

Zurich Release Highlights

▶ POPX

Agenda

Introductions

What is a Family upgrade?

CSM Update

ITSM Update

ITOM Update

SPM Update

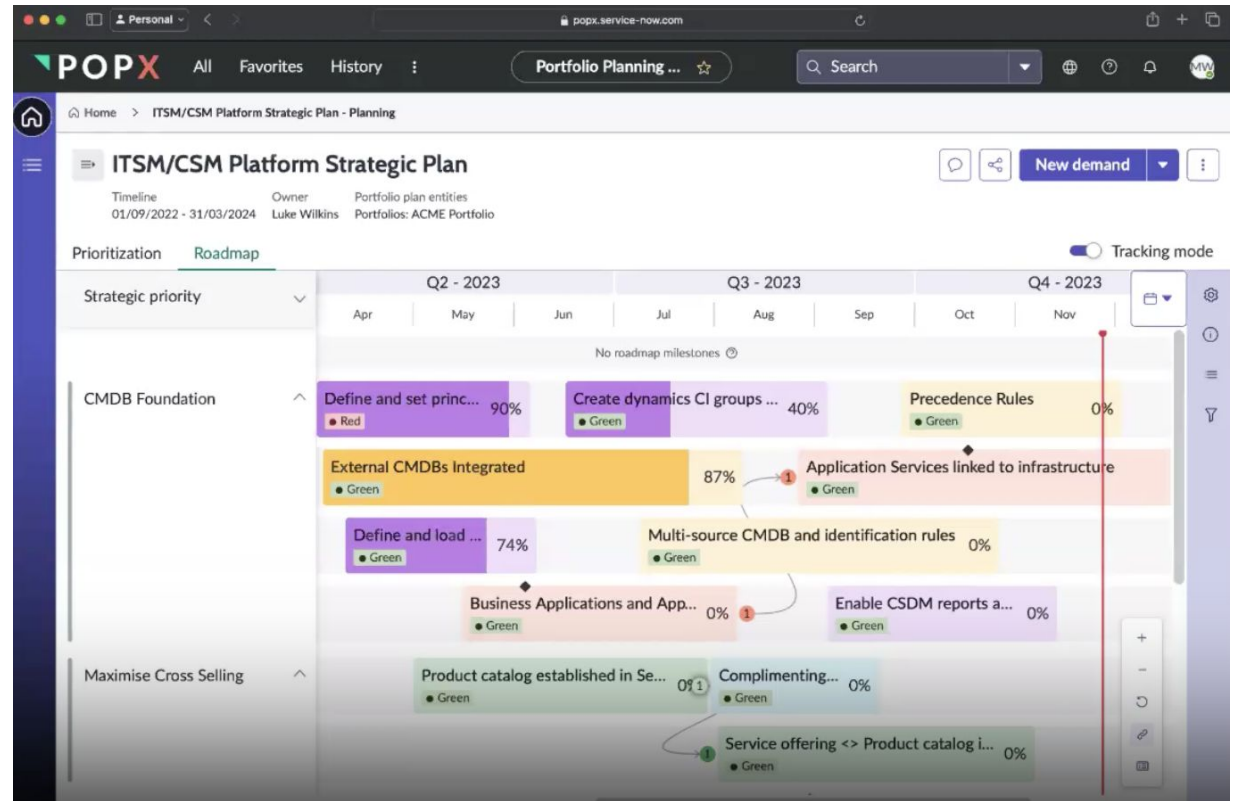
Other platform features

Q&A and wrap-up

What happens next?

See something that might add value?

Talk to your POD or account team.



What is a family upgrade

What is a family release

Family release

A family release is ServiceNow's major platform upgrade, delivered twice per year (e.g., Yokohama, Zurich and Australia).

It is a full platform version update that includes:

- Core platform enhancements
- Updates across all product lines (ITSM, CSM, HRSD, ITOM, etc.)
- Performance and security improvements
- New platform capabilities and UI updates
- Deprecations and technical changes

Store release

A Store Release is an update to a specific scoped application distributed via the ServiceNow Store.

Key Characteristics

- App-specific (not platform-wide)
- Can occur at any time but usually monthly
- Installed/updated via the Store
- Usually independent of family upgrades
- Typically lower risk and more targeted

Within the POPX Managed Service:

- Customers own business outcomes and process direction
- POPX owns platform integrity, architectural governance, and upgrade protection

Customisation decisions must support both.

Why customisation governance matters:

ServiceNow is engineered to be upgraded twice per year. Heavy or uncontrolled customisation directly impacts:

- Upgrade cost and effort
- Platform stability
- Security posture
- Performance
- Ability to adopt new OOTB innovation
- Long-term managed service costs

Every custom change becomes a permanent support obligation.

CSM

CSM Workspace - Chat Information Tabs

- Last release we had SLAs for chat tabs introduced.
- The CSM centered chat interaction record page provides a chat component in the centre of the workspace that agents can use to handle customer chat conversations.

The screenshot displays the SAP Financial Accounting application chat interface. At the top, there are tabs for 'Lists', 'CS000001', 'CS000002', and 'Steve Rogers'. The main header reads 'SAP Financial Accounting application appears inactive' with buttons for 'Compose message', 'Discuss', 'End chat', 'Create case', and 'Save'. The interface is divided into three main sections:

- Customer:** A contact card for Steve Rogers, including mobile and business phone numbers, email, and address (2255 Lawson Ln, San Diego, California).
- Interaction:** A 'Customer history' section showing recent activities such as 'Steve Rogers called John Jason', 'Steve Rogers viewed a Knowledge article', and 'John Jason created a case'.
- Active chat:** A chat window with John Jason. The chat history shows a greeting from John and a response from Steve. A 'Solana Platinum Card' is featured in the chat, with a note that it is available to Steve if he has not received a Sapphire card.
- Recommendations:** A sidebar on the right showing suggested actions, including 'Block lost credit card' with a 'Summarize' and 'Send in chat' button.

CSM - Customer History enhancements

The following enhancements allow you to control grouping, appearance, and refresh behavior in customer history:

Grouping and Filtering:

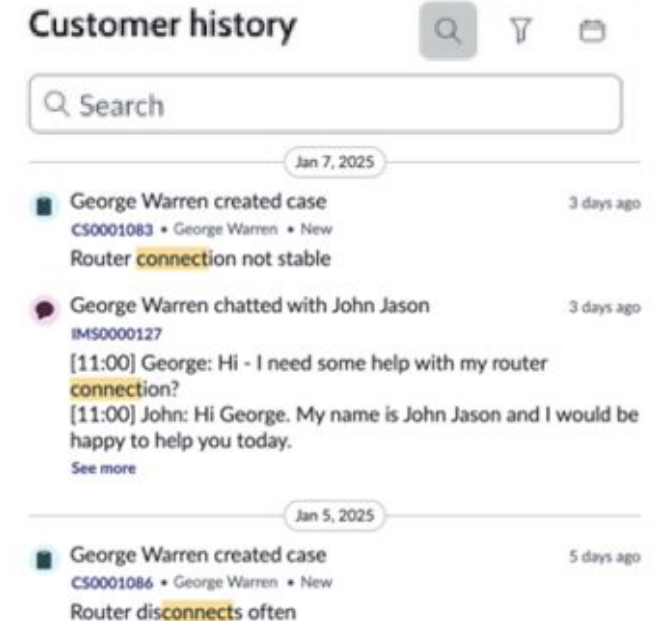
- **Time Grouping:** A new property enables the selection of monthly or quarterly (Q1-Q4) time grouping in date filters.

Appearance:

- **Feed Customisation:** Admins can now configure feed icons and their background colors using a property that offers predefined color options.
- **Search Bar Control:** A new search icon allows agents to easily show or hide the search bar.

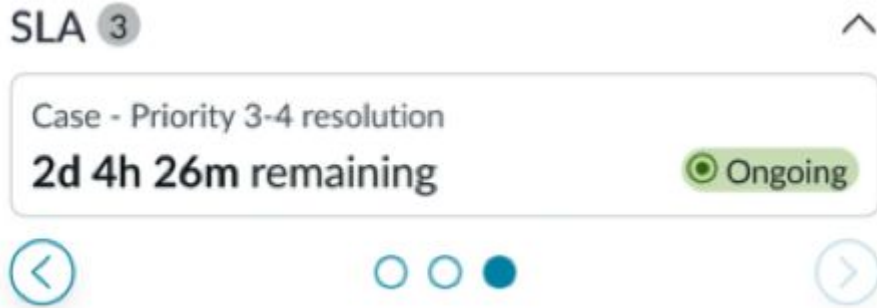
Refresh Behaviour:

- **Activity Display:** Feeds can now surface activities based on the last updated timestamp in Customer History, enabled by a new property.
- **Dynamic Updates:** Customer History feeds now refresh automatically. This refresh applies only to records in the Customer History activities table and within the current context (e.g., Contact). Other tables and parent records are not included.

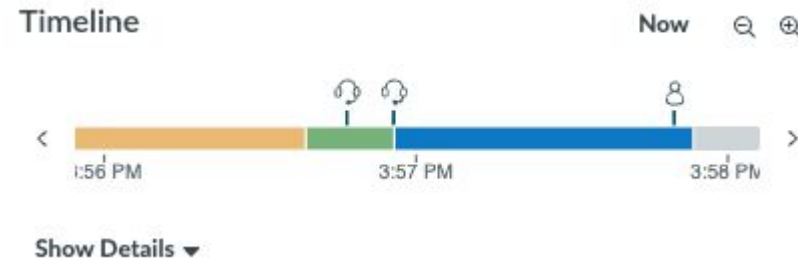


CSM Workspace - Improvements

Task SLA cards component



Task activity timeline preset and controller



Modeless dialogs

Modeless dialogs are windows that overlay the main window content in CSM Configurable Workspace.

Customer service agents can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables agents to interact with the window content and the overlay content at the same time. Agents can use modeless dialogs to do the following:

- Create comments and work notes to post to the activity stream.
- Create and send emails and reply to or forward emails.

Other CSM Enhancements

The ServiceNow Link Manager plugin can be found on the Google Chrome, Microsoft Edge, and Mozilla Firefox stores.

Streamline tab management and reduce browser clutter with ServiceNow Link Manager:

- Automatically consolidates new ServiceNow related tabs into an existing open ServiceNow tab.
- Provides cross-platform support.
- Enables agents to share record links, such as cases, through platforms like Gmail, Microsoft Teams, Microsoft Outlook, and other web tools integrated with ServiceNow.
- These links open using ServiceNow Link Manager, ensuring the record loads in the correct workspace and context.
- Provides a user-friendly interface that is easy to enable and turn off directly from the extension settings in the respective browser.

Display the special handling notes at any time by selecting Special handling notes from the More actions menu on the case record action bar.

Special Handling Notes [X]

- 1 - Critical** [Dismiss]
Urgent issue
Follow up immediately.
- 2 - High** [Dismiss]
Urgent issue reported
There is an urgent issue reported for this account.
- 3 - Moderate** [Dismiss]
Update contact numbers

Other CSM highlights

CSM Data Classification Store App

Utilise the new **CSM Data Classification Store** application to classify CRM data. It includes base system classifications such as internal, personally identifiable information (PII), confidential, and others. This solution leverages the ServiceNow AI Platform's data privacy features, specifically data classification, to enhance data security and apply required protection measures.

CSM Billing Account Core Store Application

Install this new application to establish a foundational data model and hierarchy for managing billing accounts. Key capabilities include:

- Defining billing relationships.
- Establishing account hierarchies.
- Tracking financial responsibility.

Sold Product Form Enhancements

Updates to the Sold Product entity offer two main improvements:

- **Billing Account:** A direct reference to the associated Billing Account is now available in ServiceNow® CRM. This provides agents with instant access to financial data, which in turn:
 - Offers visibility into payment terms.
 - Fosters customer trust through transparent billing.
 - Supports accurate revenue recognition.
- **Start and End Dates:** Provides full lifecycle state-transition support (In preparation, Active, Expired, Cancelled) with automated updates driven by these dates.

ITSM

ITSM - Change enhancements

- Review and authorise change requests and review recently implemented changes in the Change Advisory Board Workbench in the Service Operations Workspace (SOW).
- Track conflict detection using the Change - Conflict Detection flow and the Change Management Worker table instead of Progress Workers.

Propose a standard change template in Service Operations Workspace

▼ Change templates

My proposals

Open proposals

All templates

▼ Change Advisory Boa...

My CAB Definitio...

All CAB Definitions

My upcoming CA...

Upcoming CAB m...

All CAB meetings

Continual Improvement Management (CIM) Enhancements

- **CIM Roles:** Implement and monitor improvement initiatives as a CIM coordinator or manager without ITIL role restrictions.
- **Integrated Applications:** CIM managers or coordinators can now create change records directly from CIM tasks. If necessary roles (ITIL or change_write) are missing, contact the system administrator.

Service Management Enhancements

- **SLA Timer Configuration:** Configure a 'First to Breach' SLA timer for target-based and advanced condition-based SLAs to better manage service level expectations for incidents.

ITSM - Service Ops Workspace

- Configure the Microsoft Teams integration with Notify in SOW Admin Center.
- Use visual indicators like colors and icons on chat session tabs to notify agents about unread messages to maintain the Service Level Agreement (SLA) for the chats in SOW.
- Optimise your viewing experience by resizing the modals in SOW.
- Find similar incidents and add them as child incidents to a major incident record.
- Support subflows in the On-Call trigger rule configurations.
- Configure the alerts and notifications in SOW to automatically dismiss within the specified time.
- View the dependency map for reference fields in a separate tab within the workspace.
- Starting in version 8.2, you can do the following:
 - Analyse the metrics for configuration items (CIs) in the Digital End-User Experience (DEX) and Service Observability (SO) UI dashboard view on the Investigate tab of an incident record.
 - Access and configure SOW from the Admin Center using granular feature admin roles.
 - View the recent task records to which the knowledge article is attached.
 - Manage user actions on the reference fields with the glide list action.
 - Perform DEX actions on a Configuration Item (CI) using the Action library from the contextual panel of the record page.
 - View the details of conflicts detected, and manually run conflict detection in the change request form.
 - Configure monthly roster rotation for an on-call schedule.
 - As an on-call shift administrator with the rota_admin role, access Teams, Schedules, and Home pages in SOW.

ITOM

Discovery and Service Mapping

Cloud Discovery and Visibility:

- **Alibaba Cloud Support:** Discovery now includes support for Alibaba Cloud (Patterns store v1.29.0+), providing real-time visibility and CMDB population.
- **Unified Cloud Discovery Scheduling:** Discovery Admin Workspace (v1.11.0+) centralises scheduling for AWS, Azure, and GCP, consolidating cloud discovery capabilities and paving the way for the deprecation of Cloud Discovery Workspace.
- **Agentless AWS EC2 VM Discovery:** Detailed discovery of AWS EC2 VMs uses AWS Systems Manager (SSM), eliminating the requirement for direct SSH or PowerShell connections.
- **New Product Discoveries:**
 - Introduces support for Alibaba Cloud, OCI GovCloud, 10 Azure services, 22 AWS services (including a new AWS API Gateway model and AWS data centers resources), OLVM templates/disks/networks, and Nutanix Prism (API v4).
 - Adds 22 Azure services, GCP Cloud Function, GCP AlloyDB, and GCP Redis Cluster.

Configuration and Administration:

- **Discovery Guided Setup Access:** Access ITOM Discovery Guided Setup directly from the Discovery Admin Workspace home page (v1.11.0+) for efficient configuration and accurate CMDB visibility.
- **Discovery Admin Workspace Actions Menu:** Version 1.10.0 incorporates an Actions drop-down on the Diagnostics page's Anomaly Detection tab, offering quick access to settings and a "Clear all anomalies" option.
- **Pattern Designer Viewer Role:** The new `pde_viewer` role (Pattern Designer Enhancements v3.9.0+) permits viewing associated tables, Command Validation Tasks, and Command List modules, but prohibits modifications.

Operational Efficiency and Governance:

- **Pattern Update Retention:** Activating/deactivating a pattern (Visibility Content v6.28.0+) is no longer considered customisation, ensuring continuous receipt of updates. Upgrading will reset previously customised patterns to the latest version while retaining the last active field value.
- **Tag Categorisation:** Tag Governance (v1.7.0+) automates consistent tagging using five predefined categories.
- **Cloud License Estimator (CLE):** Provides an estimate of cloud resources eligible for licensing prior to adopting ITOM cloud solutions.
- **Service Mapping Automated Service Suggestions:** A new property enhances candidate relevance by automatically excluding non-operational or retired servers from Application Service Candidates.

Event Management

AIOps and Alerting Enhancements

- **Mixed Alert Grouping:** Combines CMDB and tag-based strategies to reduce noise and speed response in the Service Operations Workspace. Use "Criteria Type" and "Related CIs" for combined grouping.
- **AIOps 360 Overview Dashboard:** Comprehensive dashboard for actionable insights on product value, operational efficiency, and automation impact, informing faster IT operations decisions.
- **"Recommended" Dashboard Category:** Added for easy identification of ITOM-approved content (e.g., AIOps 360 Overview and Value Realisation).
- **Centralised Management (ITOM AIOps Configuration Center):** Central hub for managing AIOps settings, simplifying monitoring tool integration, optimisation of alerts/metrics/logs, and management of services/dashboards/teams/authorisations.

Incident and Impact Management

- **Delay Incident Creation from Alerts:** Configure a delay in Respond Automation to allow alerts to auto-close, reducing unnecessary incident creation.
- **Application Services for Impact Calculation:** Filter application services used in impact calculation for focused, accurate results.

Express List® Updates (v26.9.0 unless noted)

- **View Links Between Alerts:** Investigate connections in alert groups via Link View (now for log analytics-based and mixed groups).
- **Anomaly Information in Preview Panel:** Review anomaly visualisations for log analytic-based and metric intelligence alerts in the preview panel.
- **New Properties & Time Ranges:** Admins can configure time delay for live list update resumption after a pause, and customise time range options, including the default.
- **Respond to Multiple Alerts:** Execute response actions on multiple alerts simultaneously.

Service Operations Workspace List Updates

- **Live Updates Functionality:** Toggle switch enables/disables automatic alert updates. A badge indicates available updates when off. Setting is saved per user.
- **New Dependency View for Alerts:** Explore the Dependency view via the preview panel (CI topology), Utilities panel, action drop-down, or Core UI alert form.

Integrations and Connectors

- **Metric Connector in Integrations Launchpad:** Configure metric pull connectors to automate data retrieval and integrate external metrics.
- **Dynatrace Metric Connector:** Bring metrics into Metric Intelligence for visualisation, enrichment, dynamic thresholds, and anomaly detection.
- **Datadog Metric Connector:** Integrate metrics with Metric Intelligence for anomaly detection, visualisation, enrichment, and correlation with events/log alerts.
- **Kafka Connector:** Stream time-series metric data from Kafka topics into Metric Intelligence for real-time monitoring, anomaly detection, and alerting.
- **Support for Multiple AWS Subscriptions:** Multiple AWS member accounts can forward CloudWatch/EventBridge events to a centralised account via a single SNS topic to the ServiceNow Event Ingestion endpoint, reducing onboarding effort.

SPM

Project Management Enhancements with Project Workspace

- **Resource Assignment Management:** Automatically end resource assignments when a project concludes. View detailed assignment information and synchronise assignment dates with the project timeline.
- **Streamlined Resource Editing:** Edit resource details directly from the Resource page, eliminating the need to switch between different views.

Now Assist for Demand Management

- **Identify Similar Records:** Leverage the "identify similar records" skill to detect existing demand records that are contextually similar (based on Name, Description, and Business Case fields) when creating or editing a demand.

Converting Demands to EAP Entities

- **Quick Conversion:** Easily convert demand records into Enterprise Agile Planning (EAP) entities, such as Epic, Feature, or Capability.
- **Automatic Record Generation:** The system creates a new record of the selected EAP entity type, duplicates common fields from the original demand, and automatically sets the demand's status to Approved.

Project Workspace

Project Playbooks

- Define structured stages and activities for project tracking.
- Two new out-of-the-box playbooks are available: Project Default and Stage-gate Default.
- Users can utilise default playbooks or create custom ones.

Status Report Management

- **Monitor and Update Status:** Track status using a dropdown. Only Project Managers can change the status from Draft to Published upon completion.
- **Copy and Edit Enhancements:** Status reports can be duplicated without needing the form modal. Duplicated reports automatically refresh with current project data (status, milestones, metrics), while retaining original static/manual data.
- **Editing:** When editing is disabled, all fields are read-only. When enabled, only dynamic fields are read-only. Reports can be edited in both cases via the "Edit Status Report" context menu action.

Resource Assignment Updates

- Access and modify resource details directly from the Resource page, eliminating the need to go through the Resource Management Workspace.
- End resource assignments automatically upon project conclusion.
- View and synchronise assignment dates with overall project dates.
- Adjust assignment dates to accommodate dependencies or resource availability.

Project Financials

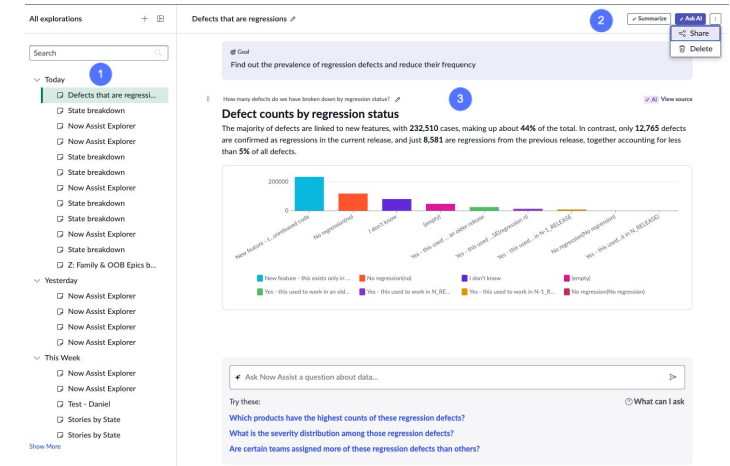
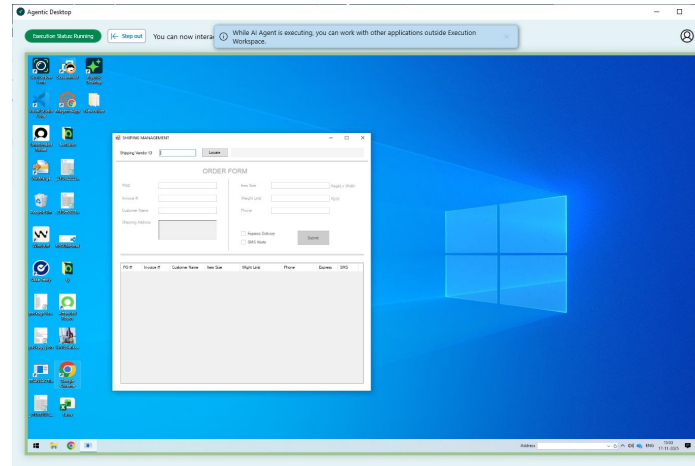
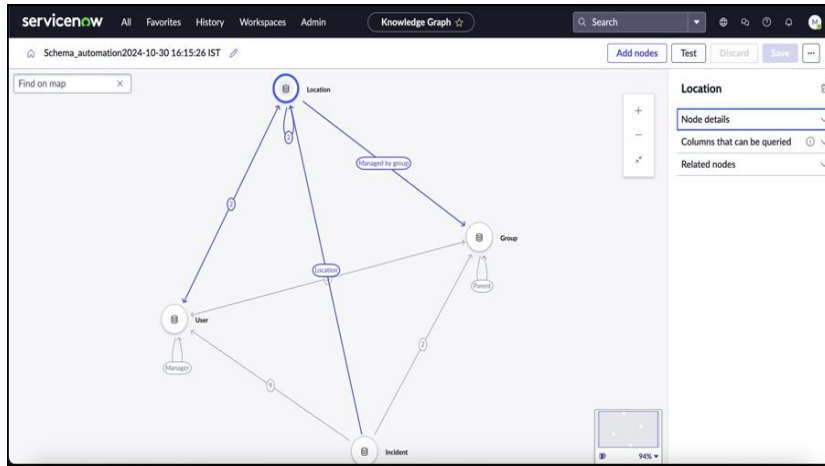
- Track total project costs by viewing only the planned costs of planning items.
- Use 'Display mode' for focused views of financial data.
- Manage planned and actual monetary benefit plans via the Cost and benefits screen to assess financial performance.
- Multicurrency support allows viewing and managing records in the Investment currency (which may differ from the functional currency).
- Manage multiple financial records (e.g., planned/actual expenses and benefits).
- Generate labor costs for sub-projects based on resource assignments.

Outside features

Wider AI Updates

Summary

AI features are being introduced across all products. Most features require a subscription to both the NowAssist product and the specific product they are attributed to.



Knowledge Graph

Knowledge Graph enables you to create and manage a Knowledge Graph schema for default integrations with Virtual Agent.

Agentic Desktop

Agentic Desktop enables users to design and manage automated desktop actions, minimising repetitive tasks. AI agents can autonomously or semi-autonomously execute these actions across various systems, including those without APIs.

Now Assist for Platform Analytics

Now Assist for Platform Analytics consists of several skills and applications that let you generate and work with Platform Analytics objects through Generative AI.



Requires ServiceNow NowAssist licences

More information: [Intelligent Reporting](#)

Order Management highlights

Handle move orders support.

- Enhance the Order management (OM) integration with Strategic Portfolio Management (SPM) to enable projects for site and maintain program project and subproject hierarchy.
- Enables agents to change the location for product inventory at the order line level.
- Support for nested objects, arrays, and custom attributes to model complex products.
- Support for order header discounts.



Field Service Management

Summary

FSM updates have been summarised here as some POPX customers are entering this space. Some features may be part of heightened licences.

Using Dispatcher Workspace

- Use the advanced resource filter to sort contractors and equipment.
- Add agents to see their schedules or assign tasks, without loading the entire assignment group or territory.
- Set up the calendar to use multiple time zones at once.
- Navigate from a work order task to related smart assessments.
- Manually assign work order tasks to agents.

Records Page

- Perform tasks previously limited to Dispatcher Workspace:
 - Flag a work order task.
 - Use assignment assistance.

Schedule Optimisation

- Initiate immediate optimisation for in-day events (new priority task, cancellation, PTO, late agent).
- Assign the best agent based on efficiency (Field Service Agent Efficiency).
- Define work, travel, and overtime penalty values for agents to guide optimisation.
- Improve scheduling by assigning dependent tasks to a single technician within the same shift.

Workforce

- Managers can show/hide work order tasks from the Calendars tab; also visible in Hybrid and Map views if Workforce Optimisation for Field Service is enabled.

Field Service Scheduling

- Manage resource attributes for any duration.

Appointment Booking

- Enable better control over task sequencing using new dependency types ('Finish to Start - Same Day', 'Finish Together' with lag options).
- Enhance operational insight with improved visualisations: dependency trees, conflict alerts, and task indicators.
- Optimise appointment recommendations by allowing radius configuration at the territory level.
- Enhance appointment recommendations by allowing grading against user-defined similar services.
- Increase scheduling flexibility with new features to support slot overlap and overrides, enabling territory-based customisation of appointment windows, default schedules, and specific slot-level overrides.



Requires ServiceNow Field Service Management add on licences

More information: [Field Service Management Product](#)

Questions?

▼ POPX

Australia is coming - GA is Early May

Look-out for Australia highlight webinars in May/June before the POPX Upgrade

Do check out the release notes

If you want to know more, raise with your POD

Check out previous webinars and lookout for upcoming ones

Thank you

