



Configuration vs Customisation

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INTRODUCTION



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Certified ITIL expert with over 10 years of hands-on experience working with various service management products, including ServiceNow. He is currently working as a ServiceNow consultant based in Perth.

AGENDA

How ServiceNow defines configuration and customisation

Examples of configuration and customisation

Impacts of customisation

Basic guidelines on customisation

Group discussion

Configuration

- Configuration is tailoring an instance using ServiceNow best practices and API to meet your requirements without making changes to code that is part of the baseline installation of an instance.

Customisation

- Customisation is any change to code that is part of the baseline install of a ServiceNow instance

https://hi.service-now.com/kb_view.do?sysparm_article=KB0553407

CONFIGURATION EXAMPLE

Before an incident is submitted, the resolution code must be a mandatory field. If it is not completed, the record should not be updated.

A UI Policy can be used to meet this requirement which is one of the many tools within the platform that are used to tailor specific functionality to meet specific requirements

CUSTOMISATION EXAMPLE

You are in the process of implementing the Service Catalog and have a requirement to add additional fields to gather data on the catalog checkout page.

The catalog checkout page is a UI Macro that is part of the baseline installation of an instance. A change to this code would be considered a customization.

IMPACTS OF CUSTOMISATION

- You would need to maintain that customised solution going forward
- You would be responsible for making sure that functionality still works after an upgrade
- Yes, you still receive support on a customisation. However, if during a support call it is determined that the customization that was made is the cause of the issue, the support team would advise you to revert back to the code that was part of the baseline installation so that the support team can assist you.

GUIDELINES FOR CUSTOMISATION

- Make a duplicate record of the code that is to be customised.
- Make the original record inactive.
 - Any changes that are only the result of changing the Active field are excluded from update tracking. This allows you to change the field value without affecting the Updated and Updated By system fields.

Common scenarios leading to customisation:

- *'The out-of-the-box processes are good but they won't work for us because...'*
- *'This is how it works in the other tool'*

- Discussion

Thank You

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