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ServiceNow Certified System Administrator (CSA) Certification Study Notes

Code: servicenow-csa

Platform Overview (~15%)



ServiceNow Architecture

Understanding the platform foundation

What is ServiceNow?

- **Cloud-based PaaS:** Platform-as-a-Service running entirely in the cloud
- **Multi-instance architecture:** Each customer gets their own dedicated instance
- **Single System of Record:** Unified platform for IT service management
- **Now Platform:** The underlying technology powering all ServiceNow applications

Key Exam Concept

ServiceNow uses a multi-instance architecture where each customer has their own dedicated instance with isolated data. Instances are identified by unique URLs (e.g., yourcompany.service-now.com).

Instance Types

Instance Type	Purpose	Data
Production	Live environment for end users	Real production data

Analytics (⌘⇧A)

Feedback

Instance Type	Purpose	Data
Development	Building and testing customizations	Sample/cloned data
Test/QA	Quality assurance and UAT	Cloned from production
Sandbox	Training and experimentation	Demo data

Release Cycle

- **Family releases:** Named alphabetically (Utah, Vancouver, Washington, Xanadu)
- **Two major releases per year:** Typically March and September
- **Patch releases:** Hot fixes and security updates between major releases
- **N-1 Support:** ServiceNow supports current and previous release

User Interface & Navigation

Navigating the ServiceNow platform

UI Components

Banner Frame

Top header containing global search, Connect chat, system settings, help, and user menu. Always visible across all pages.

Application Navigator

Left sidebar providing access to all modules and applications. Users can favorite frequently used modules.

Content Frame

Main working area displaying lists, forms, homepages, and dashboards. Can be split into multiple tabs.

Filter Navigator

Type-ahead search in the Application Navigator to quickly find modules by name.

Lists

- **Display multiple records:** Show data from a table in row format
- **Column configuration:** Users can add, remove, and reorder columns
- **List controls:** Filter, sort, group, export, and refresh data
- **Context menu:** Right-click options for record actions
- **List v2/v3:** Modern list experience with improved performance

Forms

Form Element	Description
Form Header	Record number, buttons, and UI actions
Form Sections	Groupings of related fields
Related Lists	Associated records from other tables
Activity Stream	Journal entries, work notes, comments
Form Context Menu	Right-click for field-level options

Exam Tip

Know the difference between personalization (user-specific changes) and configuration (system-wide changes). Users can personalize their views without admin rights.

Applications & Modules

Core ServiceNow applications

Core ITSM Applications

Incident Management

Problem Management

Restore normal service operation as quickly as possible. Key table: incident

Identify root causes of incidents and prevent recurrence. Key table: problem

Change Management

Control changes to minimize risk and disruption. Key table: change_request

Service Catalog

Self-service portal for requesting services and items. Key table: sc_request

Knowledge Management

Create and share knowledge articles. Key table: kb_knowledge

Asset Management

Track and manage IT assets throughout lifecycle. Key table: alm_asset

Application Scope

- **Global scope:** Accessible across the entire instance
- **Application scope:** Limited to specific application boundaries
- **Scoped applications:** Custom apps with their own namespace (x_company_appname)
- **Store apps:** Applications from the ServiceNow Store

Best Practice

Always develop customizations in a scoped application when possible. This protects your code during upgrades and makes it portable between instances.



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