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Lab Guide

Technical Best Practices 101:

Plan for Success

Chuck Tomasi & Jonatan Jardi

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

This lab explains how to work as a team to gather requirements for building an access request system. The lab leader(s) simulate your process owner to let you know what they think they need. Your job is to turn their needs into functional and technical requirements.

Lab 1.1
Requirements

Discussion

Your process owner has provided you with the following requirements for an access request system.

1. Create an access request system.
2. Concept: Recipient is “modeled” after another user.
3. The request has a list of add/remove actions for the fulfiller.
4. Each entitlement with an owner requires an approver.
5. No owner means it’s a “freebie” (can be fulfilled immediately).
6. If the owner is the recipient, it becomes a “freebie.”
7. Justification for the request is required.
8. Access request admins != itil users (new role).

What questions do you have?

Lab Success Verification

There is no verification for this lab.

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Lab Goal

Create the table(s) needed to support the requirements gathered from the previous lab.

NOTE: Fields will be created in the next lab.

Lab 2.1 Create Tables

Before You Begin

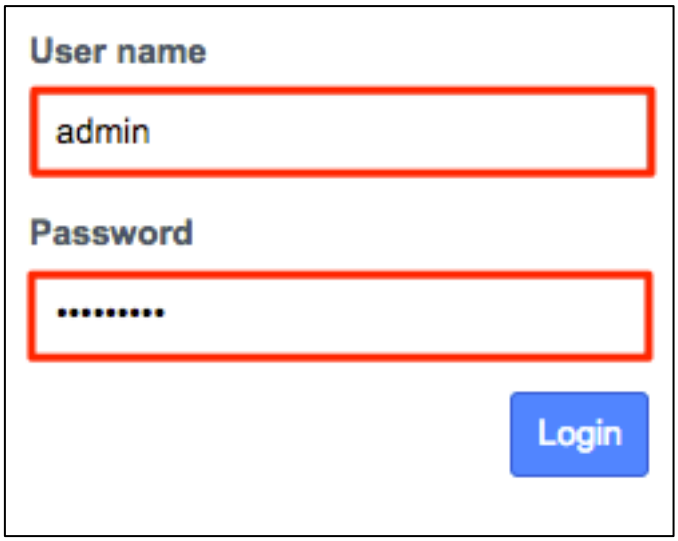
Consider the following issues before creating the requirements tables:

- What would be good names for these tables?
- Should either or both of these be extended?
  - If so, what base table would be a good place to start?
  - If we extend the table, what should we be aware of?

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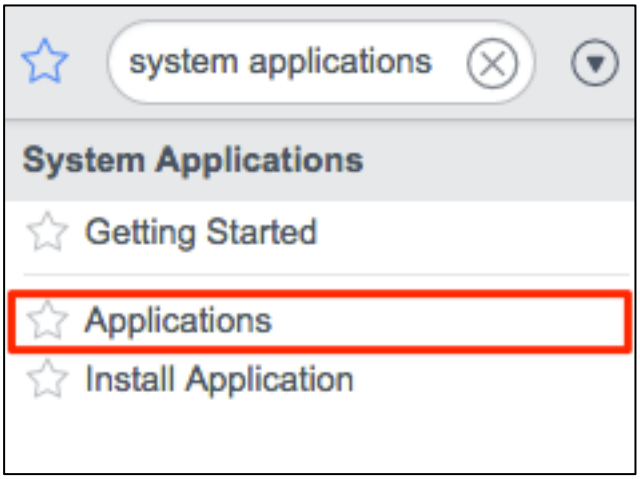
Log in to Your Instance

1. Log in to the instance URL on the cover page using the provided **admin** credentials.



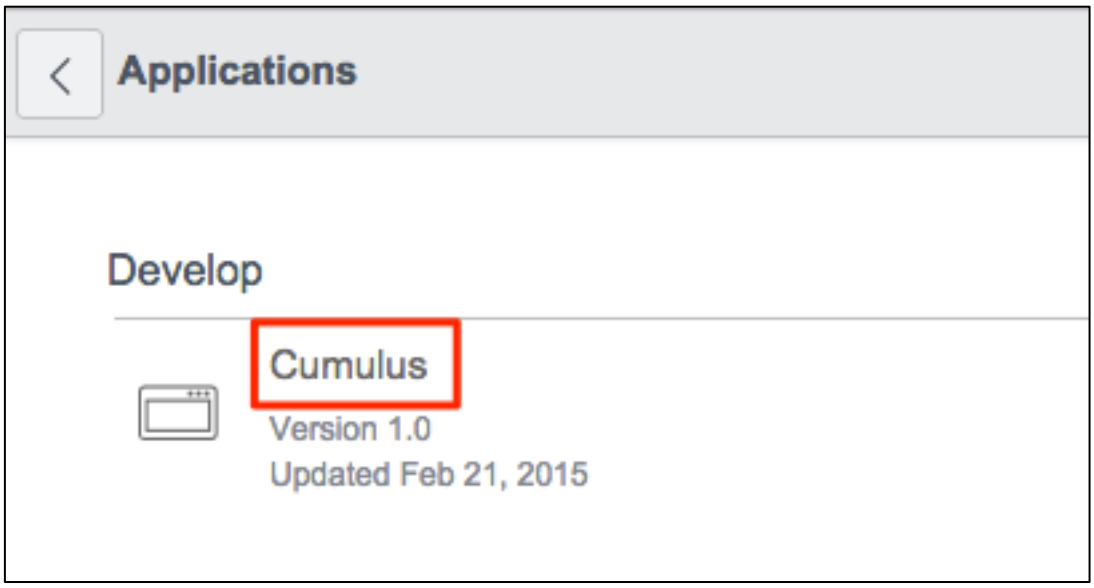
Create the Application

1. Navigate to **System Applications > Applications.**

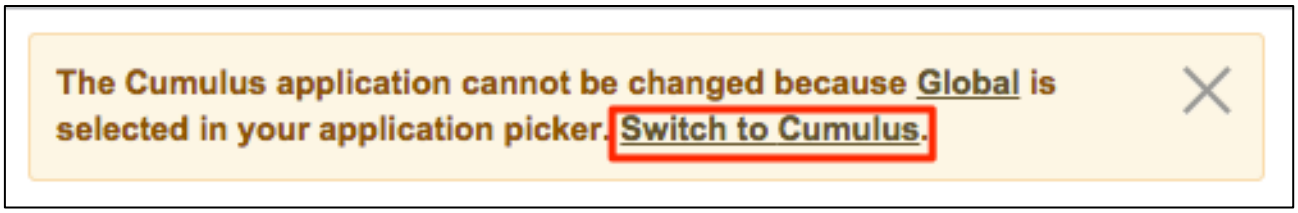


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2. Click the **Cumulus** application. Note the warning indicating you are in the global scope.



3. Click the link **Switch to Cumulus** to change to the Cumulus application and be able to write to the record.



Questions to Consider

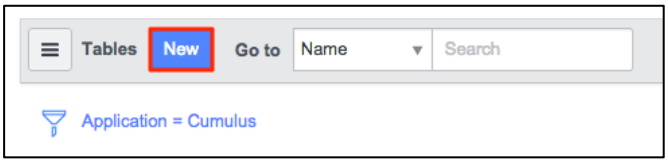
What is the scope of this application?

What is the default security role for this application?

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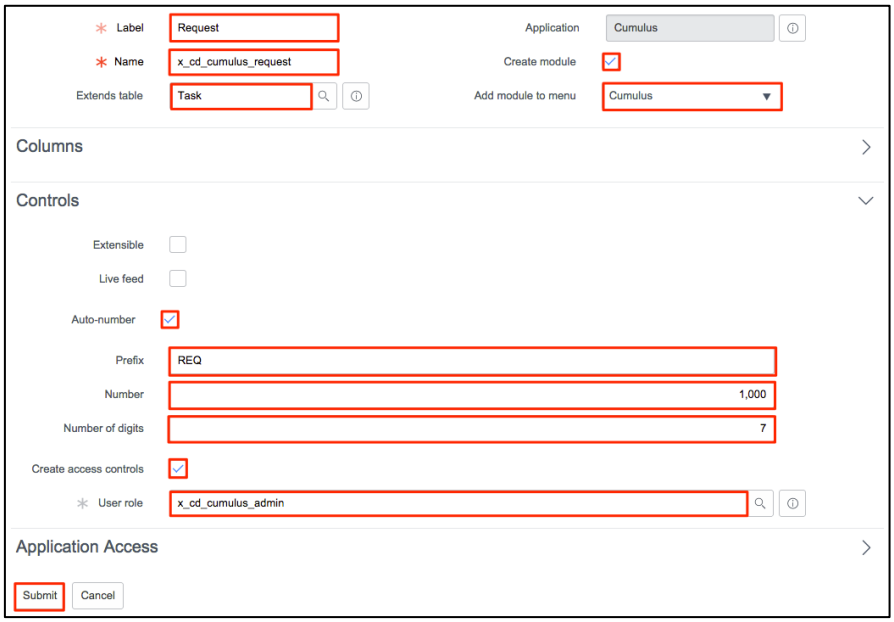
Create the Tables

1. Locate the related list **Tables** and click **New.**



2. Enter the following information in the **Table** form:

- Label: **Request**
- Name: **x_cd_cumulus_request**
- Extends table: **Task**
- Create module: **true** (checked)
- Add module to menu: **Cumulus**
- Extensible: **false** (unchecked)
- Live feed: **false** (unchecked)
- Auto-number: **true** (checked)
- Prefix: **REQ**
- Number: **1,000**
- Number of digits: **7**
- Create access controls: **true** (checked)
- User role: **x_cd_cumulus_admin**

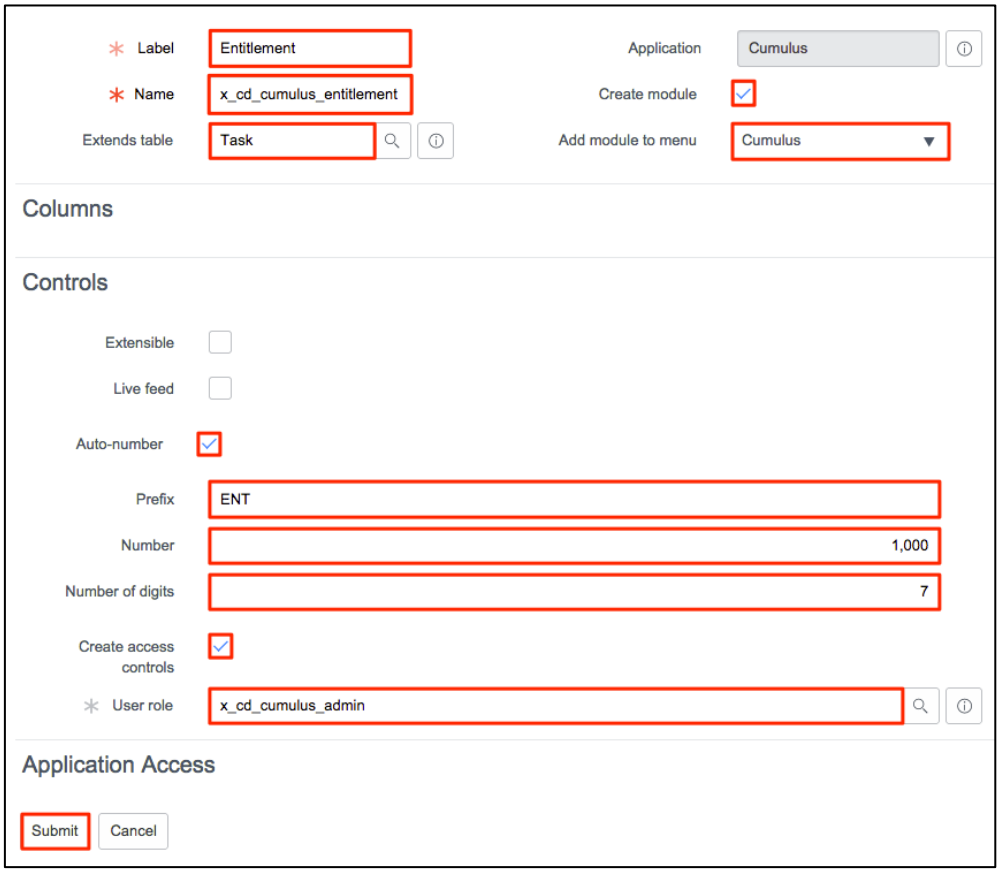


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3. Click **Submit**.

4. Create a second table by clicking **New** on the **Tables** list again and entering the following information:

   - Label: **Entitlement**
   - Name: **x_cd_cumulus_entitlement**Extends table: **Task**
   - Create module: **true** (checked)
   - Add module to menu: **Cumulus**
   - Extensible: **false** (unchecked)
   - Live feed: **false** (unchecked)
   - Auto-number: **true** (checked)
   - Prefix: **ENT**
   - Number: **1,000**
   - Number of digits: **7**
   - Create access controls: **true** (checked)
   - User role: **x_cd_cumulus_admin**



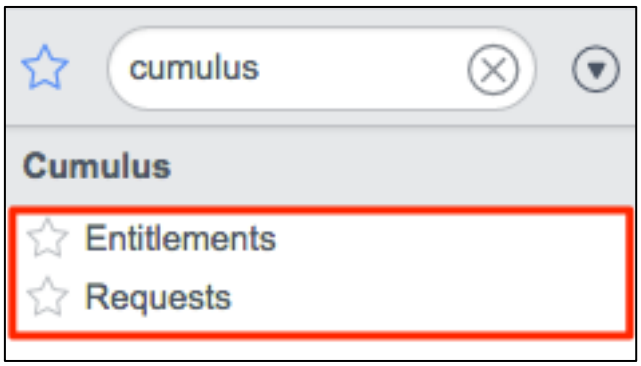
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5. Click **Submit**.

6. Explain why you extended both tables from task instead of creating new tables.

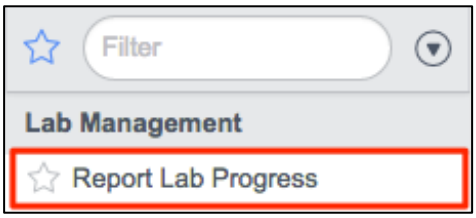
Lab Success Verification

1. Verify the Cumulus application menu appears with Requests and Entitlements modules similar to the image below:



Progress Report

1. Navigate to Lab Management > Report Lab Progress.



2. Click **I am done!**



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Lab Goal

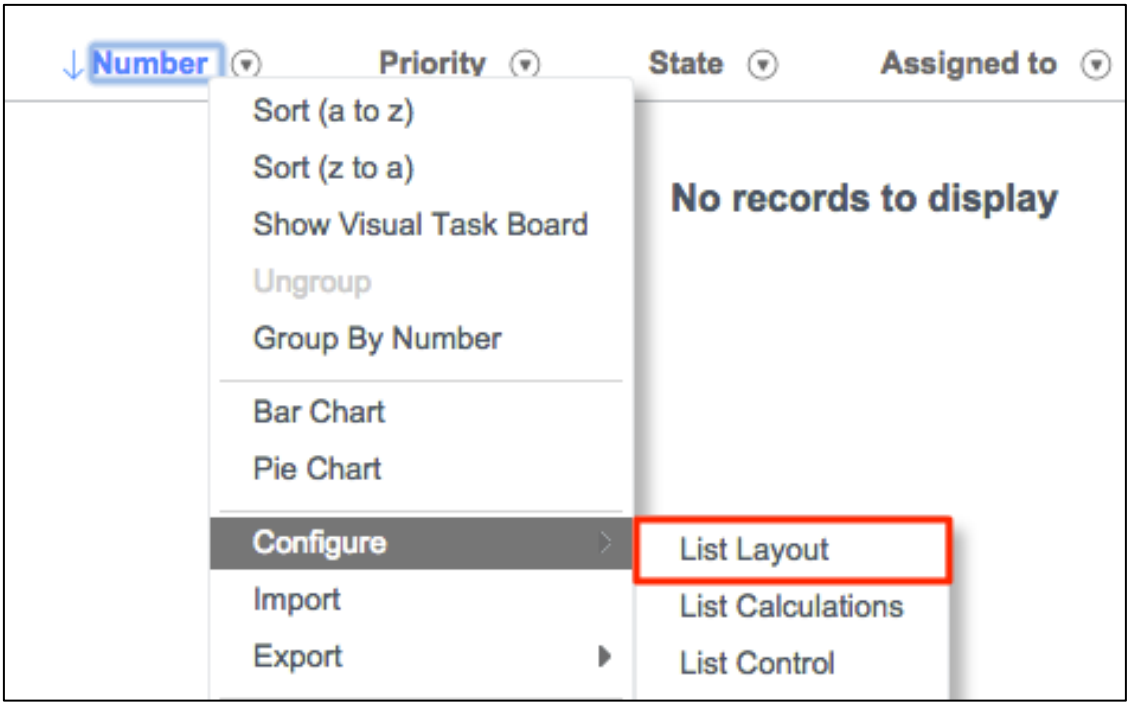
Create fields on the Request table to support the requirements provided earlier.

Lab 3.1
Create
Request Fields

Before You Begin

Based on the requirements, which fields can you repurpose from the **Task** table?

Hint: Navigate to **Cumulus > Requests**, right-click the list header and select **Configure > List Layout**.

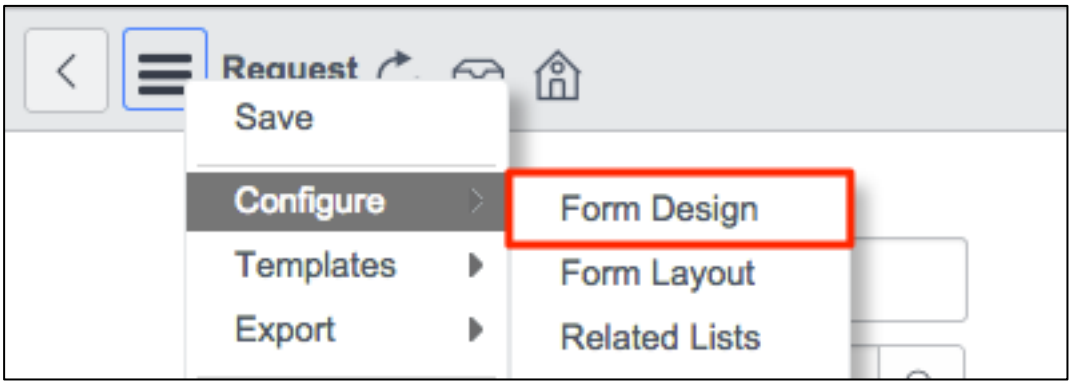


Which fields do you need to create?

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Create Fields

1. Navigate to **Cumulus > Requests**.
2. Click **New**.
3. Right-click **Configure > Form Design**.



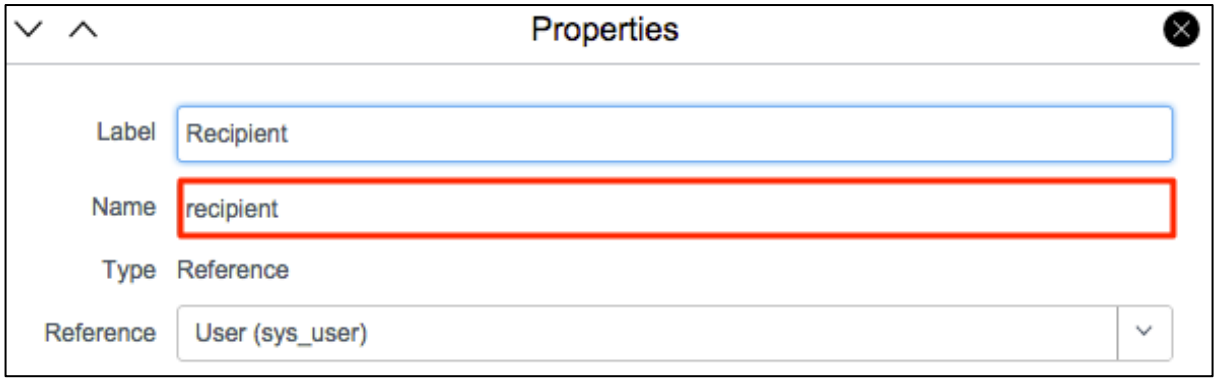
4. Remove the following fields from the form by clicking the **X** button next to the field:
   - Assigned to
   - Configuration item
   - Active
   - Priority
   - Parent
   - Short description
   - Description
   - Work notes
5. Add the following fields/formatters to the form. Do not worry about layout for now:
   - Additional comments
   - Activities (filtered)
   - Opened by
   - Due date

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6. Create the following fields and place them on the form.

Label	Name	Type	Length/Reference
Justification	justification	String	Length: 1000
Action	action	Choice	
Recipient	recipient	Reference	Reference: User [sys_user]
Model after	model_after	Reference	Reference: User [sys_user]

7. To add a new field:
   - Click the **Field Types** tab on the left.
   - Drag the appropriate field type on to the form layout (canvas).
   - Click the label **New Field** and enter the Label in the table above.
   - To change the name of the field, click on the gear icon next to the **X** (delete) button. This opens a properties pop-up window for additional properties such as: **Name** and **max length**.
   - Click the **X** in the upper right of the properties window when you are finished.
   - Repeat this step for each of the new fields.



8. Click **Save**.

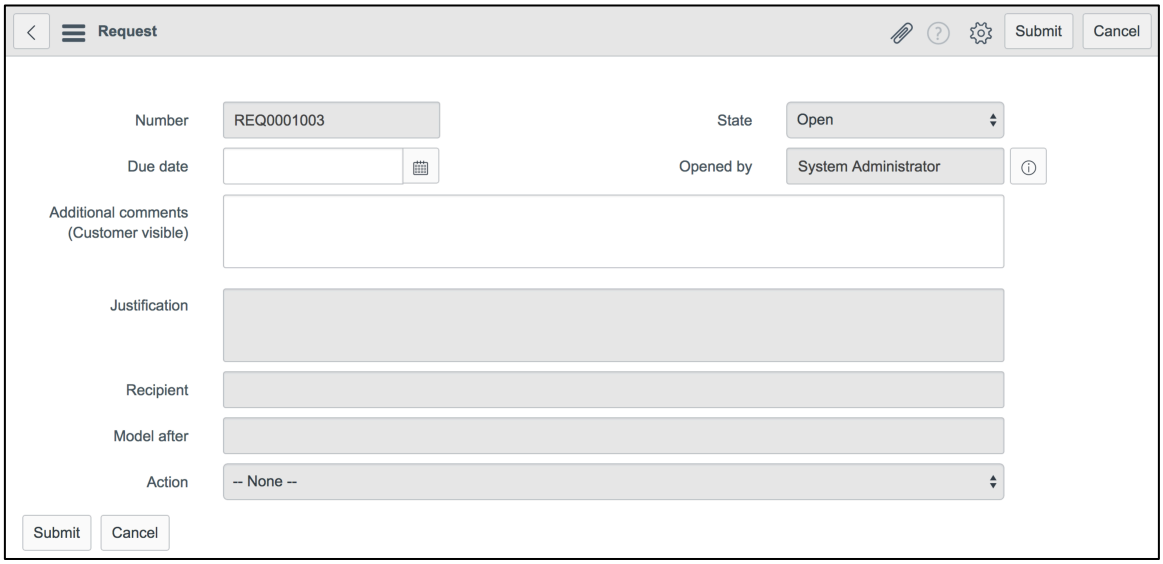


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Lab Success Verification

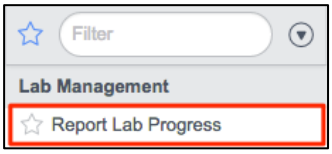
1. Select the browser tab with the **Request** form (not the form design) and reload the Request form. Verify that your screen appears similar to the image below.

   Note that some fields may appear as Read Only. The update set provided for this lab includes preconfigured access control lists.



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

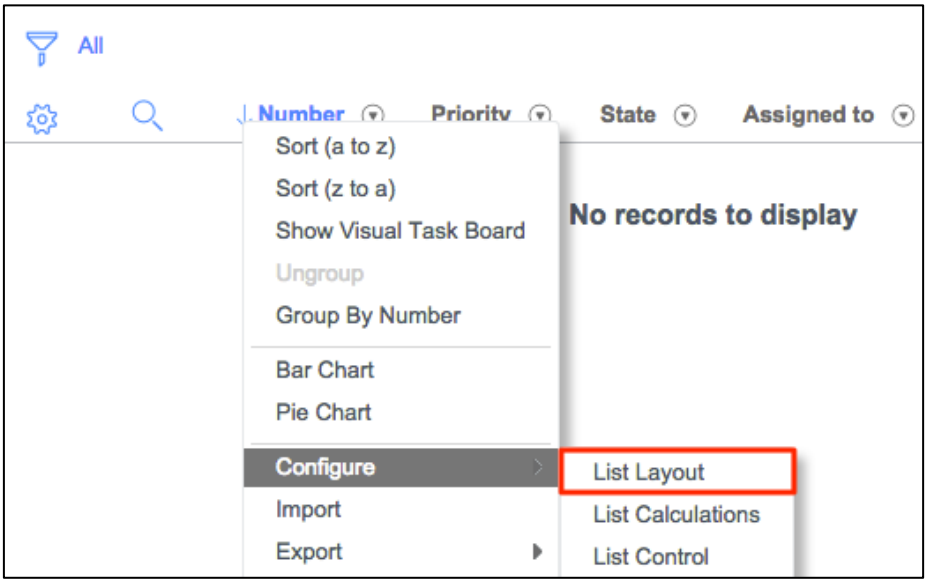
Create fields on the Entitlement table to support the requirements provided earlier.

Lab 3.2 Create Entitlement Fields

Before You Begin

Based on the requirements, which fields can you repurpose from the task table?

Hint: Navigate to **Cumulus > Entitlements**, right click on the list header and select **Configure > List Layout**.

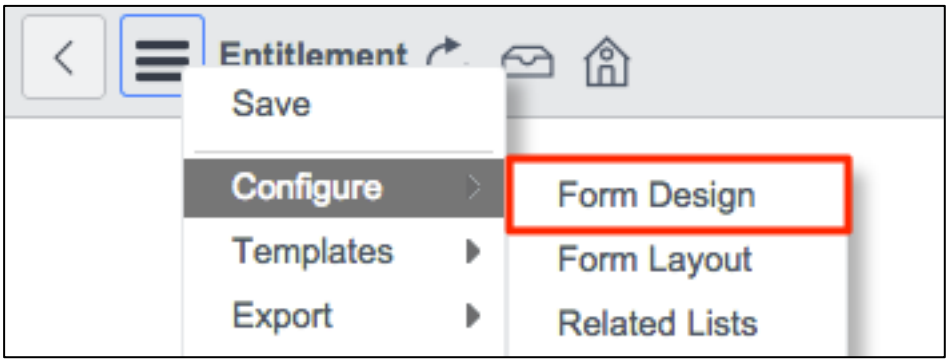


Which fields do you need to create?

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Create Fields

1. Navigate to **Cumulus > Entitlements**.
2. Click **New**.
3. Right click **Configure > Form Design**



4. Remove the following fields from the form:
   - Configuration item
   - Active
   - Priority
   - Parent
   - Short description
   - Work notes
5. Add the following fields/formatters to the form. Do not worry about layout for now:
   - Approval
   - Additional comments
   - Assignment group
   - Activities (filtered)

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6. Create the following fields on the form:

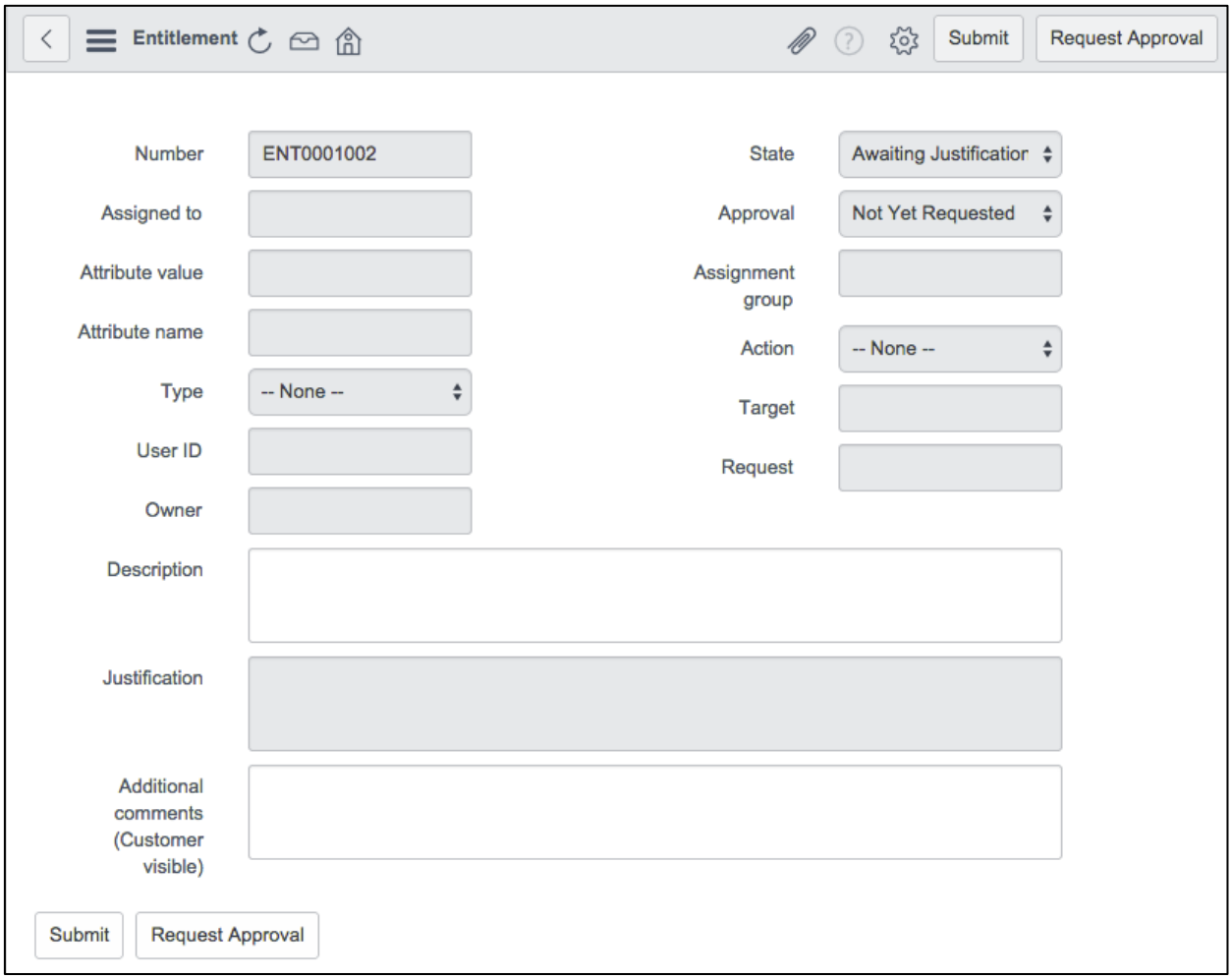
Label	Name	Type	Length/Reference
Attribute value	attribute_value	String	40
Type	type	Choice	
Action	action	Choice	
User ID	user_id	Reference	Reference: User [sys_user]
Target	target	String	40
Justification	justification	String	1000
Owner	owner	Reference	Reference: User [sys_user]
Request	request	Reference	Reference: Request [x_cd_cumulus_request]
Attribute name	attribute_name	String	40

7. Click **Save**.

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Lab Success Verification

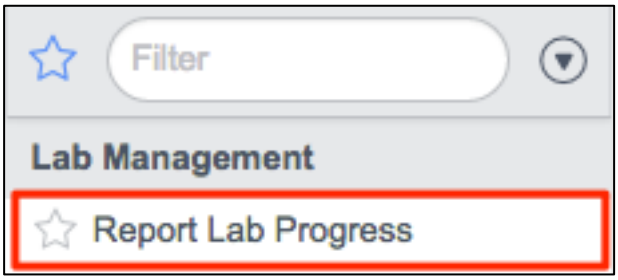
1. Select the browser tab with the request form (not the form design) and reload the **Entitlement** form. Verify your screen appears similar to the image below.



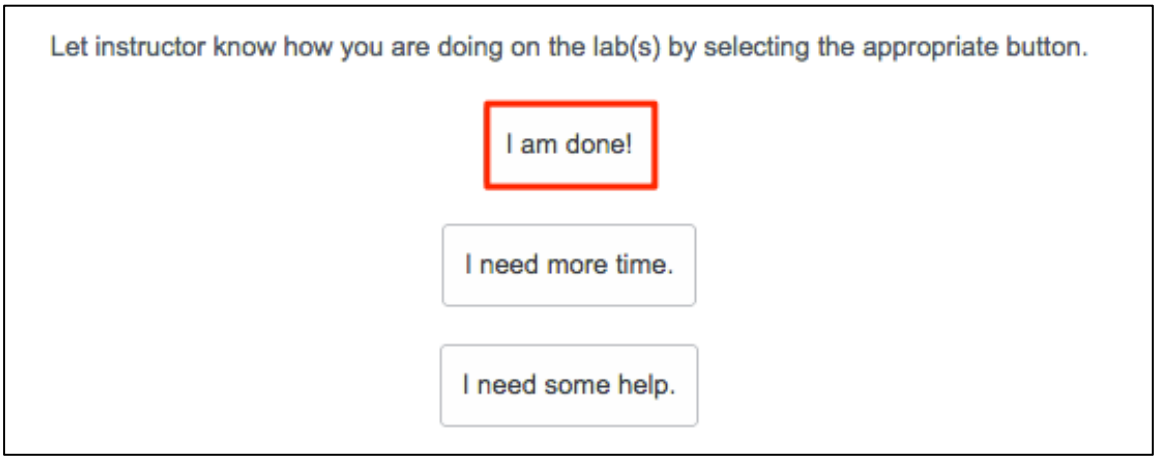
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Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

The process owner has asked for some changes to the Request and Entitlement tables. Apply the best practices you just learned to address the new requirements.

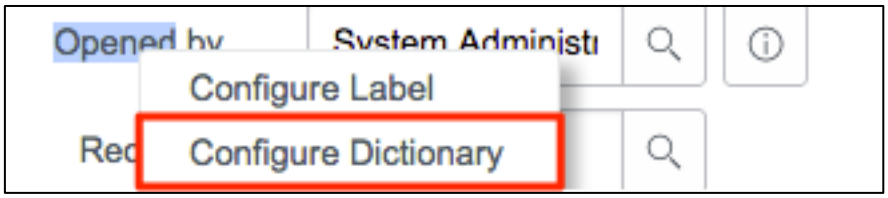
Lab 3.3 Requirements Change

The process owner has asked to change the following items:

- On the Request form, change “Opened by” to “Requester”
- Set the default state of a new Request form to be “Work in Progress”
- Set the default state of a new Entitlement to be (empty)

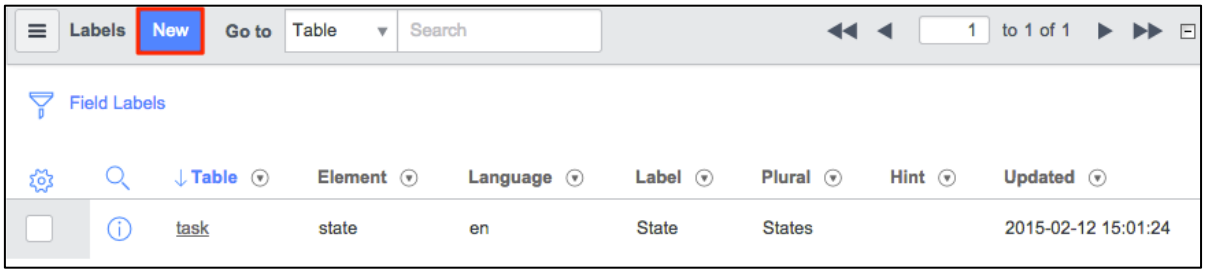
Create a New Label

1. Navigate to **Cumulus > Requests**.
2. Click **New** from the list of **Requests**.
3. Locate the **Opened by** field on your form.
4. Right-click the field and select **Configure Dictionary**.



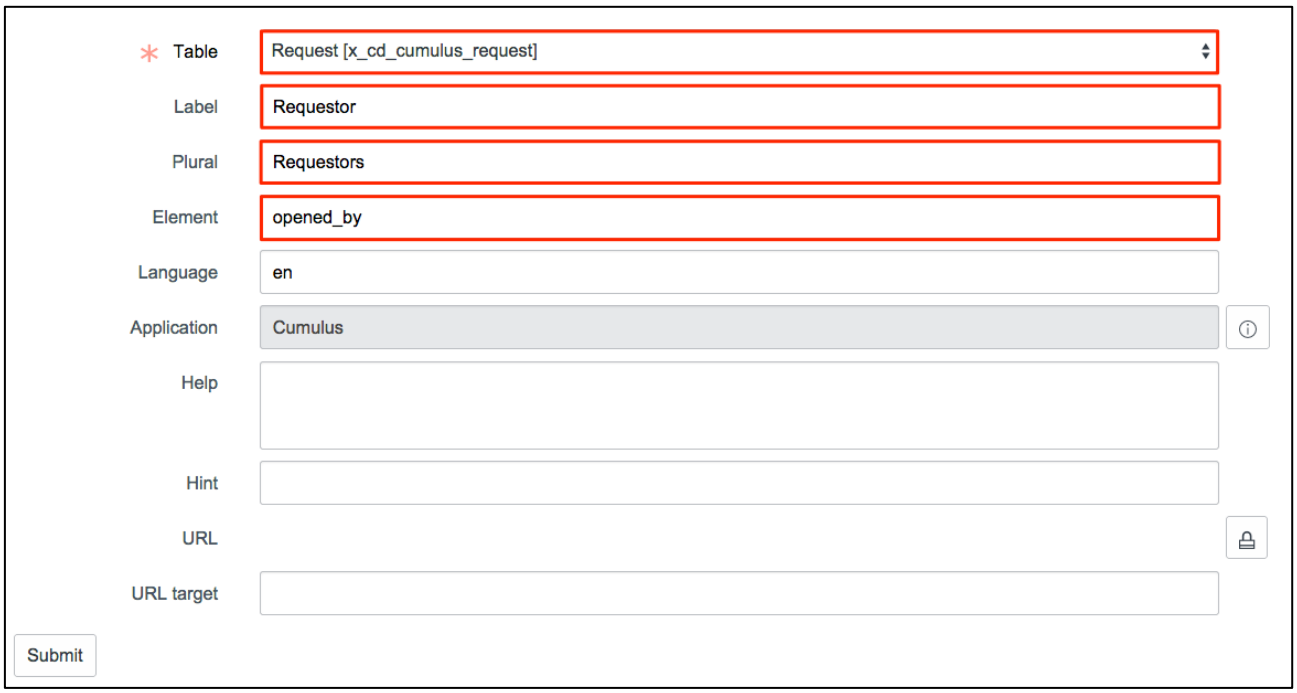
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5. Scroll to the **Labels** related list and click New.



6. Create the **Field** label with the following details:

- Table: **Request [x_cd_cumulus_request]**
- Label: **Requester**
- Plural: **Requesters**
- Element: **opened_by**



7. Click **Submit**.

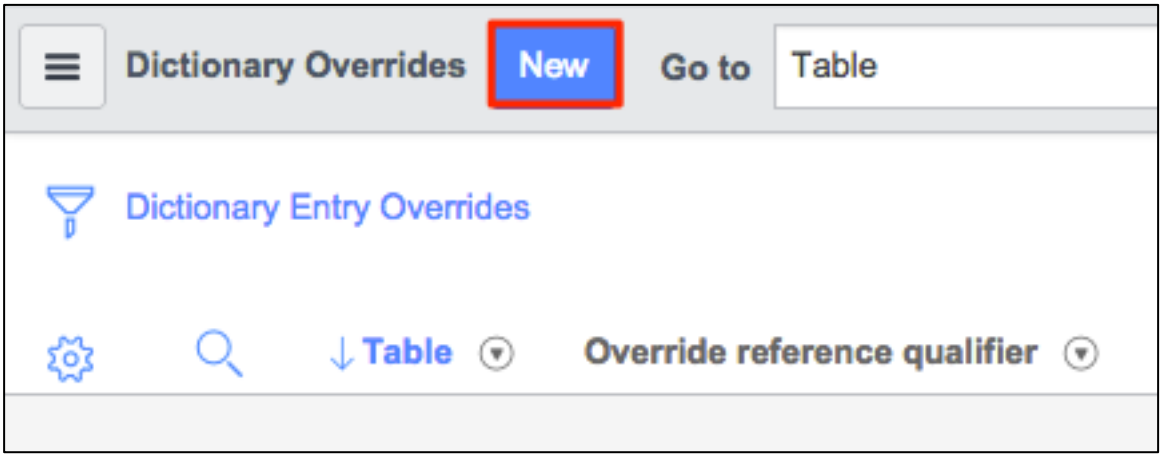
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Create Dictionary Overrides

1. Navigate to **Cumulus > Requests**.
2. Click **New.**
3. Right-click the **State** field and select **Configure Dictionary**.

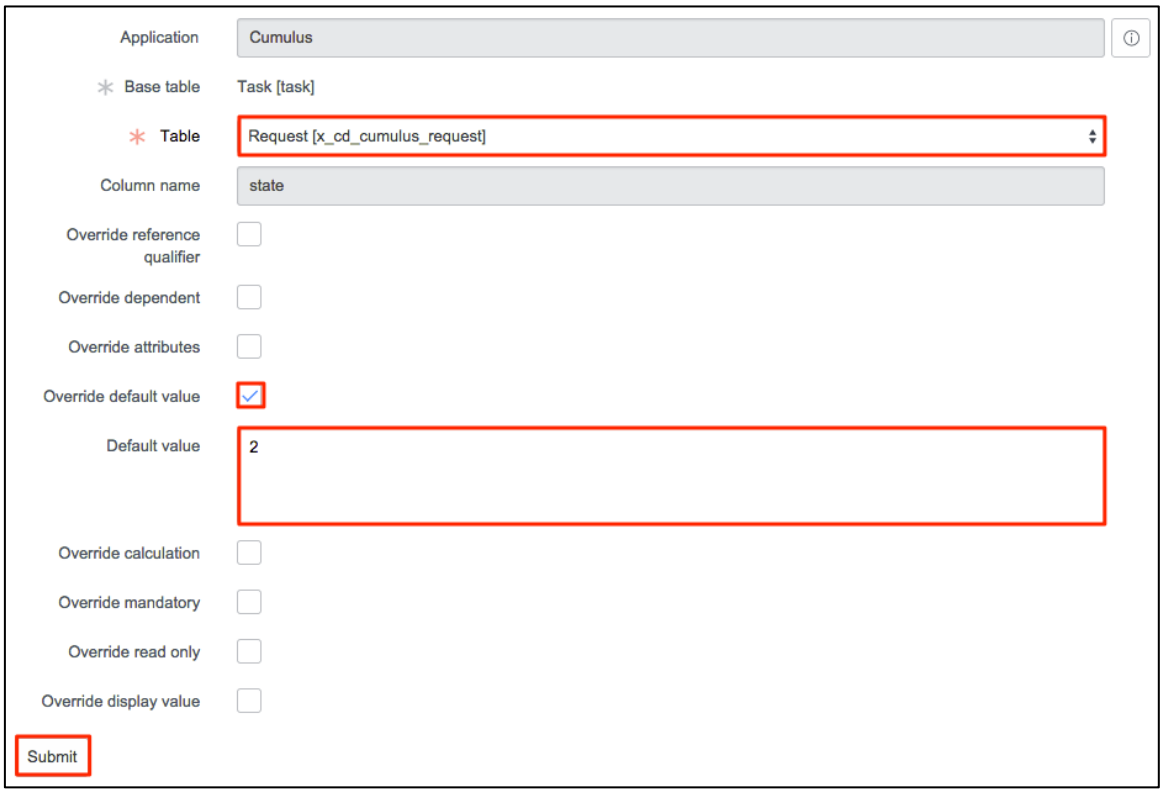


4. Scroll to the **Dictionary Overrides** related list.
5. Click New.



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6. Enter the following values in the Dictionary Entry Override form:
   - Table: **Request [x_cd_cumulus_request]**
   - Override default value: **true (checked)**
   - Default value: **2**

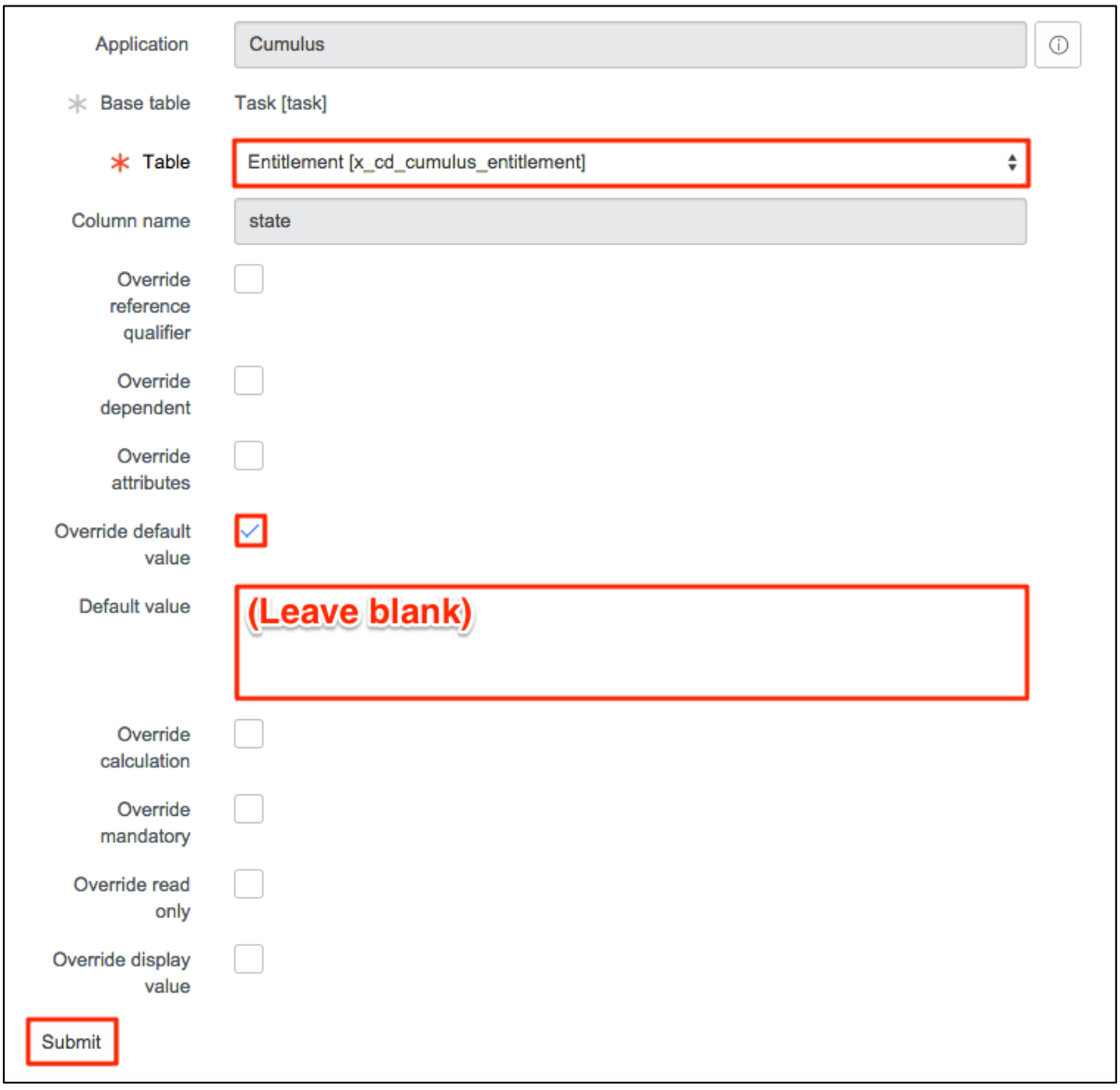


7. Click **Submit.**

8. Click **New** again on the **Dictionary Overrides** form.

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9. Enter the following values in the Dictionary Entry Override form:
   - Table: **Entitlement [x_cd_cumulus_entitlement]**
   - Override default value: **true (checked)**
   - Default value: **(empty)**



10. Click **Submit**.

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Lab Success Verification

1. Navigate to **Cumulus > Requests**.
2. Click **New** (or open an existing record).
3. Is the **Opened by** field is now labeled Requester?
4. Navigate to **Incident > Open**.
5. Click **New**.
6. Verify the **Opened by** field still labeled **Opened by**.

   What would have happened if you had modified the existing label for **Task** instead of creating a new one for **Request** in step 6?

   What is the default state of the new incident?

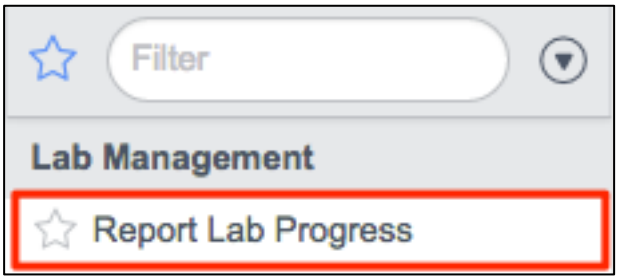
7. Navigate to **Cumulus > Requests**.
8. Click **New**.

   What is the default state of the new request?

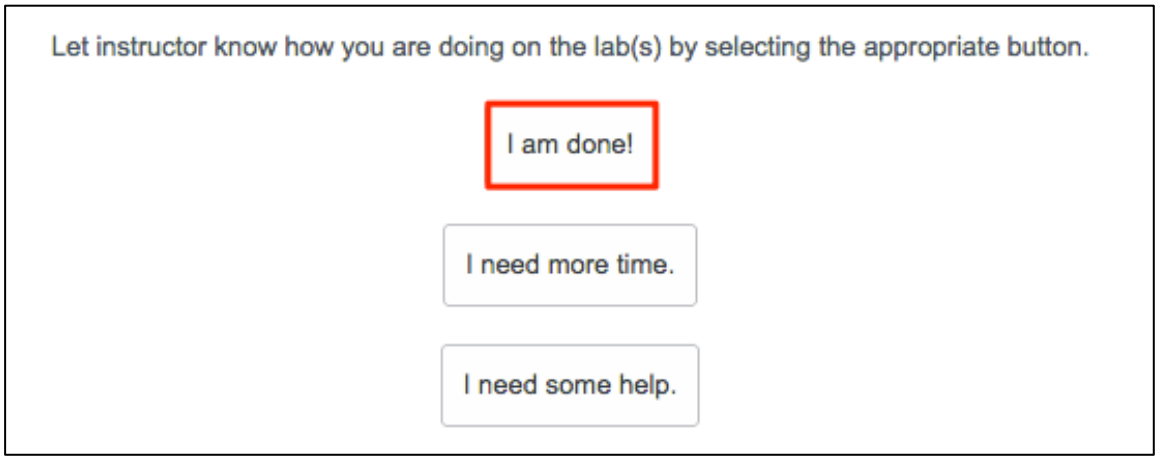
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Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

This lab explains how to organize the fields on the **Cumulus Request** form in to a more effective and user-friendly layout.

Lab 4.1
Request Form Layout

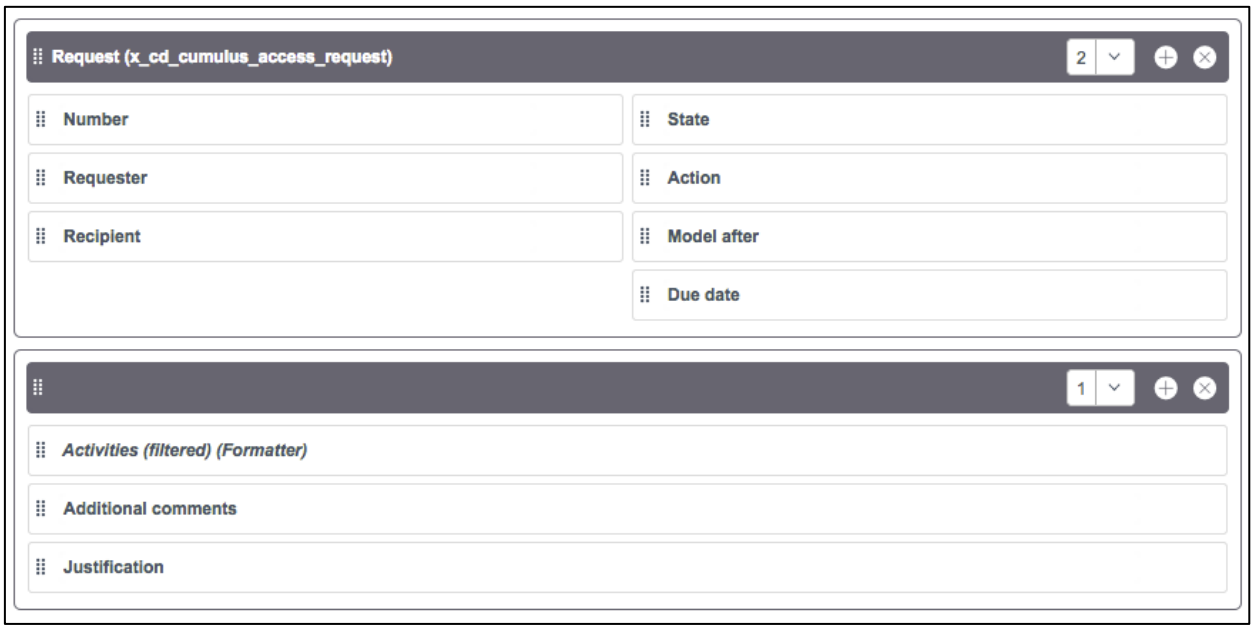
Before You Begin

1. Navigate to **Cumulus > Requests**.
2. Click **New**.
3. What best practices can be applied to the current form layout?

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Modify the Form Layout

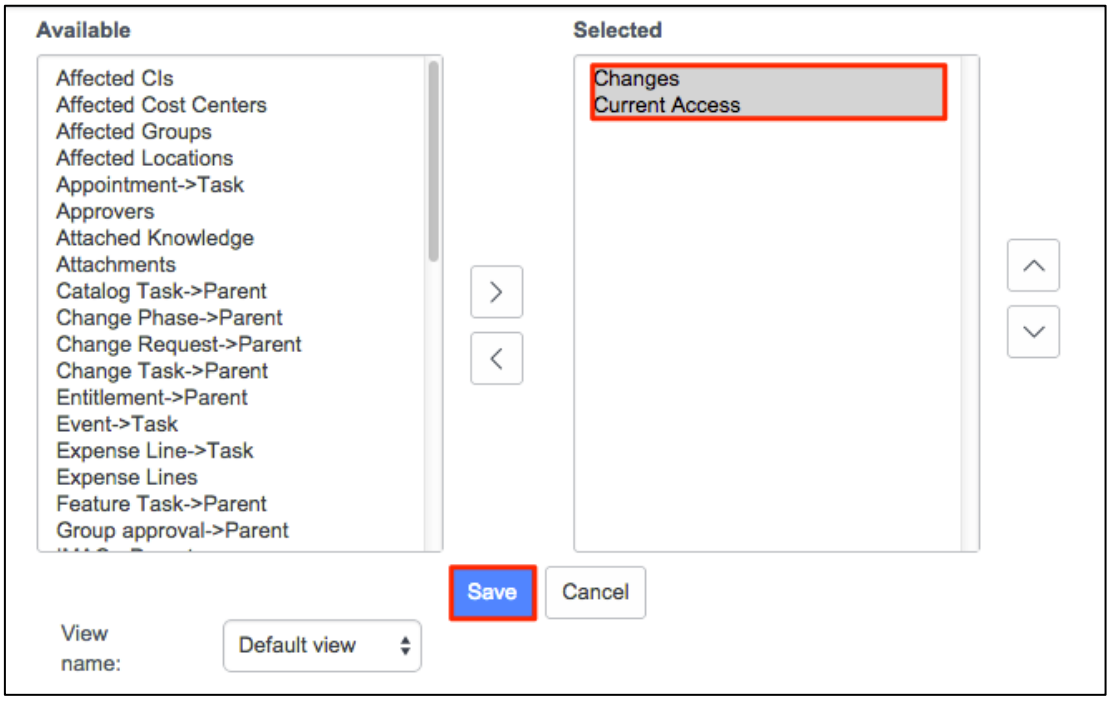
1. Right-click the header and choose **Configure > Form Design**.
2. Organize the fields in the form designer to appear as picture below.



3. Click **Save**.
4. Close the browser tab with the form designer.
5. Use the form menu icon  and select **Reload form**.
6. Use the same icon and select **Configure > Related Lists**.

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7. Move the following items from the **Available** column to the **Selected** column in the list collector:
   - **Changes**
   - **Current Access**

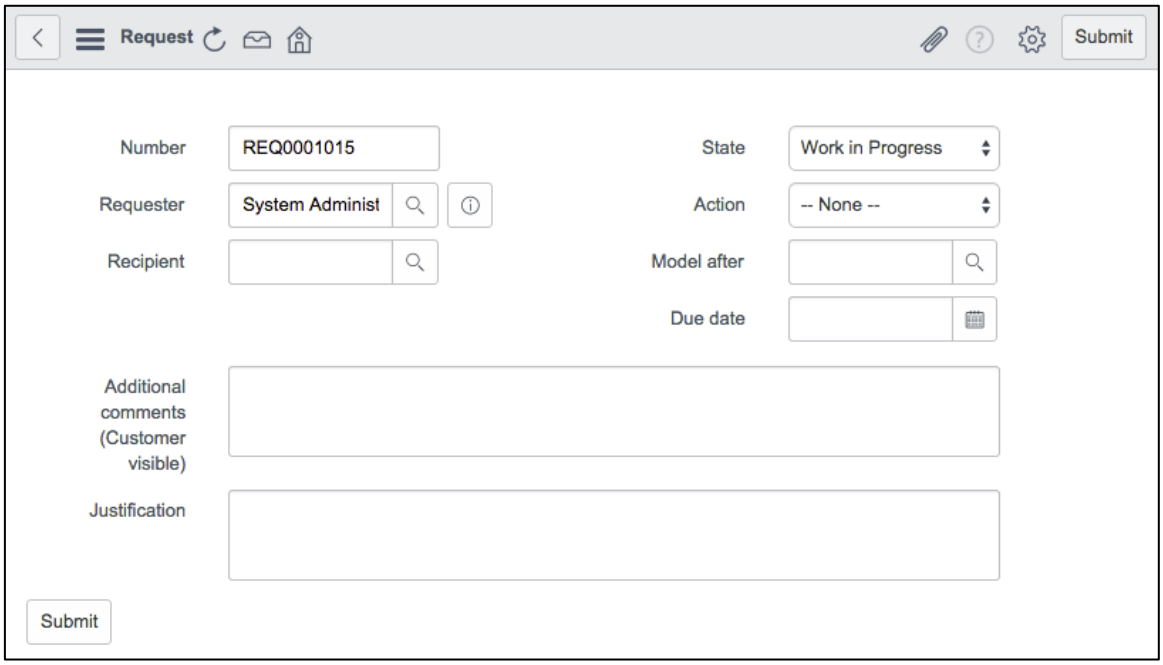


8. Click **Save**.

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Lab Success Verification

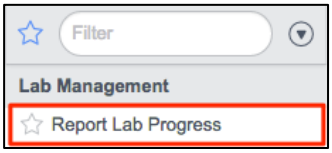
1. Ensure your form layout looks similar the following image.



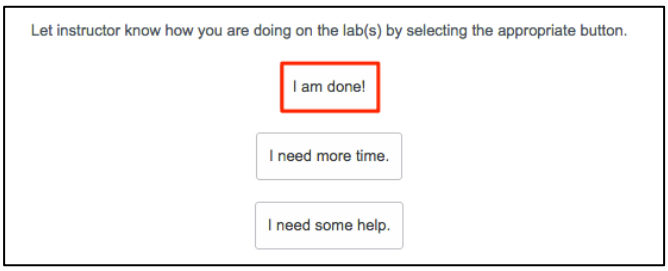
2. Question: Why do the related lists not appear on this form?

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

This lab explains how to organize the fields on the **Request** form in to a more effective and user-friendly layout.

Lab 4.2
Entitlement Form Layout

Before You Begin

1. Navigate to **Cumulus > Entitlements**.
2. Click **New**.
3. What best practices can be applied to the current form layout?

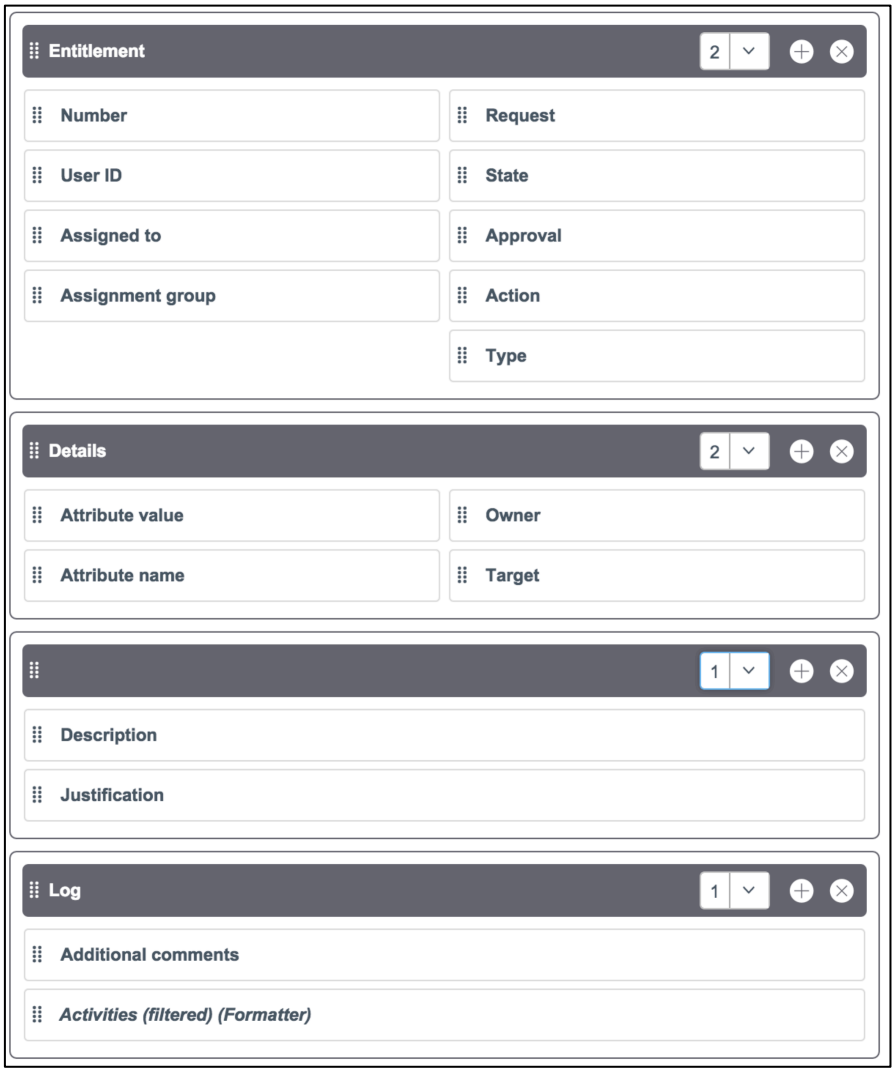
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Modify the Form Layout

1. Right click the header and choose **Configure > Form Design**.

2. Use the form designer to change the layout of your form as pictured below.

   Note: If you create a new section, removing the name changes it to a "split" area on the same form section. If there is no name, click the left side of the gray bar and enter a name. Only named sections in the form designer appear with headers on the form and are affected when the Tabbed Forms option is used.



3. Click **Save.**

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4. Close the browser tab with the form designer.

5. Use the form menu icon  and select **Reload form**.

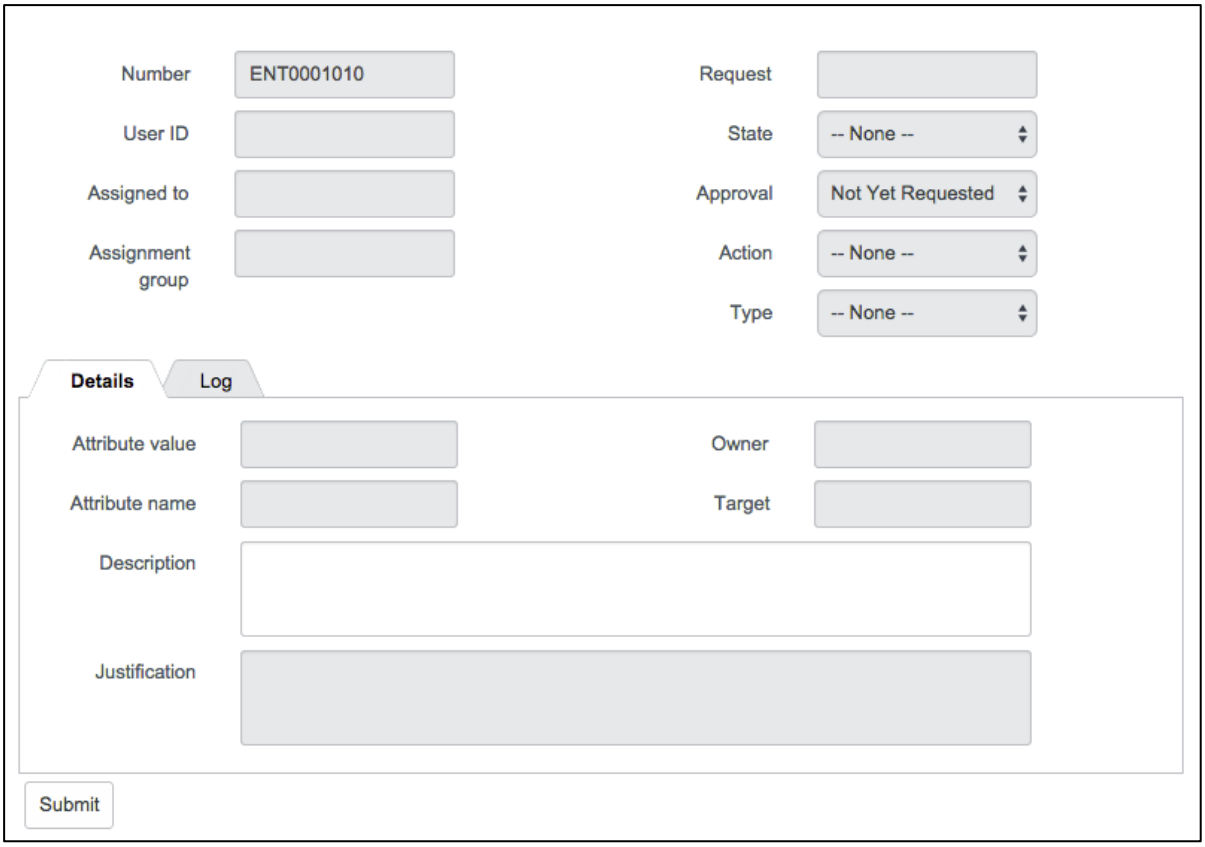
6. Use the form menu icon and select **Configure > Related Lists.**

7. Move the following item from the **Available** column to the **Selected** column in the list collector:
   - Approvers

8. Click **Save**.

Lab Success Verification

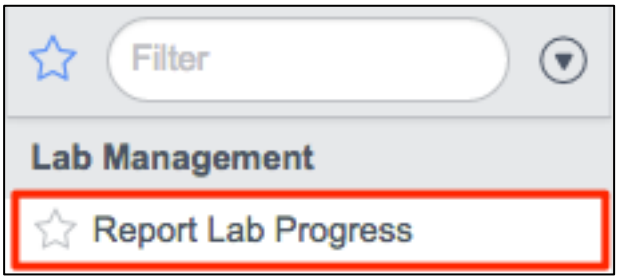
1. Ensure your form layout looks similar the following image.



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Progress Report

1. Navigate **to Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Lab Goal

This lab explains how to define effective list layouts for the **Request** and **Entitlement** layouts.

Lab 4.3
List Layout

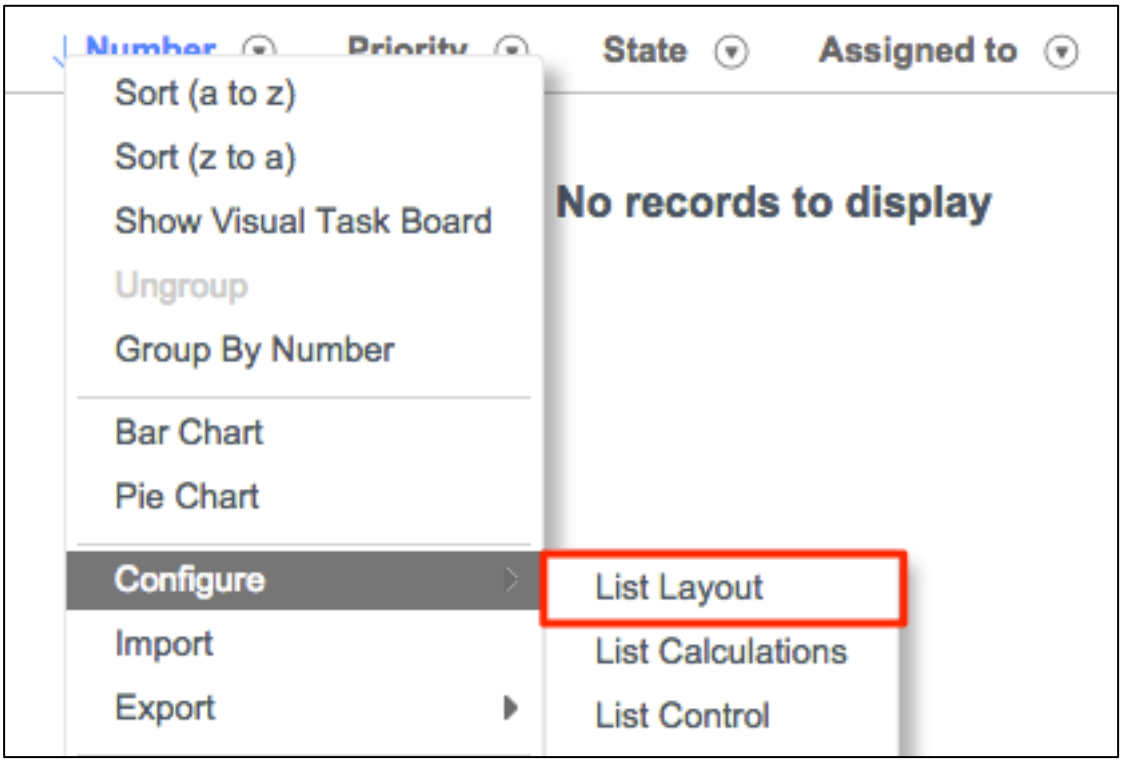
Before You Begin

1. Navigate to **Cumulus > Requests**.
2. What best practices can be applied to the current list layout?

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Configure the Request List Layout

1. Right click the list header and choose **Configure > List Layout**.



2. Place the following fields in the **Selected** column of the list collector:
   - Number
   - State
   - Action
   - Recipient
   - Model after
   - Due date

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Lab Success Verification

1. Ensure your Request list layout looks similar to the following image:

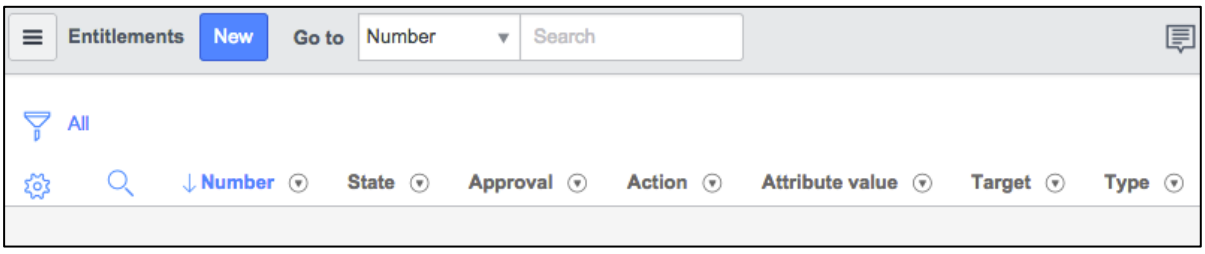


Configure the Entitlement List Layout

1. Navigate to **Cumulus > Entitlements**.
2. What best practices can be applied to the current list layout?
3. Right click the list header and choose **Configure > List Layout**.
4. Place the following fields in the Selected column of the list collector:
   - Number
   - State
   - Approval
   - Action
   - Attribute value
   - Target
   - Type

Lab Success Verification

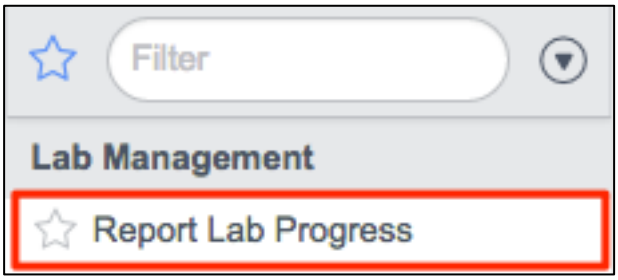
1. Ensure your Entitlements list layout looks similar to the following image:



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Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.



2. Click **I am done!**



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Additional Information

http://wiki.servicenow.com/index.php?title=Understand_the_Requirements

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Tables

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Fields

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Forms

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Lists

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