knowledge16
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Lab Guide

Configuration Management: A Service Aware CMDB

Madhavi Puvvada & Puru Amradkar

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

servicenow

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Lab Goal

Lab 1.0 Create a Manual Business Service CI

This lab provides an overview of various sub labs within Section 1:

- Lab 1.1 explains how to download a file containing lab scripts and how to create a custom related list
- Lab 1.2 explains how to create a manual Business Service CI
- Lab 1.3 explains how to import data to create CIs that are associated with a Business Service
- Lab 1.4 explains how to import Relationship data into the CMDB

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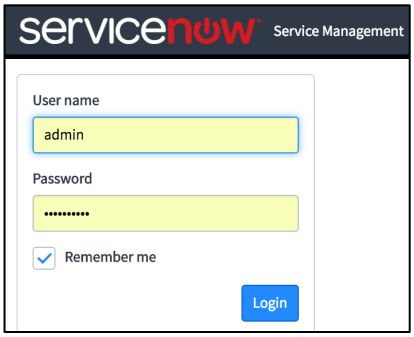
Lab Goal

This lab explains how to create a new Identification Rule.

Lab 1.1 Create a Custom Related list for Business Service CI

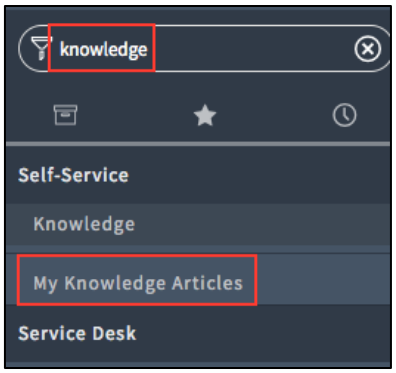
Log on to Your Training Instance

- Navigate to the unique instance URL provided to you.
- Log in using the provided **admin** credentials.



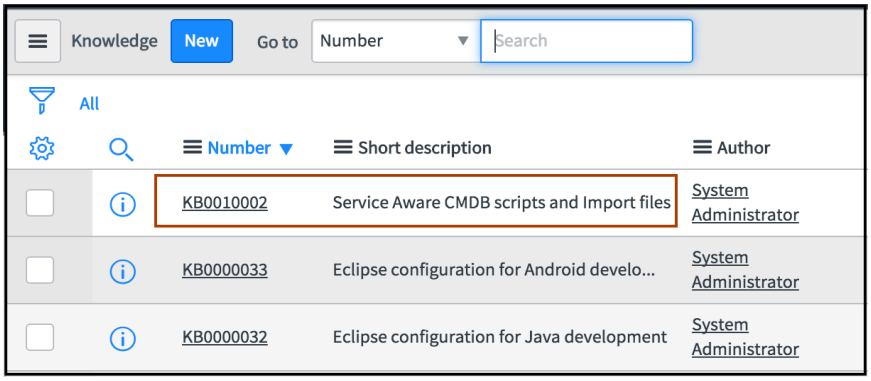
Download Files Containing Lab Scripts

1. Navigate to **My Knowledge Articles**.



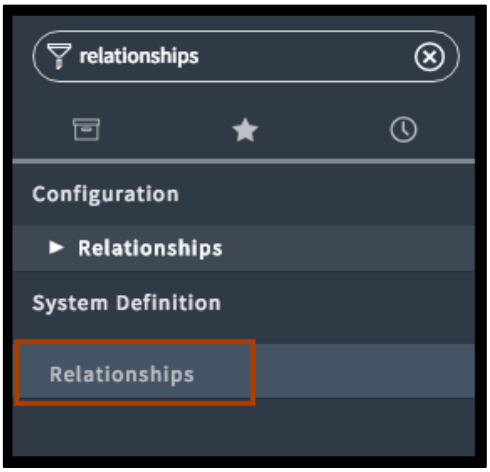
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- Open the article **Service Aware CMDB scripts** and import files.

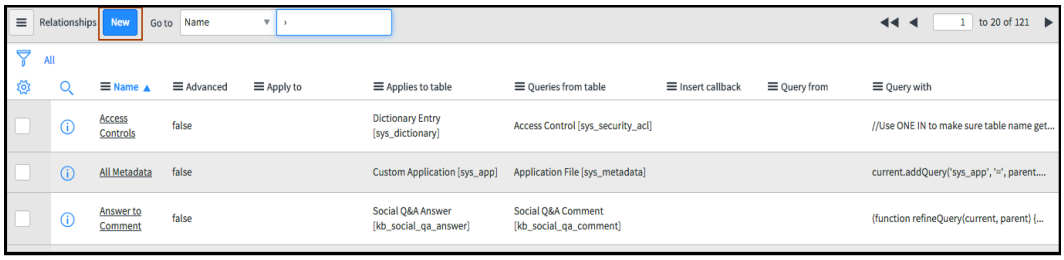


Create Custom Related list

1. Navigate to **System Definition > Relationships**.



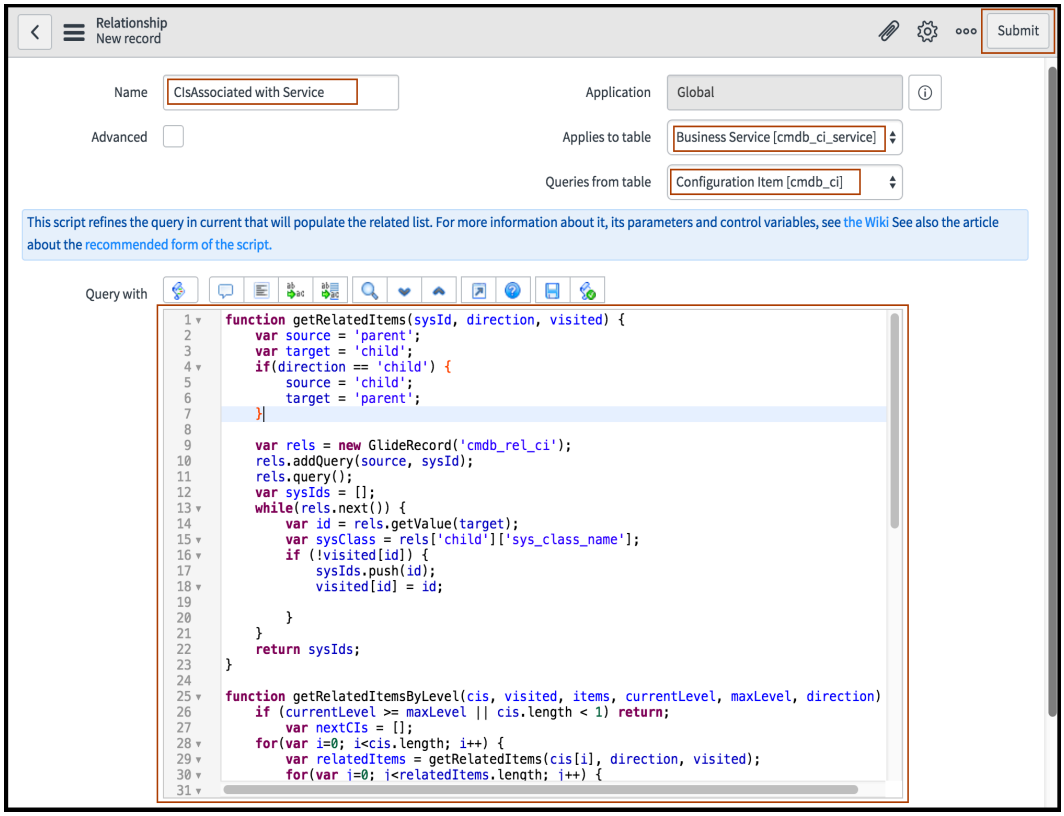
2. Click **New**.



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3. Fill out the form as follows:

   Name: **CIsAssociated with Service**
   Applies to table: **Business Service [cmdb_ci_service]**
   Queries from table: **Configuration Item [cmdb_ci]**
   Query with: Remove all content in **Query with** window and copy the script CIsAssociated_with_service from downloaded file (lab 1.1)



   Click **Submit**.

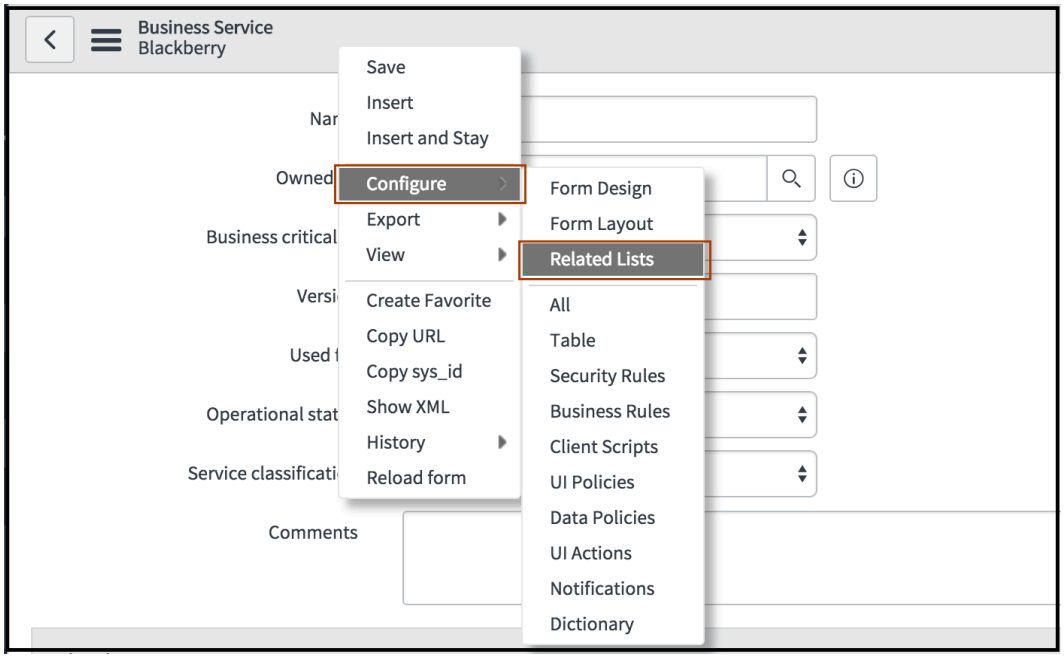
Add Custom Related list to Business Service CI Form

1. Navigate to **Configuration > Business Services**.

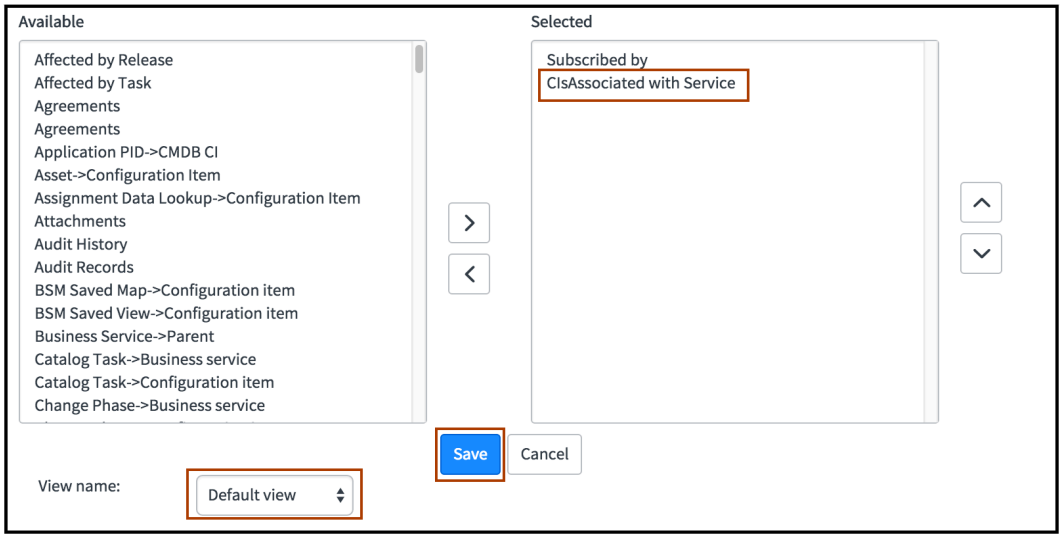
2. Select any CI from the list view [ex: Blackberry] and click on the Name to open the record.

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3. Right-click on form header and select **Configure > Related Lists**.



4. Make sure the **Default view** is selected and add **CIsAssociated with Service** to right side of slush bucket.

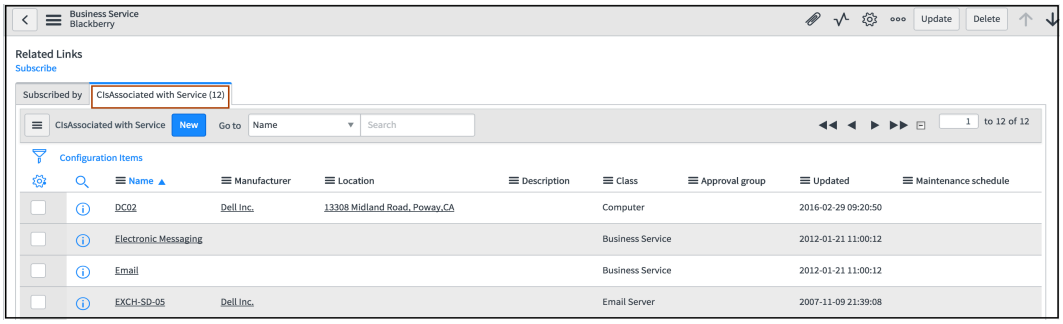


Click **Save**.

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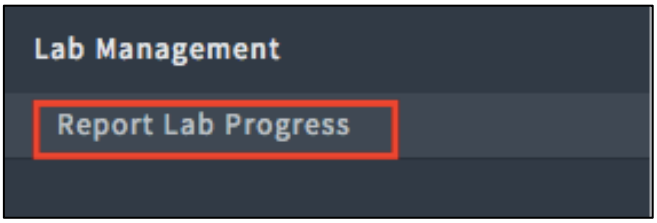
Lab Success Verification

1. **CIsAssociated with Service** should be added to the CI form. Your screen should look like example.



Progress Report

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



2. Click **I am done!**

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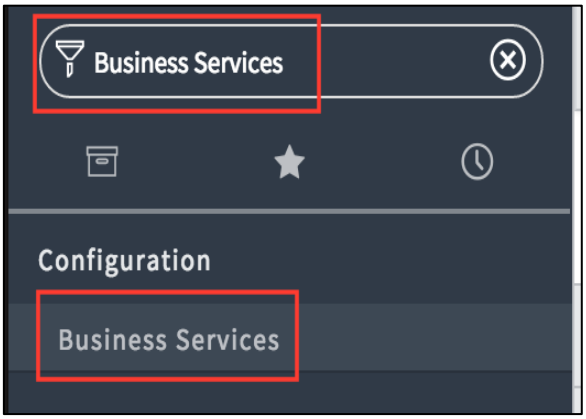
Lab Goal

This lab explains how to create a new Identification Rule.

Lab 1.2 Create a Manual Business Service CI

Create a New Business Service CI

1. Navigate to **Configuration > Business Services**.



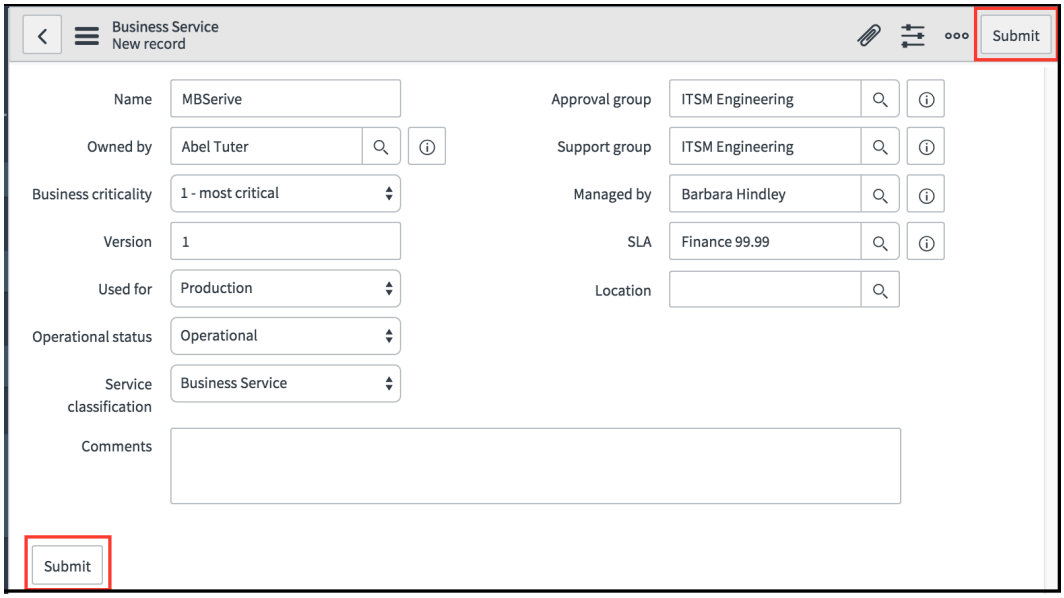
2. Click **New**.



3. Enter the following information in the CI form and click **Submit**:

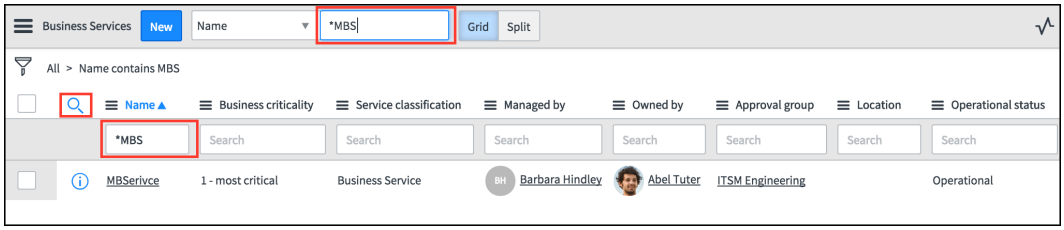
   Name: **MBService**
   Owned by: **Able Tuter**
   Business Criticality: **1-most critical**
   Version: **1**
   Approval group: **ITSM Engineering**
   Support group: **ITSM Engineering**
   Managed by: **Barbara Hindley**
   SLA: **Finance 99.99**

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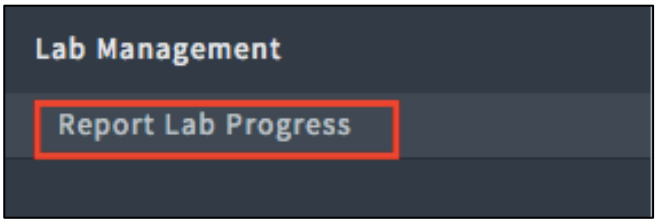
Lab Success Verification

1. Search for newly created CI by Name in Business Services list view. Your screen should look like the example.



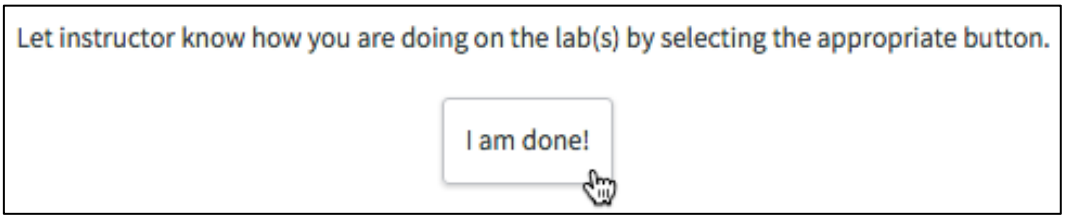
Progress Report

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



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2. Click **I am done!**



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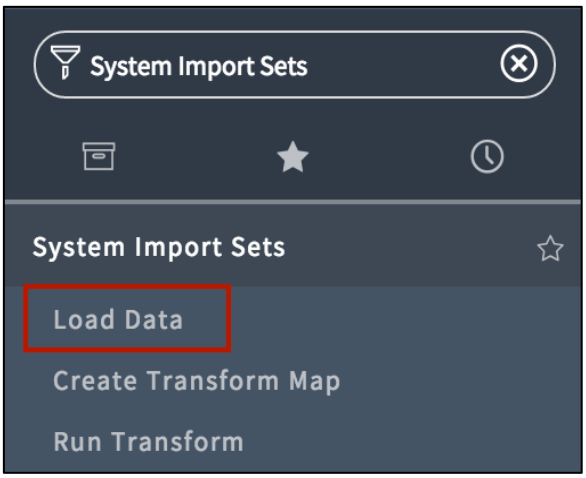
Lab Goal

This lab explains how to import data to create CIs that are associated with the Business service just created. Download the spreadsheets from the Knowledge Base Lab 1.1.

Lab 1.3
Import CIs for MBService

Create a New Import Set

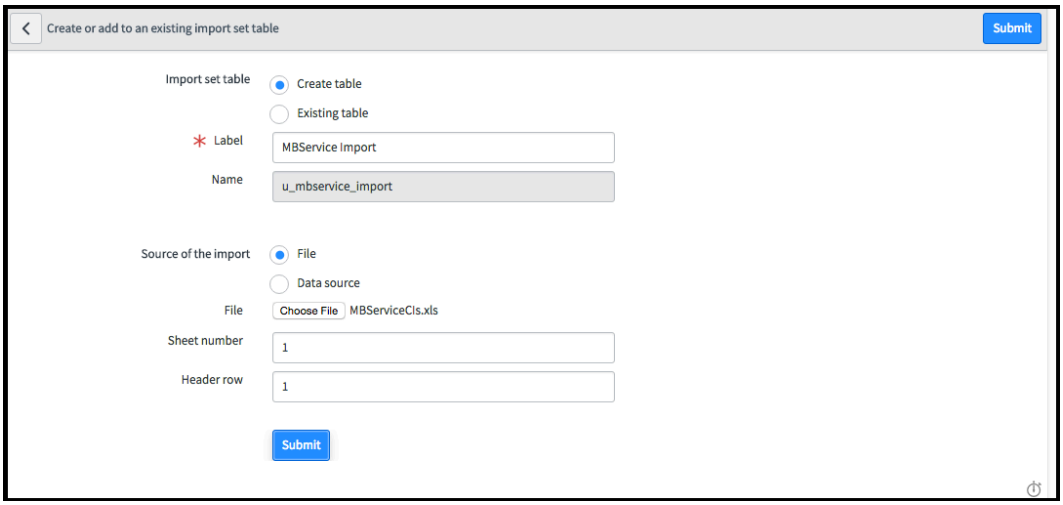
1. Navigate to **System Import Sets > Load Data**.



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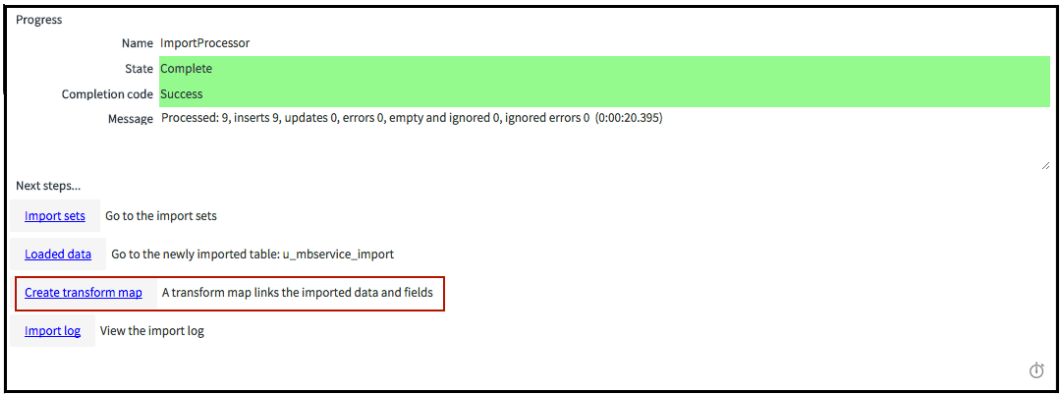
2. Create a new Import set:

   Label: **MBService Import**
   Table Name: **auto-fills with u_mbservice_import**
   Choose File: **MBServiceCIs.xls**



3. Click **Submit**.

4. The Screen should look like the example. Click **Create transform map**.



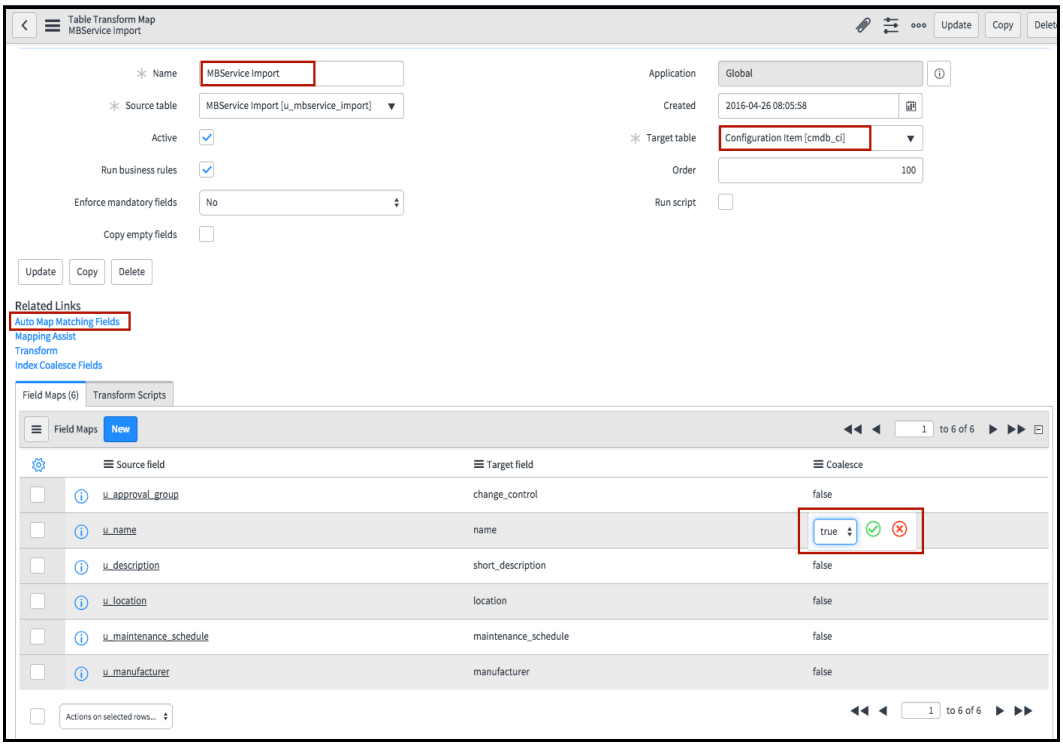
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5. Complete the form as follows.

   (Preselected) Source table: **MBService Import[u_mbservice_import]**
   Name : **MBService Import**
   Target table: **Configuration item[cmdb_ci]**
   Select **Auto Map Matching Fields**

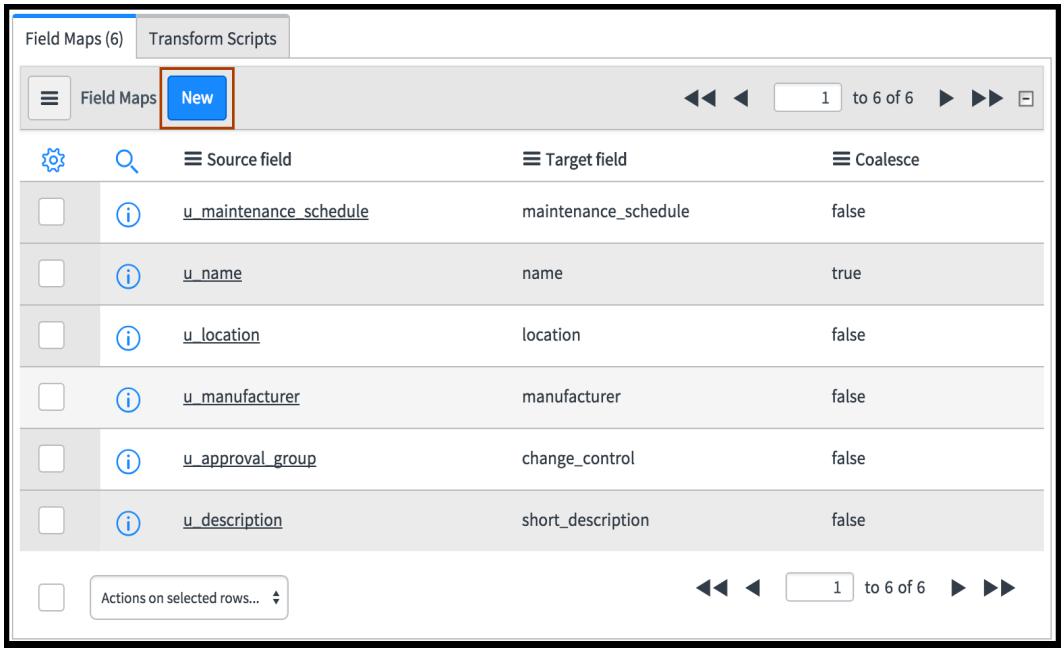
   - Coalesce fields identified above tell the system which field to use as the unique. You can have multiple coalesce fields, but for this exercise:
     - Since the fields in the spreadsheet match the fields in the CMDB, the **Auto map matching fields** link is available.
     - If the fields did not match, you need to use **Mapping Assist.** Click the **Mapping Assist** link to see the drag and drop UI for mapping fields. Click **Cancel** when you are done.

   Coalesce: **name = true**



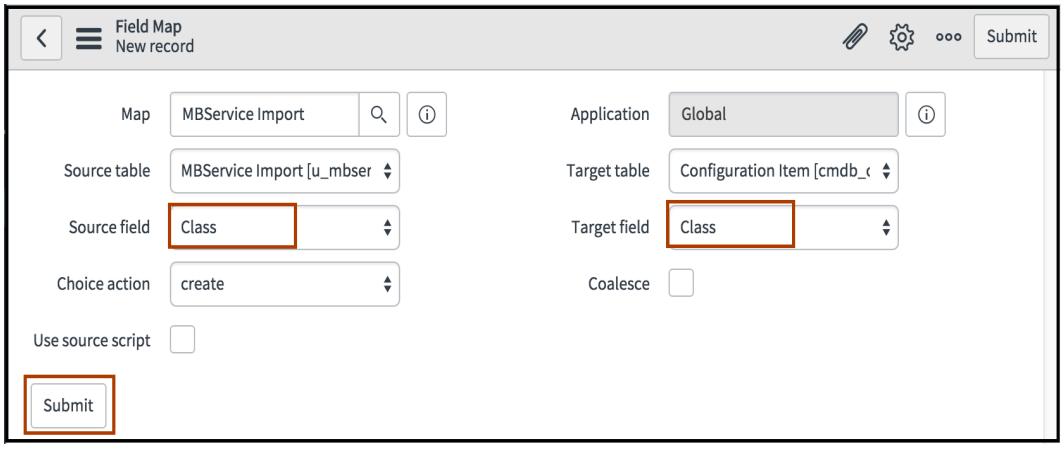
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6. Add Class field mapping by clicking on **New** button in **Field Maps** related list



7. Complete the form as follows:

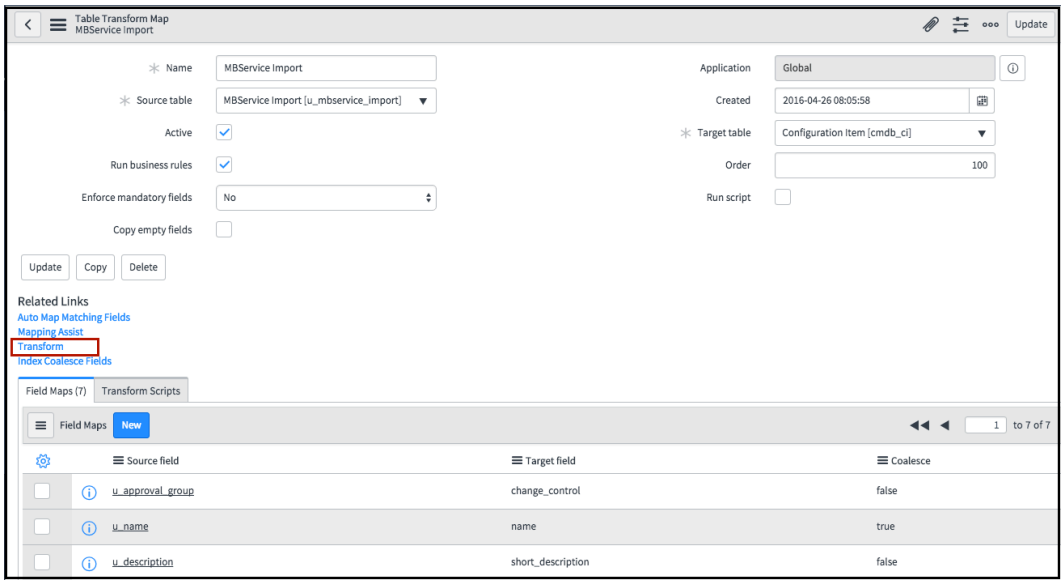
   Source field: **Class**
   Target filed: **Class**



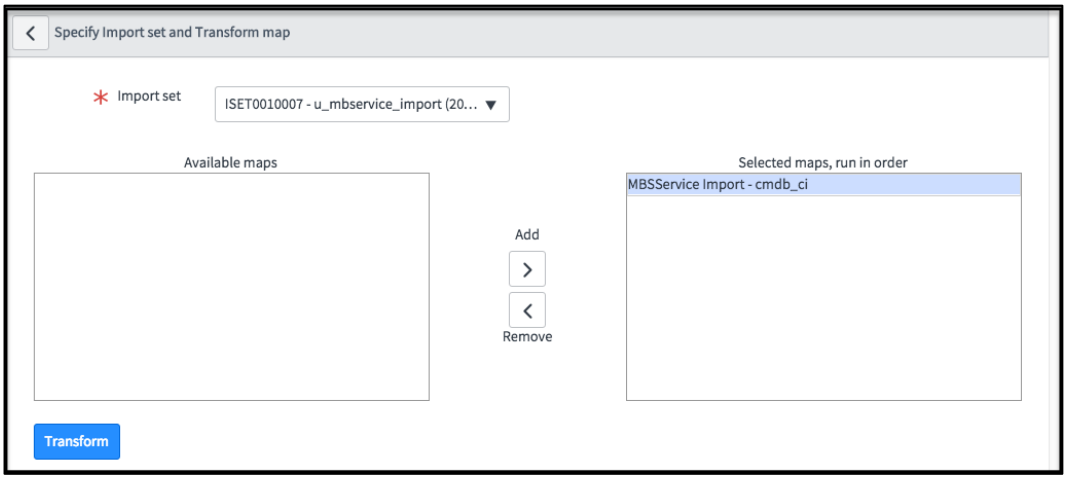
   Click **Submit**.

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8. Click **Transform**



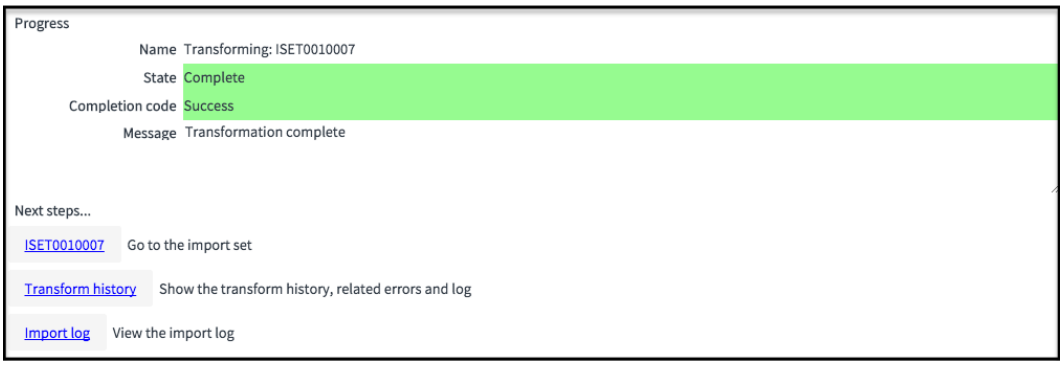
9. Make sure **MBSService Import – cmdb_ci** is preselected, then click **Transform**.



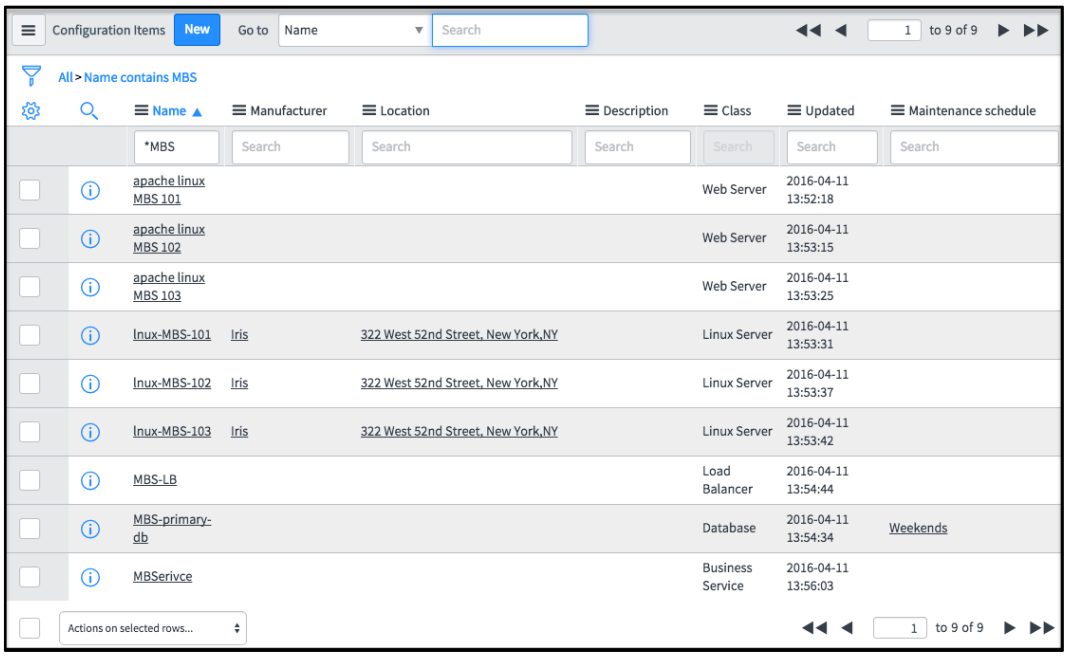
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Lab Success Verification

1. Your Screen should look like the example.



2. Navigate to **cmdb_ci.list** and search for **Name - *MBS** to see the imported data.



Progress Report

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

2. Click **I am Done!**

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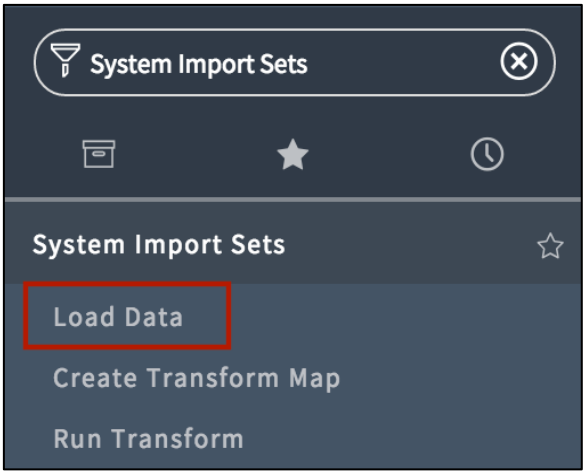
Lab Goal

This lab explains how to import Relationship data into CMDB. Download the spreadsheets from the Knowledge Base.

Lab 1.4 Import Relationships for MBService

Create a New Import Set

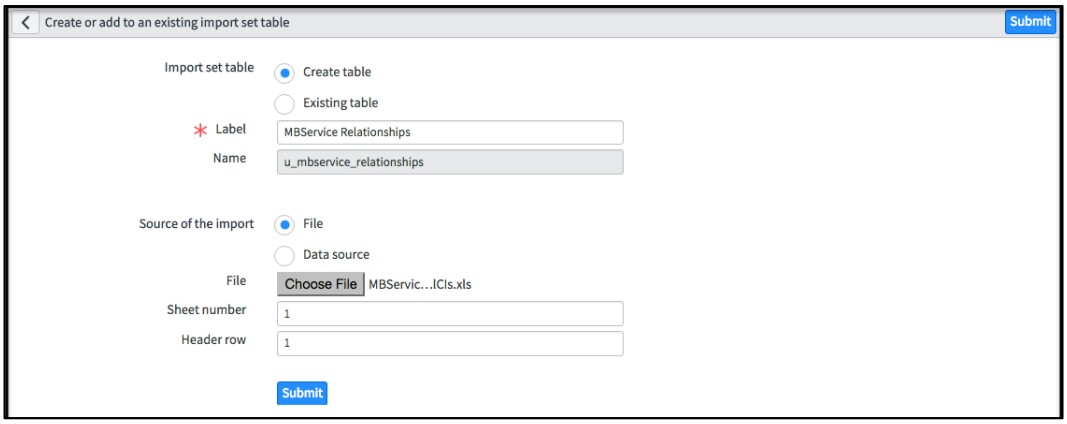
1. Navigate to **System Import Sets > Load Data**.



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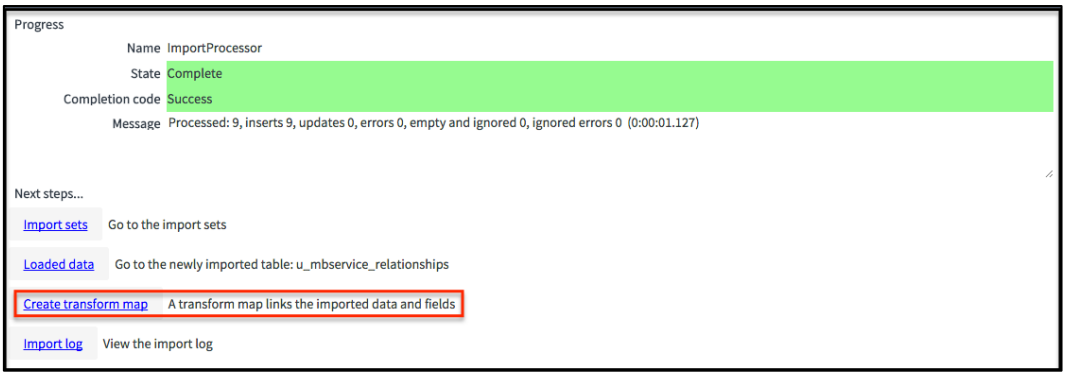
2. Create a new import set table:

   Label: **MBService Relationships**
   Table Name: auto-fills with **u_mbservice_relationships**
   Choose File: **MBServiceRelCIs.xls**



3. Click **Submit**.

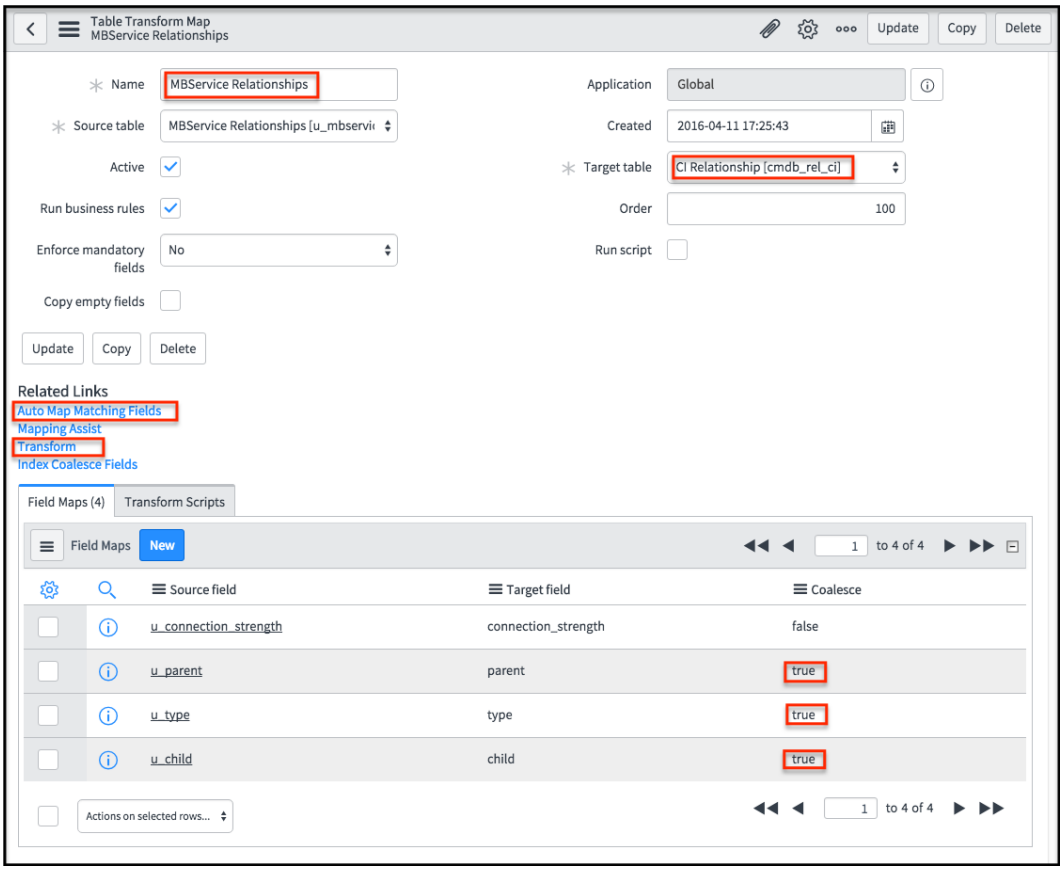
4. The Screen should look like the example. Click **Create transform map**.



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5. Complete the form as follows.

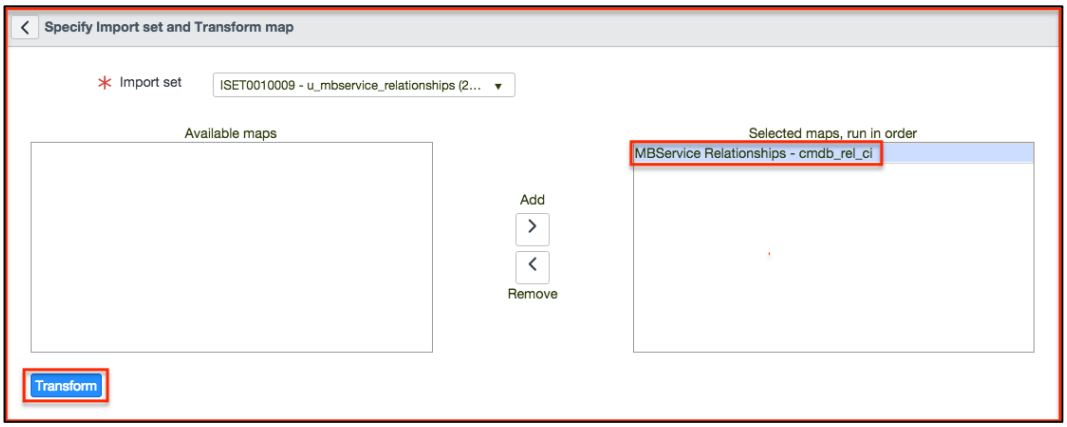
   (Preselected) Source table: **[MBService Relationships[u_mbservice_relationships]**
   Name: **MBService Relationships**
   Target table: **CI Relationship[cmdb_rel_ci]**
   Select **Auto Map Matching Fields**
   Coalesce: **parent = true, type = true, child = true**



Click **Transform**.

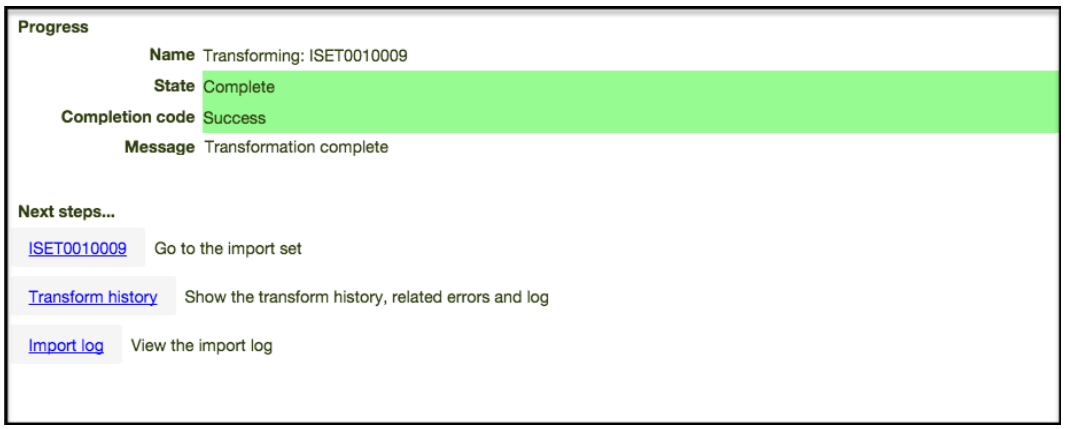
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6. Make sure **MBSService Relationships – cmdb_rel_ci** is preselected, then click **Transform**.



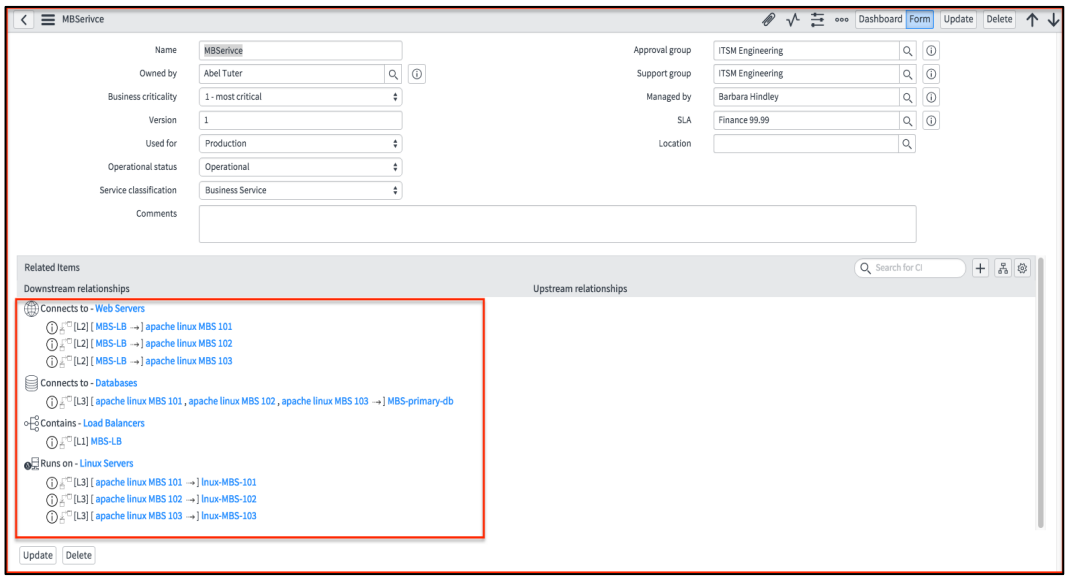
Lab Success Verification

1. The screen should look like the example.



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2. Navigate to **Configuration>Business Services**. Select and open **MBService** CI. The Screen should look like the example.



Progress Report

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

2. Click **I am Done!**

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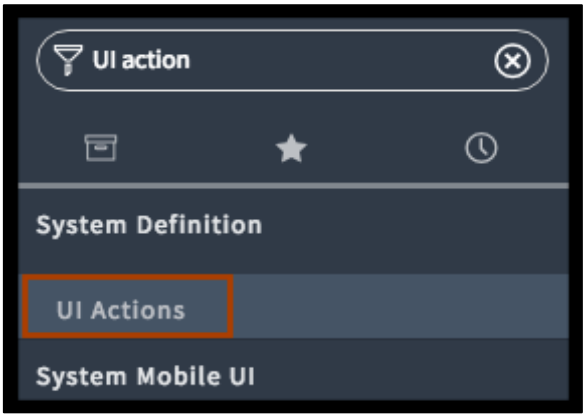
Lab Goal

This lab explains how to create an Incident and View the Business Service Impact based on the relationships created in Lab 1.4.

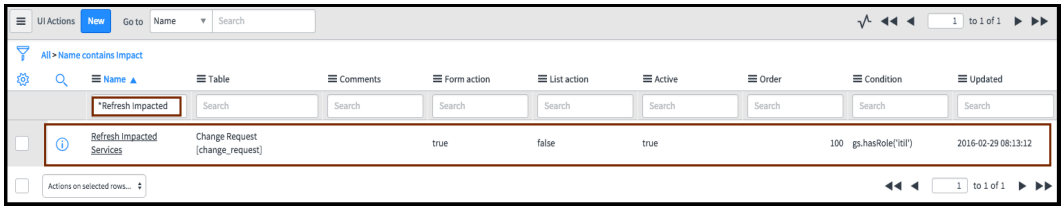
Lab 2.1 Create an Incident and View Business Impact

Create a Refresh Impacted Services UI action

1. Navigate to **System Definition > UI Actions**.



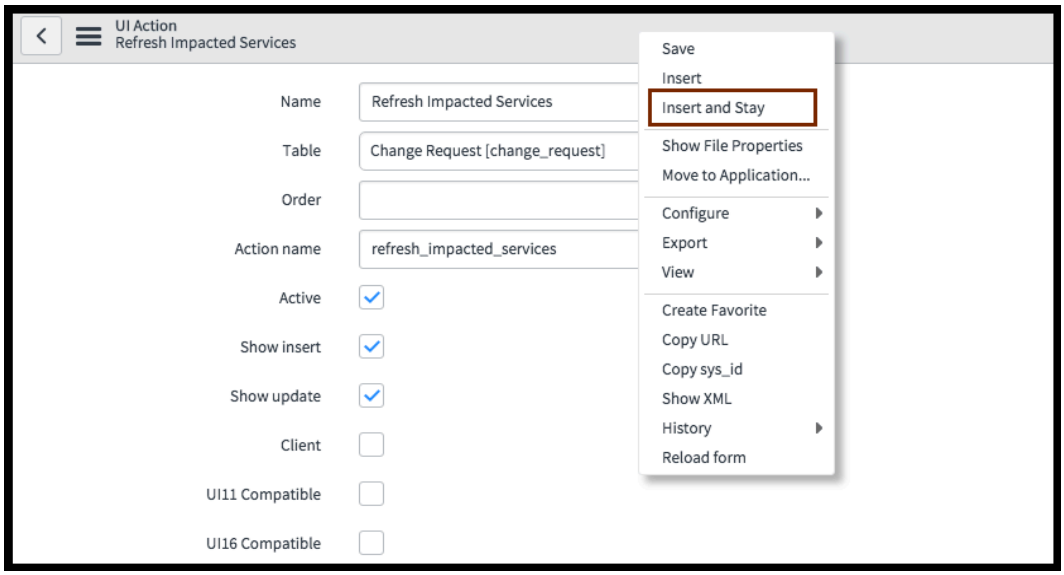
2. Search for Name = ' *** refresh impacted** ' in the list view. It should result in one search result like shown below.



3. Click on **Refresh Impacted Services** and go to the form view of the UI action.

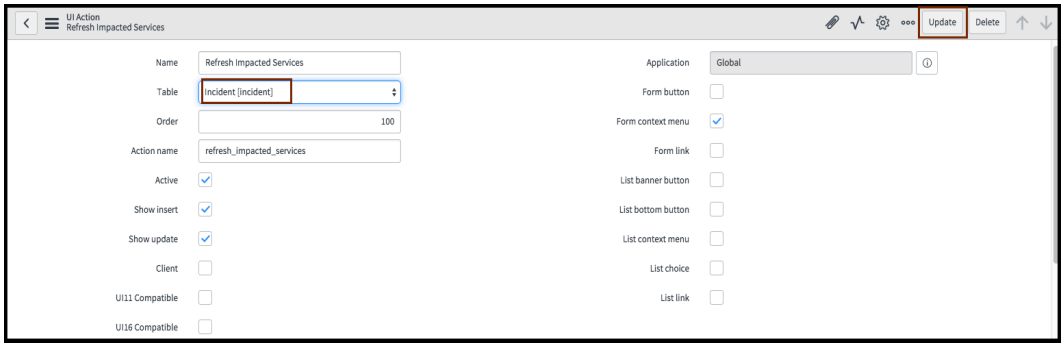
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4. Right-click on the form header and select **Insert and Stay**.



5. Change the following:

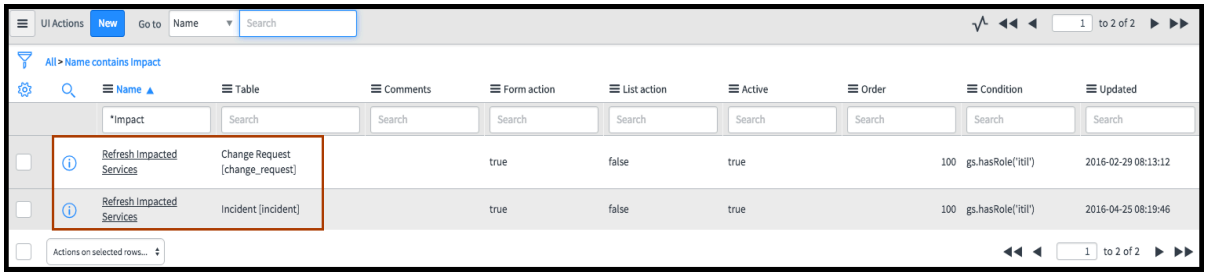
   Table: **Incident [incident]**



   Click **update**.

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6. The list view should show 2 UI actions one for Incident and one for Change Request like the example below



Create a New Incident Request

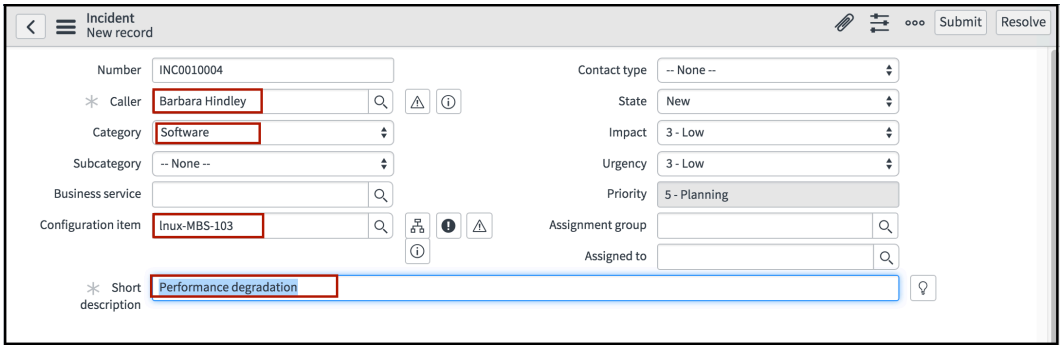
1. Navigate to **Incident > Create New**.



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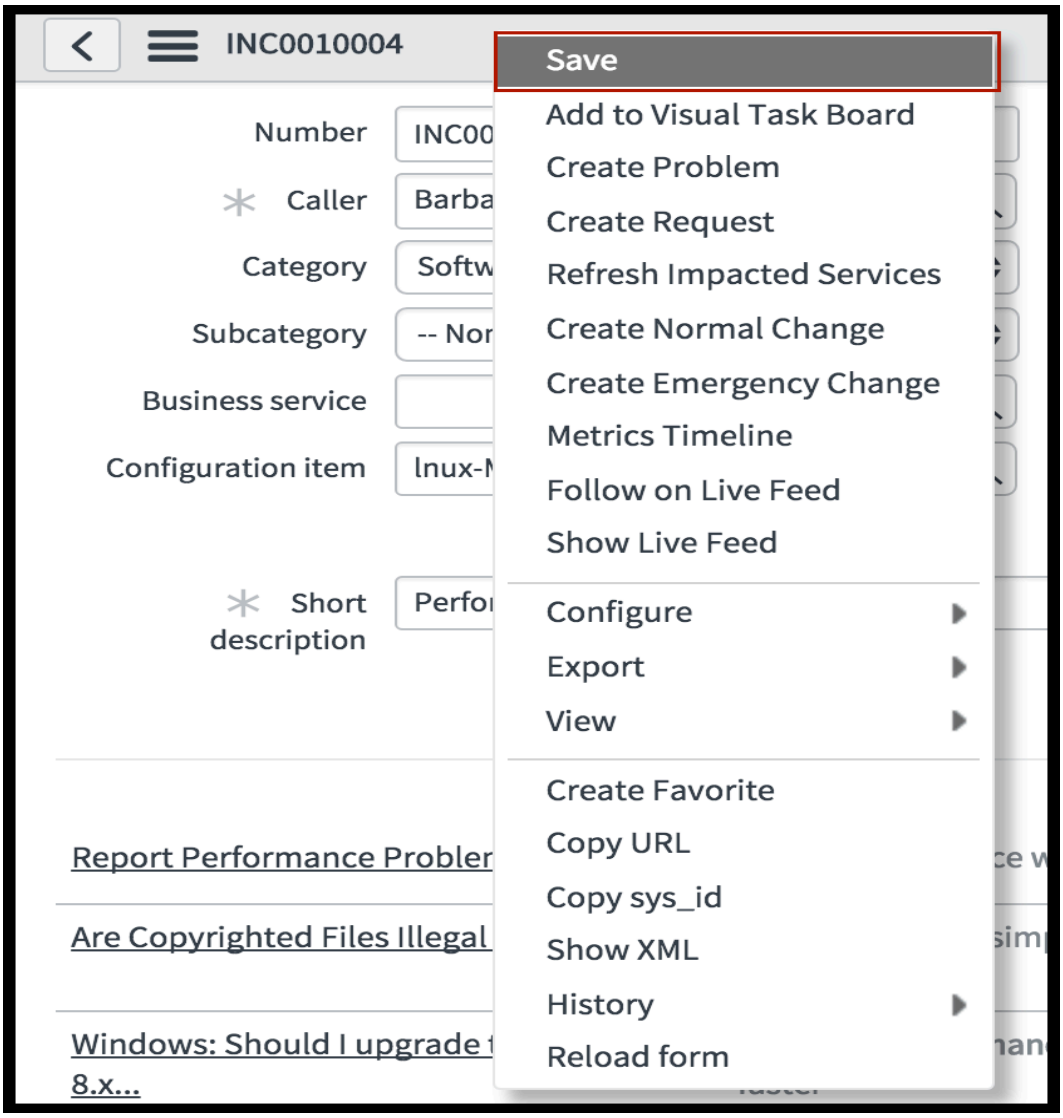
2. Complete the Incident form with the following:

   Caller: **Barbara Hindley**
   Category: **Software**
   Configuration Item: **lnux-MBS-103**
   Short description: **Performance degradation**



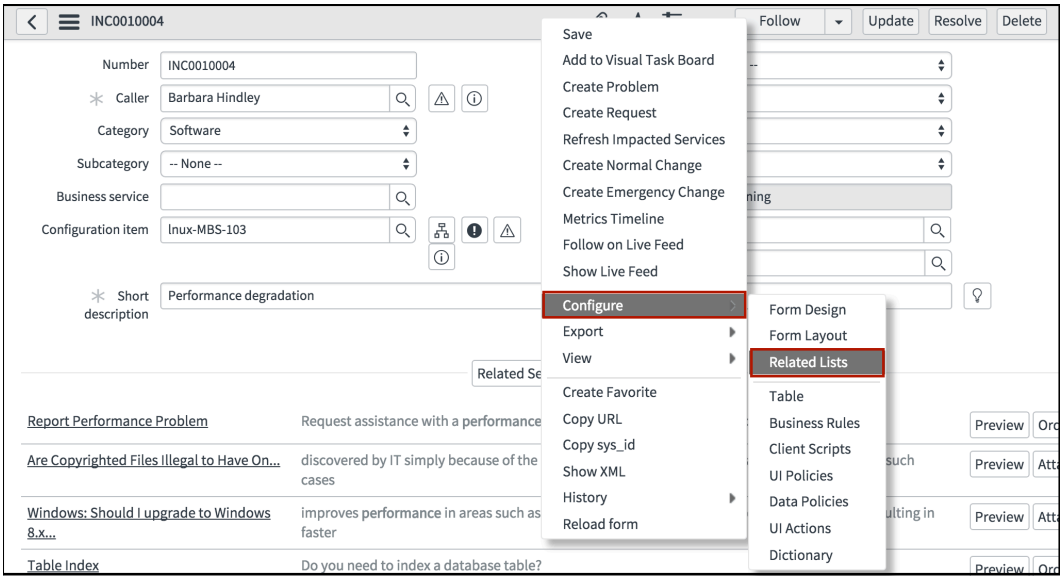
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3. Right-click the form header and click **Save**.

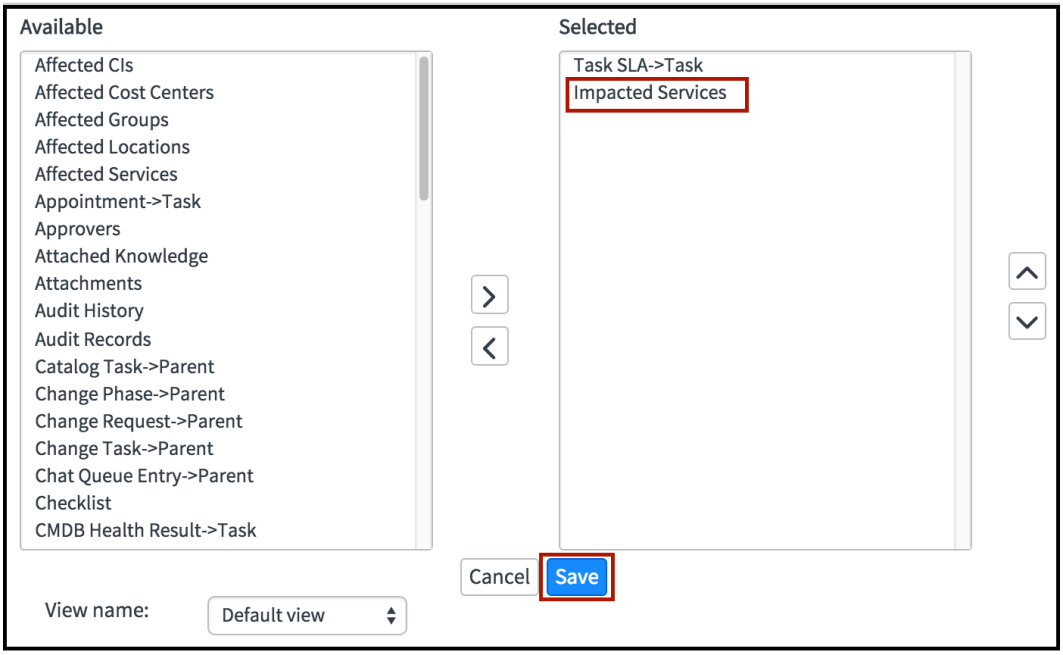


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4. Configure the Incident form Related list section. Right-click on the **Incident** form header and select **Configure > Related Lists**.

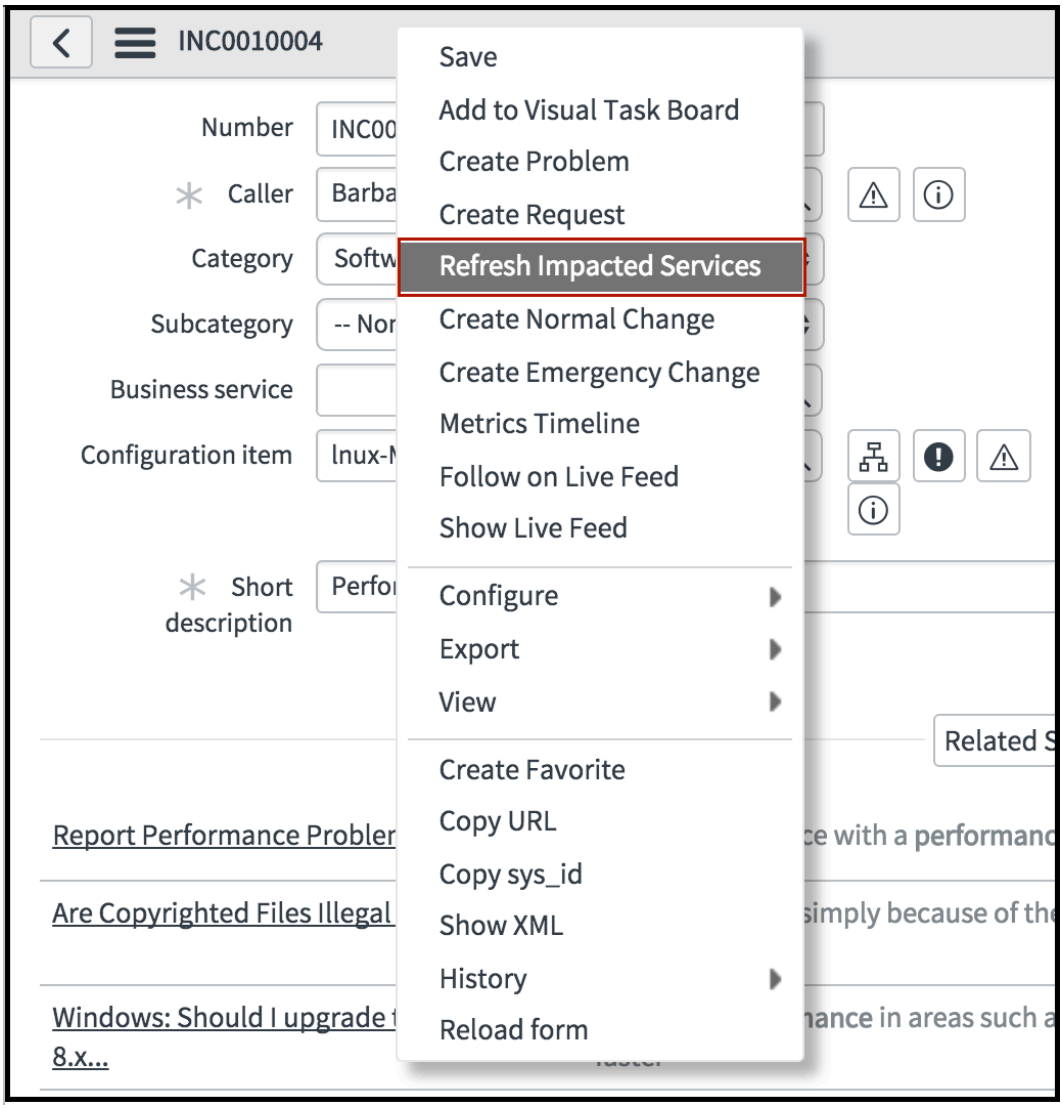


5. Add **Impacted Services** to right side of the **slush bucket**. Click **Save**.



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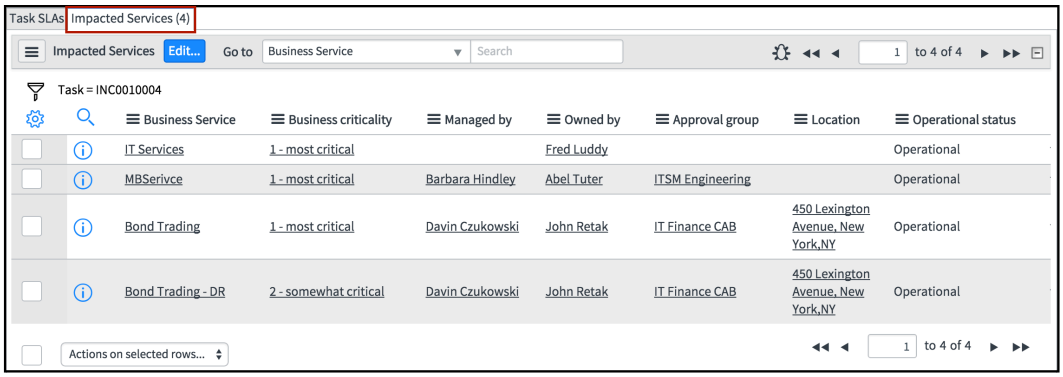
6. Right-click the form header again and select **Refresh Impacted Services**.



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Lab Success Verification

1. The Impact Services related list should look like the example.



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am Done!**

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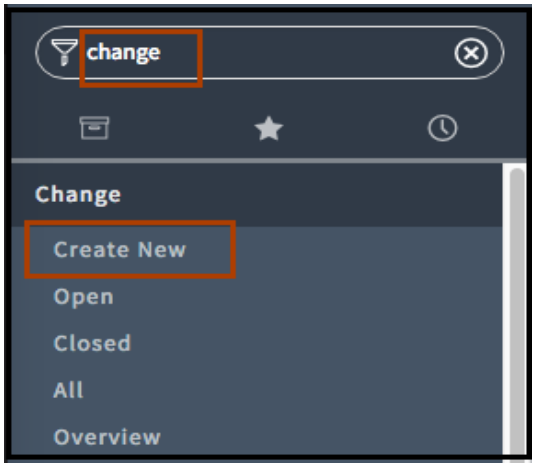
Lab Goal

This lab explains how to create a Change and View the Business Service Impact based on the relationships created in Lab 1.4.

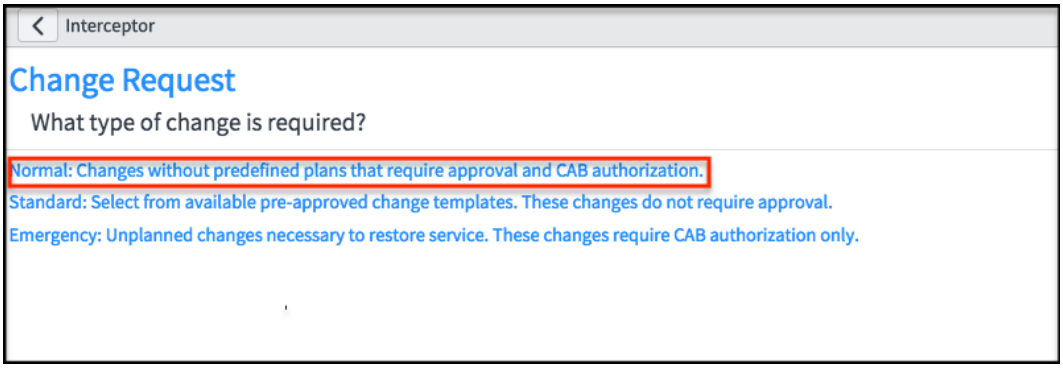
Lab 2.2
Create a Change and View Business Impact

Create a New Change Request

1. Navigate to **Change > Create New**.



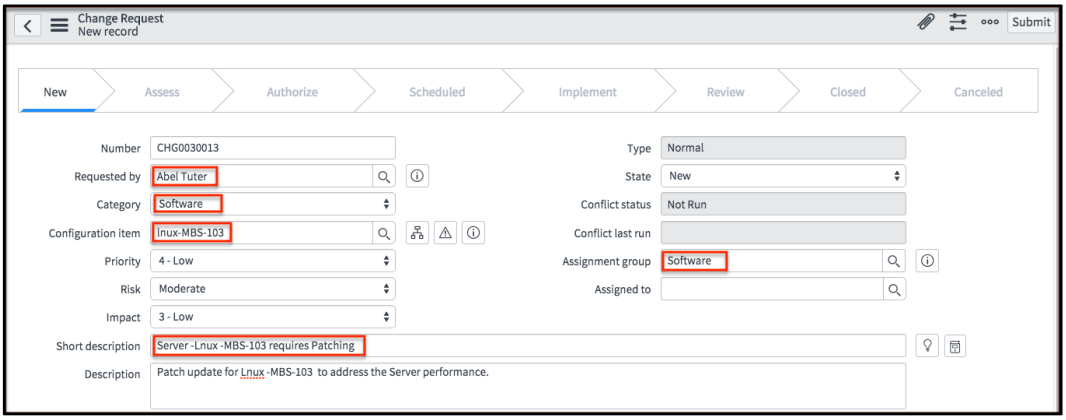
2. Click **Normal: Changes without predefined plans that require approval and CAB authorization**.



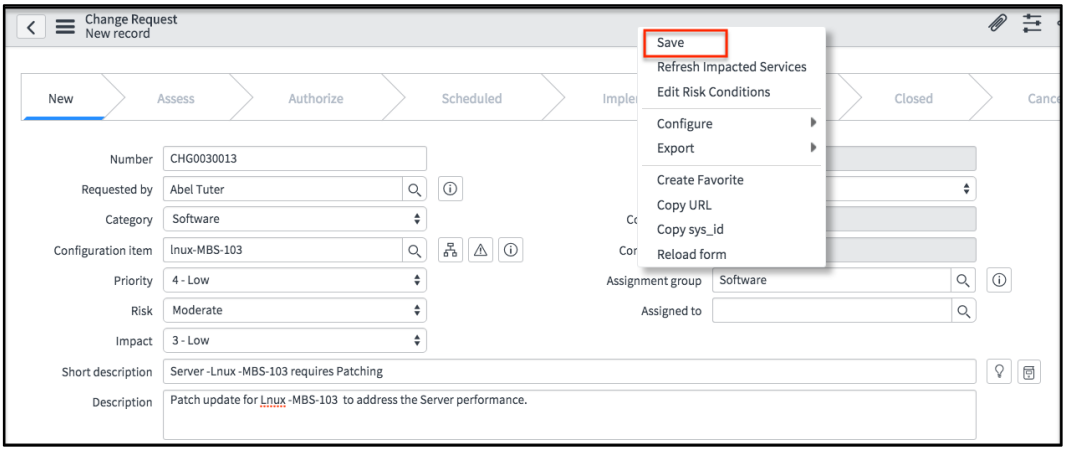
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3. Complete the Change Request form with the following:

   Requested by: **Abel Tuter**
   Category: **Software**
   Configuration Item: **lnux-MBS-103**
   Short description and Description: **Server -Lnux -MBS-103 requires Patching**
   Assignment group: **Software**

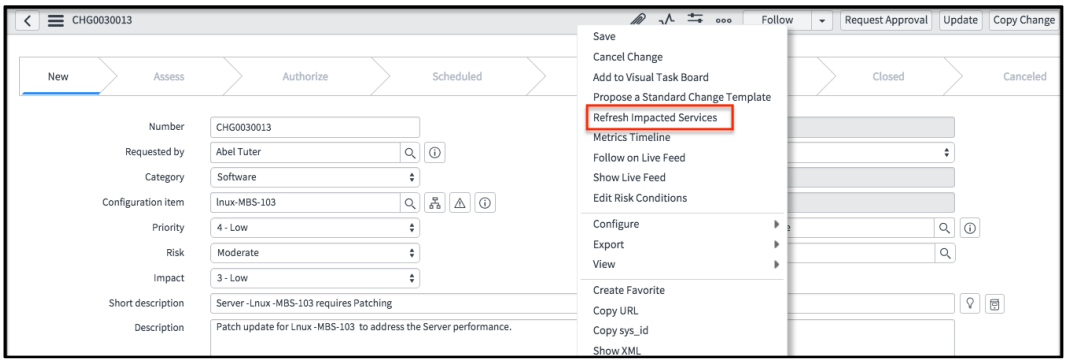


4. Right-click the form header and select **Save**.



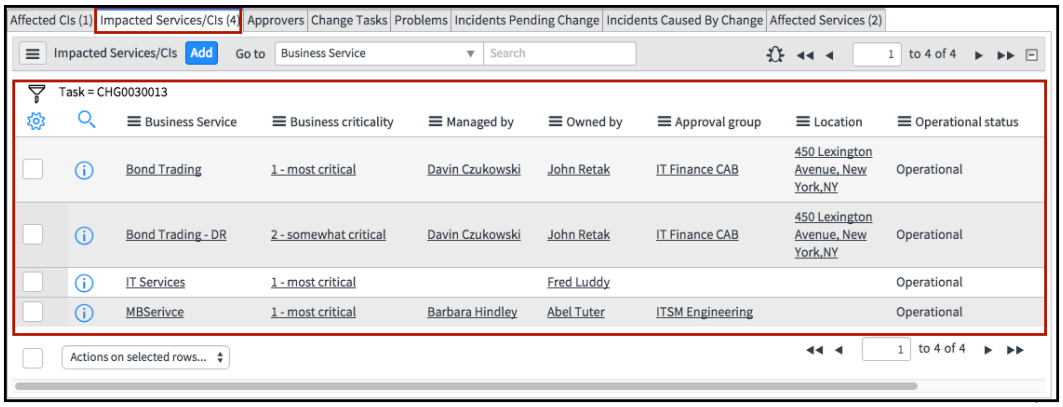
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5. Right-click the form header again and select **Refresh Impacted Services**.



Lab Success Verification

1. The Impact Services/CIs related list should look like the example.



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am Done!**

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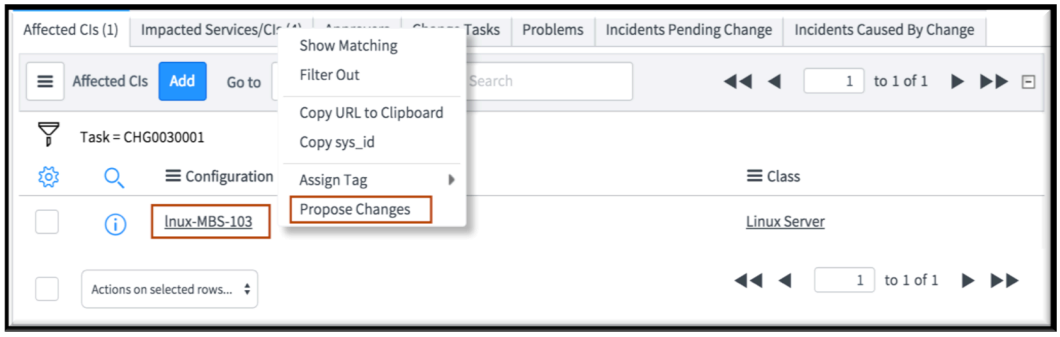
Lab Goal

This lab explains how to propose a change to configuration items and apply change and view change history on the timeline view.

Lab 2.3
Propose and View Changes on Timeline

Propose a Change to Configuration Item

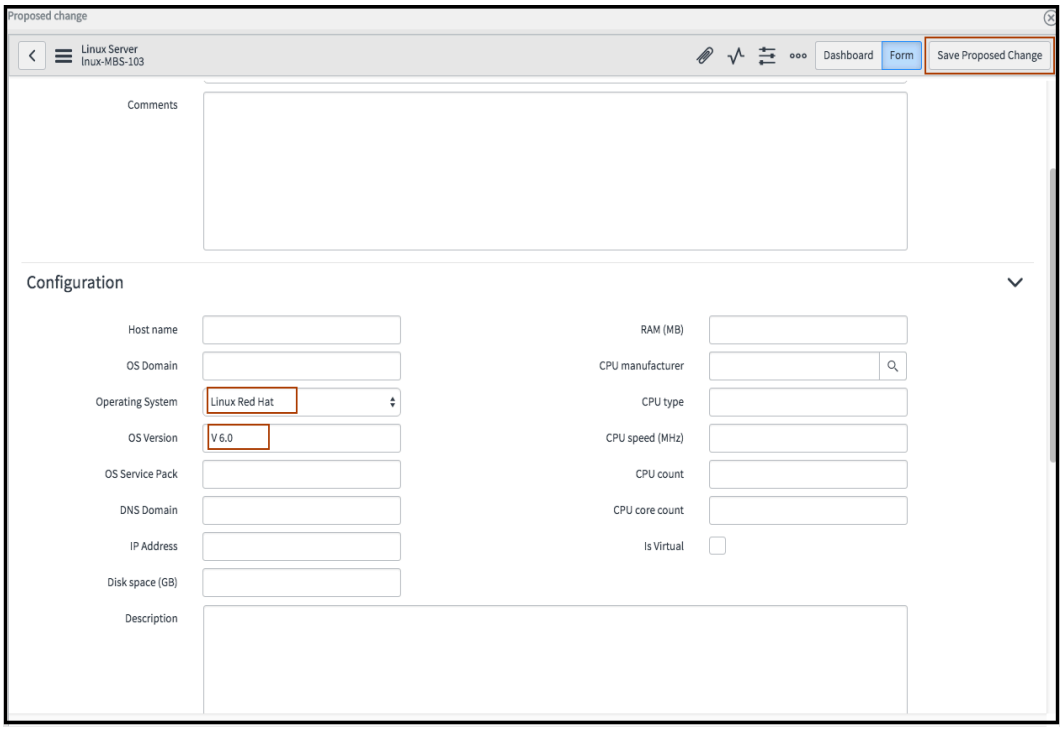
1. Navigate to **Change > Open** and select the **Change request** created in Lab 2.2.
2. Scroll to the **Affected CIs** related list. Right-click **lnux-MBS-103** and select **propose changes**.



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3. Complete the form with the following:

   Operating System: **MAC OS 10 (OSX)**
   Version: **v10.2**



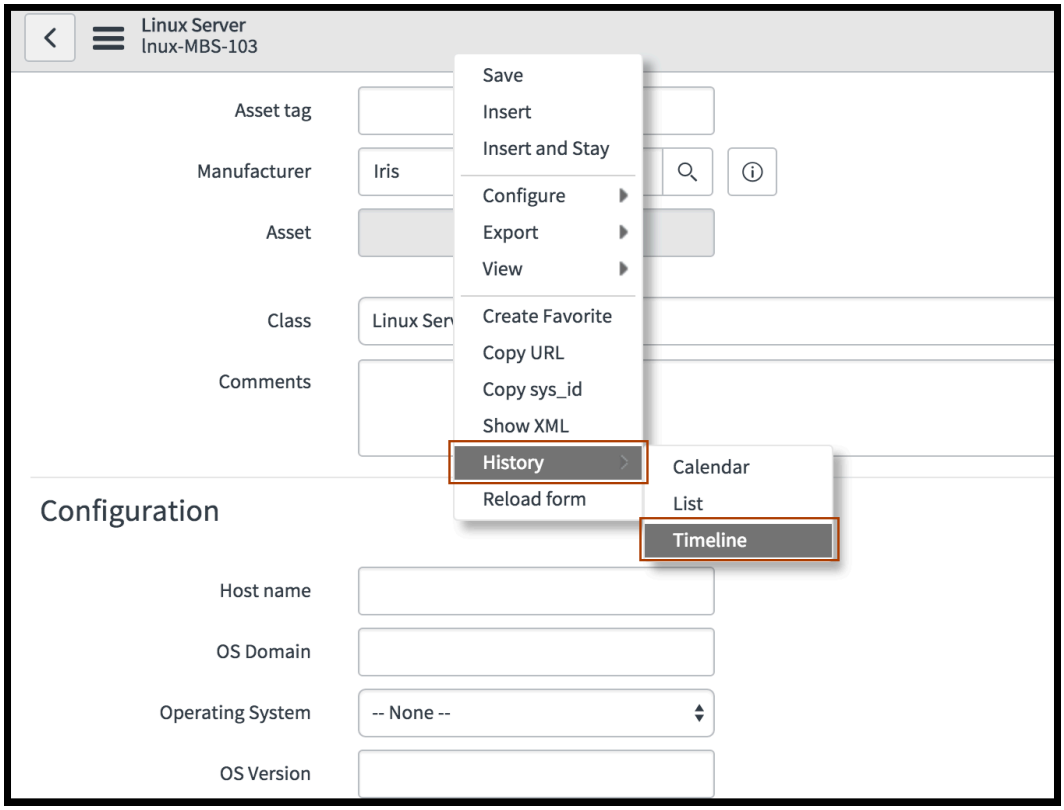
   Click **Save Proposed Changes**.

4. Navigate **to CI lunx-MBS-103** by scrolling to **Affected CI** related list and clicking on the CI.

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Viewing Proposed Change on a Timeline

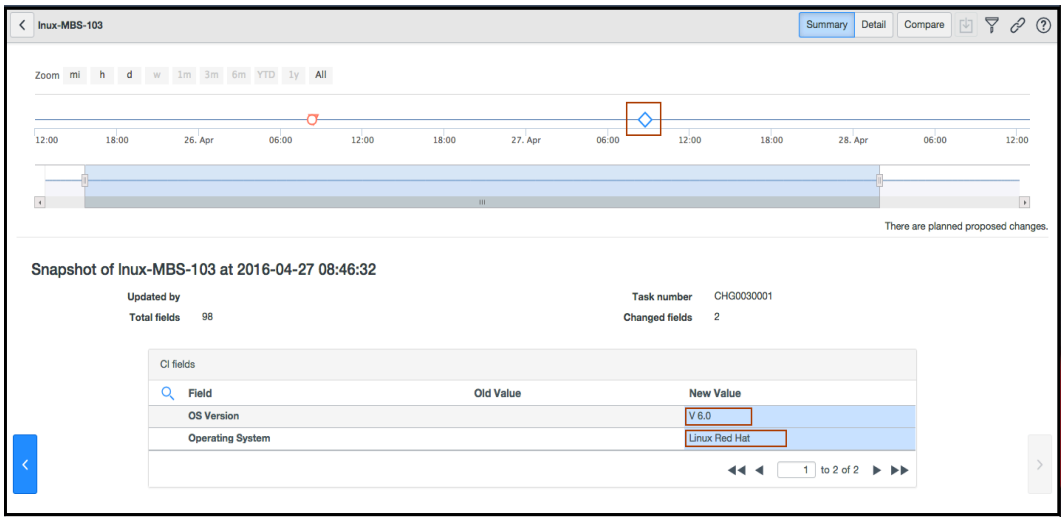
1. On a lunx-MBS-103 CI form right-click on the form header and Select **History > Timeline**.



2. Select diamond shaped symbol on the timeline to view proposed changes.

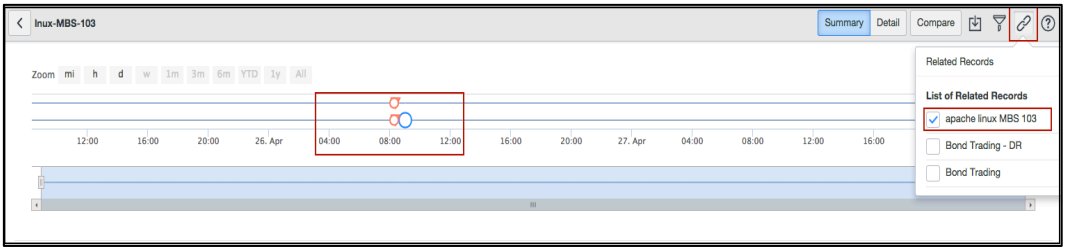
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3. Check changes proposed to Operating System and Version fields are shown.



View Related CI Changes in Timeline

1. In the timeline view, click on the **link** icon on the header.
2. Select **apache linux MBS 103** CI.
3. A new timeline for the related CI is added to the view.
4. Select bubble on related CI timeline to view change details.



Apply Proposed Change

1. Navigate to **Change > Open** and select the **Change request** created in Lab 2.1.

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2. Click **Request Approval** on the form header.



3. Scroll down and select the **Approvers** tab.

4. Change the state to **Approved** for all entries as shown below.



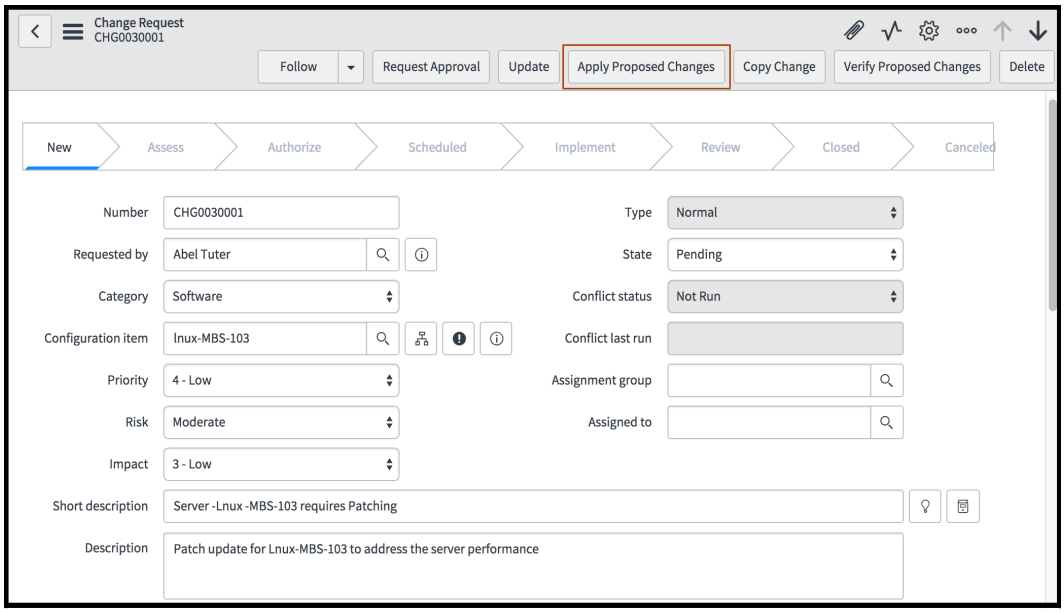
5. **Reload** the form and check the **Approvers** state. If there are more rows change the state to **Approved**.

6. Click **Implement** on the form header.



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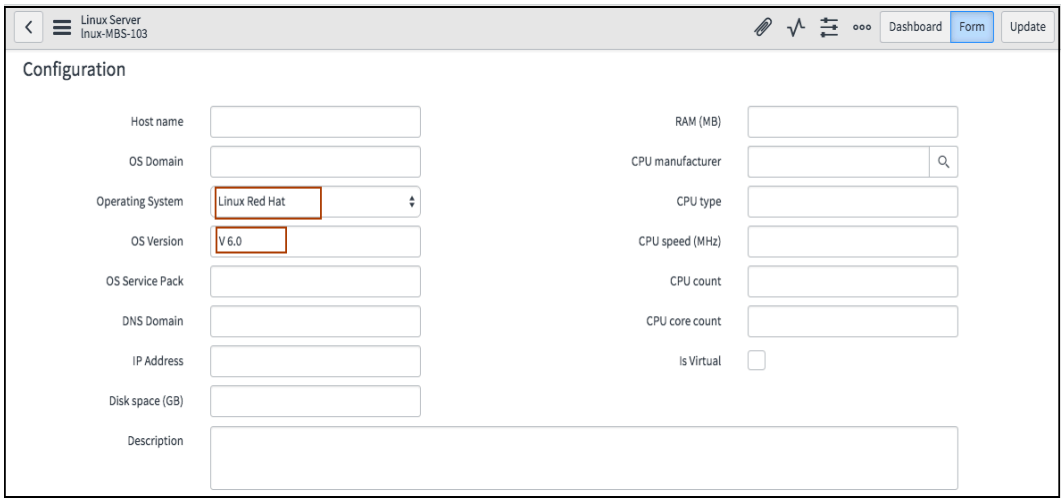
7. Click the **Apply Proposed Changes** button on the top of the Change form.



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Lab Success Verification

1. Navigate to CI **lunx-MBS-103** and verify the **Operating System** and **Version** field values under the **Configuration** section.



Progress Report

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

2. Click **I am Done!**

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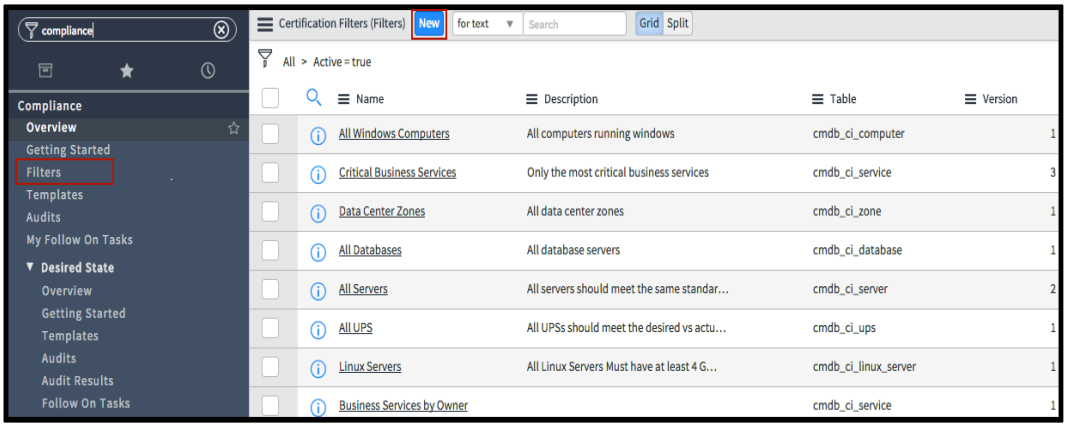
Lab Goal

This lab explains how to create a Desired state audit for the service CI created in Lab 1.4 using custom related list.

Lab 3.0
Create a Desired State Audit

Create a Certification Filter

1. Navigate to **Compliance > Filters**. **Click New**.

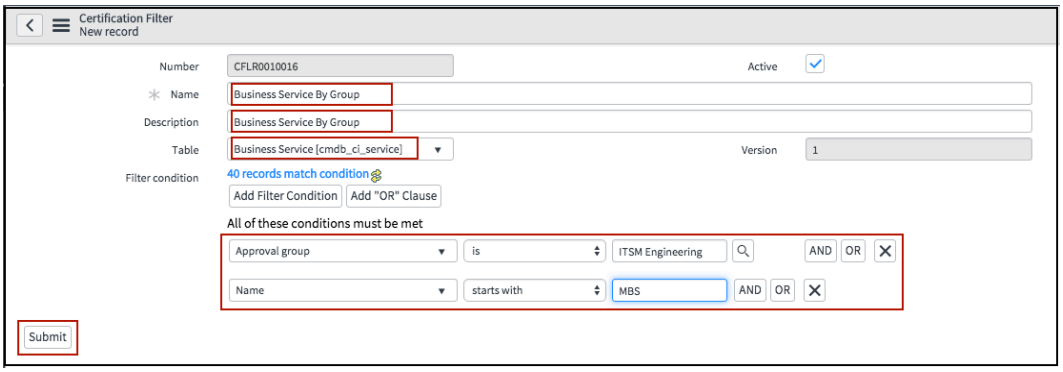


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2. Fill out the form as follows:

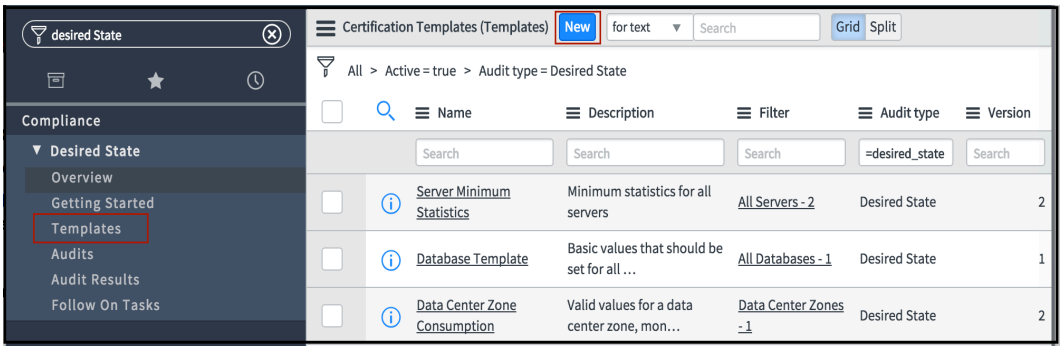
   Name: **Business Service by Group**
   Description: **Business Service by Group**
   Table: **Business Service [cmdb_ci_service]**
   Add Filter Condition: **Approval group is ITSM Engineering & Name starts with MBS**

   Click **Submit**.



Create Desired State Template

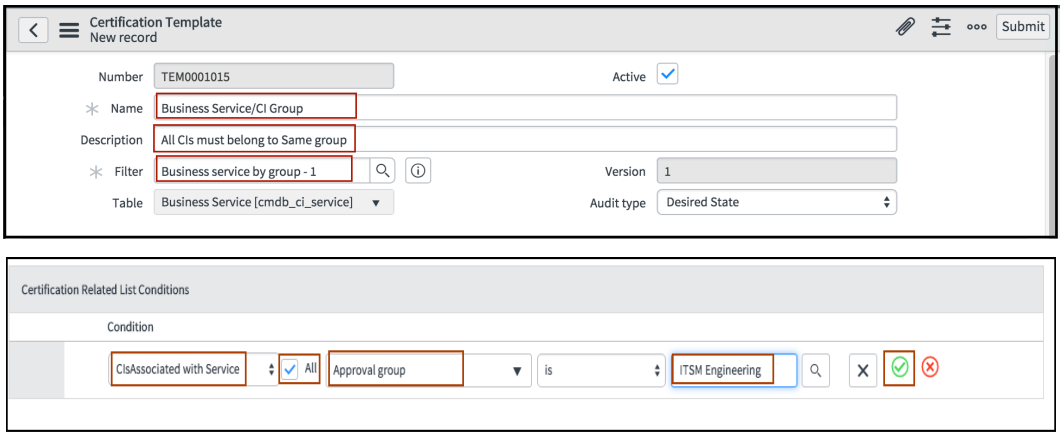
1. Navigate to **Compliance > Desired State > Templates**. Click **New**.



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2. Complete the form as follows:

   Name: **Business Service/CI Group**
   Description: **All CIs must belong to Same group**
   Filter: **Business Service by group - 1**
   Certification Related list Condition: **CIsAssociated with Service: Approval group is ITSM Engineering for ALL**



3. Click **Submit**.

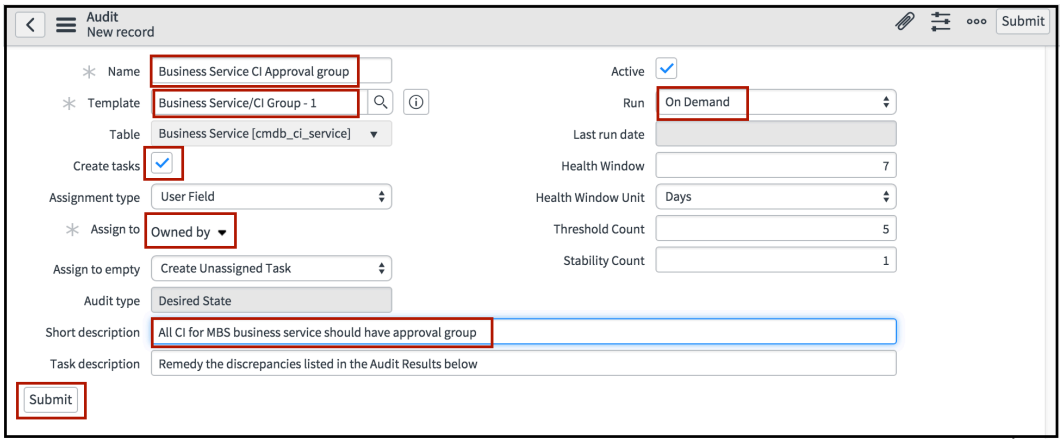
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Create and Run an Audit

1. Navigate to **Compliance > Desired State > Audits**. Click **New**.

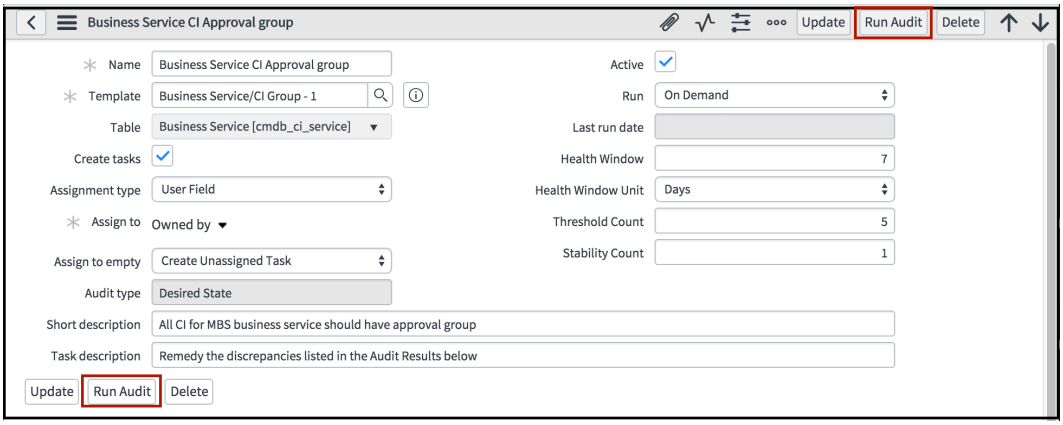
2. Complete the form as follows:

   Name: **Business Service CI Approval group**
   Template: **Business Service/CI group**
   Run: **on Demand**
   Create tasks: **Checked**
   Assignment type: **User Field**
   Assigned to: **Owned by**
   Assign to empty: **Create Unassigned Task**
   Short Description: **All CI for MBS business service should have approval group**



3. Click **Submit**.

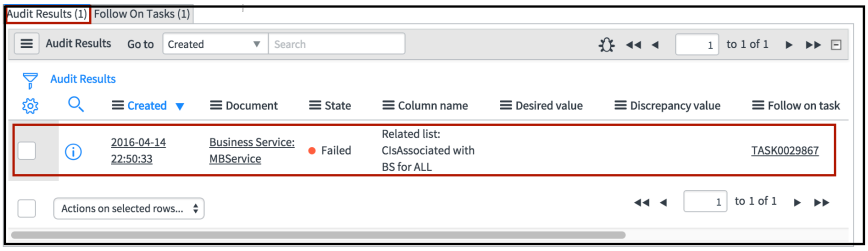
4. Click back into the **Business Service CI approval group** Audit. Click **Run Audit**.



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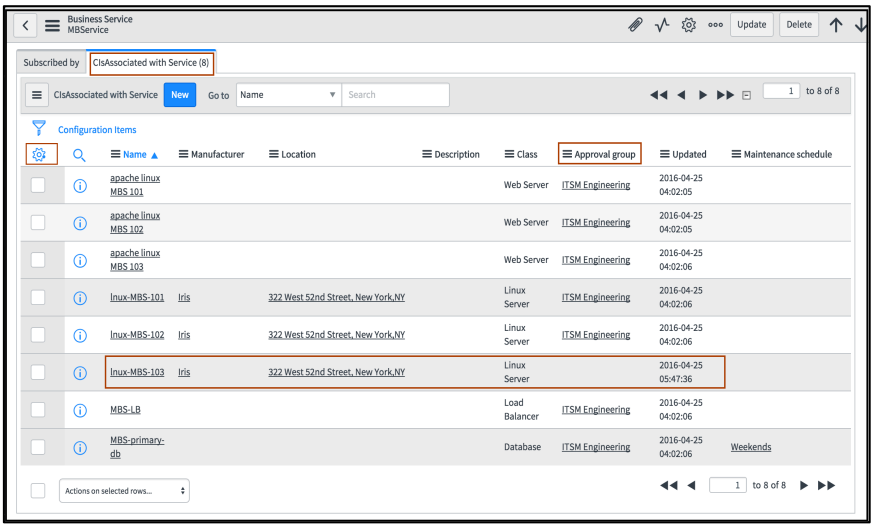
Lab Success Verification

1. Open **Business Service CI approval group** Audit, scroll to the **Audit Result** related list. Your result should look similar to example.



2. Navigate to **Configuration > Business Services** and select the **MBService** CI from the list view and check the **CIsAssociated with Service** related list tab. It should look like the example below.

   Add the Approval group column to the list view by clicking on the gear settings icon.



Progress Report

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

2. Click **I am Done!**

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