5. To delete a condition, tap the adjacent x.
6. Tap Save.
Search a mobile list

Search in a list on a mobile device.
1. From the mobile homepage or the navigation menu, tap the list you want to search within.
2. In the search field at the top of the screen, type your search terms. On an Android device, access the search field from the List options menu ( ).
3. To change the sort order, tap Sort.

Mobile service catalog

Browse the service catalog using the native mobile app.

Figure 132: Mobile service catalog

Table 76: Elements of the mobile UI: Service Catalog

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current catalog</td>
<td>Displays the title of the current service catalog.</td>
</tr>
<tr>
<td>UI element</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Back button</td>
<td>Returns to the previous screen.</td>
</tr>
<tr>
<td>Search</td>
<td>Enter search strings for categories or catalog items.</td>
</tr>
<tr>
<td>Categories</td>
<td>Search for catalog items by a logical grouping.</td>
</tr>
<tr>
<td>Application navigator button</td>
<td>Displays the list of menus and modules available to the current user.</td>
</tr>
<tr>
<td>Shopping cart</td>
<td>Displays the shopping cart to check out.</td>
</tr>
<tr>
<td>Share button</td>
<td>Displays the document providers available to share the current record.</td>
</tr>
</tbody>
</table>

**Mobile service catalog categories**

Browse service catalog categories using the mobile app.

Each category displays on its own page in the mobile app.
Mobile service catalog categories consist of the following elements.

Table 77: Elements of the mobile UI: service catalog category

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current category</td>
<td>Displays the currently selected service catalog category.</td>
</tr>
<tr>
<td>Back button</td>
<td>Returns to the previous service catalog page.</td>
</tr>
<tr>
<td>Search</td>
<td>Enter search strings for categories or catalog items.</td>
</tr>
</tbody>
</table>
Use the category filter to switch between categories and subcategories.

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category filter</td>
<td>Displays the current category filter.</td>
</tr>
<tr>
<td>Catalog items</td>
<td>Displays one row for each catalog item.</td>
</tr>
<tr>
<td>Shopping cart</td>
<td>Displays the shopping cart to check out.</td>
</tr>
</tbody>
</table>

Figure 134: Elements of the mobile UI: category filter

Table 78: Elements of the mobile UI: category filter

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel button</td>
<td>Closes the category filter.</td>
</tr>
<tr>
<td>UI element</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Current category</td>
<td>Displays the currently selected category.</td>
</tr>
<tr>
<td>Current filter</td>
<td>Displays the current filter applied to categories and subcategories.</td>
</tr>
<tr>
<td>Subcategories</td>
<td>Displays the subcategories available to filter the service catalog.</td>
</tr>
<tr>
<td>Apply button</td>
<td>Saves changes to the category filter.</td>
</tr>
</tbody>
</table>

**Mobile catalog items**

Browse service catalog items using the mobile app.
Figure 135: Elements of the mobile UI: catalog item

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current item</td>
<td>Displays the name of the currently selected catalog item.</td>
</tr>
<tr>
<td>Back button</td>
<td>Returns to the previous screen.</td>
</tr>
<tr>
<td>Item description</td>
<td>Displays the catalog item description.</td>
</tr>
<tr>
<td>Item variables</td>
<td>Displays input fields appropriate to the catalog variable type.</td>
</tr>
</tbody>
</table>
Input types appropriate to the catalog variable type display in the mobile app. For example, for a choice variable the mobile app UI displays a list of choices.

![Sample catalog variable input](image)

**Figure 136: Sample catalog variable input**

### Table 80: Elements of the mobile UI: variable input

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to cart button</td>
<td>Adds the current item to shopping cart.</td>
</tr>
<tr>
<td>Shopping cart</td>
<td>Displays the shopping cart to check out.</td>
</tr>
<tr>
<td>Current variable</td>
<td>Highlights the currently selected variable.</td>
</tr>
<tr>
<td>Variable choices</td>
<td>250 GB 500 GB [add $300]</td>
</tr>
<tr>
<td>UI element</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Previous or next variable</td>
<td>Navigate to the previous or next variable input available for the catalog item.</td>
</tr>
<tr>
<td>Variable choices</td>
<td>Select the choice to use for the catalog item. Swipe to see more choices.</td>
</tr>
<tr>
<td>Done button</td>
<td>Close the list of variable choices.</td>
</tr>
</tbody>
</table>

Mobile shopping cart

Shopping cart items display in a separate page overlay of the service catalog in the mobile app.

![Mobile shopping cart diagram]

Figure 137: Elements of the mobile UI: shopping cart
Table 81: Elements of the mobile UI: shopping cart

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel button</td>
<td>Closes the shopping cart.</td>
</tr>
<tr>
<td>Items requested</td>
<td>Displays the list of items in the shopping cart.</td>
</tr>
<tr>
<td>Item costs</td>
<td>Displays the one-time and ongoing costs of each requested item.</td>
</tr>
<tr>
<td>Cart totals</td>
<td>Displays the one-time and ongoing total costs.</td>
</tr>
<tr>
<td>Checkout button</td>
<td>Requests the catalog items in the shopping cart.</td>
</tr>
<tr>
<td>Edit button</td>
<td>Displays an edit view to add or remove catalog items from the shopping cart.</td>
</tr>
</tbody>
</table>

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Table 82: Elements of the mobile UI: editing the shopping cart

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items requested</td>
<td>Select items to remove from the shopping cart.</td>
</tr>
<tr>
<td>Item quantity</td>
<td>Edit the number of items requested.</td>
</tr>
<tr>
<td>Cart totals</td>
<td>Displays the one-time and ongoing total costs as you edit the shopping cart.</td>
</tr>
<tr>
<td>Save button</td>
<td>Update the shopping cart with the current items and quantities.</td>
</tr>
</tbody>
</table>
After checking out, the mobile app UI displays an order status page consisting of the following elements.

Table 83: Elements of the mobile UI: order status

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items requested</td>
<td>Displays the items the user requested from the service catalog.</td>
</tr>
<tr>
<td>Item costs</td>
<td>Displays the one-time and ongoing costs of the items requested from the service catalog.</td>
</tr>
<tr>
<td>Order details</td>
<td>Displays information from the request record for this order.</td>
</tr>
</tbody>
</table>
Mobile Connect Chat

Use Connect Chat in the mobile app.

Activate Connect before using chat in the mobile app. Many, but not all the features supported in the desktop interface are available in the mobile app UI. Administrators can show or hide Connect Chat by configuring it by role.
Figure 140: Elements of the mobile UI: Connect Chat
Table 84: Elements of the mobile UI: Connect Chat

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back button</td>
<td>Returns to the previous screen.</td>
</tr>
<tr>
<td>Edit button</td>
<td>Turns on conversation editing mode, in which you can delete conversations or mark them as read. Deleting a conversation only removes it from the list. Chat history is preserved and you can add the conversation back to your list using the new conversation button.</td>
</tr>
<tr>
<td>New conversation</td>
<td>Opens a new conversation to which you add one or more members.</td>
</tr>
<tr>
<td>Filter</td>
<td>Enables you to filter conversations by member name.</td>
</tr>
<tr>
<td>Conversations</td>
<td>Lists your open conversations. You can view All your conversations or only conversations with Unread messages.</td>
</tr>
<tr>
<td>Application navigator button</td>
<td>Displays the list of menus and modules.</td>
</tr>
</tbody>
</table>

Mobile Connect Chat conversations

Have conversations with groups of people in Connect in the mobile app.
Figure 141: Elements of the mobile UI: Connect Chat conversation

Conversation name

ITIL, Modesto & Abel

Details

Conversation details

Avatar

ITIL User

System Administrator has been added to the group

5 mins

System Administrator

that's not your car is it??

5 mins

ITIL User

No! So glad I parked on the street today!

incident.do?
sys_id=23d487264f8c12002fa02f1e0210
c746&sysparm_record_target=incident&sysparm_record_row=2&sysparm_record_rows=32&sysparm_record_list=active
%3Dtrue%5EORDERBYDESCNumber

Parking garage flooded!

INC0010004
Table 85: Elements of the mobile UI: Connect Chat conversation

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation name</td>
<td>Displays the name of the conversation.</td>
</tr>
<tr>
<td>Conversation details</td>
<td>Opens the conversation details page, which displays the following information.</td>
</tr>
<tr>
<td></td>
<td>• Record details (record conversations only)</td>
</tr>
<tr>
<td></td>
<td>• Push notification preferences</td>
</tr>
<tr>
<td></td>
<td>• Conversation members</td>
</tr>
<tr>
<td></td>
<td>For group and record conversations, the conversation details page also provides capabilities to add or remove conversation members and to leave the conversation.</td>
</tr>
<tr>
<td>Avatar</td>
<td>Displays an image or initials to represent a user. Tap an avatar to view details about the user, including email address and online presence status.</td>
</tr>
<tr>
<td>Attachment button</td>
<td>Enables you to include attachments in a message, including photos and documents.</td>
</tr>
<tr>
<td>Message field</td>
<td>Enables you to enter and send messages.</td>
</tr>
<tr>
<td></td>
<td>Note: For record conversations, all messages are sent as comments. Sending a message as a work note is not supported.</td>
</tr>
</tbody>
</table>

**Mobile device location**

Administrators can set up the mobile app UI to request a current location for a mobile device and store GPS coordinates in a string field.

Take advantage of mobile device tracking features such as GPS location by configuring a string field to use the current_location dictionary attribute. This attribute causes the mobile app UI to display a special icon to request the current location of the mobile device.
Figure 142: Elements of the mobile UI: current location field

GPS coordinates are stored in the string field. Administrators can assign any label they want to this field.
Get current location allows the app to access the current location of your mobile device.
Current location field asks for permissions to use your current location the first time you use that option.
Change the app access to location from your device Settings.

Mobile barcode scanning

Administrators can set up the mobile app UI to request access to a mobile device camera to scan and store barcodes in a string field.
Take advantage of mobile device barcode scanning features by configuring a string field to use the barcode dictionary attribute. This attribute causes the mobile app UI to display a special icon to request access to the mobile device camera.
String field displays and stores the numeric value for the barcode. Administrators can assign any label they want to this field.

Scan barcode opens the mobile device camera to scan a barcode.

When you open the barcode scanner for the first time, the app asks your mobile device for permissions to access the camera.

The native iOS and Android apps support scanning the following barcode types:

- **2D barcodes**: QR Code, Data Matrix, PDF-417, AZTEC
Cross-release communication

Use the native app to access different versions of the platform.

When you upgrade your app to the latest version, you can still access a Geneva version of the platform. Additionally, if you choose not to upgrade your app but want to access the Helsinki release in the app, you can.

Mobile web UI

Access the user interface on a mobile device using a web browser.

When you access an instance from a mobile device, the system detects the device and displays the mobile version of the browser UI.

Two mobile UI versions are available for the web. Select the mobile browser UI version you want using mobile UI properties.

Supported devices for the mobile browser

Mobile browser interfaces support certain devices, operating systems, and browsers.

Table 86: Devices supported by the mobile browser interface

<table>
<thead>
<tr>
<th>Device</th>
<th>Supported versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple® iPhone®</td>
<td>All models of iPhone running iOS 7 and above. Safari is supported.</td>
</tr>
<tr>
<td>Apple® iPod®</td>
<td>All models of iPod running iOS 7 and above. Safari is supported.</td>
</tr>
<tr>
<td>Apple® iPad®</td>
<td>All models of iPad running iOS 9 and above are supported. Safari is supported.</td>
</tr>
<tr>
<td>Android™</td>
<td>Android version 4.0/Ice Cream Sandwich and above. Use the latest available version of Chrome to access the mobile browser interface on Android devices. Native browsers and older versions of Chrome support major interface functionality, but have some known issues.</td>
</tr>
<tr>
<td>Android™</td>
<td>Any Android tablet running 4.4 (KitKat) and above with the latest available version of Chrome™. Native browsers and older versions of Chrome support major tablet interface functionality, but have some known issues. Tablet UI is optimized for the iPad form factor and resolution. Not all Android tablets have the same form factor and resolution. Gesture-based zoom functionality is not supported.</td>
</tr>
<tr>
<td>BlackBerry®</td>
<td>All Blackberry devices running Blackberry 10 and above. Some configuration is required.</td>
</tr>
</tbody>
</table>

Note: Do not use the mobile interface on a desktop browser except for testing purposes.
Unsupported features

The mobile browser interface supports a limited subset of functionality that enables users to perform common tasks.

The following capabilities are not currently supported in mobile browsers, though they work to varying degrees.

• Switching to the standard browser interface from the mobile interface
• HTML fields
• CODE tags to render HTML in Journal Fields
• UI Scripts
• Connect Support
• Legacy Chat
• Field styles
• Formatters
• Timeline visualizations
• Embedded lists
• Assessments, surveys, and legacy surveys
• Mobile service catalog features
  • Order guides
  • Wizards
  • Content items
• These variable types:
  • Macro With Label
  • UI Page
  • List Collector
  • HTML
  • Macro
  • Label
  • Break
• Data lookup rules
• Custom auto-complete scripts

Activate the mobile web UI

Mobile web interfaces are automatically active on new instances. For instances upgrading from an earlier version, an administrator can activate the Mobile UI plugin (com.glide.ui.m) if it is not already active.

Role required: admin

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional
features to be installed, cancel this activation, activate the necessary plugins, and then return to
activating the plugin.
4. If available, select the Load demo data check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for
common use cases. Loading demo data is a good policy when you first activate the plugin on a
development or test instance.

You can also load demo data after the plugin is activated by clicking the Load Demo Data Only
related link on the System Plugin form.
5. Click Activate.

Access an instance from a mobile browser
Access an instance using a supported mobile browser.

On a supported device, navigate to the URL of an instance in a supported mobile browser. Devices are
automatically detected and the interface appends $m.do to the end of the URL. Accessing the mobile
interface does not prevent the user from also accessing the tablet or desktop interfaces.
Add a shortcut to the home screen

Add an Apple home screen shortcut that opens a mobile browser page.

1. In Safari on a mobile device, navigate to a page that you want to access as a shortcut, such as a list of open incidents.
2. Tap the sharing icon at the bottom of the browser.
3. Tap the Add to Home Screen icon.
4. Type a descriptive name for the page and tap Add. The shortcut is saved to your device.

Change the home screen icon

Administrators can change the icon that appears for browser home screen shortcuts in the mobile interface.

To replace the default icon:

1. In the desktop interface, navigate to Self-Service My Profile.
2. Switch to the Default view.
3. Click the reference icon by the Company field to open the company record.
4. Configure the form to add the Apple icon field.
5. Upload an image up to 57x57 pixels in the Apple icon field.

When users associated with the company add a home screen shortcut, the shortcut uses the new icon.
Mobile browser UI options

The mobile browser has two options for the UI.

An updated version of the browser UI provides an experience similar to the native mobile app. In the new mobile browser, favorites define what appears on your homescreen. Use the application navigator to see other applications available in the mobile browser.
Table 87: Mobile web UI versions

<table>
<thead>
<tr>
<th>Dublin mobile web UI</th>
<th>New mobile web UI</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home</strong></td>
<td><strong>ServiceNow</strong></td>
</tr>
<tr>
<td><strong>Favorites</strong></td>
<td><strong>Profile</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Catalog</strong></td>
<td></td>
</tr>
<tr>
<td><strong>My Incidents</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Recent Lists</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Service Portal Documentations</strong> Title starts with , Title is not empty</td>
<td></td>
</tr>
<tr>
<td><strong>Users</strong> Name starts with , Name is not empty</td>
<td></td>
</tr>
<tr>
<td><strong>Incidents</strong> Sys ID = 940858b134ca7c2006793cfa18110c7a6</td>
<td></td>
</tr>
<tr>
<td><strong>Incidents</strong> Active = true, Caller = System Administrator</td>
<td></td>
</tr>
<tr>
<td><strong>Incidents</strong> Active = true, Priority = 1 - Critical</td>
<td></td>
</tr>
<tr>
<td><strong>Tags</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Contacts</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Follow-up</strong></td>
<td><strong>Critical Incidents</strong></td>
</tr>
<tr>
<td></td>
<td><strong>My Approvals</strong></td>
</tr>
<tr>
<td></td>
<td><strong>My Incidents</strong></td>
</tr>
<tr>
<td>Recent Documents</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For mobile web configuration options, see [Activate new web UI](#).

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Mobile web favorites

Similar to the native app, mobile favorites in a mobile browser display as icons on the homepage in the mobile app.

Create favorites using the favorite icon in the application navigator. Connect Chat and Location favorites are not automatically included in the mobile web browser like they are in the native app.

Figure 145: Mobile web favorites

Long press a favorite to edit the following properties.

• Label
Favorites automatically synchronize between the mobile web UI and the desktop UI for your instance. Visualizations for favorites are not an option in the mobile web UI.

Use the mobile web application navigator

Use the application navigator in the mobile web to access different modules in the mobile interface.

To open the application navigator, tap the menu icon ( ).
Scroll the navigator up or down using one or two fingers. To expand an application, tap the application name. To hide the navigator, tap Done.
Mobile web lists

Lists appear as a single column of records on the mobile web UI display. Each row represents a separate record.

Figure 147: Mobile web UI list

Mobile lists consist of the following elements.
Table 88: Elements of the mobile UI: Lists

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List name</td>
<td>Displays the name of the list favorite.</td>
</tr>
<tr>
<td>2</td>
<td>Back button</td>
<td>Navigates back to the home page.</td>
</tr>
<tr>
<td>3</td>
<td>UI actions</td>
<td>Displays buttons to display the list activity stream and add a record.</td>
</tr>
<tr>
<td>4</td>
<td>Application search</td>
<td>Displays records that match the search string.</td>
</tr>
<tr>
<td>5</td>
<td>Current filter</td>
<td>Displays the conditions filtering the list.</td>
</tr>
<tr>
<td>6</td>
<td>Records</td>
<td>Displays one row for each record in the list.</td>
</tr>
<tr>
<td>7</td>
<td>List options</td>
<td>Displays list options open the application navigator, add to favorites, and sort the list.</td>
</tr>
</tbody>
</table>

Mobile web activity streams

List activity streams appear as a single column window with a separate row for each record update in the mobile web UI.

Access a list activity stream by pressing the activity stream icon. Activity streams open on a new page.
Figure 148: Sample list activity stream

Figure 149: Elements of the mobile UI: activity stream
Activity stream updates consist of the following elements.

Table 89: Mobile UI elements: activity stream

<table>
<thead>
<tr>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back button</td>
<td>Return to the list.</td>
</tr>
<tr>
<td>User</td>
<td>Displays the user photo and name of the user who made the activity update.</td>
</tr>
<tr>
<td>Record details</td>
<td>Displays the record number and relative time since the update was made.</td>
</tr>
<tr>
<td>Activity details</td>
<td>Displays the most recent activity update.</td>
</tr>
</tbody>
</table>

Swipe up or down to see more activity stream updates.
Mobile web filters

Construct complex filters with the mobile web UI.

Figure 150: Mobile web filters

Mobile filters consist of the following elements.
Table 90: Mobile web UI filters

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Current set</td>
<td>Displays the current condition set.</td>
</tr>
<tr>
<td>2</td>
<td>Current rule</td>
<td>Displays the type of rule set that applies to the current filter.</td>
</tr>
<tr>
<td>3</td>
<td>Conditions</td>
<td>Displays the conditions that are part of the current condition set.</td>
</tr>
<tr>
<td>4</td>
<td>Add rule button</td>
<td>Displays a pop-up to add a rule.</td>
</tr>
<tr>
<td>5</td>
<td>New filter button</td>
<td>Creates a condition set.</td>
</tr>
<tr>
<td>6</td>
<td>Delete set</td>
<td>Deletes the current condition set.</td>
</tr>
</tbody>
</table>

Not all filters are available on the mobile app.

Mobile web service catalog

Browse the service catalog in a web browser on your mobile device.
### Table 91: Elements of the mobile web UI: Service Catalog

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Current catalog</td>
<td>Displays the title of the current service catalog.</td>
</tr>
<tr>
<td>Number</td>
<td>UI element</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>2</td>
<td>Back button</td>
<td>Returns to the previous screen.</td>
</tr>
<tr>
<td>3</td>
<td>Search</td>
<td>Enter search strings for categories or catalog items.</td>
</tr>
<tr>
<td>4</td>
<td>Application navigator button</td>
<td>Displays the list of menus and modules available to the current user.</td>
</tr>
<tr>
<td>5</td>
<td>Shopping cart</td>
<td>Displays the shopping cart to check out.</td>
</tr>
</tbody>
</table>

Tutorials to use the mobile web interface

Learn how to use the mobile browser interface with video tutorials.
Learn how to navigate the mobile browser interface.
Learn how to customize the mobile browser interface.

Dublin mobile web UI

Use the classic Dublin mobile web UI for a more traditional ServiceNow mobile experience.
When you upgrade to the latest release you have the option to enable an updated version of the mobile UI. You don’t have to enable this option and can continue to use the classic mobile browser UI.
New instances automatically have the new mobile UI enabled.
Use this section for information on the legacy mobile browser UI.

Customize the home page

Any favorites you have automatically appear in your mobile homepage.
Mobile browser home pages display the following types of information by default:
- Favorites
- Recent lists
- Tags
- Recent Documents
To change the types of information on the home page:

1. Tap the gear icon (⚙️).
2. Tap Show section to enable or disable a section on the home page.
3. Customize the number of Items to show for each section.
4. Tap Horizontal scroll to enable or disable horizontal scrolling for each section, where applicable.

View a recently accessed record

Access recently viewed records from the mobile browser interface home page.

View the Recent Documents section of the mobile browser interface home page for an at-a-glance summary of recently accessed records.

1. Navigate to the home page.
2. In the Recent Documents section, tap a record.
   If the record contains attachments, they appear at the bottom of the form.
3. Tap an attachment name to open the attachment.

Create a tag

To help group and organize records, you can create tags and add them to specific records.
For example, you could create a tag called High Priority ABC and assign it to critical incidents submitted by an important customer. Define a tag with an icon and color for easy identification. Other users in your organization can view tags that you create. With a single tap, you or another user can then locate all critical incidents logged by ABC Corporation. Add as many tags as needed to any record.

1. On the home page, tap the Tag section heading. You can also tap My Tags in the application navigator.
   Any previously defined tags are displayed. For example, the number 1 in the High Priority tag indicates that one record has been assigned this tag.

2. Tap the Create or search tags field and enter the new name. As you type, the new tag appears below the field.

3. Tap Done.
4. Select a color and icon for the new tag and tap Save.
Assign a tag to a record

To help group and organize records, create tags and add them to specific records in the mobile browser.

Add as many tags as needed to any record.

1. Navigate to a record that you want to assign a tag to, such as an incident record.
2. Tap the More icon in the lower right-hand corner of the screen and select Tags.
3. In the Tags screen, tap the tag you want to assign to this record.
   On the selected tag, a check mark appears.

4. If needed, you can click the tag again to deselect it. You can also select multiple tags for the record.
5. Navigate away from the screen. Your tag selections are automatically saved.

Note: Green and red numbers display on tags, as shown in the following image. Green numbers indicate the number of records associated with that tag. Red numbers indicate the number of records associated with that tag that you have not viewed (that is, if other users create or updated them).
Access tagged records in a mobile browser

Tags in the mobile browser interface home page show the tags that you have defined.

Each tag shows the number of records assigned to it.

1. Tap the tag to display records that have been assigned that tag.
   Records with that tag are not necessarily the same kind of records. In the example below, the first record is an approval and the second is an incident.

2. You can sort the records by tapping the buttons at the top of the screen.

View a related list

Related lists for records are visible in the mobile browser interface. Related lists show lists of records related to the current record.

To view a related list:

1. Open a record in the mobile browser interface.
2. Tap Related Lists.
3. Tap a related list.

View an Activity Stream

Activity Stream is a real time, sequential display of activities, such as comments and work notes, from a group of records.

View activity streams in the mobile browser interface, for example, a stream of incident work notes. Streams automatically aggregate all the journal field entries from incidents and displays them, starting with the most recently updated record.

1. Navigate to a list of records that contain journal fields.
2. Tap the Stream icon. If no journal entries have been created for the type of records you are viewing, the Stream icon does not display.

Comments and work notes for the incidents display, starting with the most recent record.
Mobile web configuration

Administrators define what users can access on mobile devices through the mobile browser interface. For example, users can be granted access to specific application menus and modules, default home page favorites, online help, and UI policies.

**Configure mobile browser favorites**

Configure the default items for the Favorites area of the mobile browser home page, including the colors and icons.

1. On the device, add a homepage favorite for a particular module. For instructions, see [Add a home page favorite](#).

   For example, you could create a favorite for My Incidents.

2. In the desktop interface, navigate to System Mobile UI Home Page Favorites.

   Notice that My Incidents is displayed.
3. Click My Incidents.

![My Incidents screenshot]

4. To make the My Incidents tag a default for all mobile users, clear the User field.
5. Click Update.

Remove mobile browser favorites
To remove default favorites, remove them from the Home Favorites list in the desktop interface.

1. In the desktop interface, navigate to System Mobile UI Home Page Favorites.
2. Locate the favorite you want to remove.
3. Select the adjacent check box.
4. In the actions choice list, select Delete.
5. Click OK.

Enable UI policies for the mobile browser
Define UI policies to run on forms on the mobile interface, the desktop UI, or both.

1. In the desktop interface, navigate to System UI UI Policies.
2. Create a UI policy that is compatible with the mobile interface.
   To ensure the UI policy is compatible with the smartphone interface, see Mobile UI policies.
3. Configure the UI Policies form to add the Run scripts in UI type field.
4. Select the Run scripts check box.
5. In the Run scripts in UI type field, select Mobile or Both to have the policy run on the mobile interface.
6. Complete the fields, as appropriate.
7. Click Submit.
**Use the Smartphone Interface on a tablet**

Administrators can configure tablets to run the smartphone interface in place of the tablet interface.

Role required: admin

By default, the system provides tablets with their own mobile web UI. If you want a tablet to run the smartphone interface instead of the tablet interface, you must make the following changes.

1. Remove the device from the list of tablet mobile agents in the glide.ui.tablets_agents property. For example, remove the ipad value.
2. Add the device to the list of smartphone mobile agents in the glide.ui.m_agents property. For example, add the ipad value.

**Configure a BlackBerry device**

BlackBerry devices require some configuration to use the smartphone interface.

1. Open the browser application.
2. Open the menu and select Options Browser Configuration.
3. Select the following options.
   - Support JavaScript
• Use Background Images
• Show Images: On WML & HTML Pages
• Browser Identification: BlackBerry

4. Save your changes.

Depending on the size of the BlackBerry screen, you can change the default font size to a smaller size. Navigate to the General Properties browser submenu and set the default font size and minimum font size to a smaller size. Smaller text displays more content, but is difficult for some users to read.

**Online smartphone help**

Several help screens are provided for you on the mobile interface for you to use or modify as needed. Create help screens and localize them to support multiple languages.

---

**Note:** Make sure you have a basic knowledge of wiki markup before editing the content.

---

Edit the existing mobile browser help text

Administrators can edit the existing mobile browser help text.

Default help screens are organized based on the index file. The index file contains links to the other help files and presents those links on the device as a menu. If users add or remove items from this file, the resulting menu changes accordingly.

1. Navigate to **System Mobile UI Mobile Help**.

2. In the Updated column, click the help file you want to edit.
3. Click WikiText.
4. Edit the text and wiki markup as needed.

```
<div class="m_help_menu">
[[Overview]]
[[Navigation]]
[[Home Page]]
[[Favorites]]
[[Tags]]
[[Admin Info]]
</div>
```

5. Click Update.

Create a mobile browser help screen
Administrators can create a help screen for the mobile browser.
1. Navigate to System Mobile UI Mobile Help.
2. Click New.
3. In the Path field, type a name for the new help screen. For example, adding_aShortcut.
   Do not use spaces in the name.
4. Click Wikitext.
5. In the editing box, enter the text for the new help screen. Use wiki markup to define the formatting.
=Adding a Shortcut=

# Navigate to a page that you want to access as a shortcut, such as a list of open incidents.
# Tap the sharing icon at the bottom of the browser.
# Tap the ServiceNow "Add to Home Screen" icon.
# Type a name for the page and tap "Add".

::[[image:Shortcut.png]|left]]<br style="clear:both;" />
6. Click Submit.
7. On the list screen, open the file called index.
8. Click Wikitext.

9. Insert a line where you want the new help screen to appear and specify the name of the new page.

10. Click Update.

   Devices show the new help menu item and help content.
Display localized mobile browser help content

Administrators can edit and translate existing help screens so that help content in multiple languages is available.

Role required: admin
After help files have been translated, the mobile interface uses the help screens identified by the *user-specific language* in the User (sys_user) table.

1. Navigate to System Mobile UI Mobile Help.
2. Open the help file you want to translate.
3. Translate the existing help text. Insert translated images as needed.
4. In the Language field, select the language of the translated text.
5. Click Update.
Legacy mobile UI configuration

Legacy mobile UI is available only on instances that do not use the mobile interface.
Administrators can define which modules are available to mobile users at the application menu or module level. In the mobile UI, modules appear in sections grouped by application menu, separated by horizontal lines.

- Modules with a device type of Mobile or Any are available on mobile devices, regardless of the application menu setting.
  
  To view all modules that are available on mobile devices, use the standard browser UI and navigate to System Definition Modules (Mobile).
- Modules without a specified device type are available on mobile devices when the application menu setting for the default device type is Mobile or Any.
  
  To view all modules without a device type that are available on mobile devices, use the standard browser UI and navigate to System Definition Applications (Mobile).

When accessing an instance from an iPhone or Android device, users can choose whether to use the standard browser UI or the mobile UI. Most recent selections are saved with these user preferences:

- mobile_use_full.iphone
- mobile_use_full.android

Configure modules for mobile and standard browsers

Modules are made available for mobile and standard browsers in the legacy mobile UI.

To make a module available for mobile and standard browsers:

1. Navigate to System Definition Modules.
2. Open the module record.
3. Change the Device type to Any.
4. Enter a Mobile title.
Consider providing more detail in the mobile-specific title because the application menu names are not visible in the mobile UI. For example, in the browser UI, define a module called Open New that appears under the Incident application menu. In the mobile view, call this module Open New Incident.

5. Enter a View name for this module in the mobile UI.
Consider configuring mobile views that show a limited number of columns to improve usability for users with smaller screens or limited transmission speeds. If a view is not specified on the module record, mobile lists and forms use the Mobile view.

6. Click Update.

Define the mobile banner in legacy mobile
By default, the banner at the top of the legacy mobile UI says ServiceNow - Mobile. You can modify this text by adding a system property.

1. Enter `sys_properties.list` in the navigation filter.
2. Click New.
3. Enter the following information:
   - Name: glide.product.description.mobile
   - Type: string
   - Value: enter the desired mobile banner text

4. Click Submit.

Add a custom icon to the home screen
As part of the legacy mobile UI, users can add a link to the instance site on the home screens of their Apple iOS devices.

By default, the link appears as a ServiceNow icon. Administrators can select a custom icon instead.

1. Create the desired icon.

   Note: Use a 57x57 pixel icon, which is the maximum icon size that Apple does not automatically resize.

2. Navigate to `System Properties My Company` and open the company record form.
3. Configure the form to add the Apple icon field.
4. Upload the new icon.
Define which devices use the legacy mobile UI
Define which devices use the mobile UI.

1. Navigate to System Properties UI Properties.
2. Locate Use mobile user interface if one of these strings (comma-separated) appears in the browser user_agent header (the glide.ui.mobile_agents property).
3. Enter a comma-separated list of devices that are directed to the mobile UI.

Note: iPod, Windows CE, BlackBerry, Android, iPhone, Opera Mini, IEMobile are part of the default list.

4. (Optional) If the property does not provide enough granularity, use the DetermineMobileDevice script include to define which devices use the mobile UI. Property value is checked first. If the user agent for the device is listed in the property, the mobile UI is used. Otherwise, the script determines which UI is used.

Disable the legacy mobile UI
You can disable the legacy mobile UI for all devices and direct all requests to the standard browser UI.

1. Clear the glide.ui.mobile_agents property value.
2. Deactivate the DetermineMobileDevice script include or ensure that the determine function always returns false.

Mobile devices in scripts testing
Use the gs.isMobile() method to determine whether an action was taken through the mobile UI.

Business rule
To write different messages to the log for actions through the mobile UI and through the standard browser UI, use the following script in a business rule.

```java
if (gs.isMobile())
    gs.print("submitted from mobile UI");
else
    gs.print("NOT submitted from mobile UI");
```

UI Action Conditions (not client)
To prevent a UI action from appearing in the mobile interface, use the following condition.

```java
gs.isMobile()
```

Tablet UI
Use a tablet to access your instance either from a browser or from the native app.

Native tablet app
Use the native tablet app exactly as you would the mobile app.

Native tablet apps are linked directly to the mobile app and have the exact same appearance and functionality. Favorites drive what appear on the tablet homescreen. Create favorites out of the things you access the most including lists, records, and modules. Connect and location appear on the homescreen by default.
All models of iPad running iOS 9 and above support the tablet app. Android tablets running 4.4 (KitKat) and above support the tablet app.

Tablet app home

Use the native tablet app home page just as you would the mobile phone app.

Just like the regular mobile app, the tablet app uses favorited lists and forms to create your home page.
Figure 153: Native tablet app home
Use the tablet application navigator

Access different modules in the user interface using the application navigator just as you do in the mobile app.

1. To open the application navigator, tap the menu icon ( ).
2. Scroll the navigator up and down using your fingers. Tap a menu application to open.
To close the navigator, tap outside of the window.

Mobile lists on tablet

Lists appear as a single column of records on the mobile tablet UI display. Each row represents a separate record.

Tap a record in the column on the left to see item details.
Mobile lists on a tablet consist of the following elements.
Table 92: Elements of the mobile UI: Lists

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List name</td>
<td>Displays the name of the list favorite.</td>
</tr>
<tr>
<td>2</td>
<td>Back button</td>
<td>Navigates back to the home page.</td>
</tr>
<tr>
<td>3</td>
<td>UI actions</td>
<td>Displays buttons to display the list activity stream and add a record.</td>
</tr>
<tr>
<td>4</td>
<td>Application search</td>
<td>Displays records that match the search string.</td>
</tr>
<tr>
<td>5</td>
<td>Current filter</td>
<td>Displays the conditions filtering the list.</td>
</tr>
<tr>
<td>6</td>
<td>Records</td>
<td>Displays one row for each record in the list.</td>
</tr>
<tr>
<td>7</td>
<td>List options</td>
<td>Displays list options to add to favorites, share, and sort the list.</td>
</tr>
<tr>
<td>8</td>
<td>Record details</td>
<td>View record details in a split pane view.</td>
</tr>
<tr>
<td>9</td>
<td>Record UI actions</td>
<td>Make a particular record a favorite, share the record, add an attachment, work notes, or comments.</td>
</tr>
</tbody>
</table>

Mobile activity streams in the tablet app

List activity streams appear as a single column window with a separate row for each record update in the mobile UI.

Access a list activity stream by pressing the activity stream icon. Activity streams open in the same panel as the list. Select an item to see more details in the right panel.

Figure 156: Elements of the tablet UI: activity stream
<table>
<thead>
<tr>
<th>Activity Stream</th>
<th>1:06 PM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue with email</strong>&lt;br&gt;Spoke to customer, appears to need a new VPN token.</td>
<td></td>
</tr>
<tr>
<td>Joe Employee 2&lt;sup&gt;2&lt;/sup&gt; INC0000047 • 4 mos</td>
<td></td>
</tr>
<tr>
<td>Issue with email&lt;br&gt;Will deliver new token tomorrow when I'm in the San Diego office.</td>
<td></td>
</tr>
<tr>
<td>Joe Employee INC0000047 • 4 mos</td>
<td></td>
</tr>
<tr>
<td>Issue with email&lt;br&gt;Can't connect to Email from home. Webmail appears to be down.</td>
<td></td>
</tr>
<tr>
<td>Joe Employee INC0000047 • 4 mos</td>
<td></td>
</tr>
<tr>
<td>Issue with email&lt;br&gt;Be sure to record VPN ID number in the CMDB.</td>
<td></td>
</tr>
</tbody>
</table>

| Issue with email<br>Spoke to customer, appears to need a new VPN token. |  |
| Joe Employee 4 mos |  |
| Issue with email<br>Will deliver new token tomorrow when I'm in the San Diego office. |  |
| Joe Employee 4 mos |  |
| Issue with email<br>Can't connect to Email from home. Webmail appears to be down. |  |
| Joe Employee 4 mos |  |
Activity stream updates consist of the following elements.

Table 93: Tablet UI elements: activity stream

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Back button</td>
<td>Return to the list.</td>
</tr>
<tr>
<td>2</td>
<td>User</td>
<td>Displays the user photo and name of the user who made the activity update.</td>
</tr>
<tr>
<td>3</td>
<td>Record details</td>
<td>Displays the record number and relative time since the update was made.</td>
</tr>
<tr>
<td>4</td>
<td>Activity details</td>
<td>Displays the most recent activity update.</td>
</tr>
</tbody>
</table>

Swipe up or down to see more activity stream updates.

*Mobile filters in the tablet app*

Construct complex filters with the mobile app UI.
Figure 157: Mobile UI filters

- Cancel
- 5 Total Results
- Save

1. SET 1
2. All of these conditions
3. Active = true
4. Priority = 1 - Critical
5. Assigned to is not empty
6. Add New Condition

and Any of these conditions

- Category is Inquiry / Help
- Category is Network
- Add New Condition

Add New Rule
Mobile filters consist of the following elements.

Table 94: Mobile UI filters

<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Current set</td>
<td>Displays the current condition set and the number of records returned by the condition set.</td>
</tr>
<tr>
<td>2</td>
<td>Current rule</td>
<td>Displays the type of rule set that applies to the current filter.</td>
</tr>
<tr>
<td>3</td>
<td>Conditions</td>
<td>Displays the conditions that are part of the current condition set.</td>
</tr>
<tr>
<td>4</td>
<td>Add rule button</td>
<td>Displays a pop-up to add a rule.</td>
</tr>
<tr>
<td>5</td>
<td>New filter button</td>
<td>Creates a condition set.</td>
</tr>
<tr>
<td>6</td>
<td>Delete set</td>
<td>Deletes the current condition set.</td>
</tr>
</tbody>
</table>

Not all filters are available on the mobile app.

Tablet Connect Chat

Use Connect Chat in the native Tablet app.

Activate Connect before using chat in the tablet app. Many, but not all the features supported in the desktop interface are available in the tablet app UI. Administrators can configure Connect Chat by role.
Figure 158: Elements of the mobile UI: Connect Chat

- **Modesto, Abel**: True. However, we should be able to get mostly everything ready before next month.
- **Ashley Leonesio**: Next week. Yours should be available the following Tuesday.
- **Charles Beckley**: Sounds great, thanks!
- **Beth Anglin**: Hey, can you let me know when we get things back online?
- **Abel Tuter**: Sure, what do you need?

**System Administrator**

*New group has been created*

**System Administrator**

Hey guys

How long will it take for you to get the new system up and running?

**Abel Tuter**

It kind of depends. We've run into some issues.

We're waiting on a new shipment. But it might not be in for awhile.

**Modesto Scroggie**

True. However, we should be able to get mostly everything ready before next month.
<table>
<thead>
<tr>
<th>Number</th>
<th>UI element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Back button</td>
<td>Returns to the previous screen.</td>
</tr>
<tr>
<td>2</td>
<td>Edit button</td>
<td>Turns on conversation editing mode, in which you can delete conversations or mark them as read. Deleting a conversation only removes it from the list. Chat history is preserved and you can add the conversation back to your list using the new conversation button.</td>
</tr>
<tr>
<td>3</td>
<td>New conversation</td>
<td>Opens a new conversation to which you add one or more members.</td>
</tr>
<tr>
<td>4</td>
<td>Filter</td>
<td>Enables you to filter conversations by member name.</td>
</tr>
<tr>
<td>5</td>
<td>Conversations</td>
<td>Lists your open conversations. You can view All your conversations or only conversations with Unread messages.</td>
</tr>
<tr>
<td>6</td>
<td>Application navigator button</td>
<td>Displays the list of menus and modules.</td>
</tr>
<tr>
<td>7</td>
<td>Conversation name</td>
<td>Displays the name of the conversation.</td>
</tr>
<tr>
<td>8</td>
<td>Conversation details</td>
<td>Opens the conversation details page, which displays the following information. Toggles record details (record conversations only) for group and record conversations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Record details (record conversations only)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Push notification preferences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Conversation members</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For group and record conversations, the conversation details page also provides capabilities to add or remove conversation members and to leave the conversation.</td>
</tr>
<tr>
<td>9</td>
<td>Avatar</td>
<td>Displays an image or initials to represent a user. Tap an avatar to view details about the user, including email address and online presence status.</td>
</tr>
<tr>
<td>10</td>
<td>Attachment button</td>
<td>Enables you to include attachments in a message, including photos and documents.</td>
</tr>
<tr>
<td>Number</td>
<td>UI element</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>11</td>
<td>Message field</td>
<td>Enables you to enter and send messages.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: For record conversations, all messages are sent as comments. Sending a message as a work note is not supported.</td>
</tr>
</tbody>
</table>

**Tablet browser interface**

Access your instance in a browser on your tablet using the standard URL of an instance.

Use the tablet browser interface just as you would the regular desktop. Accessing either the tablet or desktop interface does not prevent access to the other.

Note: $tablet.do has been disabled in UI16 because the tablet interface is designed to be the same as the desktop.

**Supported tablets, operating systems, and browsers**

Supported tablets, operating systems, and browsers are listed on this page.

- **Apple® iOS**: All models of iPad® running iOS 7 and above are supported. Safari® is supported.
- **Android™**: Any Android tablet running OS 4.0.3 and above with the latest available version of Chrome™. Native browsers and older versions of Chrome support major tablet interface functionality, but have some known issues. Tablet UI is optimized for the iPad form factor and resolution. Not all Android tablets have the same form factor and resolution. Gesture-based zoom functionality is not supported.

**Features with limited tablet interface support**

Some capabilities are limited in the tablet interface.

- **Editing lists**: You cannot edit field values in a record from the list view. Access the record form to modify any field values.
- **Dependency Views map, schema map, graphical workflow editor, Gantt chart, and visual dispatch tool**: Graphics-based tools can be viewed but not modified from the tablet interface. Data presented by these tools is read-only when accessed through the tablet interface.
- **Calendars**: You can access calendar reports but scrolling around the calendar as you would on the desktop interface is not supported.
- **Homepage bookmarks**: UI11 bookmarks are not supported in the tablet UI. You can use favorites to mark modules in the application navigator for quick access when using the tablet UI.
- **Video and image attachment upload**: Attach videos and images with both iOS 9 and Android. Other file type attachments are not allowed.

**Unsupported features in the tablet interface**

Some capabilities are not supported in the tablet interface.

- **Field watcher**: Administrators must use the desktop version to access the Field Watcher.
- **JavaScript debugger**: Administrators must use the desktop version to access the JavaScript debug window.
• Language picker: Even if the internationalization plugin is enabled, the language picker does not appear in the tablet UI toolbar. Language selected through the desktop interface applies to the tablet UI.

• Domain picker: Tablet users cannot select any other domains that administrators configure for domain-specific personalizations. To select a new domain, use the desktop interface.

• Slushbucket feature: Any lists, fields, or filters that use the slushbucket feature are unsupported on a tablet device. Slushbuckets are only supported in the desktop interface.

• Suffix in the navigation filter: You can use the .list, .do, or .form shortcuts to access a list of records in a table or a new form from the desktop version only.

• Support chat: End users cannot request a chat session nor can support technicians respond to chat requests when using the tablet interface. Help desk chat is only supported in the desktop interface.

• Printer friendly view: This view, which shows the current screen in a pop-up window without frames and the application navigator, is not available from the tablet.

• Timeline sliders and the Timeline Metrics UI actions: Features that use timelines, such as the workflow timeline and the Gantt chart are not supported from the tablet.

Tablet application navigator

All the application menus you would normally see in the desktop interface display in the tablet application navigator.

Use the tablet browser interface just as you would the regular desktop browser.
Scroll the navigator up or down using one or two fingers. To expand a menu, tap the menu name. You can also filter the menu using the same filter field you see on the desktop interface just above the application navigator. To collapse the navigation menu, click the collapse button at the bottom of the navigator.

Favorites and shortcuts

Use the favorites menu in the application navigator to show you items marked as favorites only. Access the items that you use most often from the favorites menu. On the application navigator, tap the star icon to add an item to your favorites. Add items that pertain specifically to you, such as incidents assigned to you. After you add a favorite, the star icon changes color.

In UI15, modules you access are automatically marked as favorites by default. You can enable or disable automatic favorites with the Automatically Add Favorites option from the main menu.

![Figure 160: Favorites menu](image)

**Access the favorites menu**

Access the favorites menu to see all your favorites in one place.

1. Tap the favorites icon ( ⭐ ).
Note: In UI15, bookmarks in the desktop version are not the same as favorites in the tablet version. Bookmarks cannot be accessed or modified through the tablet interface. In UI16, bookmarks and favorites are the same thing.

2. To remove a favorite, clear the star icon.

Or

In UI16, open the favorites menu, then select the remove favorite icon.

For more information on editing favorites, see Edit favorites in the UI16 application navigator.

Create a Safari shortcut

If you decide not to download the native table app, use the sharing feature on the Safari browser to create a shortcut to any ServiceNow page.

Just like an application, the shortcut is saved on your tablet. Use shortcuts to access a specific page in your instance with one touch.

1. Navigate to a frequently used page, such as a list of open incidents.
2. Tap the sharing icon on the Safari browser header.
3. Tap the Add to Home Screen icon.
4. Type a descriptive name for the page and tap Add.
Preview pane

Like the desktop interface, use the Grid or Split views to see a preview of a record.

To see a preview in Grid mode, tap the information icon (i).
Figure 161: Tablet preview pop-up in Grid mode

To close the preview, tap outside of the pop-up window.

To add a comment to a record in Grid view, or to make any other changes, click Open Record in the pop-up window.

**Note:** In UI15, tapping the information icon opens the record, rather than a pop-up preview.
Use the split view toggle at the top of the screen to see a preview of the record to the right of the record list.

![Figure 162: Tablet preview in Split mode](image)

In Split mode you can edit a record when it is open in the preview pane.

**List header menu**

Access the list header context menu by tapping the icon in the list header.
Tap the menu icon (  ) in the list header.

Figure 163: iPad list header menu
Sorting by column header works the same as the standard interface. Tap the column name to sort by that column.

List row menu
Access the list row menu in a tablet interface.
Tap any cell to see the list row context menu with actions related to the values in that row.
Form menu

Similar to the desktop interface, tap the form name or icon to access the form context menu.
Related list view toggle

View forms that include multiple sections, such as the Incident form, as either tabbed or sequential arrangements of sections.

Tabs are enabled by default on new instances. You can switch to a sequential arrangement by following the same instructions as you would for the desktop interface.
Figure 168: Toggle tabs
In sequential view, you can expand or collapse a section by tapping expand (.expand) or collapse (collapse) in the section header.

Select a related record

Use the split-screen record picker to add and remove related records.

Use related lists to relate a record to the record currently displayed in the form.

1. Navigate to a record form. In the example below, an incident record is related to a problem.
2. Tap the incident number. Screen splits to display information associated with the incident. Change the way that the related list area appears by tapping the Toggle Tabs button.
3. Tap the Related Records tab to view a summary of the related problem.
Incident

Number: INC0000050
Caller: Jerrod Bennett
Location: San Diego
Category: Hardware
Subcategory: -- None --
Configuration Item: EXCH-SD-05
Impact: 1 - High
Urgency: 1 - High
Priority: 1 - Critical

Short description: Exchange server appears to be down...lots of users impacted

Notes

Related Records

Related Records

Problem: 
Change Request: 
Caused by Change: 

Task SLAs

Task = INC0000050

<table>
<thead>
<tr>
<th>SLA</th>
<th>Type</th>
<th>Stage</th>
<th>Start time</th>
<th>End time</th>
<th>Actual elapsed time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority 1 resolution (8 hour)</td>
<td>SLA</td>
<td>Breached</td>
<td>2008-02-14 14:00:45</td>
<td>2008-07-23 12:29:17</td>
<td>159 Days 21 Hours 28 Minutes</td>
</tr>
</tbody>
</table>
4. View or edit the problem record by tapping the preview pane icon next to the problem number.

Lookup lists

Filter the lookup results by using the filter fields above each column.

Click the magnifying glass next to the list header to show the search fields.

Perform a contains search in the filter fields using a period (.). For example, to search for all names that contain the characters “tu”, type .tu.
**Figure 170: Lookup list on a tablet**

<table>
<thead>
<tr>
<th>Name</th>
<th>First name</th>
<th>Last name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abel Tuter</td>
<td>Abel</td>
<td>Tuter</td>
<td><a href="mailto:abel.tuter@example.com">abel.tuter@example.com</a></td>
</tr>
<tr>
<td>Athena Cantu</td>
<td>Athena</td>
<td>Cantu</td>
<td><a href="mailto:audra.cantu@example.com">audra.cantu@example.com</a></td>
</tr>
<tr>
<td>Audra Cantu</td>
<td>Audra</td>
<td>Cantu</td>
<td><a href="mailto:george.tukis@example.com">george.tukis@example.com</a></td>
</tr>
<tr>
<td>Byron Fortuna</td>
<td>Byron</td>
<td>Fortuna</td>
<td><a href="mailto:nanette.turansky@example.com">nanette.turansky@example.com</a></td>
</tr>
<tr>
<td>George Tukis</td>
<td>George</td>
<td>Tukis</td>
<td><a href="mailto:titus.rodriguez@example.com">titus.rodriguez@example.com</a></td>
</tr>
</tbody>
</table>
| Nanette Turansky | Nanette | Turansky | tita
Accessing another record from a form

Tap the reference icon to jump to another record.

On the tablet, tap the reference icon. It opens the related record in a pop-up overlay just as it appears on the desktop interface.

Figure 171: Tablet reference icons
Record tags

Group and organize records by adding tags, which are keywords that describe the record. Use tags on a tablet browser the same way you would on a desktop browser.

For example, an incident record that deals with a wireless internet outage could be tagged with the keyword wireless. Later, someone who has access to incident records can filter all incidents by the keyword wireless to see which incidents pertain to that topic. Users can add as many tags as needed to any record. Tags are not case-sensitive.

Tags that you add to a record are saved in the Tags table with the following default settings:

- **Active**: true. Tag is enabled and appears in the tablet and desktop interfaces.
- **Global**: false. Tag is not globally visible. Tags are visible only to the user who created them.
- **Navigation**: false. Tablet tags do not appear in the application navigator on either the tablet or the desktop interface.

Administrators can modify these tags as they would modify tags in the system definition.

Mobile configuration for administrators

As an administrator, configure the mobile experience for your users to access an instance on a tablet or smartphone.

Requirements

Configuration for the mobile experience takes place in a regular desktop instance. Most of the configuration options are available for both the native mobile app and the mobile web experience. Use the native app or the mobile web to test your configuration. Depending on your device, go to the iTunes store or the Google Play store and search for ServiceNow to download the native mobile app.

Role required

**admin**

Before you begin

Take the following into consideration before configuring the mobile experience:

- What applications and modules do you want to be accessible from a mobile device?
- How do you want mobile lists to appear on a mobile device?
- Which users or roles should have access to Connect Chat?

What to do

- **Configure the application menu**: Determine which applications and modules you want to appear in the mobile application navigator.
- **Set up mobile lists**: Mobile devices have less screen real estate so you may need to change the length of titles or the default fields that appear in a mobile list. Customize the mobile list view to determine the
length of a title in a mobile list, as well as the default fields that appear in a table.

*Customize sortable columns* in a mobile list.

*Configure available search fields.*

**Configure Connect Chat for mobile**

Configure the users or roles that can access *Connect Chat* on a mobile device.

**Configure mobile UI properties**

*Disable the mobile or tablet experience.*

Update the web experience by activating the new *web UI.*

**Next steps**

Most configuration items for the mobile UI are optional. Click any of the topics below for additional configuration.

**Configure the mobile application navigator**

Define which application menus and modules are available on the mobile application navigator.

You cannot hide the application navigator from users, however you can control the contents based on role. Use the Roles field for both the application menu and the modules as listed in the following tables to configure the application navigator specifically by role.

1. On a desktop browser, navigate to *System Mobile UI Navigator Apps.*
2. Click New.
3. Fill in the fields, as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the application menu.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to specify the order of the menu. For example, an entry of 100 would place this application menu before one with an Order entry of 200.</td>
</tr>
<tr>
<td>Roles</td>
<td>Click the lock icon to select the roles for this application menu. Only users with the designated roles can access the modules under this application menu.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate this application menu.</td>
</tr>
</tbody>
</table>

4. Save the application menu.

Note: Until you add at least one module, the new application menu does not appear on the mobile application navigator.

5. Under Modules, click New.
6. Fill in the fields, as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the module.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to specify the order of the module within the application menu. For example, an entry of 100 would place this module before one with an Order entry of 200.</td>
</tr>
<tr>
<td>Application menu</td>
<td>Displays the application menu from which you accessed this screen. Select a different application menu, if appropriate.</td>
</tr>
<tr>
<td>Table</td>
<td>Select the table for this module.</td>
</tr>
<tr>
<td>Updated</td>
<td>Displays the date and time when the module record is updated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Roles</td>
<td>Click the lock icon and select the roles for this module. Only users with the designated roles can access this module.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate this module. Only active modules appear in the application menu.</td>
</tr>
<tr>
<td>Filter</td>
<td>Create a filter for identifying which fields this module uses from the selected Table.</td>
</tr>
<tr>
<td>Path</td>
<td>Enter a custom URL for the module in this format: <code>&lt;type_of_link&gt;/table/parameters</code>.</td>
</tr>
<tr>
<td></td>
<td>- <code>type_of_link</code>: determines what kind of page opens, for example, form, list, or view.</td>
</tr>
<tr>
<td></td>
<td>- <code>table</code>: Refers to the table being referenced. For example, incident.</td>
</tr>
<tr>
<td></td>
<td>- <code>parameters</code>: Any additional information you want to use to direct the user a specific URL. For example, you can include a query as part of the URL to direct users to a specific filtered list.</td>
</tr>
<tr>
<td></td>
<td>You can also use the URL format, <code>$___.do</code>.</td>
</tr>
<tr>
<td>Path Relative To Root</td>
<td>Allows mobile navigator modules that link to desktop pages. Select this check box to use mobile URL in the Path field, such as <code>$sp.do</code>, <code>$chat.do</code>, or <code>$vtb.do</code>.</td>
</tr>
<tr>
<td></td>
<td>When the Path Relative To Root is cleared, the path is considered a mobile specific path and is relative to <code>$m.do</code>.</td>
</tr>
<tr>
<td></td>
<td>For example, a path like <code>/form/incident/-1</code> would be a mobile specific path and would be considered relative to <code>$m.do</code>. This would ultimately result in navigating to a path of <code>$m.do#/form/incident/-1</code>.</td>
</tr>
<tr>
<td></td>
<td>Use mobile specific paths when possible and only use Path Relative To Root when there is not a mobile specific path for the desired resource.</td>
</tr>
</tbody>
</table>

Note: If you are creating a module for a map page, see the procedure specific to map pages.

7. Save the module you just added.

**Configure a mobile module**

After defining the application menu, configure modules and assign them to the new application menu.

Modules live inside application menus. You need to configure your application menu before you can create a module.

1. On a desktop browser, navigate to System Mobile UI Navigator Apps.
2. Open the application menu you want to create the module for.

4. Fill in the fields, as appropriate.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the module.</td>
</tr>
<tr>
<td>Order</td>
<td>Enter a number to specify the order of the module within the application menu. For example, an entry of 100 would place this module before one with an Order entry of 200.</td>
</tr>
<tr>
<td>Application menu</td>
<td>Displays the application menu from which you accessed this screen. Select a different application menu, if appropriate.</td>
</tr>
<tr>
<td>Table</td>
<td>Select the table for this module.</td>
</tr>
<tr>
<td>Updated</td>
<td>Displays the date and time when the module record is updated.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Roles</td>
<td>Click the lock icon and select the roles for this module. Only users with the designated roles can access this module.</td>
</tr>
<tr>
<td>Active</td>
<td>Select the check box to activate this module. Only active modules appear in the application menu.</td>
</tr>
<tr>
<td>Filter</td>
<td>Create a filter for identifying which fields this module uses from the selected Table.</td>
</tr>
<tr>
<td>Path</td>
<td>Enter a custom URL for the module in this format: type_of_link/table/parameters. You can also use the URL format, $__.do.</td>
</tr>
<tr>
<td>Path Relative To Root</td>
<td>Select this check box to use mobile URL in the Path field, such as $sp.do, $chat.do, or $vtb.do.</td>
</tr>
</tbody>
</table>

Note: If you are creating a module for a map page, see the procedure specific to map pages.

5. Click Submit.

Configure the mobile list layout

Configure the way forms display in the mobile UI.

1. From an instance on your desktop, navigate to any form you want to configure, for example, Incidents.
2. Click the list header menu and navigate to Configure List Layout.
3. From the View name list, select Mobile.
4. Use the slushbucket to add or remove fields from the mobile list.
Configuring Incidents List

Available

- Created
- Created by
- Date format
- Default perspective
- Department
- Domain
- Domain path
- Email
- Employee number
- Failed login attempts
- Field3
- Gender
- Geolocation tracked
- Home phone
- Internal Integration User
- LDAP server
- Language
- Last login
- Last update

Selected

- begin_split
- Number
- Category
- end_split
- Short description
- Priority

Caller: First name

List view

View name: Mobile

Create new field

- Name
- Type: String
- Field length: Small (40)

Add

Related Links

Show versions
Any fields you add to the list appear as a sortable column and as a field in the card of a specific record in the mobile UI.

Table 96: List layout results

<table>
<thead>
<tr>
<th>Record field</th>
<th>Sortable column</th>
</tr>
</thead>
<tbody>
<tr>
<td>The SAP HR application is not accessible</td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>INC00000063</td>
</tr>
<tr>
<td>Category</td>
<td>Request</td>
</tr>
<tr>
<td>Priority</td>
<td>1 - Critical</td>
</tr>
<tr>
<td>Caller First name</td>
<td>Margaret</td>
</tr>
<tr>
<td>Related Lists</td>
<td>(1)</td>
</tr>
<tr>
<td>Participants</td>
<td></td>
</tr>
<tr>
<td>Oct 20, 2015</td>
<td></td>
</tr>
<tr>
<td>System Administrator</td>
<td>8 mos</td>
</tr>
</tbody>
</table>
Customize the mobile list view

Configure what information displays in the mobile list view.

When you view a mobile list, the smaller screen can only accommodate some information. Use Fields to determine what information displays in a list on mobile.

1. In the desktop interface, navigate to System Mobile UI Table Titles.
2. Click New, or select an existing table to edit.
3. Fill in the fields, as appropriate.
Important: Table titles define the title appearance for a list on a mobile device as well as in the split pane view on the desktop interface. You can change the title for any table or add a title record for a different table, however, the change affects both mobile lists and the list card in the split pane view.

For example, the default title for the Incidents (incidents) table is the short description. If you create a table title record to display the priority field as the incident title, the priority field
appears as the table title for incidents on a mobile device as well as in the list card in the split pane view.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table</td>
<td>Select the table you are defining a title for. Note: The list shows only tables and database views that are in the same scope as the title.</td>
</tr>
<tr>
<td>Fields</td>
<td>Click the lock icon to display the Fields slushbucket. Select the fields that display by default when someone views this table on a mobile interface.</td>
</tr>
<tr>
<td>Updated</td>
<td>Displays the date and time when the table title was updated.</td>
</tr>
<tr>
<td>Script</td>
<td>(Optional) Create a server-side script that generates a string to display under the display value on lists. For example, if you are defining a title for My Approvals, the script could display the different approval items below the title.</td>
</tr>
</tbody>
</table>

4. Click Submit.
Configure mobile list search fields

Configure search fields to determine what fields are searched for in the table. If search fields aren’t configured, only the columns in the mobile list layout are searched.

Search fields might not appear on the Table Title form. Add Search Fields to the form by editing the form layout.

1. Navigate to System Mobile UI Table Titles.
2. Open the table you want to configure search fields for, or click New.
3. Use the slushbucket to add or remove fields from the mobile list.
Configure Connect Chat for mobile

Configure Connect Chat to show or hide on the mobile app homepage.

Connect Chat appears on the mobile app homepage by default if it is active on the instance and the user has the correct roles. As an administrator, you can hide Connect Chat limiting user access by role. Use these steps to hide Connect Chat from users without a particular role.

2. In the Comma separated whitelist of roles able access Connect. Empty allows all roles., type a list of the roles you want to enable Connect Chat for.

Configure the blur app option

As a security feature, administrators can configure the mobile app to blur when not in focus on a mobile device.

For example, when you double-click the home button on your mobile device to close apps or navigate back to where you left off, the ServiceNow app appears blurred.

1. Navigate to System Properties Mobile UI Properties.
2. Select the Blur native app UI when the application enters the background check box.
Activate new web UI

With Helsinki you have the option to select a new web UI that is similar to the native app. New instances automatically have the new mobile web UI enabled. You can use these steps to enable or disable the new mobile web UI.

1. Navigate to System Properties Mobile UI Properties.
2. Select the option to activate the updated Helsinki web experience.

Disable the mobile or tablet experience

Administrators can disable or enable different parts of the mobile UI.

Navigate to System Properties Mobile UI Properties to enable or disable any of the properties below.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>glide.ui.m_enabled</td>
<td>Turns on/off the mobile web UI</td>
</tr>
<tr>
<td>glide.ui.m.helsinki_mobile_enabled</td>
<td>Turns on/off the helsinki mobile web UI</td>
</tr>
<tr>
<td>glide.ui.m.native_apps_enabled</td>
<td>Turns on/off native apps</td>
</tr>
<tr>
<td>glide.ui.tablet_enabled</td>
<td>Turns on/off tablet UI</td>
</tr>
<tr>
<td>glide.ui.mobile_agents</td>
<td>Clear out these user agents to disable the legacy mobile UI</td>
</tr>
</tbody>
</table>

Enable client scripts for the mobile browser

Define client scripts to run on forms on the mobile interface, the desktop UI, or both.

1. On a desktop, navigate to System Definition Client Scripts.
2. Create a client script that is compatible with the mobile interface. To ensure compatibility, see Client script types.
3. In the UI Type field, select Mobile or Both to have the script run on the mobile interface.

   Note: Configure the form to add the UI Type field.

4. Fill in the fields, as appropriate.
5. Click Submit.
Enable mobile location and barcode scanning

Take advantage of mobile devices by allowing location and barcode scanning in the mobile app.

Role required: admin

1. Navigate to the form you want to add the location or barcode scanner to.
2. Use the form context menu to switch the form view to Mobile.
3. From the form context menu, navigate to Configure Form Layout.
4. In the View name list, make sure Mobile is selected.
5. Use the Create new field section to add a location or barcode field to the form. Set the field type to String.
6. From the form, right-click the new field and click Configure Dictionary.
7. In the Attributes related list, click New.
8. Use the Attribute field on the Dictionary Attribute form to search for barcode or location.

The added fields appear on the form in the native mobile app. This feature is not available on the mobile web. Users will still need to allow the app to access their location and camera on their devices. These fields only appear when you create a new record, they won’t appear in one that is already existing.

The native iOS and Android apps support scanning the following barcode types:
- 2D barcodes: QR Code, Data Matrix, PDF-417, AZTEC

Mobile UI Properties
Mobile UI Properties allows administrators to configure parts of the mobile UI.
Mobile UI properties has configuration options for both the mobile browser and the native app. Use mobile UI properties to control the following.

Mobile browser
- Title and homescreen label
- Basic theming (header and footer colors, text color)
- User access to the mobile browser
- User access to the new mobile browser interface
- Which mobile platforms the browser recognizes

Native app
- Blur the app in the background
- User access to the app

Authentication with the native mobile app
The native mobile app uses OAuth for authentication and stores the OAuth token, which enables the app to re-establish connections without storing any credentials on the mobile device.

OAuth login flows do not pass through installations exits and do not show up on any system logs.

Note: When you sign in to the native app on your mobile device, the app does not store your SSO password.

To configure the lifespan of the token, navigate to System OAuth Application Registry, select the ServiceNow Mobile App, and change the token lifespan values.
iOS Keychain stores the OAuth token. The app stores only the OAuth token. The keychain encryption is AES 128 in Galois/Counter Mode (GCM). For more information, see the iOS Security Guide.

Mobile UI actions

UI actions function the same on the mobile interface as on desktop interface, but are configured on a different table: UI Action - Mobile {sys_ui_ng_action}.

Add the following types of UI actions in the mobile interface:

- List buttons
- Form buttons
- Form more items (items that display when the user taps the More button)

The lowest number in the Order column identifies the primary button at the top of the form.

Note: Mobile UI actions automatically reload the form when an action is submitted. You do not need to configure a UI action to make this happen.

Back navigation in the mobile interface

Mobile UI actions support back navigation when a UI action finishes. You can navigate back one logical navigation item in the current navigation stack.

When the navigate_back flag is set to true for a mobile UI action in the UI Action - Mobile {sys_ui_ng_action} table, you can move back to the previous screen.

Sometimes one or more discrete screens, or a nested or partial view of the screen, can represent a single navigation item. For this reason, back navigation can result in different UI behaviors depending on the current navigation content or device.

For example, the activity stream and form for a record are considered as one logical navigation item (the current record). However, some devices use multiple discrete screens for this navigation.
back navigation is triggered from a UI action on a form, multiple screens may be dismissed to return to a previous item, such as a list.

Note: Setting a redirect on the UI action through action.setRedirectURL(); takes precedence over the navigate_back flag.

Redirect to a URL in the mobile interface

As part of a UI action, redirect a user to a URL in the mobile interface. For example, add links to a form or open a new record after it is created from a UI action.

• Use this syntax to define the redirect link:
  action.setRedirectURL('incident.do?sys_id=-1');

Note: This functionality works the same as in the desktop version. For more information, see Using a UI action to redirect to a URL.

Homepage administration

A homepage is a dashboard that consists of navigational elements, functional controls, and system information.

When a user logs in to an instance, the default homepage defined for their role appears unless the user switched to another homepage. Administrators can customize several settings for homepages, including settings that control read or write access for any homepage and how homepages render.

Administrators can also perform the following actions for homepages.

• Create new global homepages for all users or specific homepages for users with a specified role.
• Specify an alternate login landing page that appears instead of a homepage.
• Configure the homepage splash page, which is a lightweight page that loads before a homepage loads.

Restrict content additions to a homepage

By default, anyone with a role can add content to a homepage.

If the user does not have permission to edit the homepage, the edits are applied to a homepage specific to the user. You can restrict who can add content to homepages by modifying the following property under the Homepage Admin Properties module.

Note: The option Add to homepage does not take into account the property cms.glide.add_content. This means that users can add reports to any homepage they can view. The result is that users create new homepages with the added information when they modify a homepage that they don’t own.
Secure a homepage

Homepages have two types of roles: read and write. Read roles limit who can view the page, and write roles limit who can make edits to the page, such as moving widgets or deleting the homepage.

Role required: admin

Note: If no write roles are specified on a homepage, then any user with one of the specified read roles may access this page and delete it.

Note: The option Add to homepage does not take into account the property cms.glide.add_content. This means that users can add reports to any homepage they can view. The result is that users create new homepages with the added information when they modify a homepage that they don’t own.

1. Navigate to Homepage Admin Pages.
2. Select the homepage you want to secure.
3. Click the edit icons next to Write roles or Read roles.
4. Move the roles you want to restrict homepage access to from the Available column to the Selected column.
5. Click Done.
6. Click Update.

Homepage user preferences

You can set your homepage user preferences.

After users have selected a homepage to view, their homepage preference is stored in User Administration User Preferences in a preference named homepage. The value of the preference is the sys_id of the homepage the user sees. You can access a list of homepages by navigating to Homepage Admin Pages.

Users must have at least one role to view homepages.

Add a homepage to an update set and application

You must manually add homepages and content pages to update sets prior to distribution.

Role required: admin
After inclusion, the update set always uses the current version of the page and does not require additional action. Applications automatically include any homepages and content pages that are created within or associated to an application.

1. Navigate to Homepage Admin Pages.
2. Right-click a homepage record.

The page is added to the current update set.

Add existing reports to a homepage

Add reports to homepages to share them and make them easily accessible.

1. Navigate to a homepage.
2. Click Add content.
3. Select Reports in the left column.
4. Select the table the report is based on in the middle column.
5. Select the report in the right column.
6. Click Add here where you want to place the report on homepage.
7. To add more reports, repeat steps 3 through 6.
8. Click the close icon (🗑️) in the top right corner when you finish adding reports.

Arrange objects on a homepage

Arrange widgets on custom homepages to customize your experience. You can always restore the homepages to the arrangement your system administrator created.

- Moving widgets - Click, hold and drag near the top of a widget to move it another area. Objects in the top or bottom areas display at 100% of the available width. Widgets in the right, left, or center areas display at 50% of the available width. If widgets are added to all these areas, they display at 33% of the available width.

- Removing widgets - Click the icon to remove a widget.

URL widget variable height workaround

URL widget can be used to display a different web page or website as part of a homepage.

URL widgets are set with a fixed height, meaning that you may have to scroll to see the entire web page in the widget. URL widget widths are controlled by the positioning of the widget on a particular homepage. You cannot modify URL widget height, but you can set up an iFrame in a UI page to manage the height.

1. First, create a UI page. The UI page name must start with render_gadget_ (for example, render_gadget_iFrameSNC). Add the following to the HTML field, replacing the src with the URL that should appear in the iFrame. The height you specify must be a static value and you must use CSS style tags for this to work.

   `<iframe id="myframe" src="http://www.service-now.com" scrolling="yes" style="height:450px; width:100%"></iframe>`

2. Next, navigate to System UI Widgets and create or modify a widget to use for selecting your UI page from the Add content pop-up window on a homepage. The widget script must reference your
UI page. The widget Name must be the name of the category in the Add content pop-up window. For Renderer type, select JavaScript. The following script can be added to the Script field if you want to create a new widget.

```javascript
function sections () {
    return { 'ServiceNow' : { 'type' : 'iFrameSNC' } };}

function render () {
    var scope = gs.getCurrentScopeName();
    var type = renderer.getPreference('type');
    return renderer.getRenderedPage(scope + type);
}

function getEditLink () {
    var scope = gs.getCurrentScope();
    var type = renderer.getPreference('type');
    return "sys_ui_page.do?sysparm_query=name=render_gadget_" + scope + type;
}
```

3. When the widget is saved, go to any homepage and add the new content.

**Count gauge colors**

In a count gauge, the count item color is based on the upper and lower limit values on the gauge panel.

The following colors are used:

- **Red**: If the count result is greater than or equal to the upper limit.
- **Orange**: If the count result is between the upper and lower limit.
- **Green**: If the count result is less than or equal to the lower limit.

You cannot customize these colors.

The upper and lower limit fields are in the Gauge (sys_gauge) table. You can configure the Gauge form to add these fields.

**Ensure domain separation on a gauge**

To ensure domain separation on a gauge when the MSP Extensions plugin is not installed, a domain field must be added to the table for gauges and gauge counts. This domain field must then be set as a reference field.

By default, the Domain Support plugin separates data on certain tables by domain. It does not, however, separate gauges by domain except if the MSP Extensions plugin is installed. The gauge will display data only from the user’s domain, but the user will be able to see all of the gauge.

Follow these steps to ensure domain separation on gauges if the MSP Extensions plugin is not installed.

1. Navigate to System UI Gauges and select a gauge to separate by domain.
2. **Configure a form** and add a new field named sys_domain.
3. **Configure the dictionary** on the sys_domain field and fill in the Reference field with the domain for this gauge. If left blank, the gauge is global.
4. Select one of the gauge counts records under the gauge’s related lists.
5. Repeat steps 2 and 3.
Domain fields appear on gauges and gauge counts, and the field references a table. After a domain field exists on a form, all records within the table will have the domain field enabled. By default, all of these records are global.

Top Searches homepage

The Top Searches homepage displays the most popular searches over the past hour, day, week, or month. The homepage includes widgets for specific tables and across the entire instance.

- Users with the itil role can view the homepage by default. To control access to the page, administrators can secure the homepage.
- Users can add any of the top searches widgets to their homepages. Administrators can control who has access to top searches widgets.
- Users can select the time period for which to view top searches and perform searches directly from the widget.

Use a top search widget

Top searches widgets display the top 10 searches over the past hour, day, week, or month for the specified table or across the entire instance (All).

Take either of the following actions to use a top searches widget.

- Click the desired time period for which to see top searches (default is Day). You can change the time period at any time, and your most recent selection is loaded the next time you view the homepage.
- Click any item on the list to search for it. The Top Searches - All widget performs a global search and a table-specific widget performs a search of the table or application. For example, knowledge searches return knowledge base search results.

Note: Each user’s time period selection is stored by the top_searches.period user preference.

Add a top search on a homepage

You can add a top searches widget to a homepage.

1. On a homepage, click Add content.
2. Select Text Search from the left panel and Top Searches from the middle panel.
3. Select the desired top search widget from the right panel.
4. On the bottom of the window, click Add here in the appropriate layout position, and then close the window.
5. Select the time period for which you want to see the top searches (default is Day).

The widget displays the top 10 searches for the selected time period.

Control access to a top search widget

You can control who has access to top searches widgets by restricting who can add content to homepages or by applying roles to the widget.

Role required: admin

1. Navigate to System UI Widgets.
2. Select Text Search.
3. Click the edit user roles icon and select the required access rights, then click Done.
4. Click Update.

Define a table for a top search

You can define the tables for which top searches widgets are available.

Role required: admin

1. Navigate to System Properties Text Search.
2. Enter the tables for which you want top searches widgets in the Comma-separated list of table names which will have home page top searches widgets available for them field (the glide.ts.widget.top_search_tables property).

   The default tables are Knowledge, Problem, Incident, Change Request, Catalog Item, and Live Message (kb_knowledge,problem,incident,change_request,sc_cat_item,live_message).

   Note: Adding a parent table includes all searches on tables that extend the parent table. For example, if you add Task, then all Incident, Problem, and other task tables are included.

3. Click Save.

View user preference for time period

Each user’s time period selection is stored with a user preference.

- top_searches.period: stores the user’s selection for the Top Searches - All widget.
- top_searches.period.<table name>: stores the user’s selection for the Top Searches - <Table> widget. For example, top_searches.period.kb_knowledge stores the user’s preference for Top Searches - Knowledge.

1. To view user preferences, navigate to User Administration User Preferences.
2. Find the top searches preferences.
3. Make the necessary changes to the user preferences and save the record.

Update a top search statistic

Top search statistics are compiled on an hourly basis by the TS Search Summary scheduled job.

Role required: admin

Use the following procedure to manually refresh the list.

1. Navigate to System Scheduler Scheduled Jobs Scheduled Jobs.
2. Open TS Search Summary.
3. Change the date and time in the Next action field to run the scheduled job at the specified time. For example, if it is currently 9:48 AM and you want to run it immediately, set the date to today and the time to 10:00.

   Note: This scheduled job is designed to collect hourly data. For optimal data accuracy, do not run this job more frequently.

4. Click Update.
Custom homepage widgets

There are a number of widgets provided out-of-box to be added to a homepage, but administrators can also create their own widgets.

To create a widget, an administrator must first create a UI page to control its functionality. UI pages are coded in either HTML or Jelly script, and will power the functionality of the widget.

Creating a UI page is outside the scope of this article. However, once the UI page exists, it will be used to render the widget. It is very easy to create a trivial UI page named "my_ui_page" with a single line of text, add it to a homepage, and see how it renders.

After the UI page is scripted, create a widget that renders the UI page and executes its script.

Create a widget to display a UI page

Display a custom UI page in a homepage widget.

Role required: admin

Note: This functionality requires a knowledge of JavaScript.

1. Navigate to System UI Widgets and click New.
2. Give the widget a Renderer type value of JavaScript and a Name value of My Custom Page.
3. Include the following required functions in the script.
   • The sections() function adds the widget to the Add Content section of a homepage.
     The sections() function needs to return a JavaScript array describing how the widget should appear in the homepage Add Content UI, and what UI page should be displayed. Here is an example:

     ```javascript
     function sections() {
       return {
         "Cool Page" : { "name" : "my_ui_page" }
       };
     }
     ```

     The above example appears in the Add Content UI as shown below, where the Name of the widget appears in the first column, and the Cool Page text appears in the second column. The UI page displayed in the preview is my_ui_page.

   • The render() function defines how the widget should be rendered in the homepage. It can be the same for all custom widgets. This code works with scoped and global applications:

     ```javascript
     function render() {
       var scope = gs.getCurrentScopeName();
       var page = renderer.getPreference('name');
       return renderer.getRenderedPage( scope + page);
     }
     ```

     The function uses the value of the name object returned by the sections() function. In the example, the value is my_ui_page. This is the name of the UI page that is rendered. If the UI page does not exist, then Form not found is displayed.

   • The getEditLink() function defines the target page to use when editing the widget. It can be the same for all custom widgets. This code works with scoped and global applications:

     ```javascript
     function getEditLink() {
       var scope = gs.getCurrentScopeName();
       var page = renderer.getPreference('name');
       return "sys_ui_page.do?sysparm_query=name=render_gadget_" + scope + page;
     }
     ```
The function uses the value of the name object returned by the sections() function. In the example, the value is my_ui_page. This is the name of the UI page that is rendered. If the UI page does not exist, then Form not found is displayed.

Here is the entire example widget with all functions.

Create a new personal homepage

Users with at least one role can create new personal homepages that are visible to themselves.
You can create a completely new personal homepage with no content on it, or you can create a new homepage that uses the content of an existing page. Either way, the personal homepage is only visible to you by default unless the administrator makes your homepage global.

1. Navigate to **Self-Service Homepage** to open your current homepage.
2. Click the new page icon

   ![New Page Icon](image)

   Your new homepage appears with a single dropzone.
3. **Add content** as needed.

Create a personal homepage based on an existing homepage

Users with at least one role can create personal homepages based on existing homepages that are visible to themselves.

1. Navigate to any existing homepage that you have access to.
2. **Change the layout** of the homepage or add new content.

   The system automatically creates a new homepage with the title My Homepage, indicating that the homepage is a personalized one. Any changes you make are applied to the personalized homepage, not the global version.

Create a global homepage or a homepage for specific users

You can create and edit a global homepage that is accessible to all users, or homepages that are accessible to users with specific roles.

Role required: **admin**

1. Navigate to the **Homepage Admin Pages**.
2. Click **New**.
3. Complete the form.

<table>
<thead>
<tr>
<th>Table 98: Portal page fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Selectable</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>Field</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>User</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Order</td>
</tr>
<tr>
<td>Write roles</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Read roles</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

4. Right-click the header and select Save.
5. Click the Edit Homepage related link to see the homepage.
6. Add content as needed.

Note: You must click Edit Homepage to make changes to a global homepage that take effect for all users who can access the homepage. If you click View Homepage and make changes, a personal homepage is automatically created for you and those changes take effect only on that personal homepage. To see the Edit Homepage link, you must enter a value in the View field.
Figure 175: Portal Page form for the asset overview homepage

Table 99: Related links

<table>
<thead>
<tr>
<th>Related Links</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Homepage</td>
<td>View the homepage as a user would. Any changes you make when viewing the homepage automatically create a personalized version of the homepage.</td>
</tr>
<tr>
<td>Edit Homepage</td>
<td>Edit the homepage as a global homepage. Any changes you make when editing the homepage are visible to all users who can access it.</td>
</tr>
</tbody>
</table>

Note: You can also add the homepage as a module link in the application navigator.
The new homepage is available in the Switch to Page choice list for the users you specified or for all non-ESS users if the homepage is global.

Customize homepages

Users with at least one role can see a customized homepage when logging in.

Note: If no write roles are specified on a homepage, then any user with one of the specified read roles may access this page and delete it. See Secure a homepage.

The content on the homepage comes from various sources, including:

- Graphs and charts generated from a report
- Application modules
- A service catalog category
- The scrolling news widget (the News knowledge category)

System Administration homepage

The System Administration homepage shows administrative tasks such as catalog categories that provide administrators with quick access to all the items they need to configure core features, such as homepages, user administration, and email notifications.
Administrators can customize the System Administration homepage and add a homepage to an update set and application.

View your homepage
When users log in to an instance, their homepage appears.
Users who customized their homepage see the customized homepage. Users who did not customize their homepage see the homepage for their role, such as admin or itil. If their role has no homepage, a blank page appears.

After logging in, users can return to the last homepage they viewed by navigating to Self-Service Homepage.

Note: Users see the homepage with the lowest Order value of the pages they have roles to see when they log in. For more information, see Create a new personal homepage.

View your homepage

The homepage that you can see when you log on ServiceNow is controlled by a number of factors.

The homepage you see, depends on the following:

• If you personalized your homepage, the personalized homepage appears.
• If you did not personalize your homepage, the homepage for your role, such as admin or itil, appears. The homepage with the lowest Order value of the pages they have roles to see appears.
• If your role has no homepage, a blank page appears.

Log in to ServiceNow to access your homepage. The number of records displayed in a list report 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 report.

Refresh the homepage

Homepage users can specify a refresh time of 5, 15, 30, or 60 minutes, or no refresh. It is not possible to configure individual widgets to refresh automatically.

Click the cog wheel icon

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to choose a refresh interval. The default is Off (no refresh).

Click the refresh icon ( ) at any time.

Modify the number of records displayed in a list report

List reports added to a homepage display the same number of records as you have configured for other lists.

For example, if you display 100 records in lists, a maximum of 100 records appears in list reports. For instructions on changing this number, see Customize the number of list rows per page.

Customize a homepage

You can customize the default homepages that appear for each user.

Role required: admin

- Administrators can customize the default homepages that appear for each user by navigating to Homepage Admin Pages and selecting the homepage.
- Users who have roles can customize the homepages that are specified for their roles by navigating to Self-Service Homepage.

1. Navigate to Homepage Admin Pages.
2. Select the homepage to customize.
3. Click Edit Homepage.
   The homepage opens just as it does when you view it, but it is in edit mode.

   Note: You must click Edit Homepage to make changes to a global homepage that take effect for all users who can access the homepage. If you click View Homepage and make changes, a personal homepage is automatically created for you and those changes take effect only on that personal homepage. To see the Edit Homepage link, you must enter a value in the View field.

4. Add items to the homepage.
   a) Click Add Content.

      A window opens that lets you select from the homepage items that 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 widget on your homepage runs individually. For example, a homepage with 10 reports runs each report every time it refreshes. If your homepage consistently loads slowly, try removing widgets to determine why.

   b) Select an item to add.
      • Reports: Reports to the homepage.
      • 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.

      Note: The world clock widget is for demo purposes only.

      • Gauges: All available dashboard gauges. Gauges are defined in System UI Gauges.
      • Catalog Categories: Active service catalog categories. The homepage uses the desktop icon of the category as the homepage icon.
      • Catalogs: Service catalogs, including all 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.

5. Reposition elements on your homepage by dragging and dropping them to a new location.
   The change you make to the homepage is saved automatically.

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

Homepage items
You can add different types of objects or widgets to homepages using the Add content button.
In the pop-up window, you select the homepage item you want to add. Some items pertain to specific features and applications. The available items vary depending on what is active on your system.
Warning: Each report on your homepage runs individually. For example, a homepage with 10 reports runs each report every time it refreshes. Keep this in mind when adding content to your homepage. If your homepage consistently loads slowly, try removing reports to determine why.

You can reposition items on a homepage by clicking the item header and dragging it to the new location. To remove a homepage item, click the close icon (X) on the right side of the item header.

Table 100: Homepage items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports</td>
<td>Add reports to the homepage</td>
</tr>
<tr>
<td>Gadgets</td>
<td>Items such as a knowledge search field and sticky notes.</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>Knowledge base categories.</td>
</tr>
<tr>
<td>Labels</td>
<td>Labels that you use to organize records.</td>
</tr>
<tr>
<td>System Applications</td>
<td>Applications and modules.</td>
</tr>
<tr>
<td>World Clocks</td>
<td>Any available world clock.</td>
</tr>
<tr>
<td></td>
<td>Note: The world clock widget is for demo purposes only.</td>
</tr>
<tr>
<td>Gauges</td>
<td>All available dashboard gauges. Gauges are defined in System UI Gauges.</td>
</tr>
<tr>
<td>Catalog Categories</td>
<td>Active service catalog categories. The homepage uses the category’s desktop icon as the homepage icon.</td>
</tr>
<tr>
<td>Catalogs</td>
<td>Service catalogs, including all of their active categories.</td>
</tr>
<tr>
<td>Diagnostics</td>
<td>Information you can use for monitoring and troubleshooting the instance, like database connections and JVM garbage collection.</td>
</tr>
<tr>
<td>Live Feed</td>
<td>Your company feed.</td>
</tr>
<tr>
<td>Text Search</td>
<td>Lists of top searches in the instance.</td>
</tr>
<tr>
<td>Filters</td>
<td>System definition filters.</td>
</tr>
</tbody>
</table>

For more information on adding content to homepages, see Add existing reports to a homepage.

Edit widget appearance

You can edit how an object on a homepage, also called a widget, looks.

1. Move the pointer to the upper right corner of the widget to show the editing controls.
2. Click the edit widget icon on the right side of the item header.
3. Select one or more options to control the appearance of the widget, such as to show a border, set title alignment and size, and set the report height.
4. Use the Interactivity options to make the widget a subscriber or publisher.
   Interactive publishers require Performance Analytics Premium.
5. Click Done.
Change the homepage layout

You can change the layout of widgets on the homepage.

1. From a homepage, click the Change Layout button.
2. Select the layout you want to use.
   Administrators can create or modify layouts by navigating to Homepage Admin Layouts.
3. Click Change.

Figure 177: Change homepage layout
Delete a custom homepage

Deleting a customized page restores the default homepage for that user.

⚠️ Warning: If a user with the admin role clicks Delete page, it deletes the homepage from the instance, which affects all users. This action cannot be reverted.

1. Navigate to the custom homepage to delete.
2. Click the homepage settings icon (gear).
3. Click Delete page.
4. Click OK to confirm the deletion.

Homepage and content page layouts

Layouts are UI elements that define how blocks of content can be added to a page.

Layouts are used for homepages and content pages. Layouts provide the following functionality.

- Administrators can define custom layouts for homepages or content pages.
- Users who are allowed to modify their homepage can select a layout for their homepage.
- Users who are allowed to add content to their homepages can choose where in the layout to add content.

Most successful web sites use a fairly limited number of layouts to define the structure of a much larger number of pages. For example, a web site may have several dozen pages, but only two or three layouts.

Layout concepts

Layouts define the overall structure of the page by arranging where dropzones appear on the page.

The dropzone is where content blocks, which make up the content of the page, can be added. The name "dropzone" comes from the fact that content blocks can be dropped into any of these zones. Most content blocks match the width of the dropzone, so the dropzone controls both the location and sizing of the content block.

Defining a custom layout requires knowledge of Jelly script, but there are a number of out-of-box layouts that can be used. After a layout is chosen, the layout dictates where the dropzones on a page appear.

Content blocks can be added at any dropzone to create the actual content of the site. Every layout divides the page into one or more logical areas. A number of commonly used predefined layouts are available, but you can also define your own custom layouts.

Custom layouts

A homepage layout is a UI macro whose name begins with layout_. You can create a UI macro to define a custom layout.

To view the list of available layouts, navigate to Homepage Admin Layouts.

- Layouts are XHTML scripts that contains one or more dropzones.
- Dropzones are defined by a TD (table data cell) within the HTML where content can be placed.
For example, here is the code for a layout.

```xml
<?xml version="1.0" encoding="utf-8"?>
<j:jelly trim="true" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null"
xmlns:g2="null">
<table border="0" cellspacing="6" id="${jvar_name}" width="100%">
  <tr>
    <td colspan="2" id="dropzone0" dropzone="true"/>
  </tr>
  <tr>
    <td id="dropzone1" dropzone="true" valign="top" width="50%"/>
    <td id="dropzone2" dropzone="true" valign="top" width="50%"/>
  </tr>
  <tr>
    <td colspan="2" id="dropzone999" dropzone="true" valign="top"/>
  </tr>
</table>
</j:jelly>
```

Rules for scripting layouts:

1. A layout must contain at least one table.
2. All dropzones must be TDs within a table.
3. A dropzone has two key attributes:
   a. Its ID starts with “dropzone” (e.g., “dropzone2” or “dropzone3”).
   b. It has an attribute of dropzone="true.”
4. Dropzone IDs must be unique (e.g., you can’t have two dropzones named “dropzone1”).

Optional layout features:

- Nested tables are allowed, so it is possible to have a table within a TD within a table.
- There can be TDs that are not dropzones.
- Styles and formatting elements are acceptable.
- Fixed-width TDs (as opposed to variable width) are allowed, although some content, such as graphs, must have a significant minimum width.
- Fixed-height TDs are allowed.

Layout hints and tips:

If cellspacing and cellpadding are set to zero, the drag-and-drop algorithm may have trouble distinguishing one cell from another, since multiple empty cells can potentially occupy the same point in space. It is still possible to place things via the layout control, and they will render properly. However, to use drag-and-drop to move things around, do not drop both cellspacing and padding to zero.
Choose a layout

Certain users can modify the layout of their homepage.

Role required: any role that lets the user change homepage content.

For example, an ESS user cannot change the layout of a homepage, but an ITIL user can change it.

1. On the homepage, click Change Layout.

   The dialog box that appears contains a list of available layouts and a short description of each. Select a layout to see a simplified preview of the layout.

2. Select a layout and click Change.

   Note:
   1. If the page already has content and the layout changes, the existing content stays in the same dropzones it started in. For example, content in dropzone2 of the old layout appears in dropzone2 of the new layout as well, although the dropzone may be in a significantly different location on the page.

   2. If the new layout has fewer or different dropzones than the old layout, there may be orphaned content. For example, if there is content in dropzone5 of the old layout, and
the new layout does not have a dropzone, that content is now orphaned. Any orphaned content is moved to dropzone1.

Add content to a homepage

The Add Content interface allows you to specify into which dropzone you want to place your content. You can see this in action by clicking the Add content button.
When you select a piece of content, you see a preview of the content in the middle of the dialog. At the bottom of the dialog, you see a model of your current layout with an Add here link in each dropzone.
To add content to a particular dropzone, click Add here in the appropriate dropzone. Your content is automatically added without closing the dialog. You see the homepage change in the background.

Users who can change content on a homepage can search for widgets within a category when adding content to a homepage, and configure the appearance of widgets on homepages.

Homepage caching

Complex, frequently visited homepages can slow down instance performance by consuming system resources. Homepage caching can improve performance by using less resources to load homepages.

When this feature is enabled, individual homepage widgets are cached and can be used by multiple users until the underlying data they depend upon changes, requiring a re-render.

Administrators can configure properties for homepage caching.

Configure homepage cache properties

The render cache is enabled by default with a set of sensible defaults. An administrator can modify the configuration based on the needs of the particular instance.

This behavior is controlled by properties available at Homepage Admin Properties.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the homepage render cache</td>
<td>Enables or disables the entire cache. If you disable the cache, then nothing is cached and nothing is retrieved from the cache.</td>
</tr>
<tr>
<td>Maximum amount of time an entry stays in the cache</td>
<td>By default, the system pulls an entry out of the cache if its underlying data changes. For example, if you have a report of “incidents by priority” that goes in the cache, the system removes it from the cache if the underlying incident data is updated. However, even if the underlying data has not changed, the system automatically expires cache entries older than this age. The default is 60 seconds, meaning that, at most, a cache entry persists for 60 seconds before being expired.</td>
</tr>
<tr>
<td>Enable aggressive caching</td>
<td>If aggressive caching is turned on, then the only time entries are removed from the render cache is if they expire. Even if the underlying data changes, the system still returns the previously rendered chart/graph/whatever until it expires from old age. Setting this to true can significantly improve performance, but it does so at the expense of serving known stale data. Under some circumstances, however, a combination of aggressive caching and a short maximum cache age (see above), may be appropriate.</td>
</tr>
</tbody>
</table>

Homepage caching notes and limitations

Review these notes and limitations when configuring homepage caching.

1. Instances with less than one hundred or so concurrent users should not expect to see a significant benefit to this feature in most real-world scenarios. Homepage visits in these situations are infrequent enough that most widgets will have aged out of the cache before a second user visits
a homepage. If you do not experience performance problems with your homepages, tweaking the behavior of this cache is not recommended.

2. The homepage cache is segmented by company, domain, and roles, so users with different rights and visibility into the system cannot see each other’s data by pulling it out of the cache. This does, however, mean that cache efficiency will be lower for instances that make extensive use of domain separation.

3. In an environment with a cluster of multiple UI nodes (as opposed to a UI node and worker configuration), each node has its own homepage cache. Entries are removed from the homepage cache only when their data changes on the node upon which they are cached. Entries are always removed from the cache when they expire.

Homepage splash page

When the homepage splash page is configured, a lightweight splash page loads before a homepage loads. The result is a more responsive experience for users.

For example, after logging in, users can navigate directly to the information they need without waiting for the homepage to load.

![Homepage splash page](image)

Figure 178: Homepage splash page

Activate the homepage splash page

Homepage splash pages are automatically activated for new instances. If you are upgrading from a previous version, activate the Homepage Splash Page plugin if it is not already active.

Role required: admin

1. Navigate to System Definition Plugins.
2. Find and click the plugin name.
3. On the System Plugin form, review the plugin details and then click the Activate/Upgrade related link.

   If the plugin depends on other plugins, these plugins are listed along with their activation status.

   If the plugin has optional features that are not functional because other plugins are inactive, those plugins are listed. A warning states that some files will not be installed. If you want the optional features to be installed, cancel this activation, activate the necessary plugins, and then return to activating the plugin.

4. If available, select the Load demo data check box.

   Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance.

   You can also load demo data after the plugin is activated by clicking the Load Demo Data Only related link on the System Plugin form.

5. Click Activate.

Configure a property for a homepage splash page

The Homepage Splash Page plugin installs the glide.home.page property and modifies the value of the glide.login.home property.

1. Enter sys_properties.list in the navigation filter and press the Enter key.

2. Select the glide.home.page system property.

   This property defines which page to load when a user selects a homepage from the banner.

3. Set the Value field to one of the following strings.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To use the homepage splash page (default)</td>
<td>home_splash.do?sysparm_direct=true</td>
</tr>
<tr>
<td>To use homepages without the splash page</td>
<td>home.do</td>
</tr>
</tbody>
</table>

4. Click Update.

   The System Properties list reopens.

5. Select the glide.login.home system property.

   This property defines which page to load when a user logs in.

6. Set the Value as follows:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To use the homepage splash page (default)</td>
<td>home_splash.do?sysparm_direct=true</td>
</tr>
<tr>
<td>To use homepages without the splash page</td>
<td>home.do</td>
</tr>
</tbody>
</table>

   You can also specify a different login landing page, if desired.

7. Click Update.

Manage a service catalog homepage

The homepage for a service catalog provides the primary front end for ordering items within that catalog.

Administrators and catalog administrators can design a homepage in any of the following ways.

- Customizing the catalog homepage.
- Adding, removing, and arranging categories.
Enable content types

To select content types, also called widgets, to use for a catalog:

1. Navigate to Service Catalog Catalog Policies Properties.
2. In the List of content types (comma-separated) to allow on the catalog homepage (glide.sc.home.filter) property, enter the content types to use in the service catalog.

To see a list of content types available, navigate to System UI Widgets.

The default value is Service Catalog, which includes only service catalog categories. For example, to include service catalog categories and gauges, set the property to Service Catalog, Gauges.

Customize a catalog homepage

1. Navigate to Service Catalog Catalog.
2. Click the add content icon (+) at the top of the page to add a category.
3. Select a category in the middle panel of the pop-up window that appears.
Figure 179: Service Catalog add categories pop-up window
4. Click Add here in the location where the category should appear on the homepage.
5. Repeat steps 3–4 to add more categories.
6. Close the pop-up window.
7. To change a category’s location, drag it to the appropriate place.
8. To remove a category, click the (X) icon on the top right of the category header.
9. Add a shopping cart on the page.

Define the mobile layout

You can configure the mobile layout for categories within a service catalog.
Role required: admin

By default, service catalog categories appear on mobile devices in the same order as on desktop devices.
1. Navigate to Service Catalog Mobile Admin Mobile Layout to display a list of service catalogs.
2. Click the lookup icon for the service catalog you want to configure.
   The mobile layout details for that catalog displays.
3. Click Edit to select which categories appear on mobile devices, and in which order.
4. Add, remove, or reorder the selected mobile categories, and then click Save.
Configure content types

You can configure content types for the service catalog.
You can use service catalog properties to configure content types, which are also called widgets.

Navigate to Service Catalog Catalog Policies Properties to view service catalog properties.
Navigate to System UI Widgets to see a list of content types available.

Enable content types for the Service Catalog

By default, only service catalog categories are displayed on the service catalog homepage.
To select additional content types, add these types in a comma-separated list in the List of content
types (comma-separated) to allow on the catalog homepage property (glide.sc.home.filter).

For example, to include service catalog categories and gauges, set the property to Catalog Categories,
Gauges.

Display the expand / collapse icon

By default, the expand / collapse icon is not displayed for categories on the service catalog homepage.
To display this icon on the left of each category, check Yes beside the Toggle whether the
expand/collapse icon is rendered for category widgets on the service catalog homepage property
(glide.sc.homepage.show.collapse).

Note: To return the display to the default desktop layout settings for the portal page
associated with that catalog, click the Replace categories with desktop layout related link.
Configure search and navigation

You can use service catalog properties to configure search and navigation within the service catalog homepage.

Navigate to Service Catalog Catalog Policies Properties to view service catalog properties.

Restrict search access

Each catalog homepage provides a search bar to help locate items not displayed on the homepage. By default, any user who can access the catalog homepage can search using this search bar.

To restrict access to this search function by role, use the List of roles (comma-separated) that can search the service catalog property (glide.sc.can_search).
For example, to only allow logged-in users to access search, set this to blank. To remove the search function for all users, set this to None.

Note: Search results only show items that the logged-in user can access.

Hide search results from inactive categories

By default, search results are returned from all categories, including inactive categories.
To avoid returning results from inactive categories, set the Service catalog searches return items in inactive categories property (glide.sc.search.disabled_cats) to No. For example, when designing a new category, you may want to avoid users seeing search results from this category until you are ready to make it active.

Note: Security constraints may also make a category or catalog item inaccessible.

Restrict search by item type

By default, a search field does not appear when viewing order guides, record producers, and wizard launchers.

To define which catalog item types do not show the search field, list these types in the List of class names for catalog items that do not have the search field displayed (glide.sc.item.cannot_show_search) property.

For example, to enable searching when viewing record producers, remove sc_cat_item_producer from this list.
Request a reset of a password for a service or an application.

Request a reset of a password for a service or an application.

Whose password needs to be reset?

Joe Employee

What application password do you need reset?

How would you like to be contacted with your new password?

- More Information

- Email
- Telephone
- SMS

Submit

Figure 182: Service catalog search bar removed
Enable breadcrumb links

By default, breadcrumbs appear without links when using content management pages as service catalog homepages.

To display these breadcrumbs with links, set the Use links for breadcrumbs rendered in Service Catalog pages accessed via a CMS site property (glide.sc.use_breadcrumb_links.cms) to Yes. This provides greater navigational control for end users.

Disable search suggestions

By default, service catalog searches display “Did you mean?” suggestions if a search does not return any results and an alternate spelling or similar recent search does.

To disable these suggestions, set the Specify whether search suggestions should be enabled property (glide.sc.search.suggestions) to No.

Change the parameter for parallel homepage rendering

The system uses a parallel rendering algorithm to speed up home page rendering.
Role required: admin

In testing, the average performance benefit is between 20% to 50% depending on the page in question. Administrators can set parallel homepage rendering properties for optimal performance on an instance. To change the parameters for parallel homepage rendering, add the following system properties.

1. glide.ui.homepage.parallel: enables or disables parallel homepage rendering. The default value is true.
2. glide.ui.homepage.parallelism: sets the number of threads to use when rendering a homepage. The default value is 2.

Turn on homepage render time

To see render times on homepage widgets, you can turn on homepage debugging.

Role required: admin

Navigate to System Diagnostics Debug Homepage Render.

For the remainder of your session, load times appear on homepage widgets and debugging messages appear at the bottom of homepages. Use these times to identify items that may slow down homepage rendering.
Troubleshoot a report on a homepage

You can troubleshoot reports that may be impacting homepage performance by identifying which reports are on the problem homepage, determining which reports are running slowly, and correcting problems in slow reports.

Role required: admin

1. Navigate to Homepage Admin Pages.
   Opening the homepage record instead of the homepage saves time and system resources.
2. Open the problem homepage record.
3. In the Portal related list, note item names in the Summary field.
   These items may not all be reports.
4. Enter sys_report.list in the navigation filter to open a list of all reports.
5. Search for a report title that matches an item on the homepage that you noted down from the Summary field.
6. Open the report and run it.
7. If the report runs slowly, look for and correct the following common reporting mistakes.
   • Returning too many results
   • Grouping by fields such as duration or name
   • Reporting on a user-created table that uses many joins on other tables
8. If the report runs slowly and correcting common mistakes does not help, examine the type of report and what data it reports. Look for ways to optimize or replace the report.
9. Repeat these steps for each item on the homepage.

Create a widget that displays a ServiceNow UI page

You can create a widget that displays a ServiceNow UI page. This widget can be added to homepages and dashboards.

Role required: admin

A UI page is a ServiceNow page that is not a list or a form. Certain UI pages, such as external site widgets or gadgets, may not display properly on a homepage or dashboard.

1. Identify the UI page that you want to create into a widget and note its name.
2. Navigate to System UI Widgets and click New.
3. Enter a Name for the widget. This field defines the first category a user selects when adding the widget to a dashboard or homepage.
4. Enter the following code, making substitutions as noted below.
   • Widget is the title of the widget. This title appears on the top of the widget when you add it to a dashboard or homepage.
   • widgetname is the name of the UI page from step 1. This field defines the second or subcategory a user selects when adding the widget to a dashboard or homepage.

```javascript
function sections() {
    return {
        'Widget': {
            'type': 'widgetname'
        }
    }
}
```
function render() {
    var scope = gs.getCurrentScopeName();
    scope = (scope == "rhino.global" ? "" : scope + "_");
    var page = renderer.getPreference('type');
    return renderer.getRenderedPage(scope + page);
}

function getEditLink() {
    var scope = gs.getCurrentScopeName();
    scope = (scope == "rhino.global" ? "" : scope + "_");
    var page = renderer.getPreference('type');
    return "sys_ui_page.do?sysparm_query=name=" + scope + page;
}

To learn how to make a UI page without using a framework page template, see the Making a UI page without using the framework page template blog posting by a developer in the ServiceNow Community.
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