Lab Guide

Facilities:

Optimize Space Utilization

Brian Jurasic & Clay Major

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

Lab Sponsored by Amazon Web Services



This
Page
Intentionally
Left
Blank

Lab Goal

This lab explains how to use the facilities workbench to manage space, review occupancy, and understand the filters within the workbench.

Lab 1.1 Use the Facilities Workbench

Log On to the Training Instance

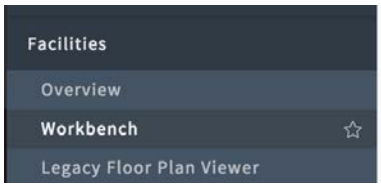
1. Navigate to the unique instance URL provided.



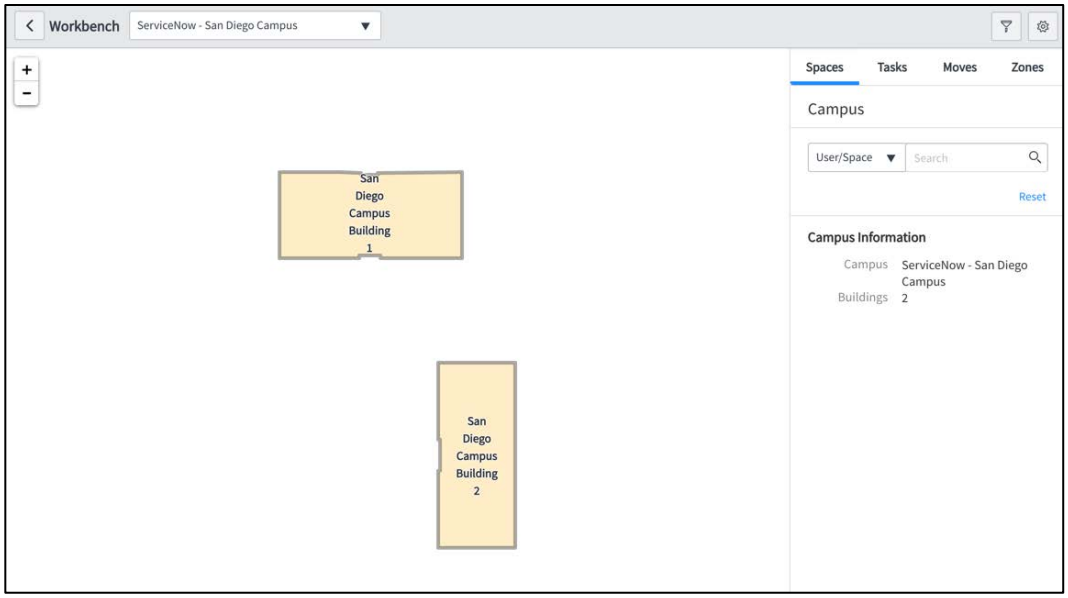
2. Log in with the provided administrator credentials.

Use the Workbench to View the Occupancy

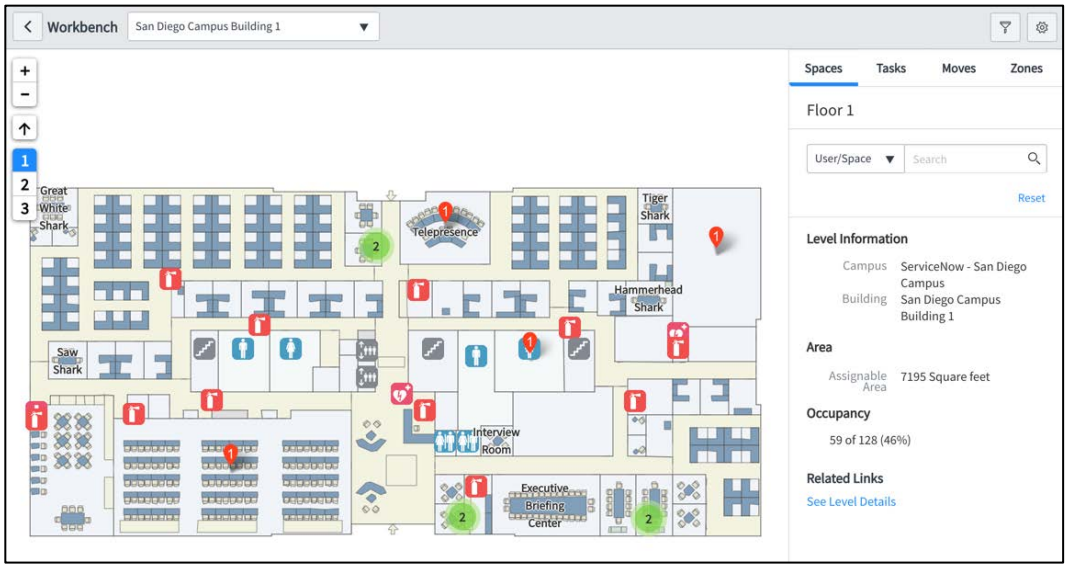
1. Click the workbench module under the **Facilities** application.



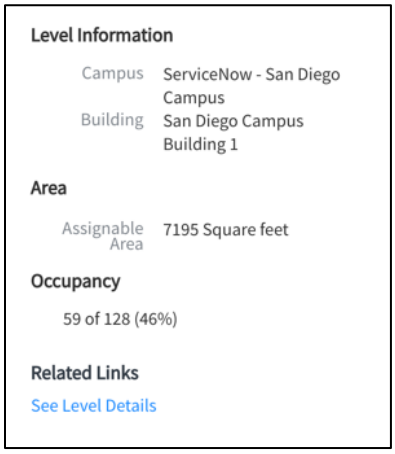
2. The **Facilities Workbench** for the San Diego Campus should appear. Click the San Diego Campus Building 1 Image.



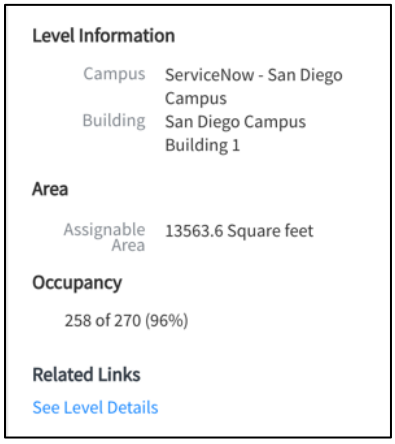
3. The **Facilities Workbench** for the San Diego Campus Floor 1 should appear.



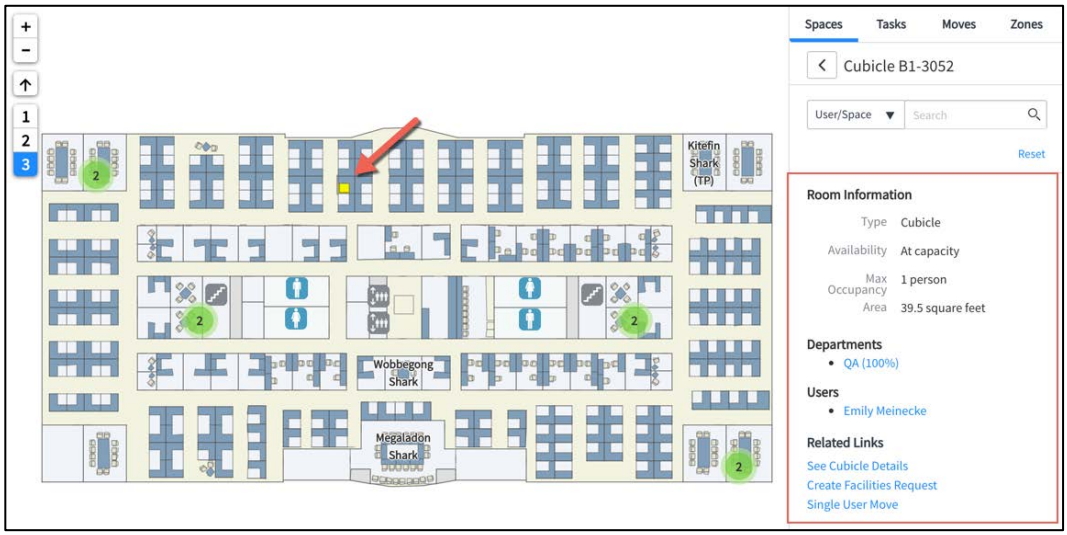
4. Note the square footage and occupancy of Floor 1.



5. Click Floor 3 in the upper-left of the workbench and note the occupancy details for the building.



6. Click a cubicle and note the occupancy details for that cubicle (highlighted in yellow).



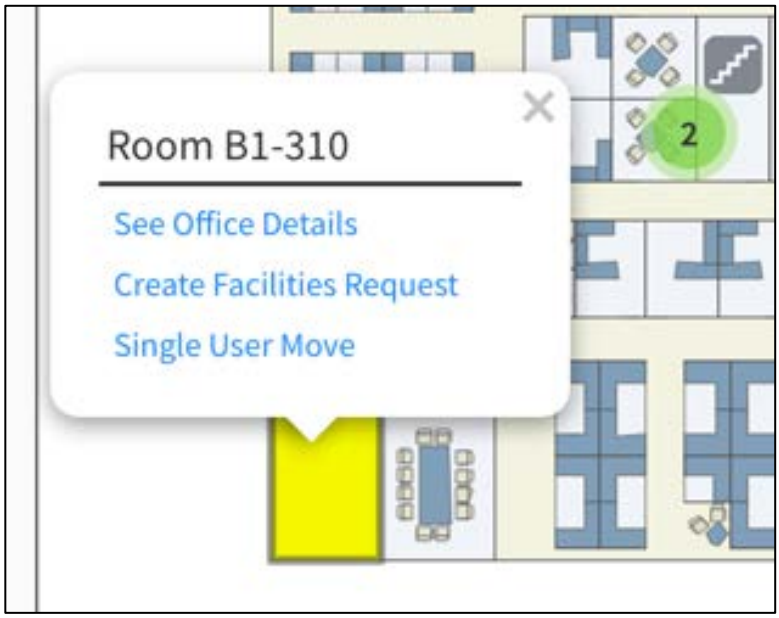
7. Click an open space and view the occupancy details. Similar to a specific cubicle, this open space can be used to occupy 2 people and has 129.4 square feet of usable space.

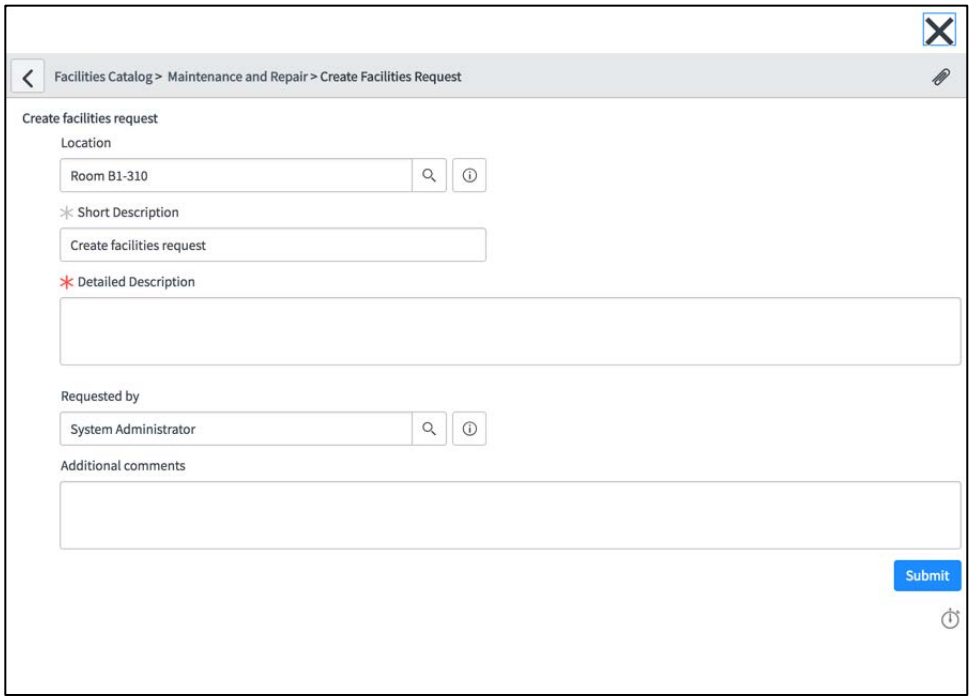


8. Click Room **310** (1), then click on **office details** (2). Here, you can change the occupancy details and requirements for that space.

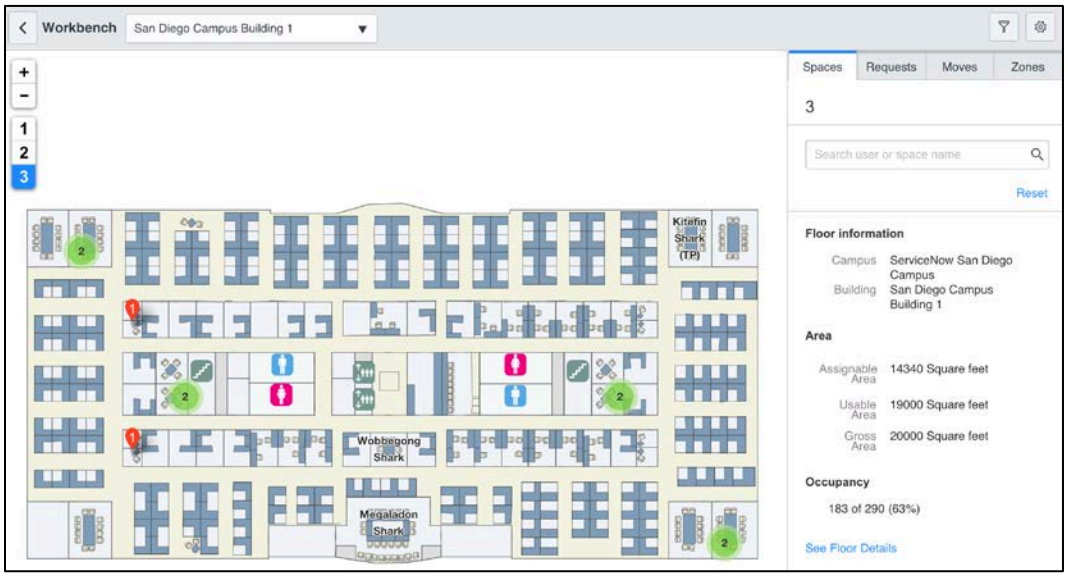


9. Close (click **X**, not shown) the office details after noting the information obtained. Right-click on the same space, **Room 310** (shown below). Here, you can create a facilities request, show space details, and view any requests on that space. Click **Create New Request**.





10. Click **X** on the Facilities Request, noting that you can create a Facilities Request from the space (which you do later in the lab). Click the **1** on the left side to take you back to the first floor. You should now be viewing the floor plan.

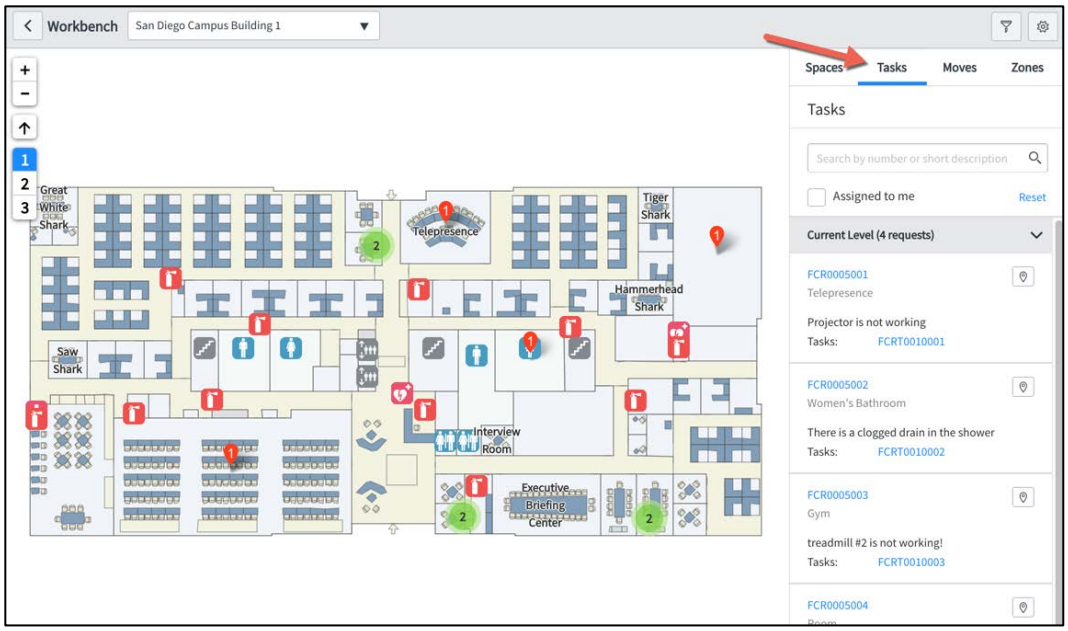


Lab Goal

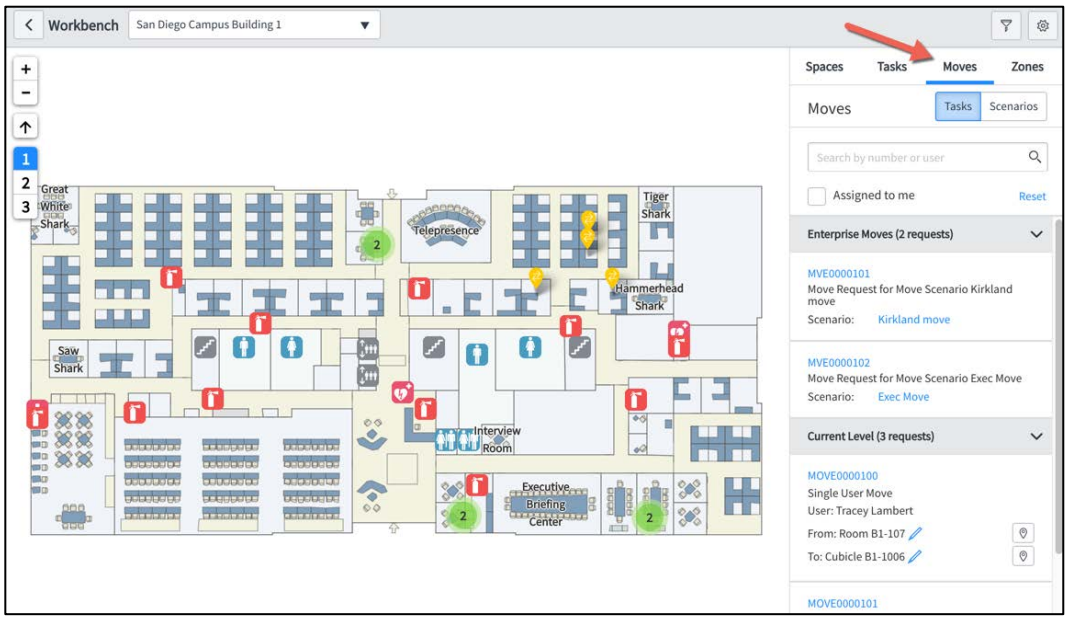
This lab continues with space management and how to view requests per floor/building, zones, and using filters.

Lab 1.2
View Requests and Use Filters

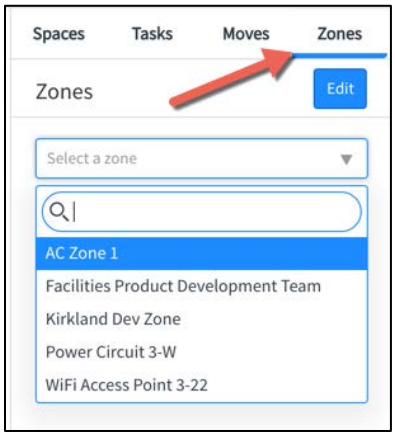
1. Now you can view other space information regarding that floor. Click **Tasks** in the upper-right of the workbench and note the requests represented by the red exclamation mark with a number indicating the number of requests for that space. 



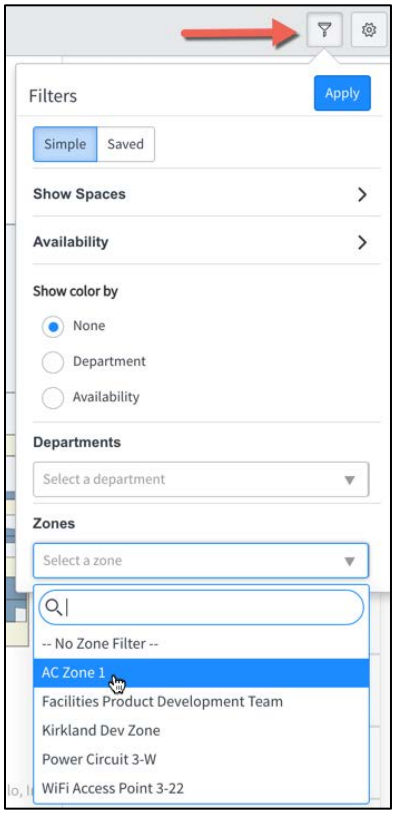
2. Click the **Moves** tab in the upper-right corner of the workbench. All move requests are represented by the yellow exclamation point on the map. 



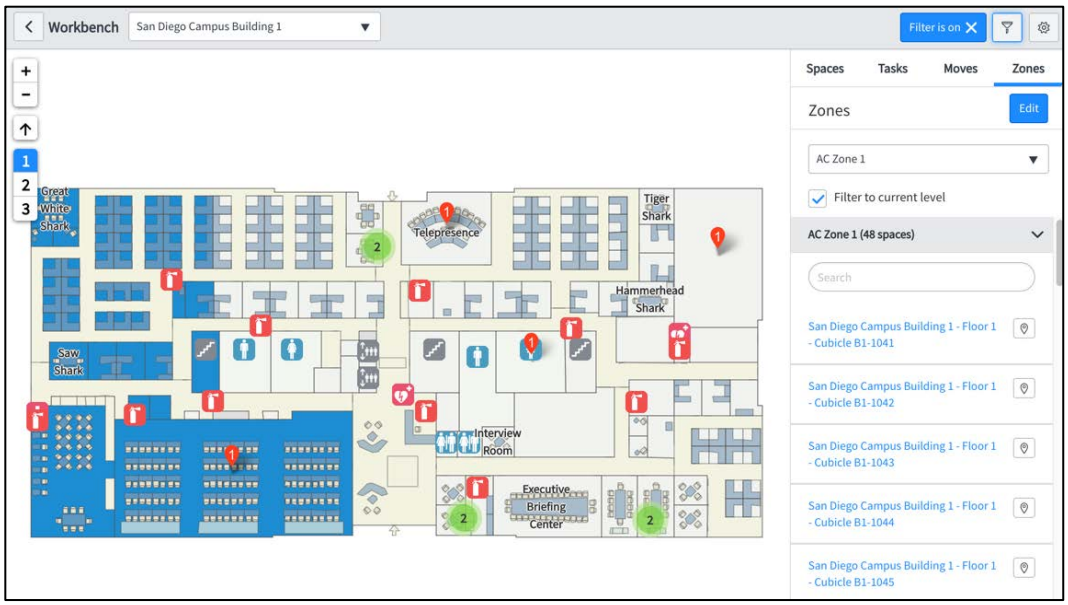
3. **Look** at zones and use the filters**:** Click the **Zones** tab in the upper-right corner. This gives you a list of all the zones on floor. When you select **AC Zone 1**, a list of all the spaces that fall within that zone appears (48 spaces).



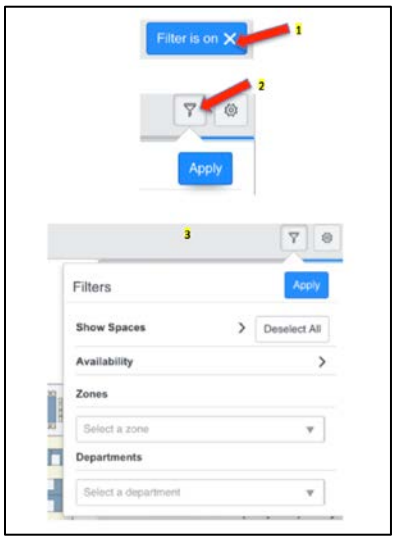
4. View the zone on the map. Click the  above the Zone tab and select **AC Zone 1**.



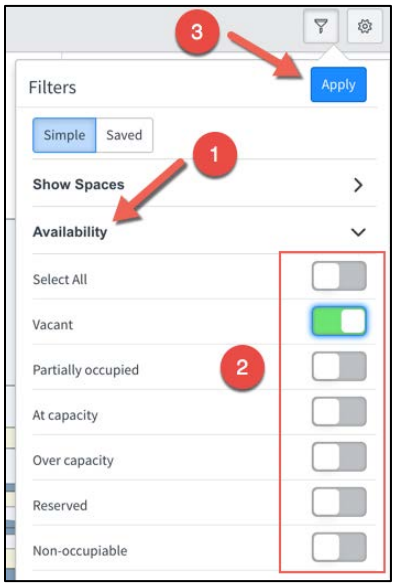
5. Click the Apply button and view the Zone 1 highlighted in **green** on the workbench. The green spaces represent the positions of the AC Zone 1 services, providing more info on what may be causing an HVAC issue or what equipment needs to be serviced.



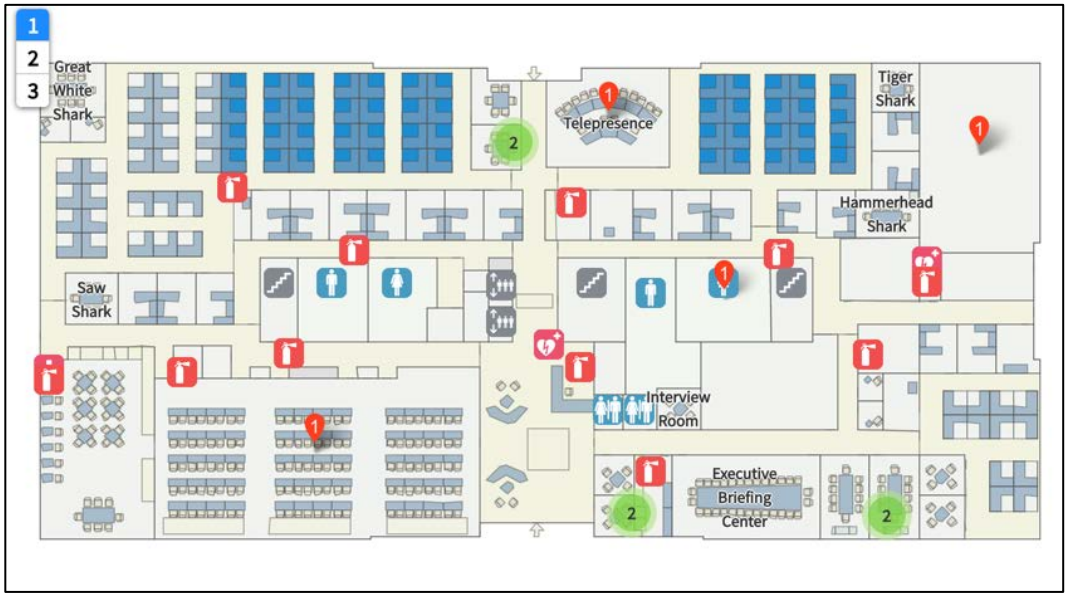
6. Look at the filters to see how to use them to view **layers** within the workbench. (1) Click the **X** to clear the filters. (2) Click the **filter** icon. (3) This should be your view within filters.



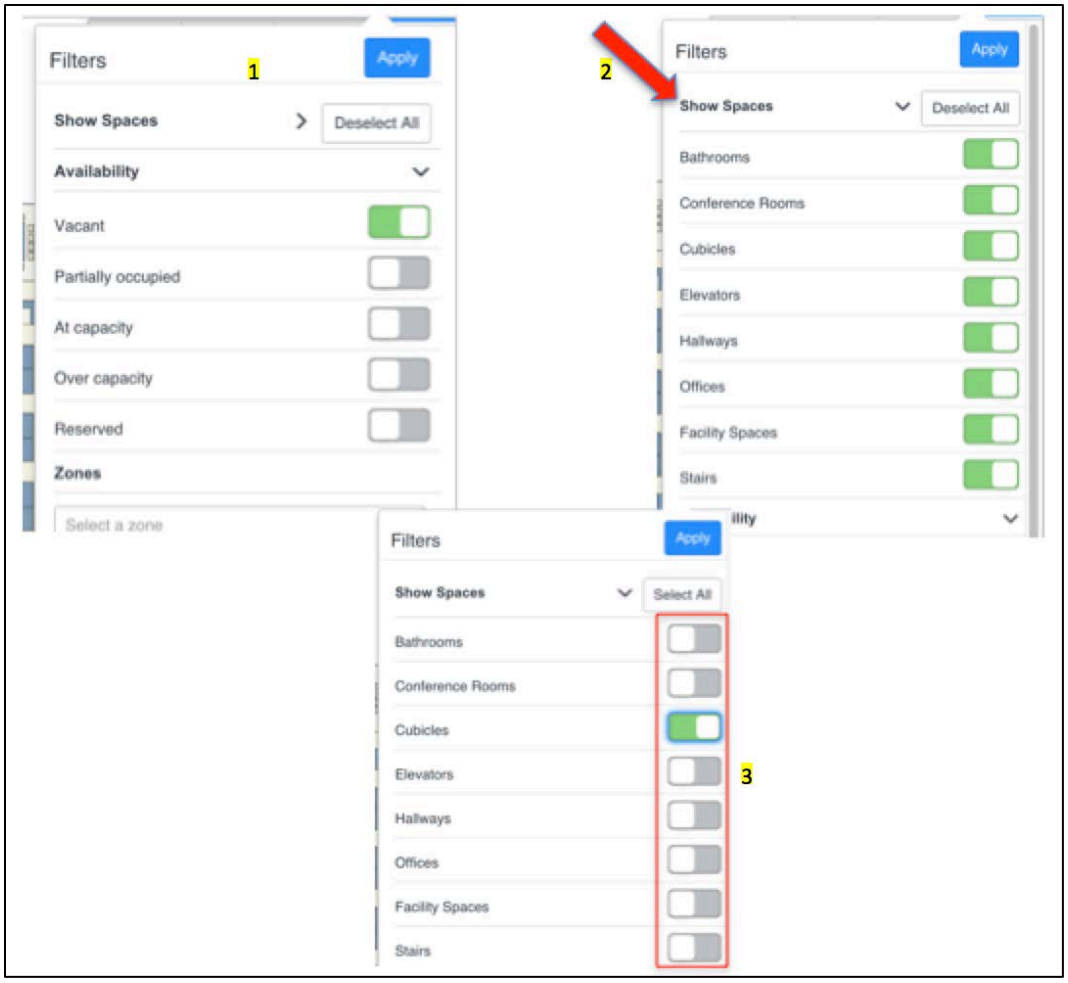
7. Look at all the available spaces. (1) Click the **Availability** choice; a drop-down list appears below for viewing the options. (2) Deselect all the options **except Vacant**. (3) Click the **Apply** (blue) button.



8. View the green highlighted spaces – these are all the spaces that are **Vacant** on Foor 3.



9. View just the **Vacant** cubicles. This is handy when doing a move request and you need to know what cubicle is available to move the employee. Select Floor 3 from the left side. (1) Click the **filter** icon in the upper-right corner; (2) click the **Show Spaces** choice; and (3) ensure that only the **Cubicle** choice is **green**.



10. Click the **Apply** (blue) button and view the workbench. The green highlighted cubicles are all the vacant cubicles on Floor 3. This same process can be used to show vacant conference rooms, reserved cubicles, partially occupied spaces, etc. Zoom in on the floor plan if you want to view details of the spaces with the green circles and numbers.

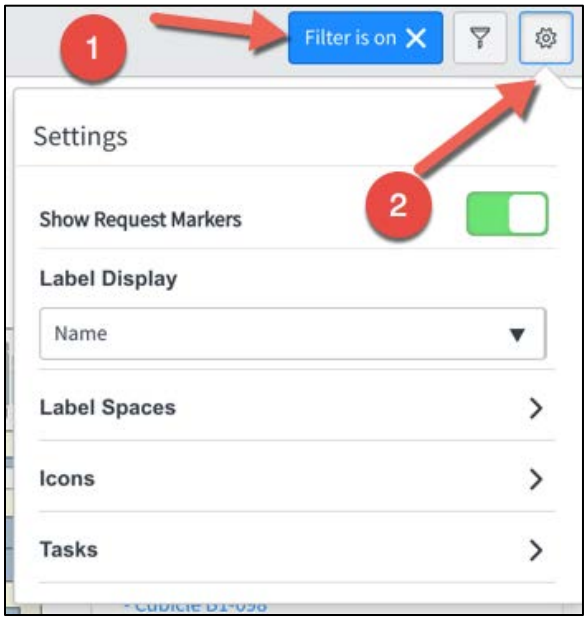


Lab Goal

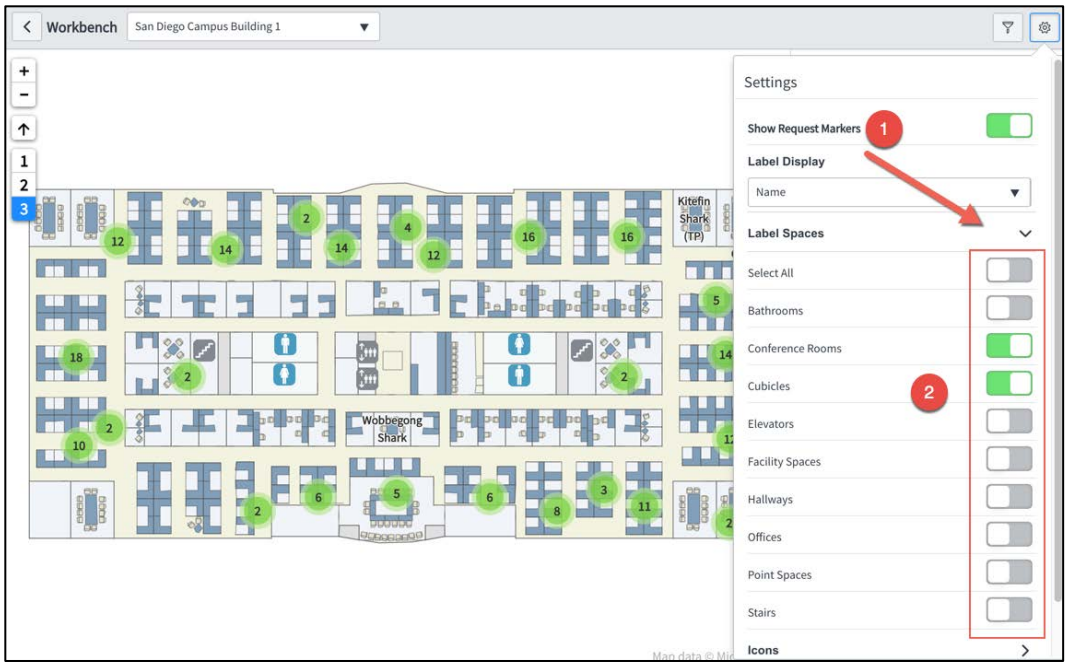
This lab continues with space management and how to use labels and icons to get a better view of what you need information on.

Lab 1.3
Use Labels and Icons

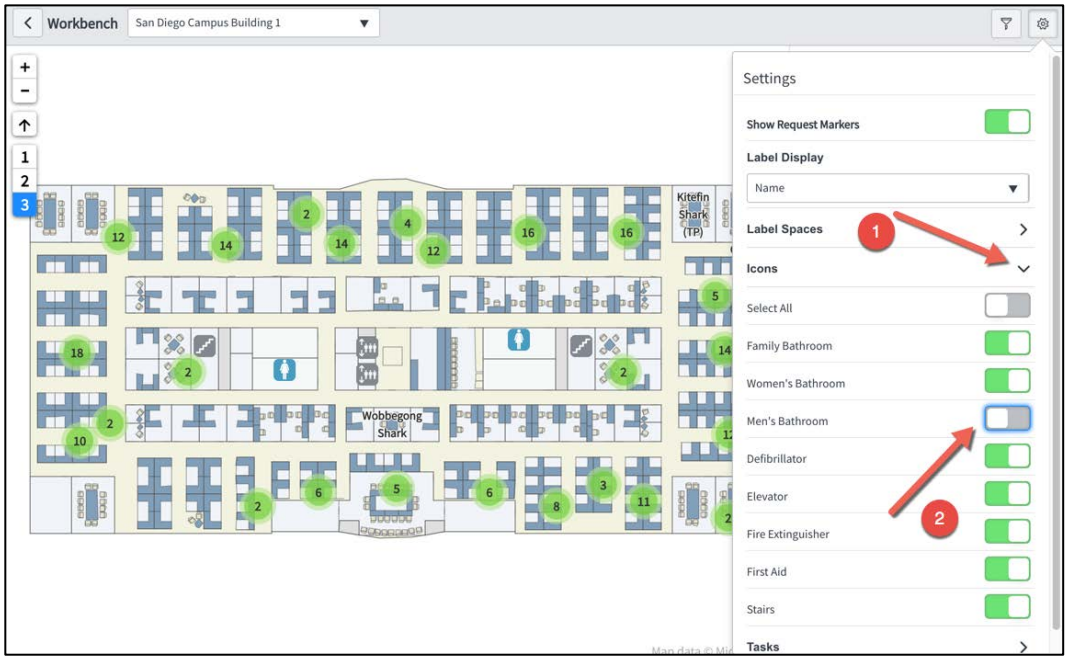
1. Clear the current filters and view the labeling options available. (1) Click **X** on the blue **Filter is on** icon to clear the current filters; then (2) click the **gear** icon.



2. (1) Click the **Label Spaces** to view the dropdown box. (2) Ensure only the **Conference Rooms** and **Cubicles** are **green**. Take note of the labels on the workbench. This is how you can quickly view certain spaces, then you can zoom in to show the details of the green circles as you did previously.



3. You just learned how to view only specific spaces. Now look at different icons available. (1) Click **Icons** and (2) **deselect** the option for **Men's Bathroom** to remove the label from the workbench. View the resulting change on the floor plan. You can add labels during the mapping process for anything that you want to keep track of or have visual representation for easy filtering like fire extinguishers, WiFi routers, vents, etc.

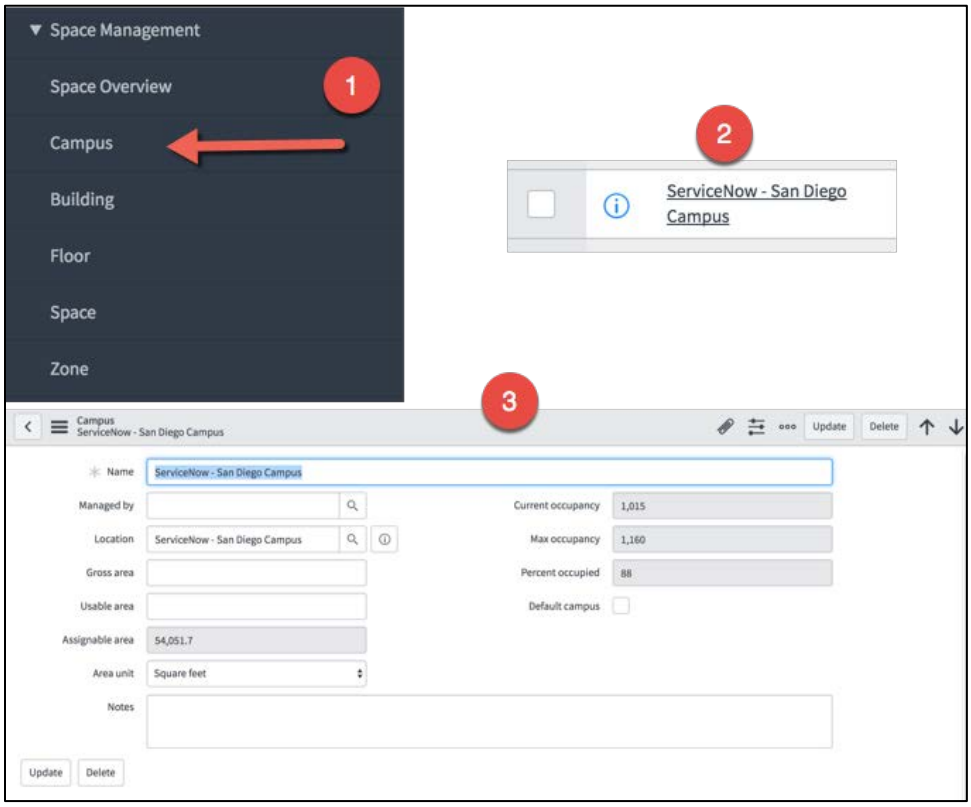


Lab Goal

This final lab of space management uses the application menu to easily view details of each space and how the maps are processed into your ServiceNow instance.

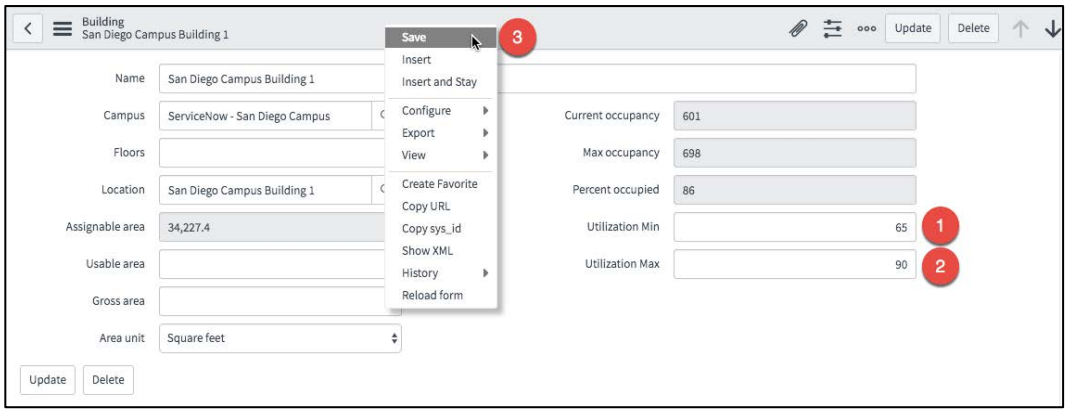
Lab 1.4
Use the Application Menu

1. Look at some more detailed data on the spaces. (1) Under the Space Management application, click the **Campus** module; (2) click **ServiceNow San Diego Campus**. (3) Note the occupancy and space data for the Campus.

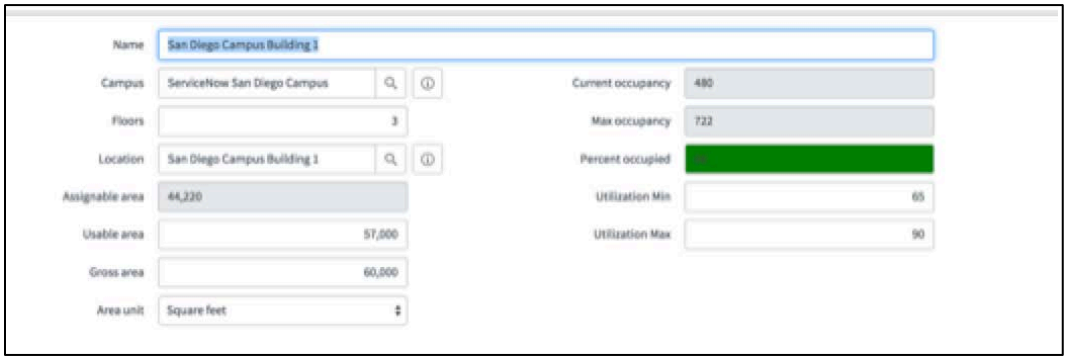


2. View details about the building. Scroll to the bottom and click on **San Diego Campus Building 1** located under the first tab, **Buildings**. The **green** shade in the Percent Occupied field indicates that you are within your defined threshold. Based on these fields, you could create alerts or use the fields to evaluate current space conditions and future moves, etc.

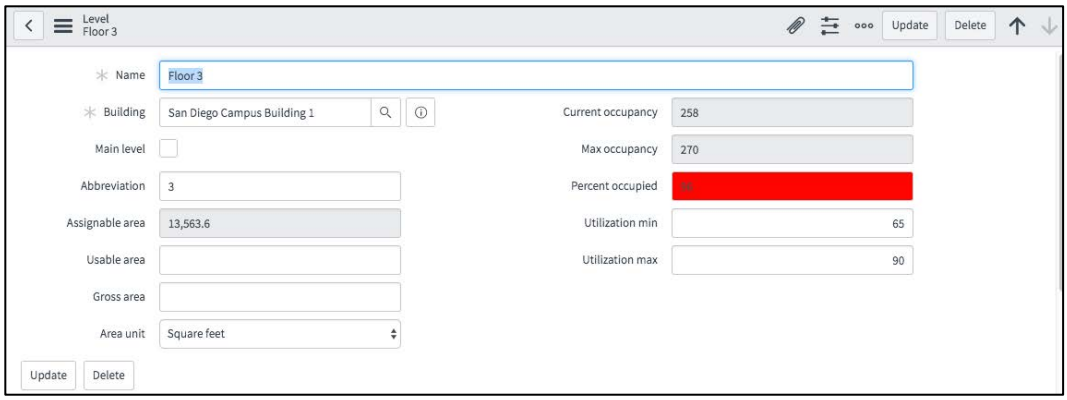
   You can set color indicators by setting utilization Min and Max on the building details. Set (1) Utilization Min to **65** and (2) Utilization Max to **90**. Right-click in the gray bar and select (3) **Save**.



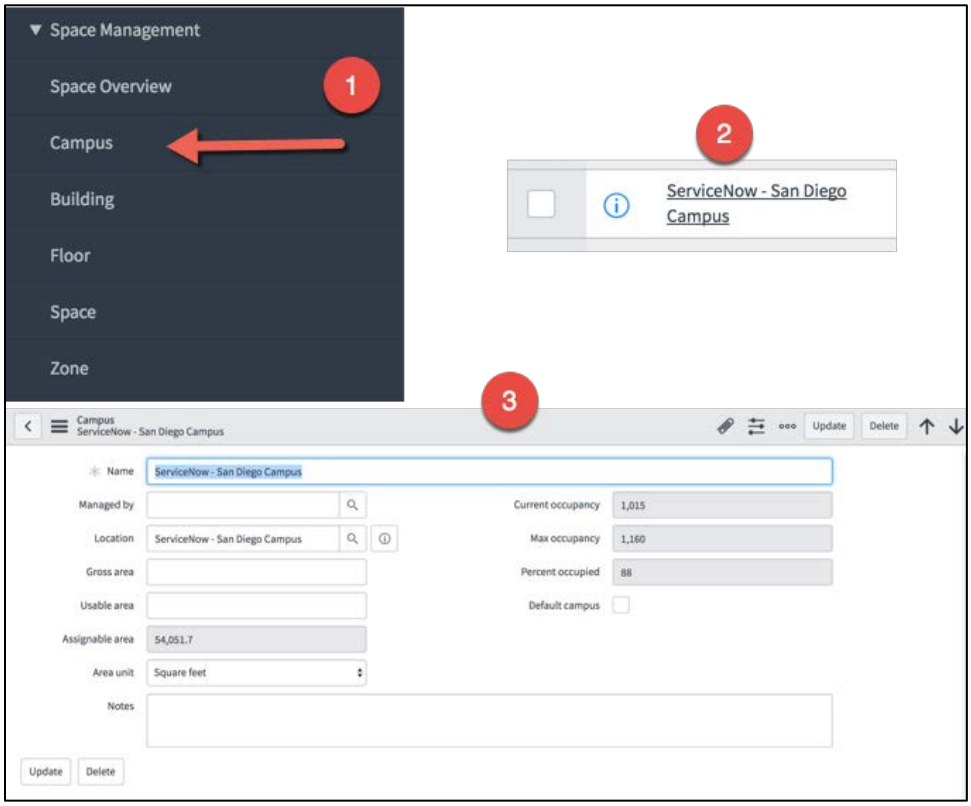
3. The **green** shade in the Percent Occupied field indicates that you are within your defined threshold. Based on these fields, you can create alerts or use the fields to evaluate current space conditions and future moves, etc.



4. View each floor. Scroll to the bottom of the building form and choose **Floor 3** and update the Utilization **Min** (65) and Utilization **Max** (90). Click **Save**. The **red** shade indicates you are over your set threshold for occupancy. You could also view assets assigned to this floor and any expense line items associated to this floor.



5. Look where this data comes from. (1) Click the **Campus** module in the left application menus; then click (2) **ServiceNow San Diego Campus.**



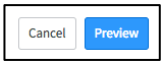
6. Click the **Facilities Map Sets** tab. This is the map set imported from our partner, Micello. Process the file to see what is collected.



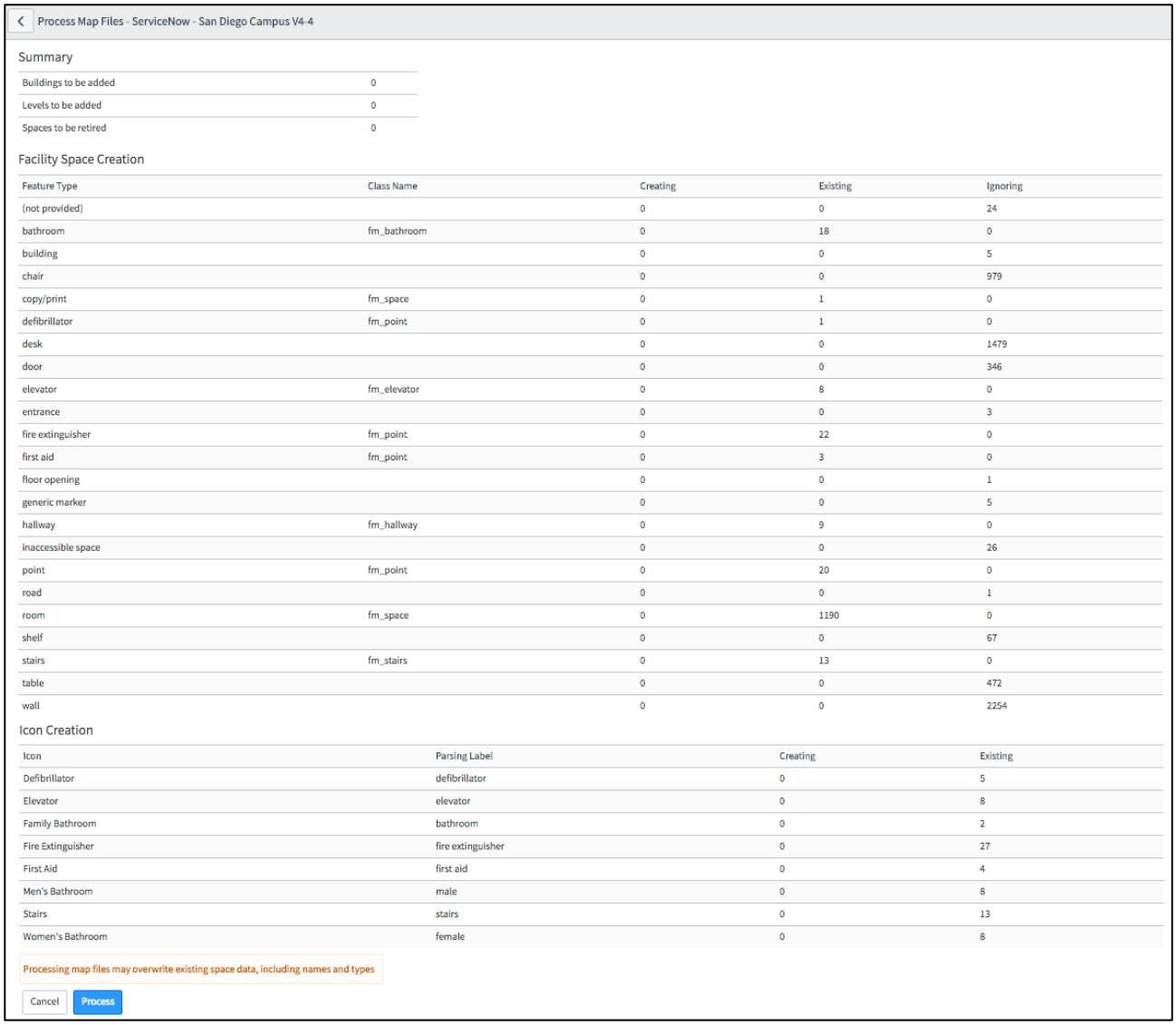
7. Click the map set **ServiceNow San Diego Campus V1-1.** Click the link **Process Map Files**.



and **Preview**



(this could take a few seconds to process).



Process Map Files - ServiceNow - San Diego Campus V4-4

Summary

Buildings to be added	0
Levels to be added	0
Spaces to be retired	0

Facility Space Creation

Feature Type	Class Name	Creating	Existing	Ignoring
(not provided)		0	0	24
bathroom	fm_bathroom	0	18	0
building		0	0	5
chair		0	0	979
copy/print	fm_space	0	1	0
defibrillator	fm_point	0	1	0
desk		0	0	1479
door		0	0	346
elevator	fm_elevator	0	8	0
entrance		0	0	3
fire extinguisher	fm_point	0	22	0
first aid	fm_point	0	3	0
floor opening		0	0	1
generic marker		0	0	5
hallway	fm_hallway	0	9	0
inaccessible space		0	0	26
point	fm_point	0	20	0
road		0	0	1
room	fm_space	0	1190	0
shelf		0	0	67
stairs	fm_stairs	0	13	0
table		0	0	472
wall		0	0	2254

Icon Creation

Icon	Parsing Label	Creating	Existing
Defibrillator	defibrillator	0	5
Elevator	elevator	0	8
Family Bathroom	bathroom	0	2
Fire Extinguisher	fire extinguisher	0	27
First Aid	first aid	0	4
Men's Bathroom	male	0	8
Stairs	stairs	0	13
Women's Bathroom	female	0	8

Processing map files may overwrite existing space data, including names and types

Cancel Process

8. You can view everything that is brought in by Micello before processing. Micello takes any document you have (e.g., AutoCAD, napkin, picture) and can turn it into an actionable for space management, move management, and request creation by importing zones, occupancy information, icons, etc. with some pre-built transform maps.

Lab Goal

Now, bring it all together. In this lab, you create a new zone, then view the map with the right filters to view your new zone.

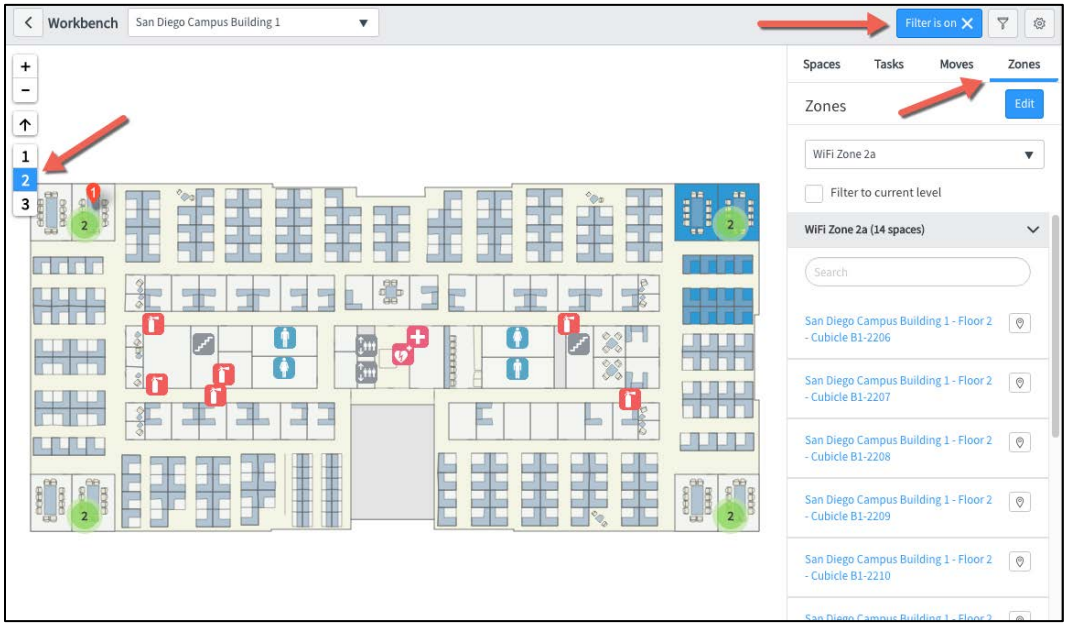
Lab 1.5
Create a Zone and Use Filters

1. Go to the module Zone under the Space Management application, and create a new zone called **WiFi Zone 2a** and **Save**.
2. Add these Facilities Spaces to the new zone:

   Silvertip Shark (TP), Whitetip Reef Shark, Cubicle B1-2214, Cubicle B1-2215, Cubicle B1-2216, Cubicle B1-2217, Cubicle B1-2210, Cubicle B1-2211, Cubicle B1-2212, Cubicle B1-2213, Cubicle B1-2206, Cubicle B1-2207, Cubicle B1-2208, Cubicle B1-2209

3. **Submit** the changes.

4. Go to the workbench and view the new zone, WiFi Zone 2a. Use what you learned in previous labs to get the view below (the arrows will give you tips!). You should see this:



Lab Goal

This lab explains how to manage employee moves with the Facilities Workbench.

Lab 2.1 Request an Employee Move

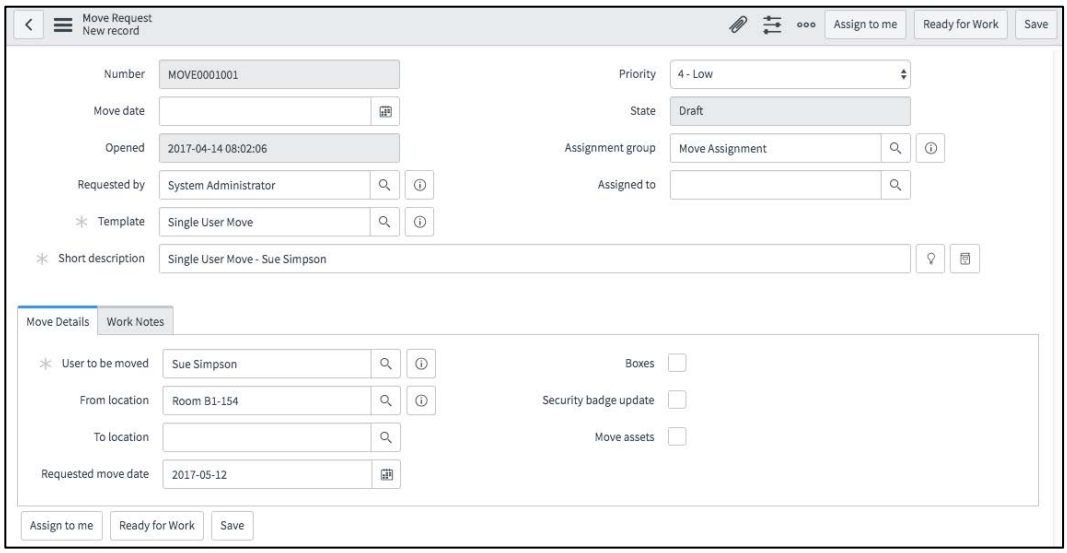
Create an Employee Move Request

1. Under **Facilities Move > Requests**, click **Create New**.

2. Enter the following information in the **Move Request form**:

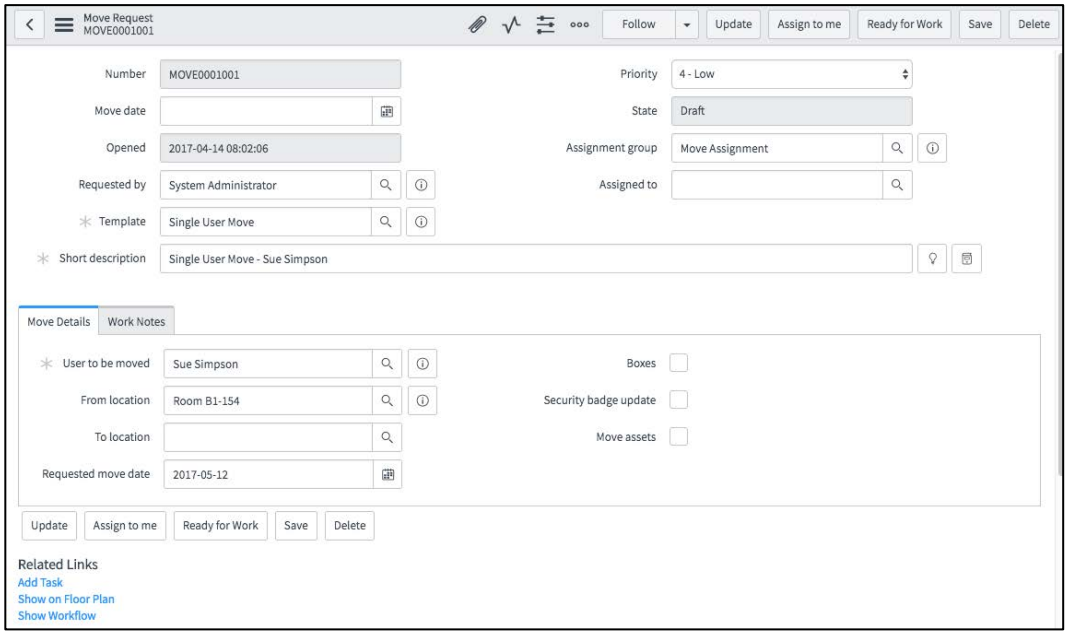
   Template: **Single User Move**
   Short Description: **Single User Move – Sue Simpson**
   User to be moved: **Sue Simpson**
   From location: **<auto populates>**
   To location: **<intentionally leave blank>**
   Requested move date: **2017-05-12**

   Note: you can include items to be included in the move using the checkboxes on the right side of the **Move Details** tab**.**



3. Click **Save** at the bottom-left of the form.

4. Related Links now appear on the form.



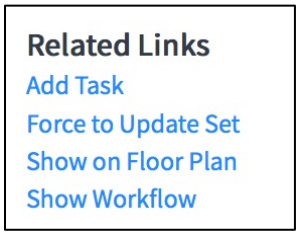
Lab Goal

This lab explains how to use the Facilities Workbench to select a location to move a user.

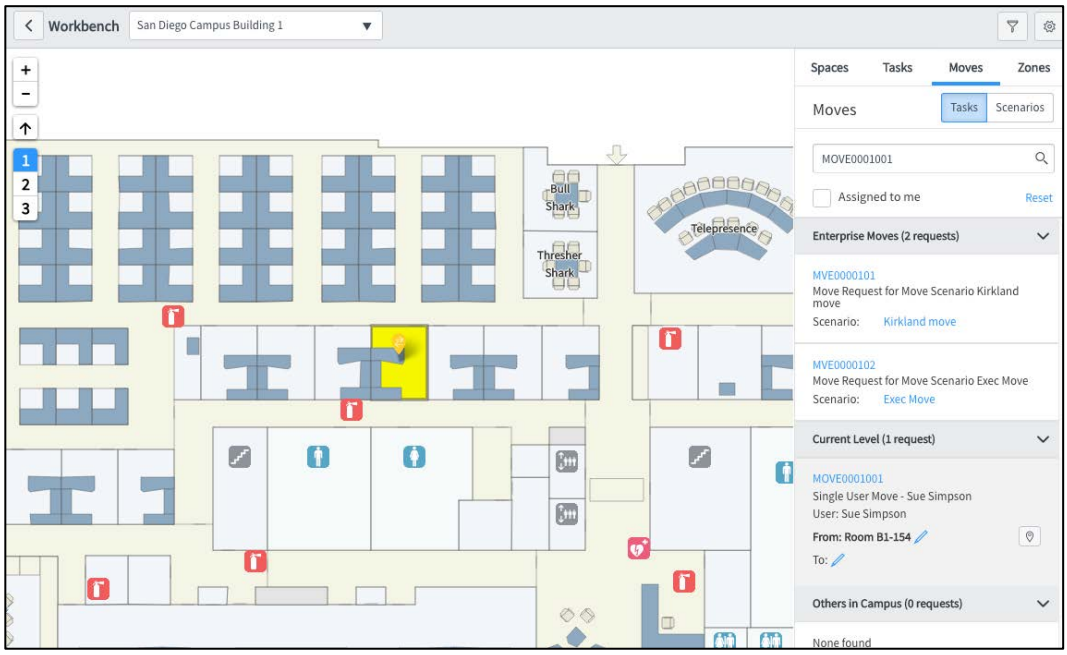


Select a Location for the Move Request

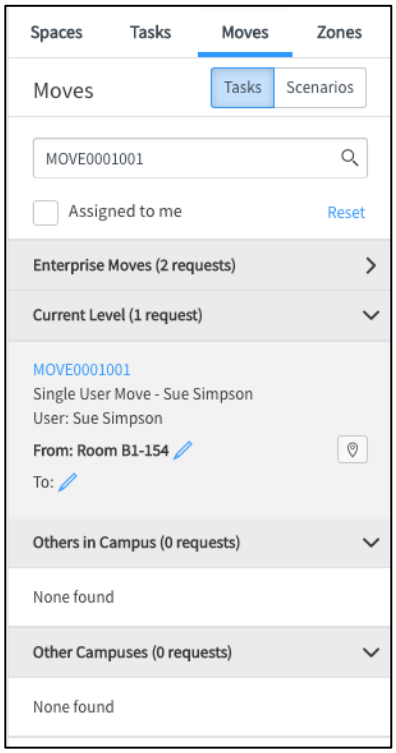
1. **From the** Move Request form that you just created, click the **Show on Floor Plan** related link.



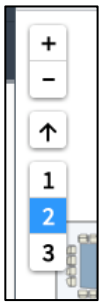
2. The Facilities Workbench opens, which is an interactive floor plan that allows you to modify Space information, Facilities Requests, and Move Requests.



3. All the open moves that are planned on the floor appear with an  icon. The move details that appear on the right are associated with the move that was just created. The floor plan is interactive, so clicking on any move icon will make the associated details appear on the right.

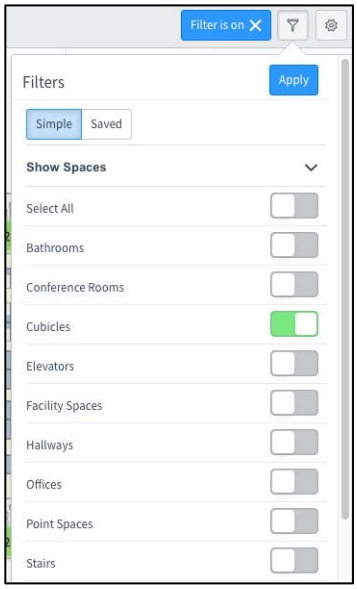


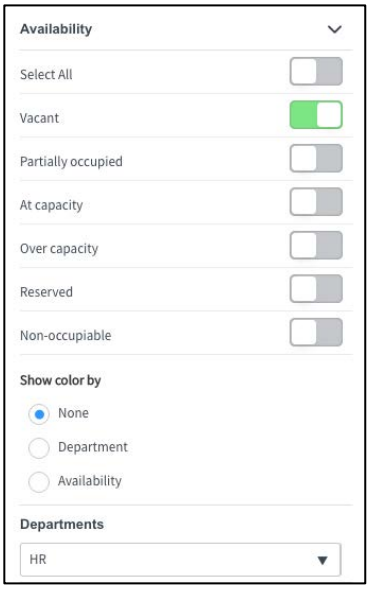
4. Sue needs to be moved to the second floor. In the top-left area of the floor plan viewer, click the number **2** to view the first floor.



5. A floor plan of the first floor opens. Since Sue works on the Finance team, you need to locate a vacant cubicle for her near other members on her team. Click the  icon in the top-right section of the floor plan viewer to show filtering options. Make the following selections:

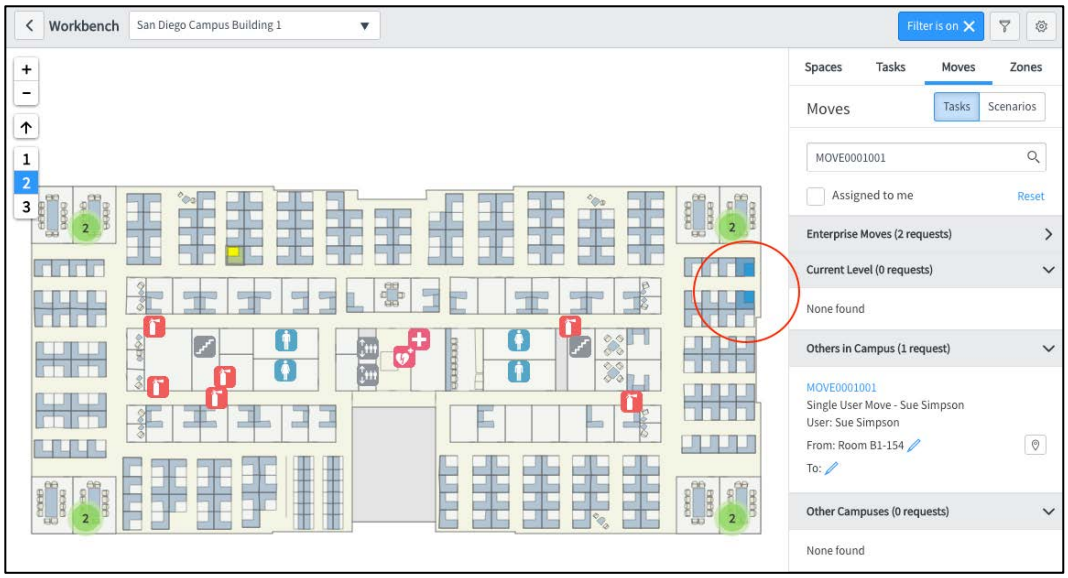
   Show Spaces: deselect all except **Cubicles**
   Availability: deselect all except **Vacant**
   Departments: select **HR**



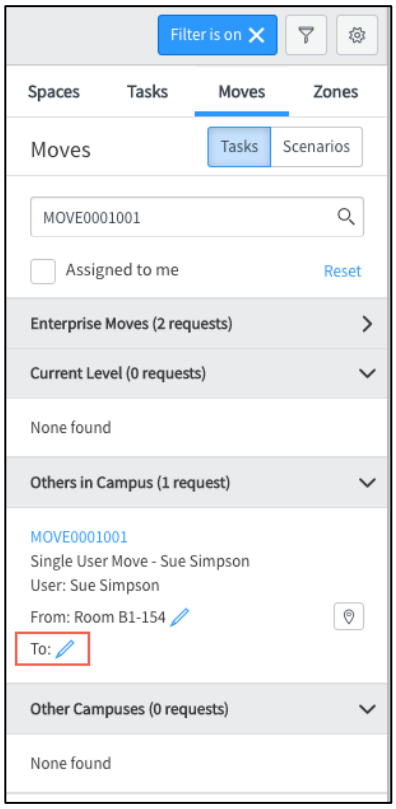


6. Click **Apply** and confirm that you see the indicator: 

   All the vacant cubicles related to the HR department now appear in blue to indicate they match the filter criteria you created.



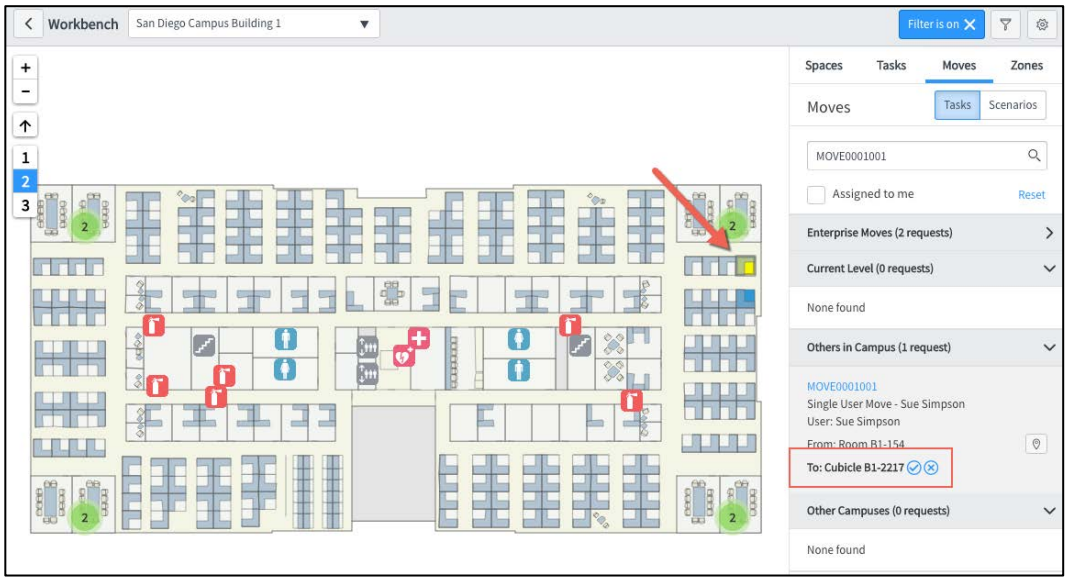
7. Now that you can see all the available options, you need to select a space for Olga. In the right section, click on the **pencil** icon next to the **To:** field to enable editing for that field.



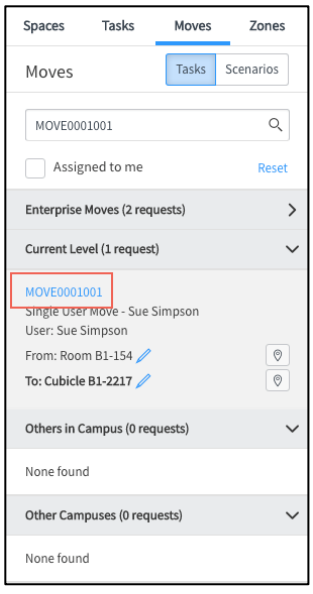
8. Confirm the icons next to the **To:** field have changed to indicate edit mode.



9. **Select any blue space** on the floor plan as the cubicle to move Sue into. The **To:** field now populates on the right with the space that was chosen.



10. Click the checkbox next to the **To:** field on the right to confirm your selection, and then click the **MOVE000100X** link in the right section to go back to the Move Request form.



11. Populate the following fields:

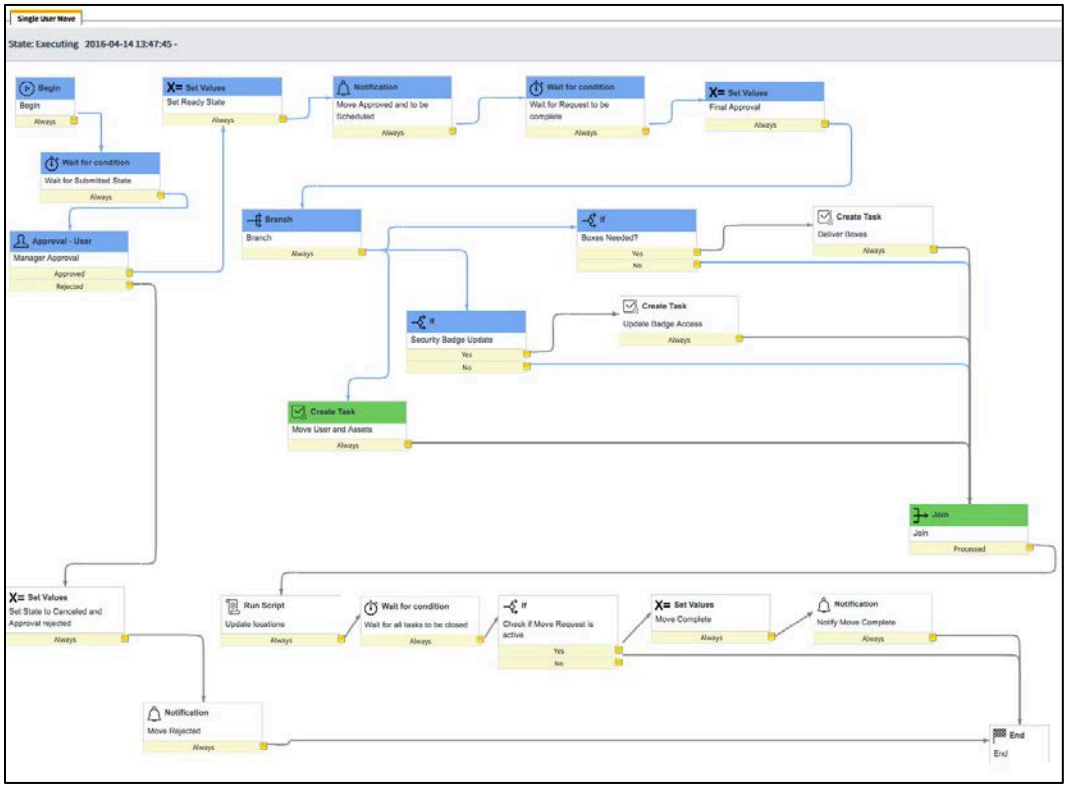
    Move date: **2017-05-12**
    Assigned to: **Quintin Isacson**

    Once those two additional fields have been populated, click the UI Action form button **Ready for Work** to advance the workflow.



Lab Success Verification

1. Now that the Single User Move has been assigned and submitted for work, click the **Show Workflow** UI Action in the **Related Links** section to see the workflow that is in progress. The Move Request form leverages the ServiceNow standard service management functionality to execute the request through its fulfillment.



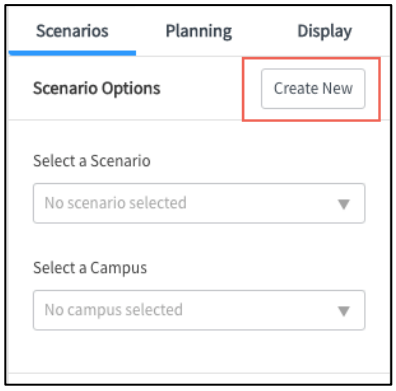
Lab Goal

This lab explains how to use the Enterprise Move Planning Tool to perform what-if scenarios to help plan a multi-person move.

Lab 2.3 Perform an Enterprise Move

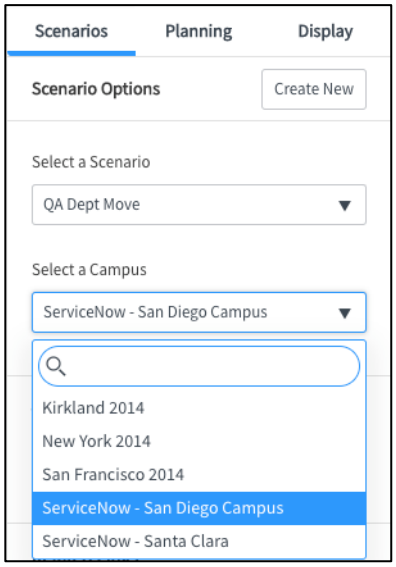
Create an Enterprise Move Scenario

1. Select **Enterprise Move > Move Planning Tool** from the left navigation bar.
2. On the right menu, click **Create New.**

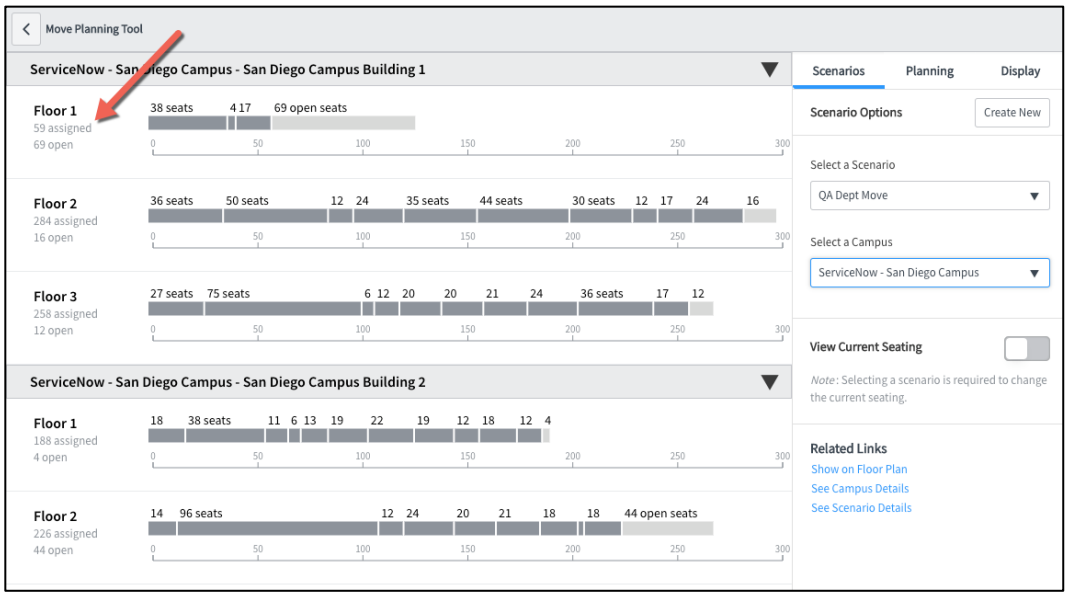


3. In the Enterprise Move Scenario form, type in **QA Dept Move** as the Scenario Name. Click **Submit**.

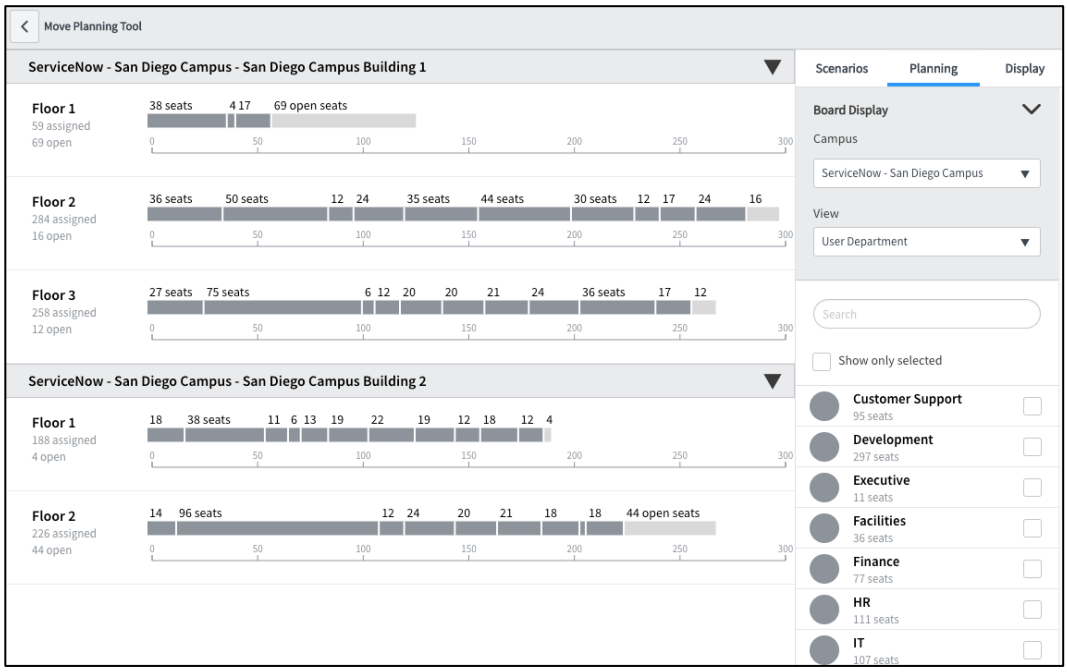
4. Select the Campus that this scenario applies to: **ServiceNow – San Diego Campus**.



5. The following Screen appears, showing each building of the campus as well as each floor of the buildings. Notice within each floor you can see how many seats are assigned and how many are open.



6. Select the **Planning** tab to begin planning the scenario. Notice the new menu allows you to interact with the seating chart.



7. Check the boxes next to each Department to give more color to the seating chart. This allows for the user to distinguish from each Department.

   Note: The user can also display the seating by Manager by selecting the dropdown value under **View** within the **Board Display**.



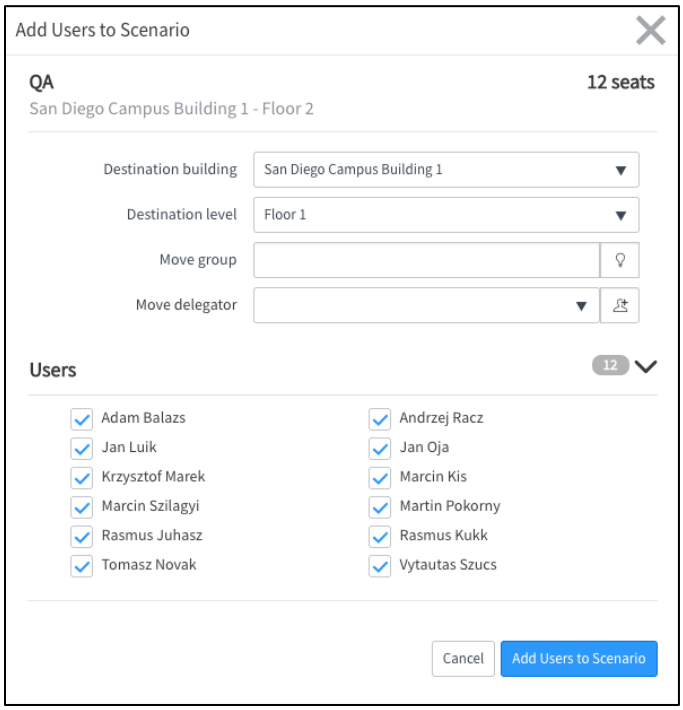
8. Move the QA department from the Floor 2 of Building 1 to Floor 1 of Building 1. Find the **QA** group (**light green**) and select that tile – should be the one with 12 seats.



9. A new form pops up that is used to add users to the scenario. Fill in the following values:

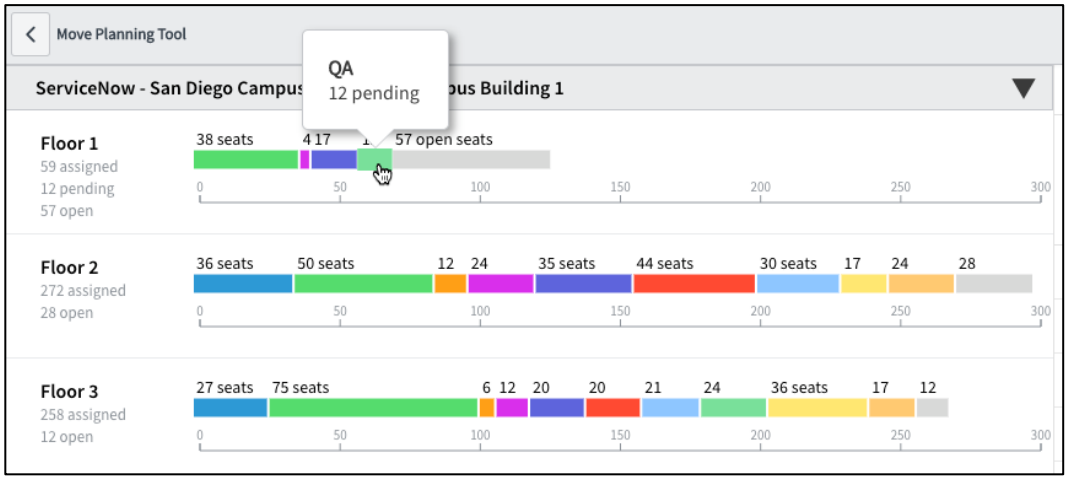
   Destination Building: **San Diego Campus Building 1**
   Destination level: **Floor 1**

   Note: The user can also select which users they want to move. In this case, you select all 12 within this group, but by checking and unchecking next to users, the user count can be updated.

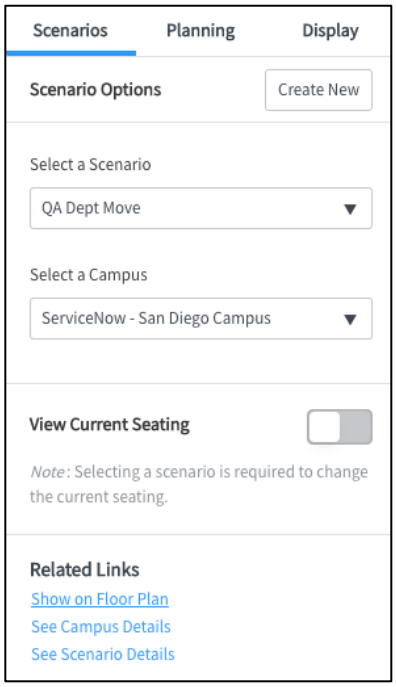


10. Click **Add Users to Scenario**.

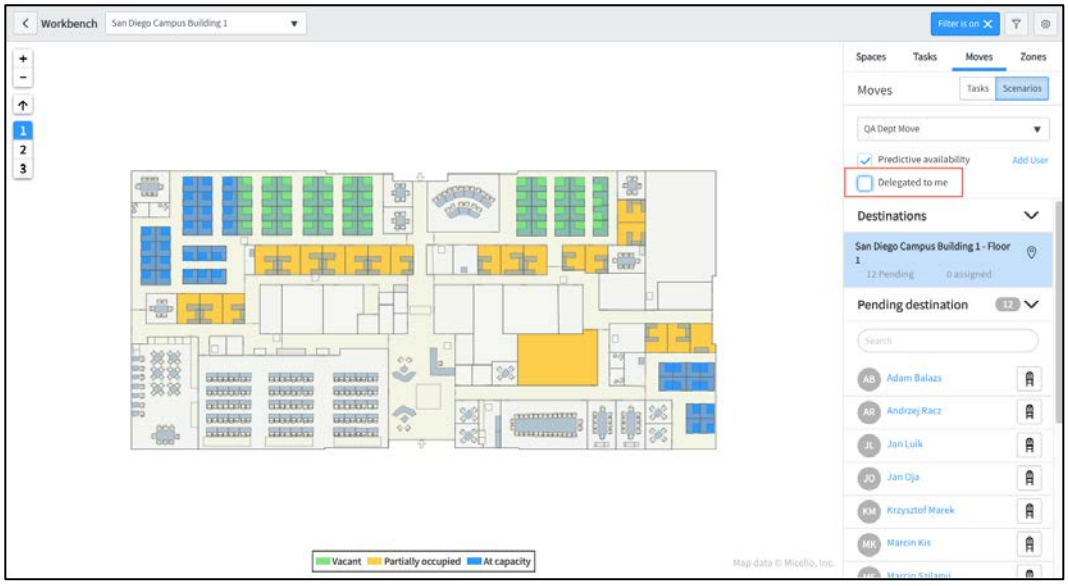
11. Notice the 12 QA users that were assigned to Floor 2, are now labeled as **pending** on Floor 1.



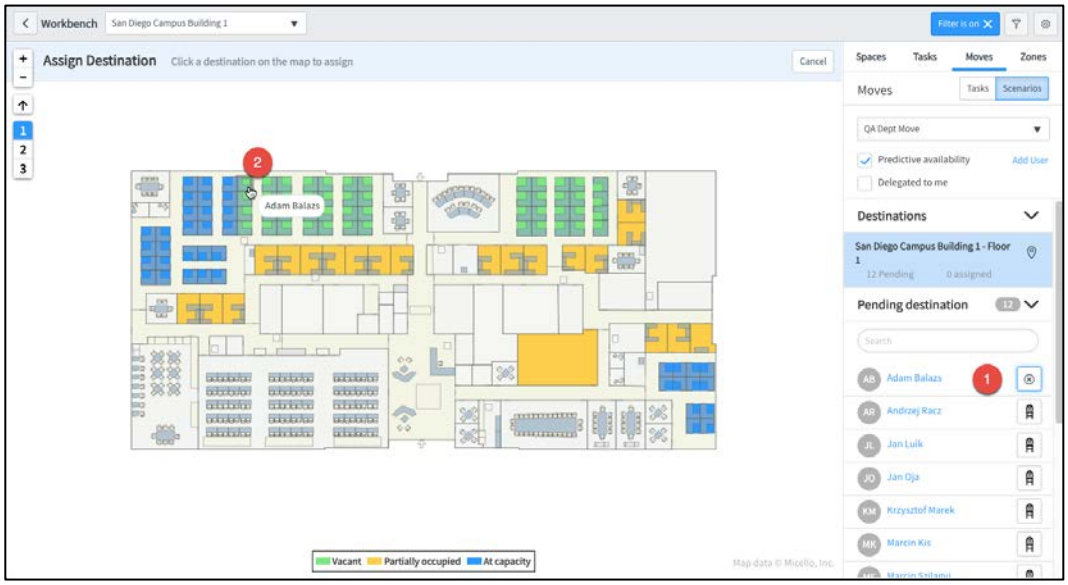
12. Click back to the Scenarios tab and select **Show on Floor Plan**.



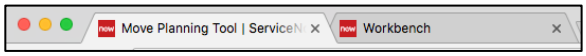
13. The workbench pops up in an additional tab and displays the workbench for the scenario, in this case San Diego Campus Building 1 – Floor 1. (**Select the Building 1 and Floor 1**) Within the Moves section, deselect the **Delegated to me** box to see the below screen.



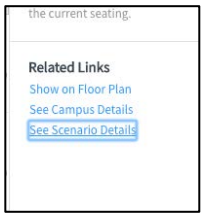
14. The scenario has the list of pending users to be moved to their new locations. Each user has a chair icon next to their name. Begin assigning the users to locations by clicking the **chair** (1), then selecting a **Vacant** space on the map (2). Notice that the pending destination count went down to **11** and the space is now **At capacity**.

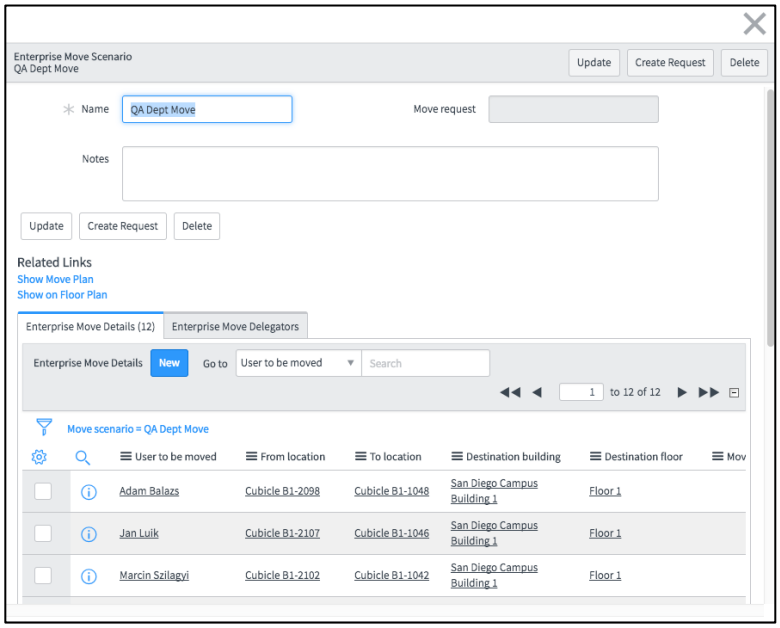


15. Assign the rest, then go back to the previous browser tab, **Move Planning Tool…**



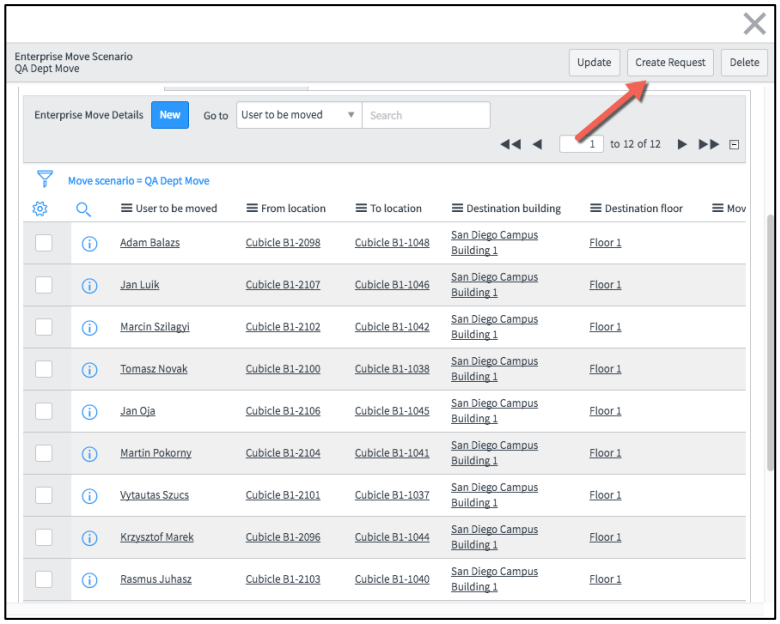
16. Select **See Scenario Details** which opens a new form.



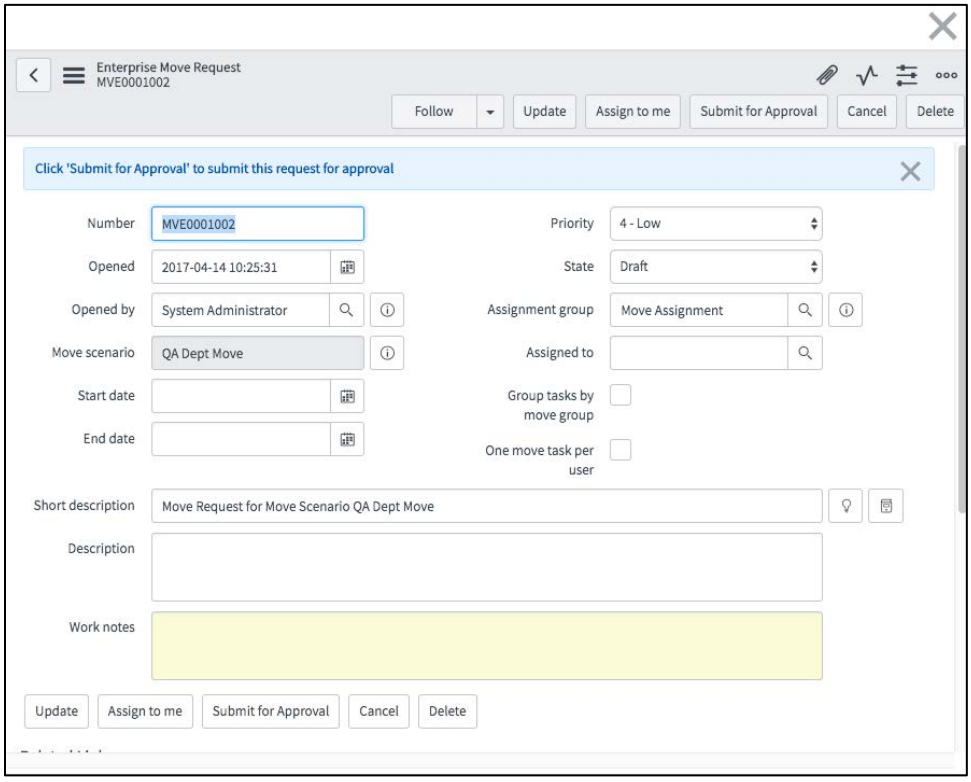


17. Scroll through the details of the Enterprise Move Scenario to see the list of users to be moved, their **From location** and **To location**, **Destination building** and **floor,** etc. From here, you can use the Move Request to initiate the assignment and task of moving these users.

18. Click the **Create Request** button.



19. An Enterprise Move Request form opens, prefilled with the details of the request. From here, you can follow the same assignment, approval, and process flow to perform the move.



Lab Goal

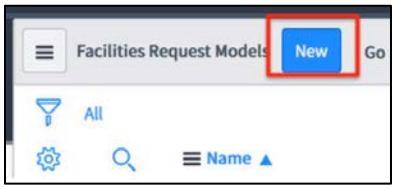
This lab explains how to use Templates to automatically generate assigned tasks and accomplish work in a planned manner.

Lab 3.1 Create a Facilities Request Template

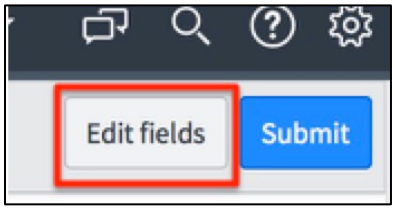
Create a Facilities Request Template

1. Select **Facilities > Catalog & Knowledge > Facilities Request Templates** from the left navigation bar.

2. At the top of the list view, click **New.**

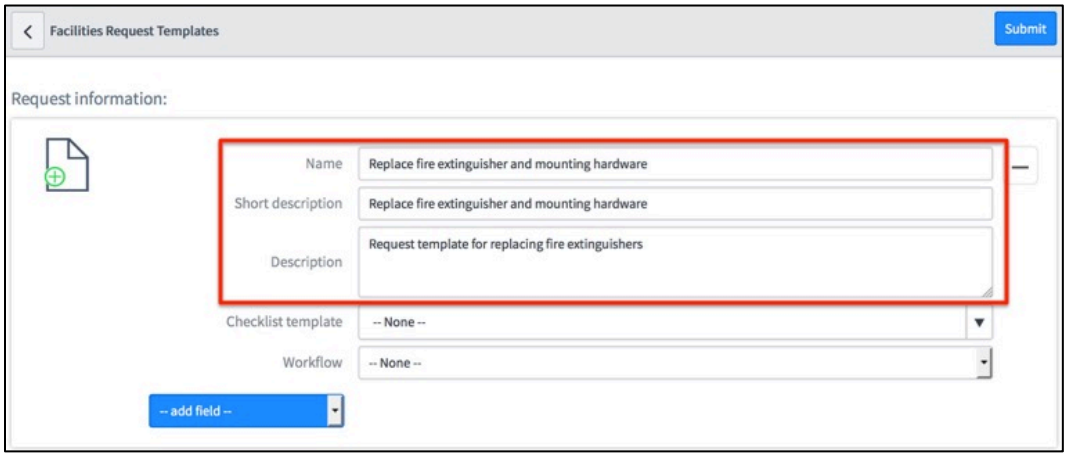


3. On the Facilities Request Form, click **Edit fields** in the top-right. This enables the template to be configured in a later step in this lab.



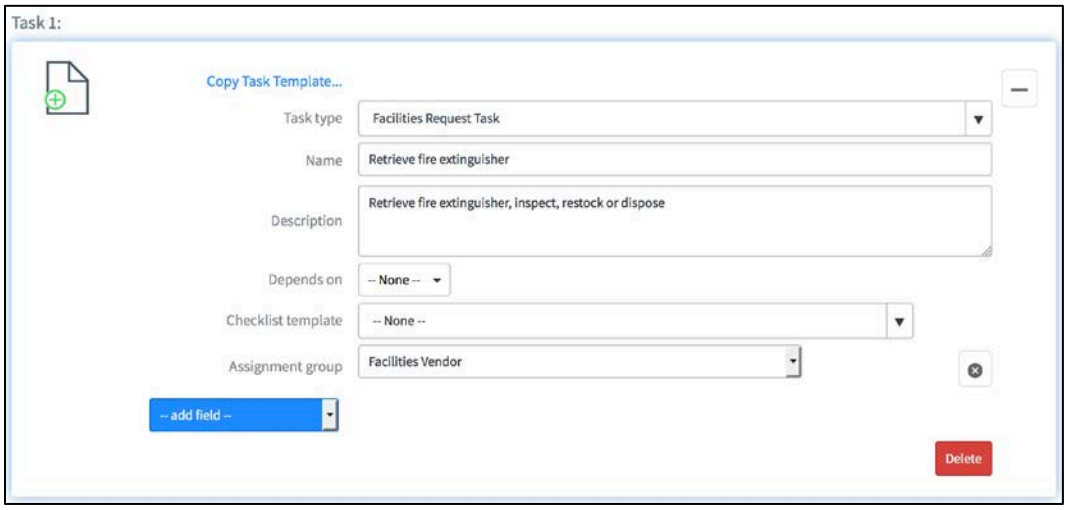
4. Enter the following information in the **Request information** section:

   Name: **Replace fire extinguisher and mounting hardware**
   Short description: **Replace fire extinguisher and mounting hardware**
   Description: **Request template for replacing fire extinguishers**



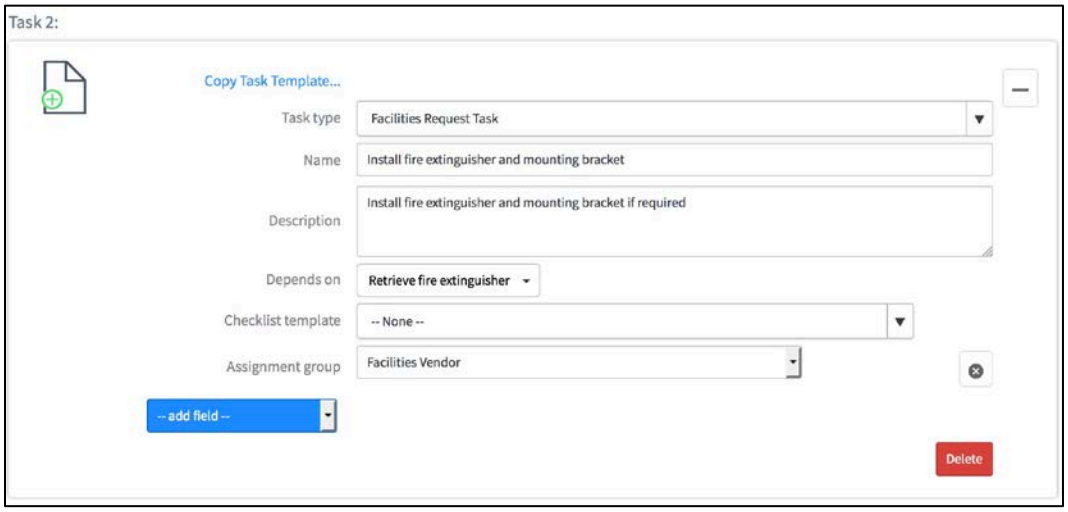
5. Enter the following information in the **Task 1** section:

   Name: **Retrieve fire extinguisher**
   Description: **Retrieve fire extinguisher, inspect, restock or dispose**
   In the**—add field—** dropdown list, select **Assignment group**
   Assignment group: **Facilities Vendor**



6. Enter the following information in the **Task 2** section:

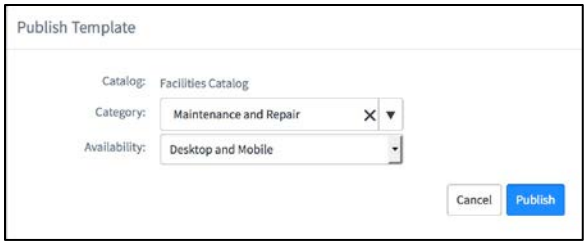
   Name: **Install fire extinguisher and mounting bracket**
   Description: **Install fire extinguisher and mounting bracket if required**
   Depends on: **Retrieve fire extinguisher**
   In the **—add field—** dropdown list**,** select **Assignment group**
   Assignment group: **Facilities Vendor**



7. Click **Submit**. (**Note**: Task 3 automatically appears as blank since the preceding task has a value in the Name field. This is OK, as the third task does not appear when this template is used.)

8. A dialog box appears that prompts you for additional information. Fill out the following:

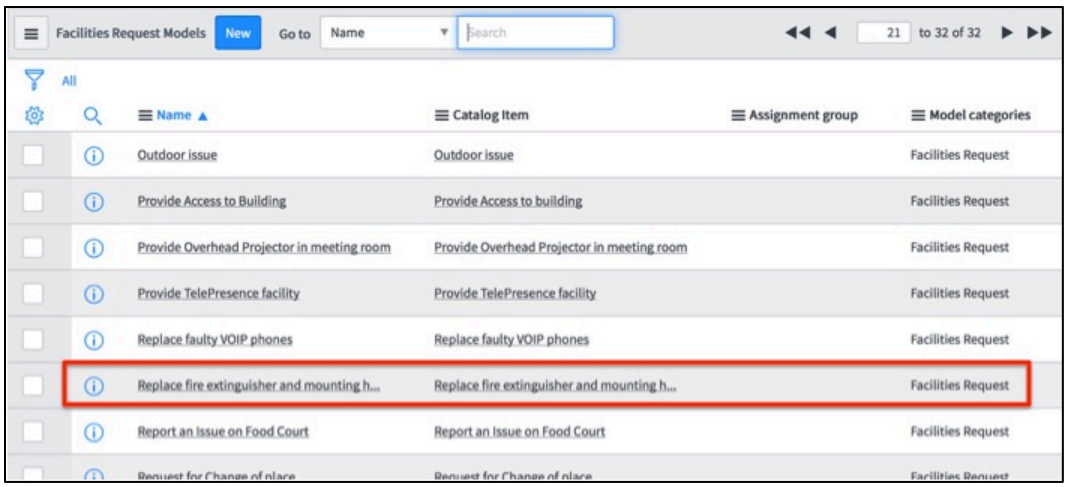
   Category: **Maintenance and Repair**
   Availability: **Desktop and Mobile**



9. Click **Publish**.

Lab Success Verification

1. Select **Facilities > Catalog & Knowledge > Facilities Request Templates** from the left navigation bar and confirm the record with the name **Replace fire extinguisher and mounting hardware** appears.



Lab Goal

This lab explains how to automate a Facilities Request using components that were created in the previous sections.

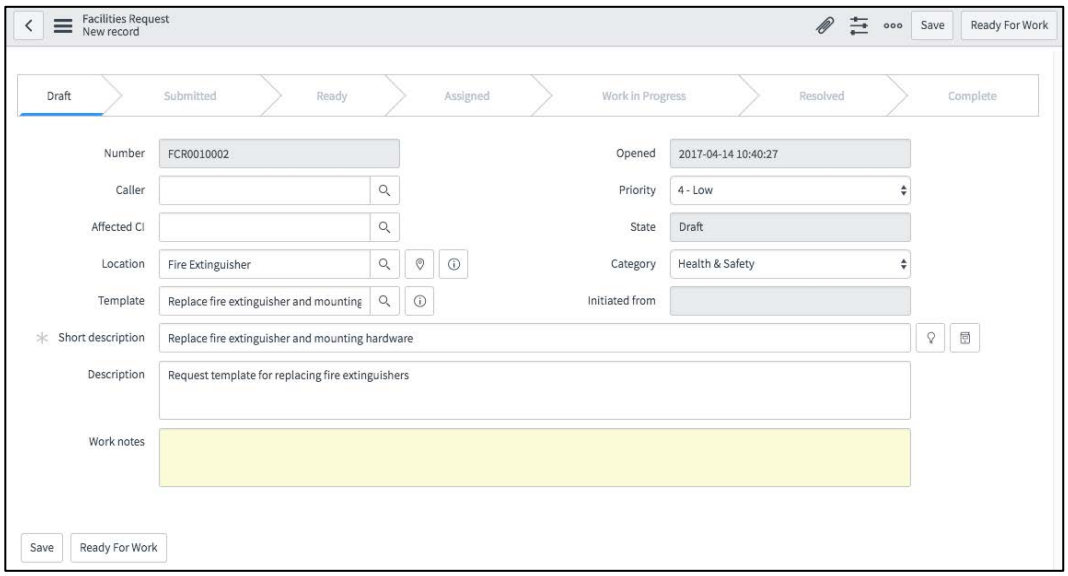
Lab 3.2 Automate a Facilities Request

Create a New Facilities Request Using the Workbench

1. Click **Facilities > Workbench**. The floor plan for **San Diego Campus Building 1 Floor 1** appears.

2. Input the following information in the Facilities Request record:

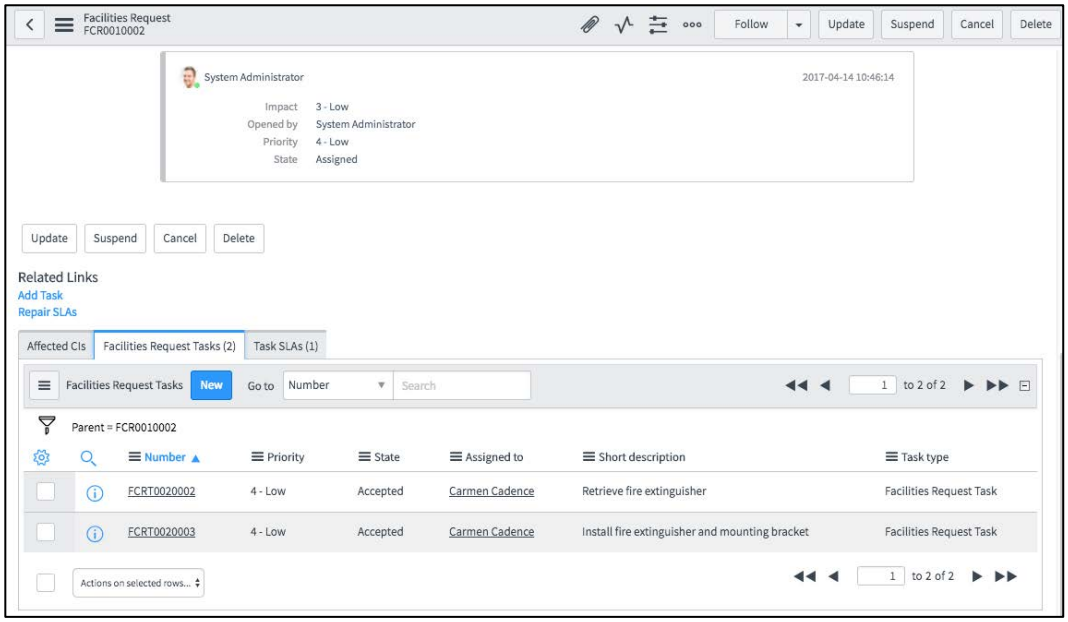
   Location: **Fire Extinguisher**
   Template: **Replace fire extinguisher and mounting hardware** (**Note:** this automatically populates additional fields)
   Category: **Health & Safety**



3. Click **Ready For Work**.

Lab Success Verification

1. Scroll down on the Facilities Request that was just created and confirm that two Facilities Request Tasks assigned to Carmen Cadence appear in the Related List.



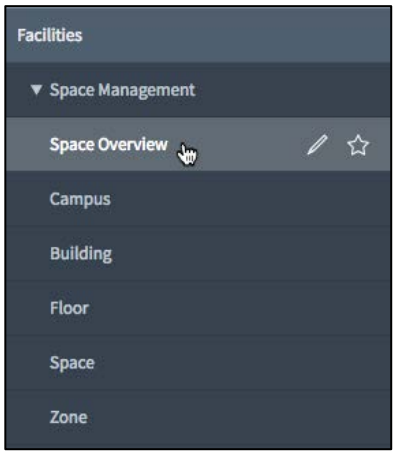
Lab Goal

This lab explains how to see the space details from a dashboard and reporting perspective. This lab also explains how to navigate through the standard Space Overview dashboard and cycle through the standard reports offered with the Facilities Management Plugin.

Lab 4.1
Dashboards and Reports

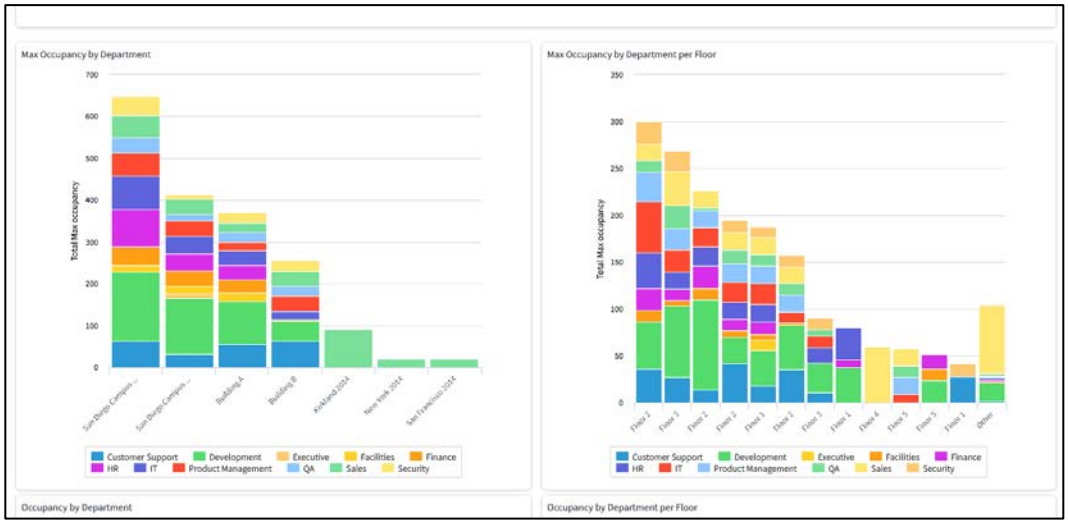
Space Overview Dashboard

1. Under **Facilities > Space Management > Space Overview**

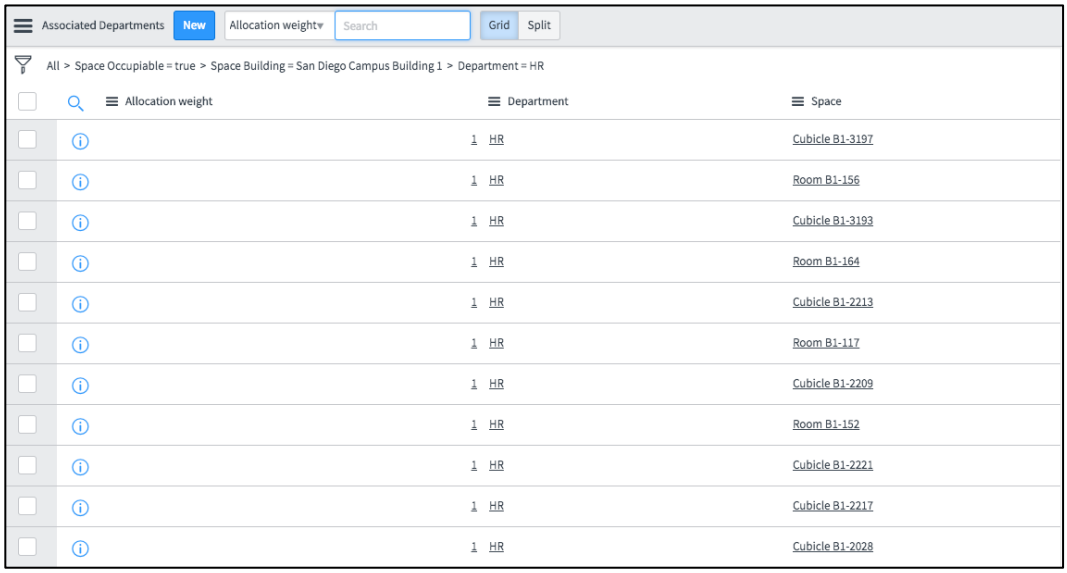


2. Take a minute to review the various charts that are available related to Space details.

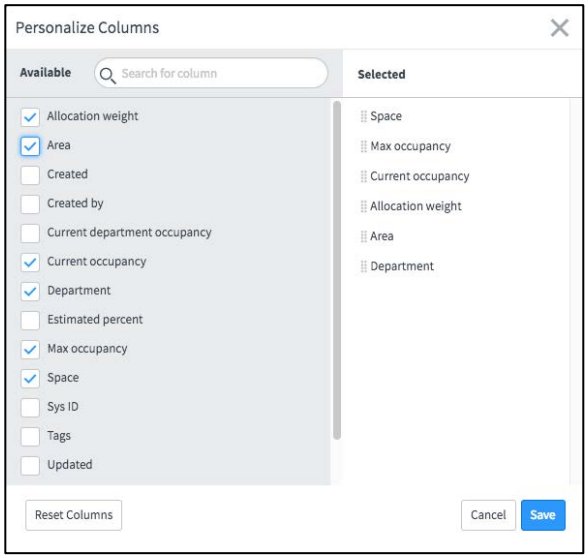
3. Drill into the details of the reports. Scroll to the **Max Occupancy by Department** Report.



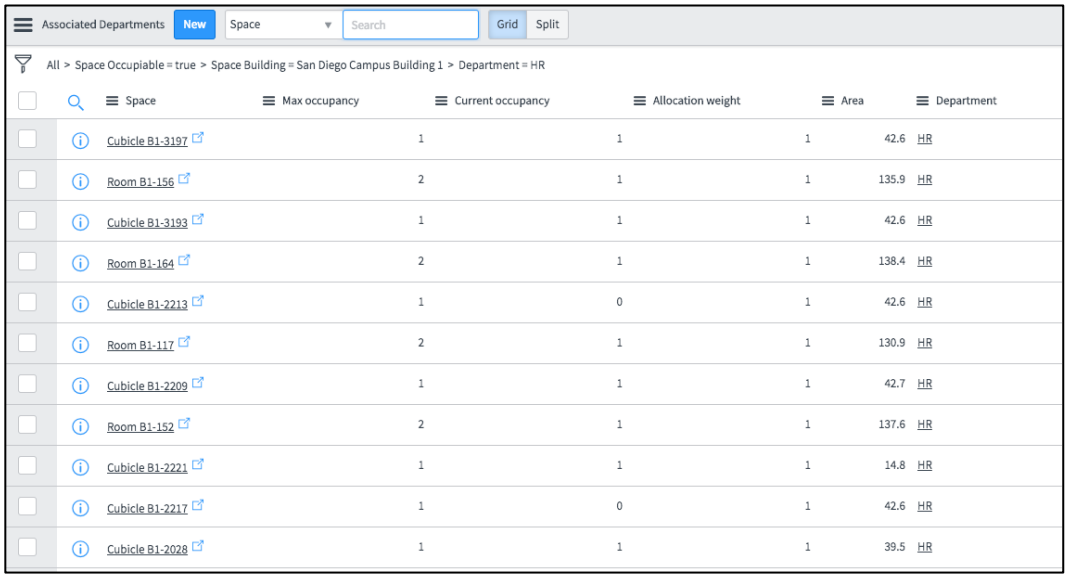
4. Click one of the bars to drill into the records that make up the associated value. In this example, select **HR**. The image below shows the results.



5. Within this result, you can get more details of the data by selecting the **Personal List Columns** from the menu icon . In this list, you can add columns to make these results more meaningful. For example, in the image below shows the selection of **Max** occupancy, **Current** occupancy, and **Area** columns, that were then reordered.

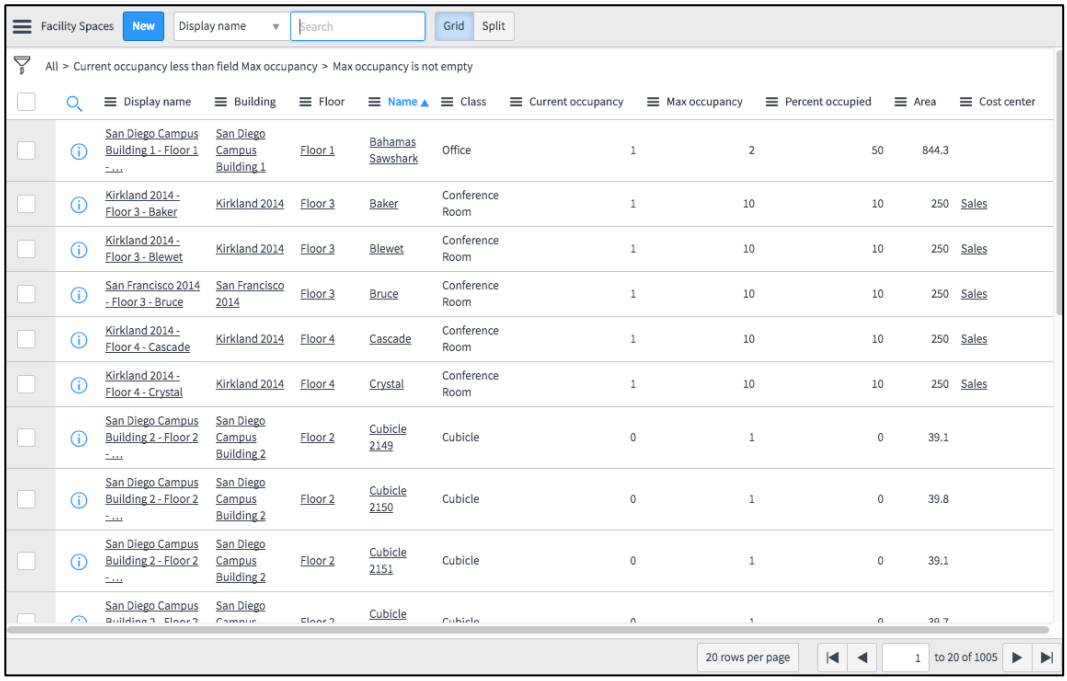


6. The results show the Occupiable Space at the San Diego Campus Building 1 for the HR Department.

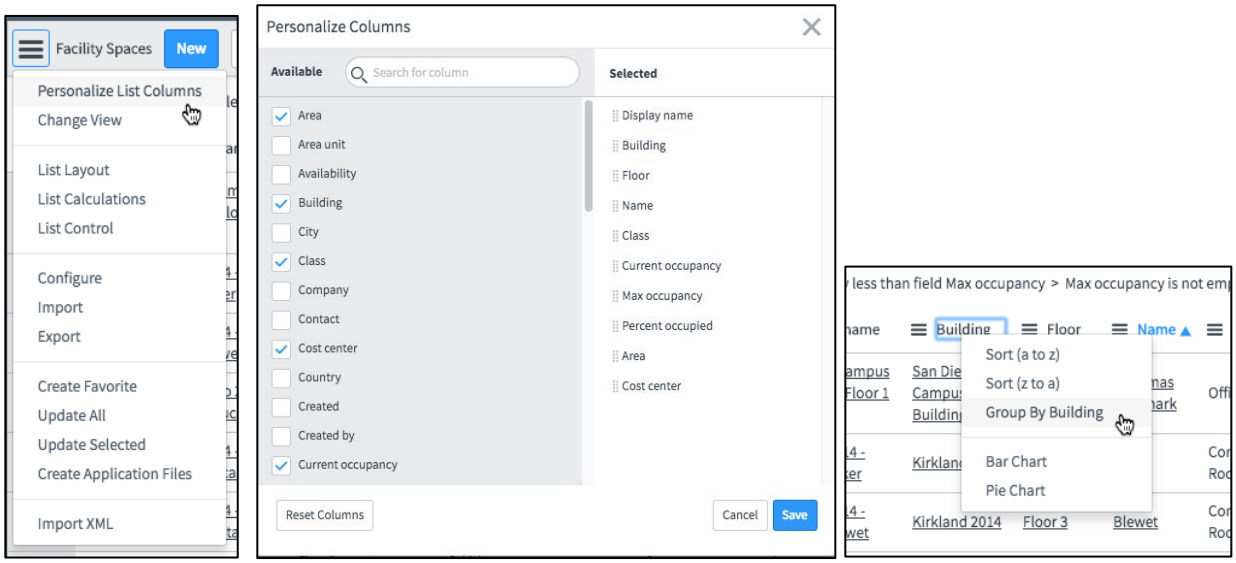


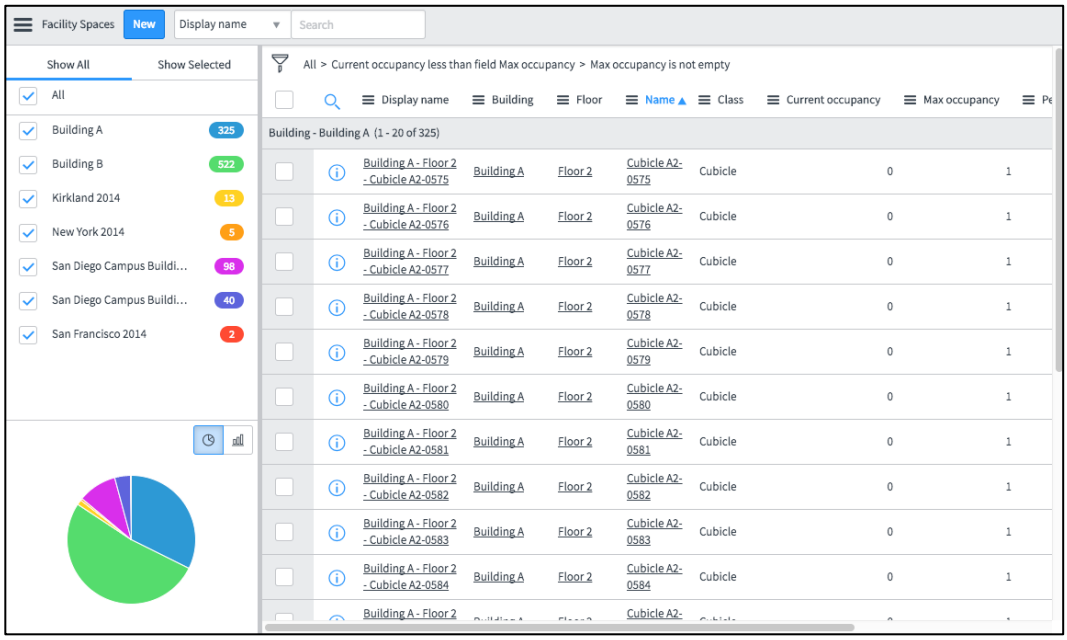
Reports

1. Navigate to **Facilities > Reports > Open Spaces**. This view gives an idea of where the open spaces are located.



2. Add the **Building** column to the list and **Group** by **Building**. Click the **update personal list** icon and select **Building**. Right-click on the **Building** column header and select **Group By**. Now you can see the availability by building.





3. This List view gives you the ability to slice and dice the data appropriate to your needs.

4. Under **Reports > View/Run**, click **Global Reports** and type **Facilities** in the Search bar to find all the Standard Facilities Reports.

