knowledge17

http://clabs.link/lab131998

WORK at LIGHTSPEED

Automating ITSM with Graphical Workflow

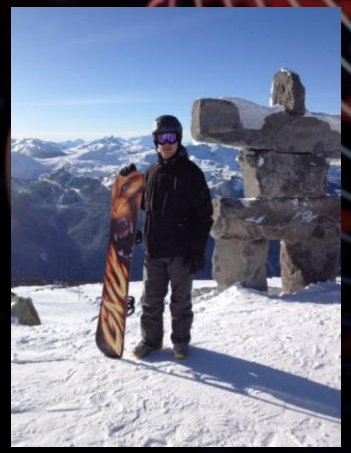
Ryan Fraser
Advisory Solution Consultant
ServiceNow

Greg Buonaiuto
Advisory Solution Consultant
ServiceNow

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servicenow

Speaker Introduction



Name: Ryan Fraser

Title: Advisory Solution Consultant

Company: ServiceNow

Location: Vancouver, British Columbia

Experience: Almost 5 years at ServiceNow

Expertise: ITIL Expert, Distinguished Professional in Service Management, and ServiceNow Platform

Achievements: Contributor to ITIL 2011 edition, President ITSMF Canada (BC Branch), Certified Snowboard Instructor

Current Projects: Building strategic roadmaps with customers

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Speaker Introduction



Name: Greg Buonaiuto

Title: Advisory Solution Consultant

Company: ServiceNow

Location: Long Island, NY

Experience: 14 years split between professional services, field R&D, and development management. 4 years in pre-sales.

Expertise: Field SC – jack of all trades. Focus on ITOM, ITBM, and SecOps

Achievements: Father of 2 boys, star of Sharknado 7 (Summer 2019)

Current Projects: Financial Services Vertical: AMEX, EY, Aetna, DTCC. Special Interest in Agile, SAFe, and DevOps transformation

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Objectives and What You Will Learn

Objectives

- Hands-on experience automating ITSM processes
- Become a Graphical Workflow rock star

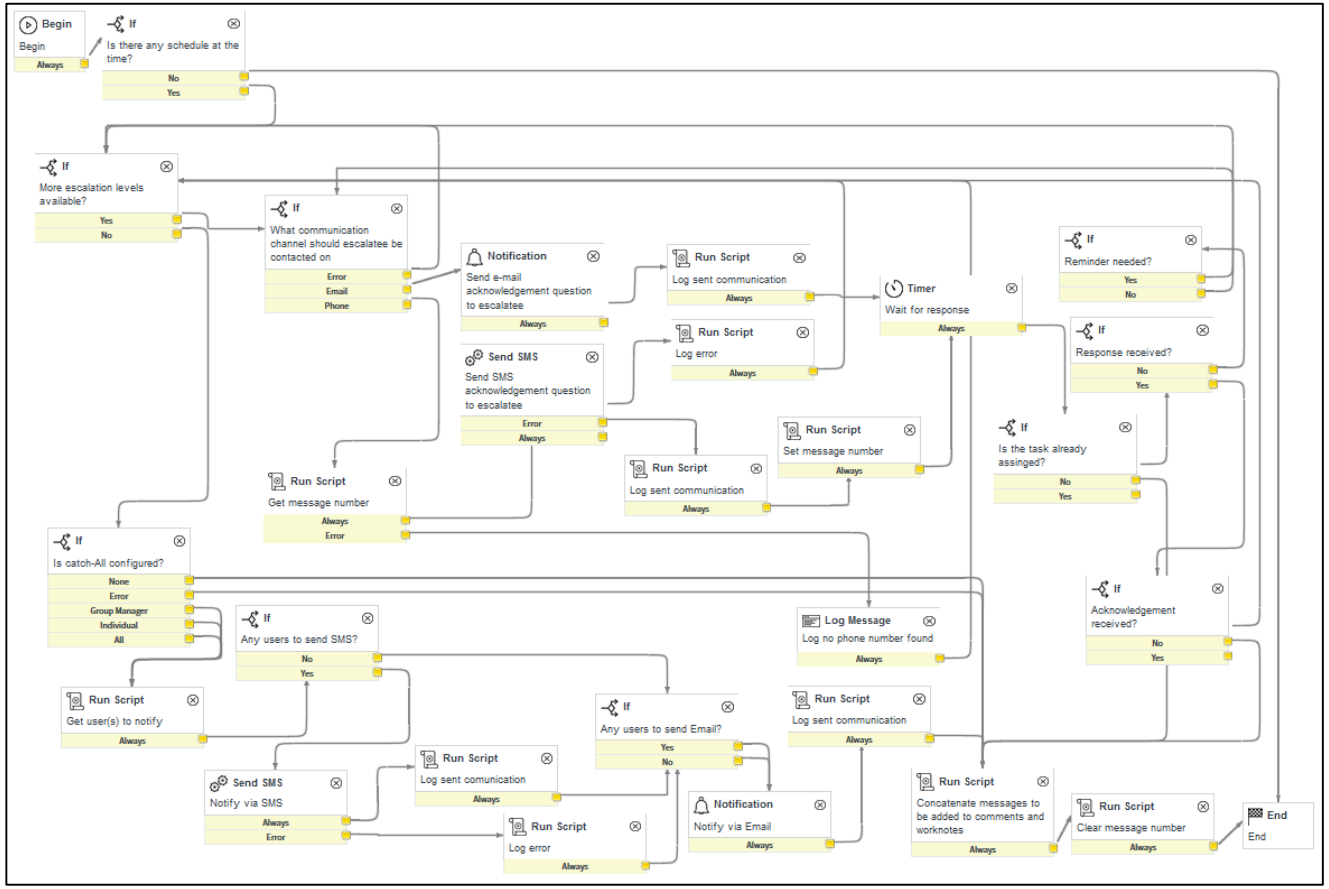
What you will learn

- Understand the fundamentals of Graphical Workflow
- Modify existing workflows
- Build new workflows for commonly manual processes
- Learn advanced workflow techniques, and build superstar ITSM processes

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Workflow – A Quick Overview

- Build and define automated processes
- Include notifications, assignments, and escalation triggers
- Provides the ability to include email and SMS options into the workflow for notification
- Logic to drive next steps of workflow and escalation, based on response from SMS and email

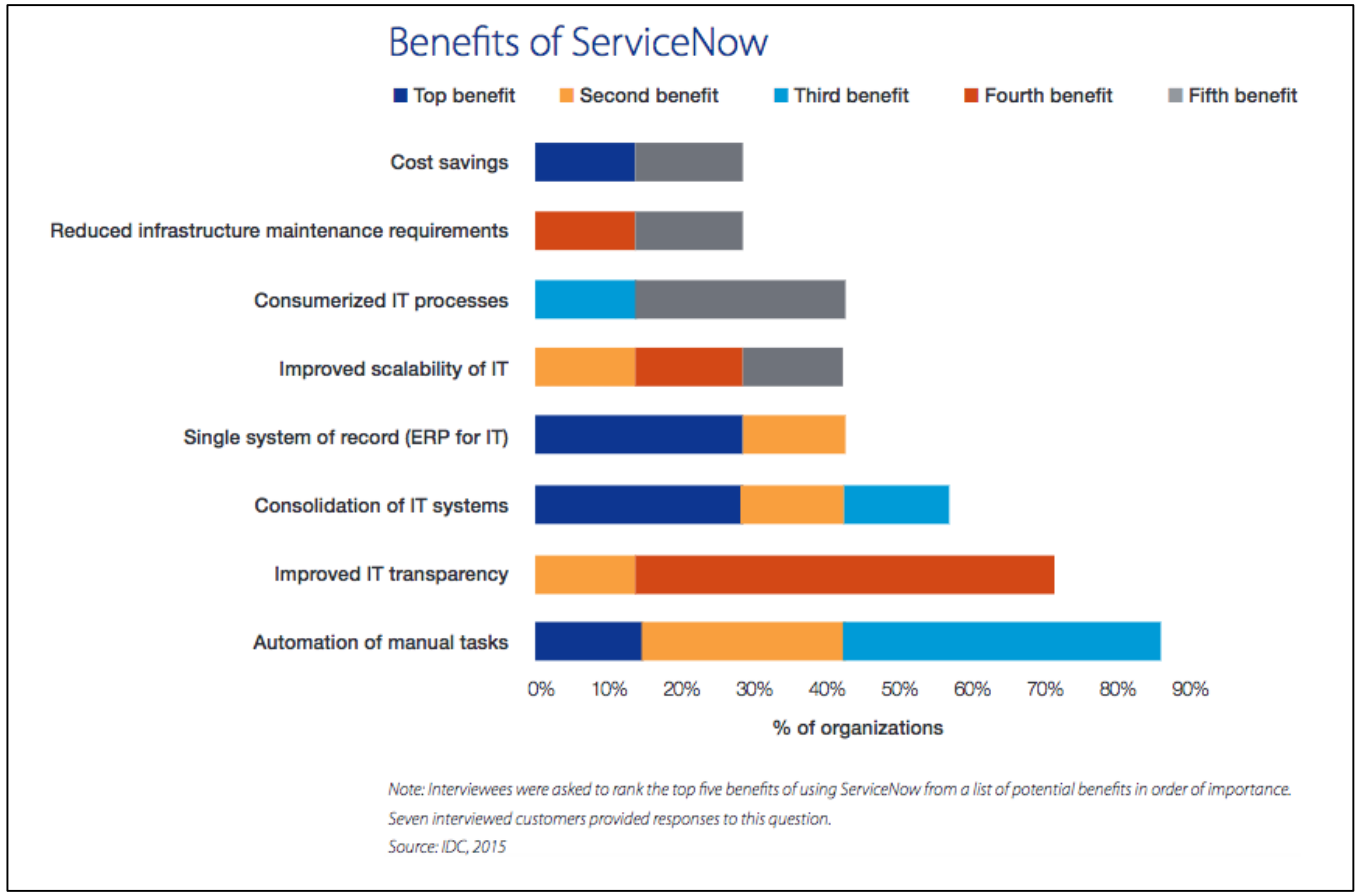


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The Benefits of ServiceNow

Process Automation is #1

- It is built into the platform
- Automate standard and repeatable processes
- Save time/effort
- Get more work done with the same resources

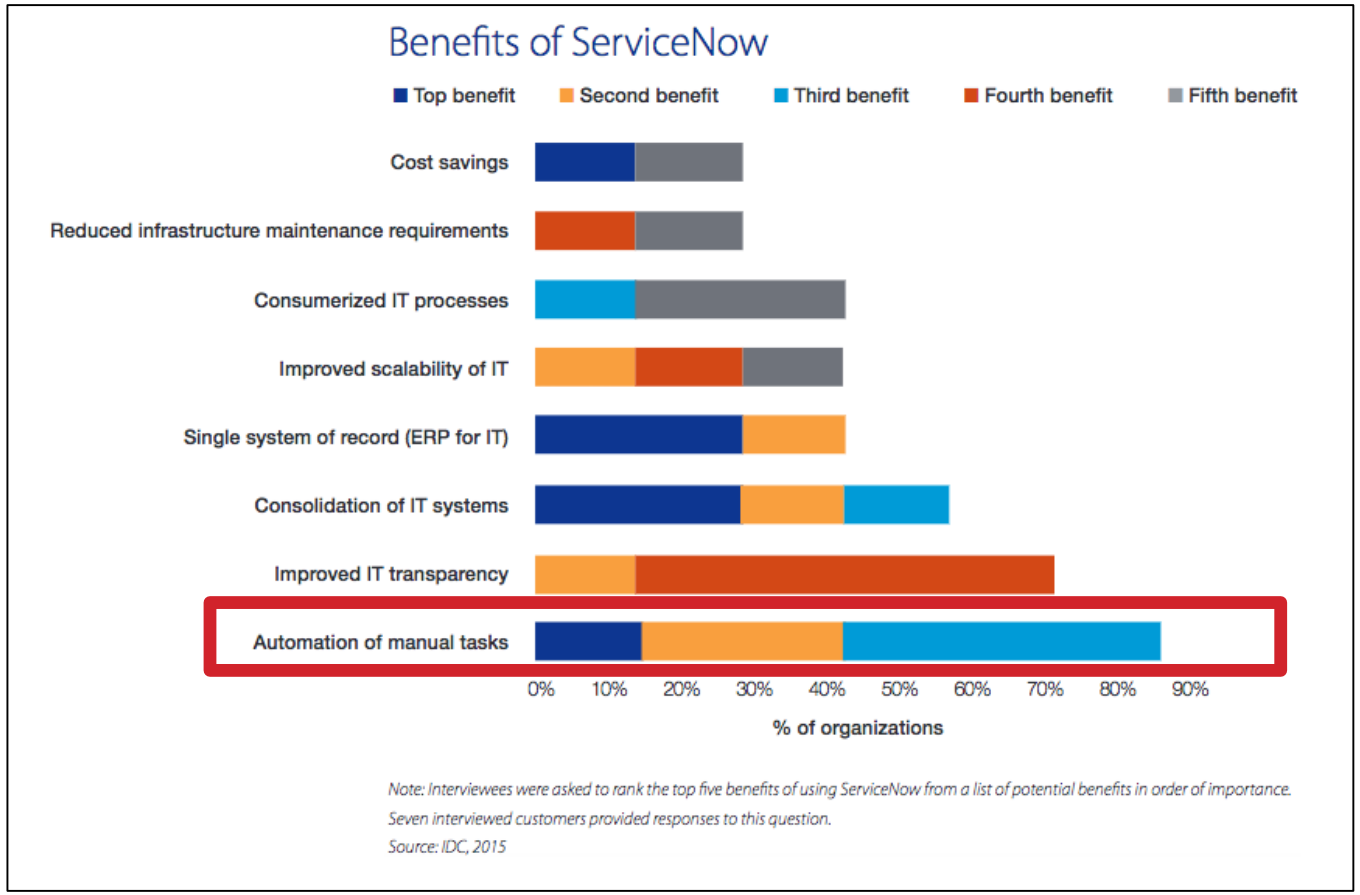


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The Benefits of ServiceNow

Process Automation is #1

- It is built into the platform
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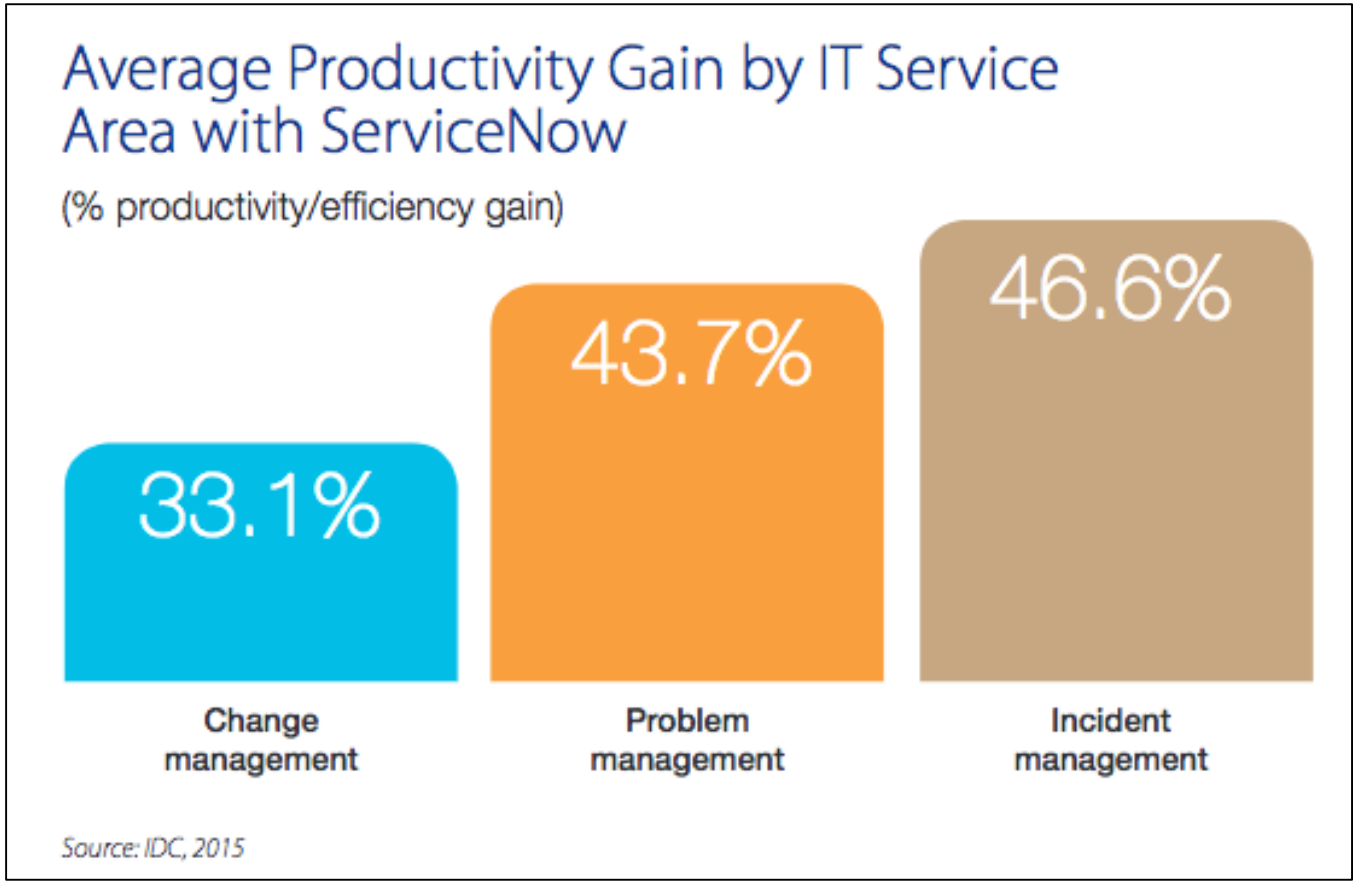


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Productivity Gains

Bringing the Benefits to ITSM

- Incident management teams have become 46.6% more productive
- Teams can handle more incidents without corresponding growth to staff
- Handle about 100% more incidents, and that's a very low estimate



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Lab Agenda

Out-of-the-Box Scenarios

- Trigger a Workflow
- Workflow Refresher
- Manage Poor Quality KB Articles
- Manage Major Incidents
- Using Conditional Logic for Routing
- Automate Problem Management

Advanced Use Cases

- Verify Notify Properties
  - Lab Exercise 7.0 – 7.1
- Create On-Call Rotation
  - Lab Exercise 8.0
- ServiceNow Orchestration with Notify
  - Lab Exercise 9.0

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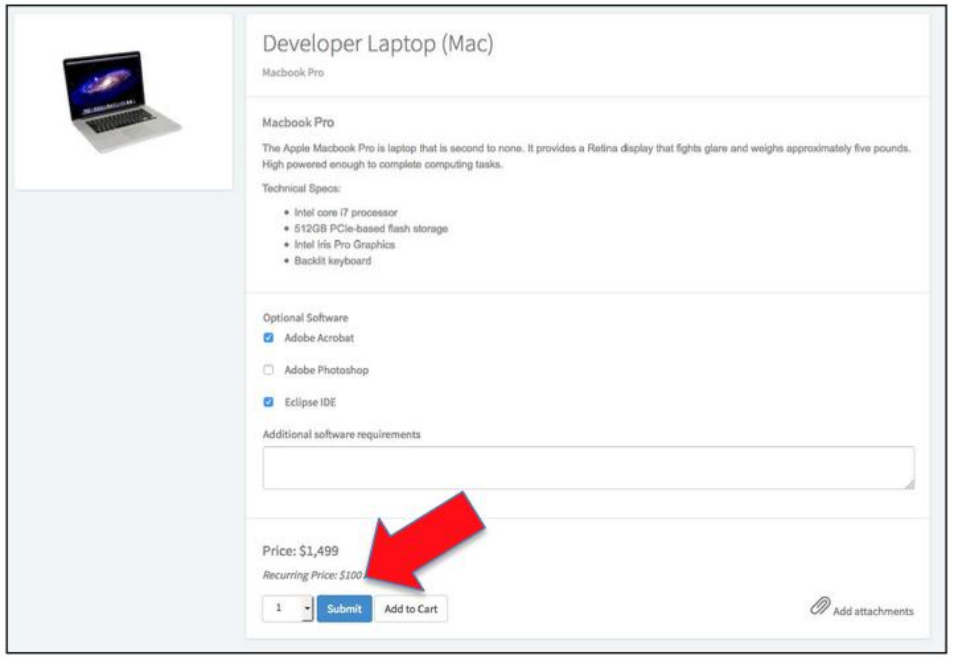
Workflow Refresher

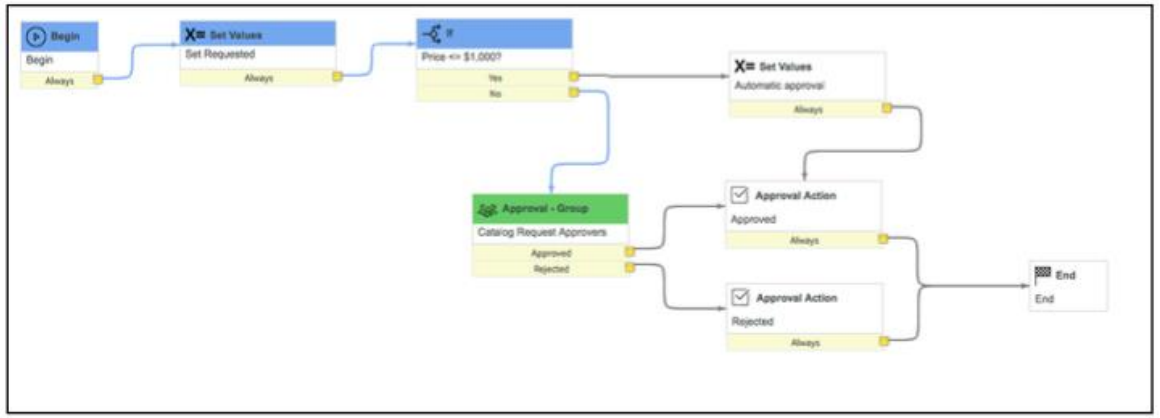
Lab Exercises 1 - 2

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Lab 1.0 – Trigger a Workflow

- Goal
  - Trigger and observe workflows in motion
- Steps
  - Follow steps in Lab 1.0

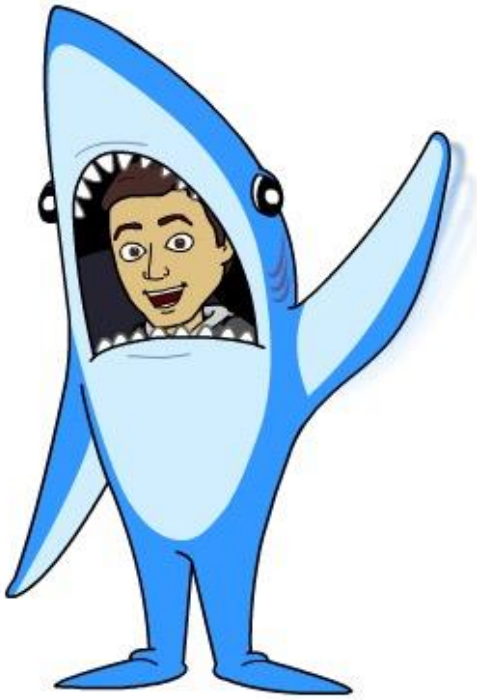




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Lab 1.0 – Lab Guide Update

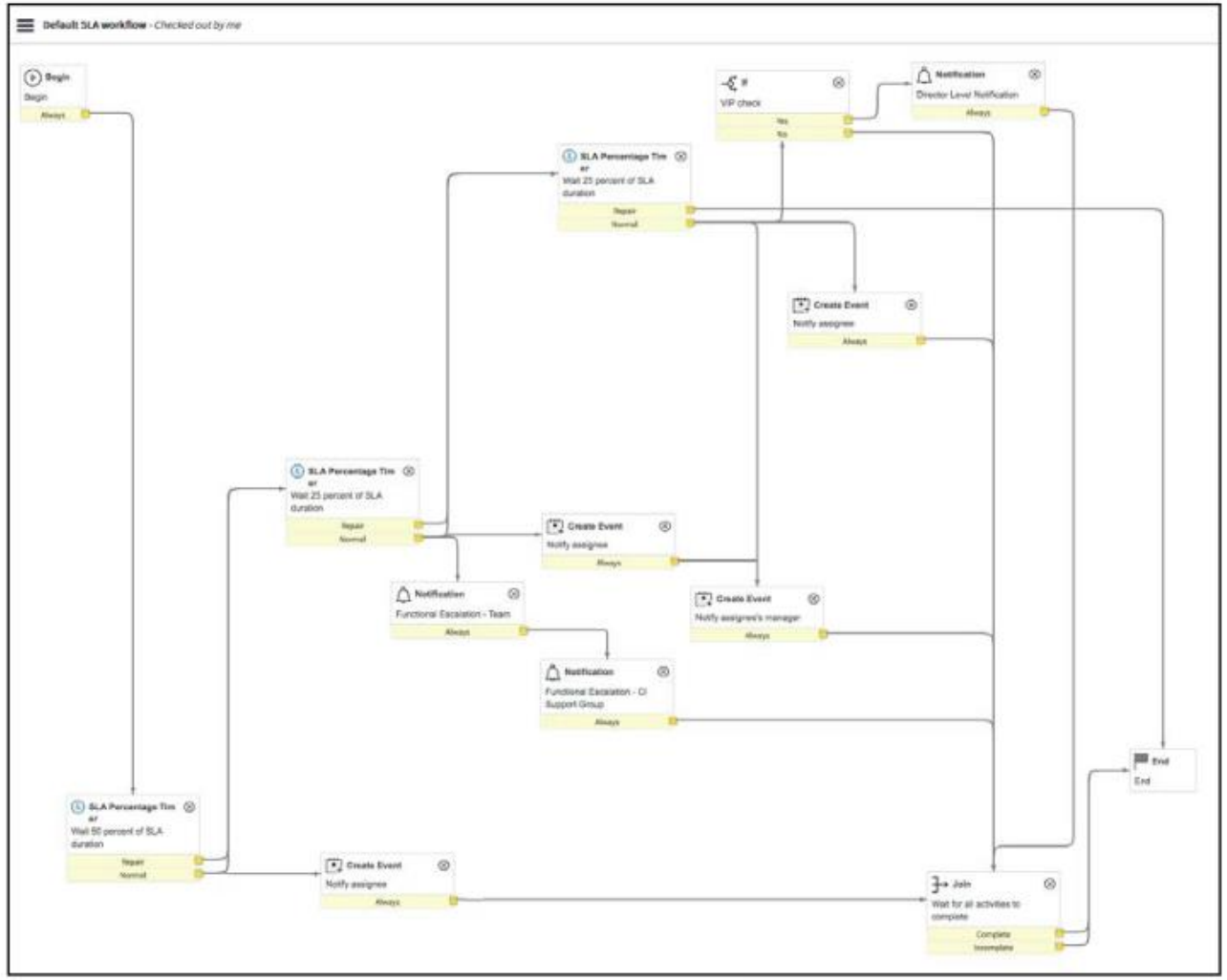
- Page 4, Step #3
  - Navigate to Service Catalog → Open **Records** → Requests



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Lab 2.0 – Workflow Refresher

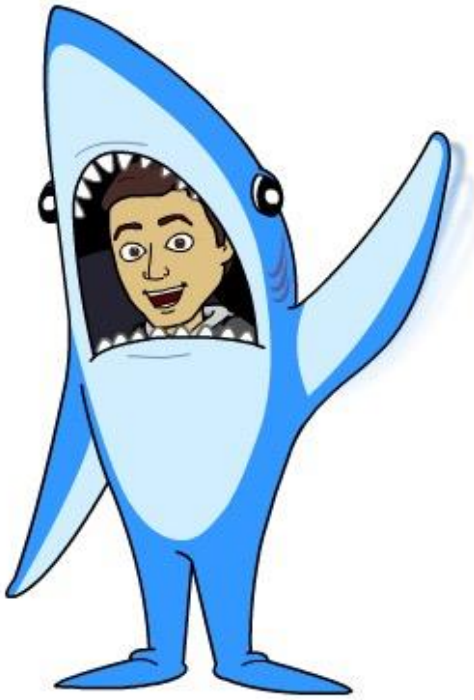
- Goal
  - Modify an existing Workflow
  - Enhance the Default SLA Workflow
  - Add hierarchical and functional escalations
- Steps
  - Follow steps in Lab 2.0



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Lab 2.0 – Lab Guide Update

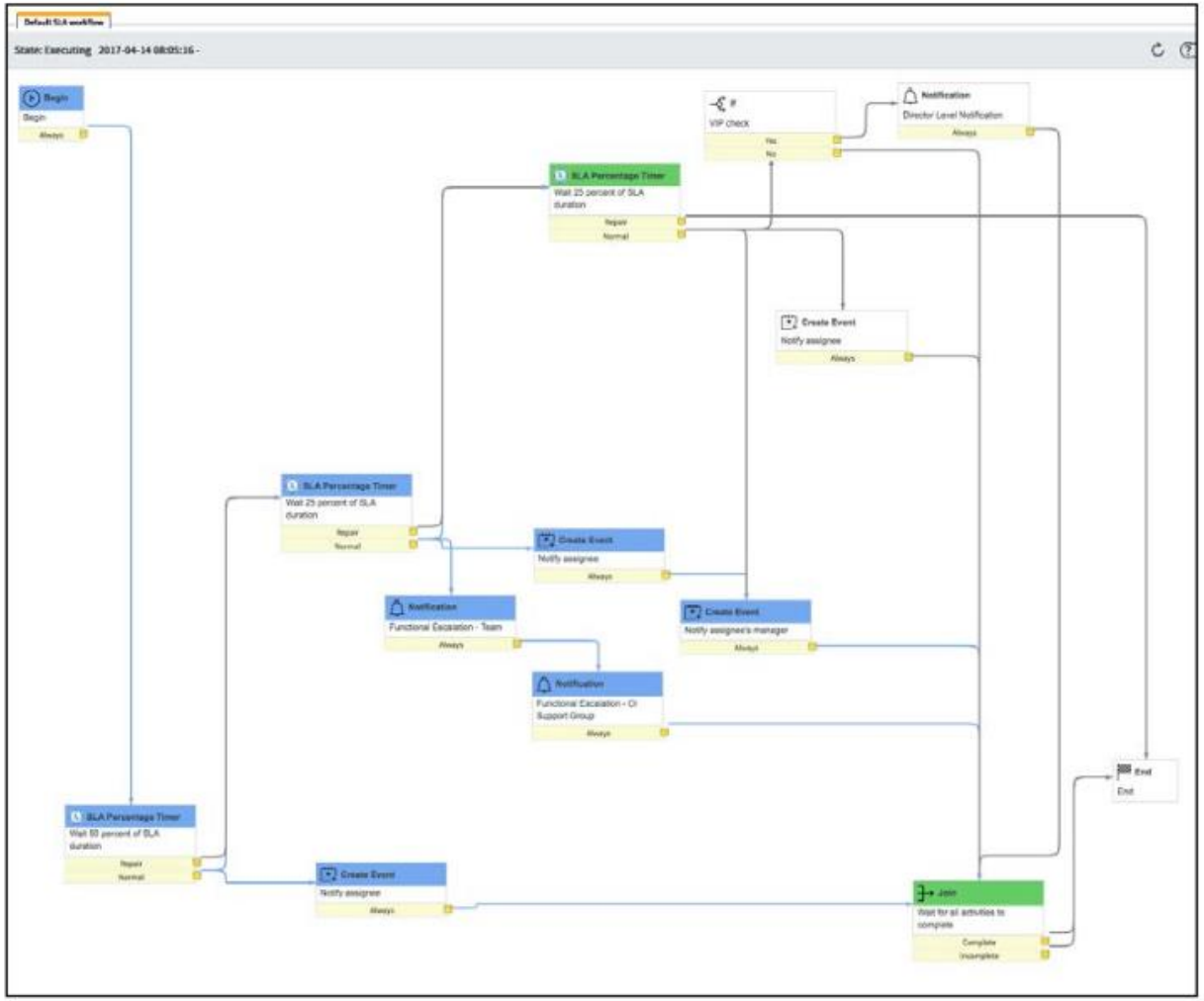
- Page 25, Step #2
  - **Assignment Group** field is not shown on form
  - NOTE: Software group is automatically assigned, when saved



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Lab 2.1 – Validate Your Work

- Goal
  - Validate that the Workflow created in Lab 2.0 works as expected
- Steps
  - Follow steps in Lab 2.1



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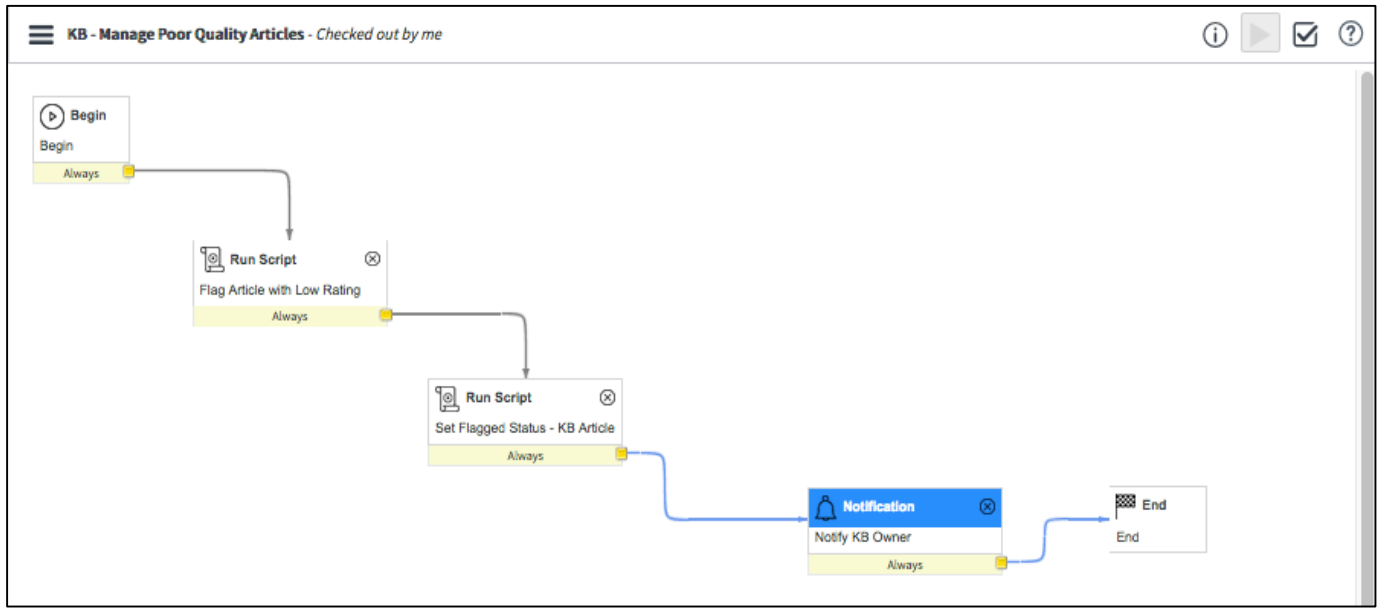
Knowledge Management

Lab Exercise 3

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Lab 3.0 – Manage Poor-Quality KB Articles

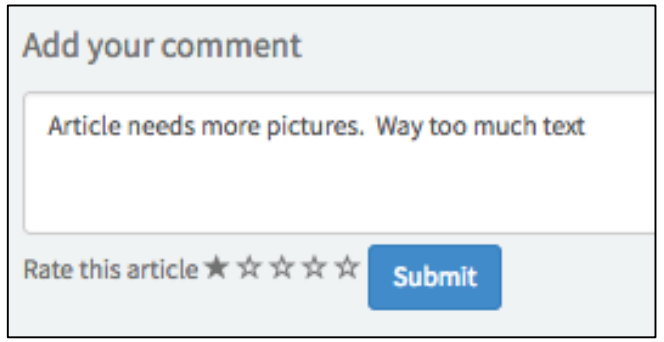
- Goal
  - Create a new Workflow
  - Automate several individual Business Rules
  - Add notification and unpublishing KB article
- Steps
  - Follow steps in Lab 3.0

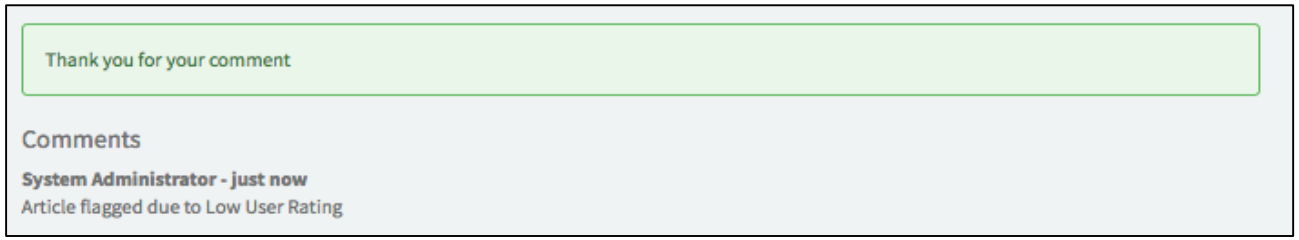


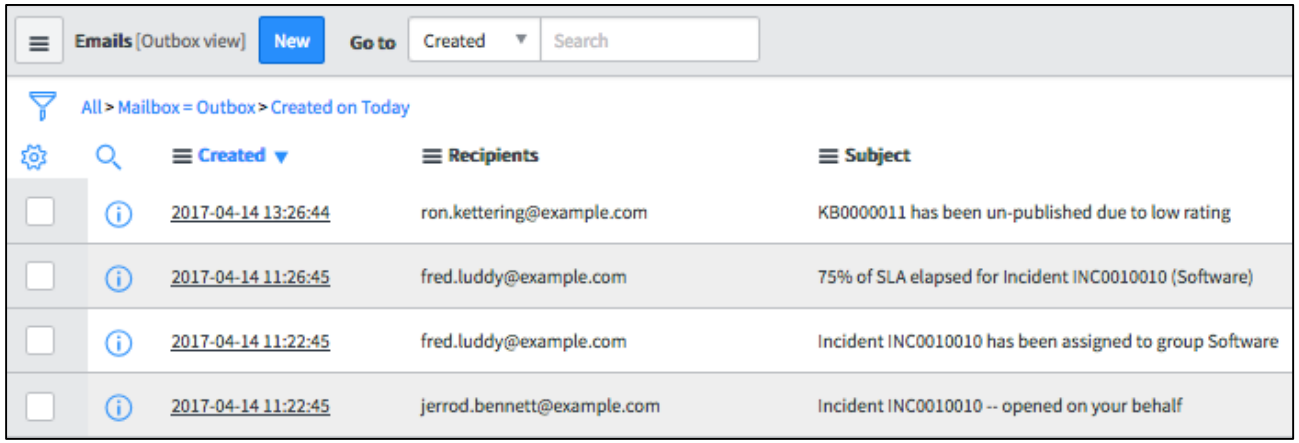
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Lab 3.1 – Validate your Work

- Goal
  - Validate that the Workflow created in Lab 3.0 works as expected
- Steps
  - Follow steps in Lab 3.1







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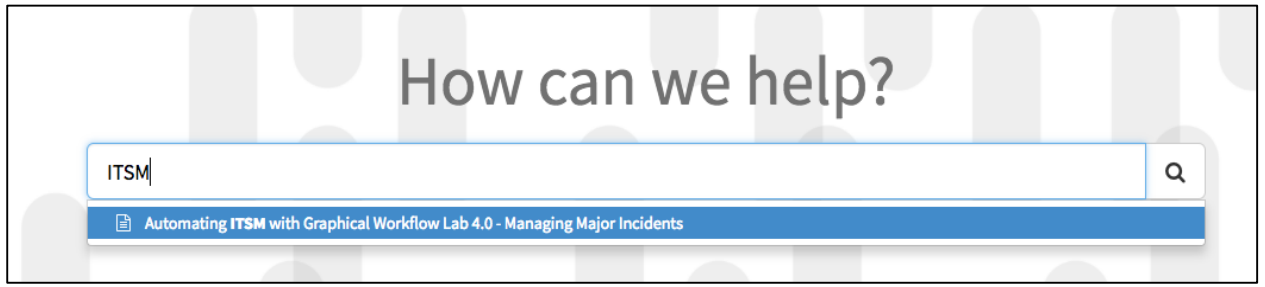
Major Incident Management

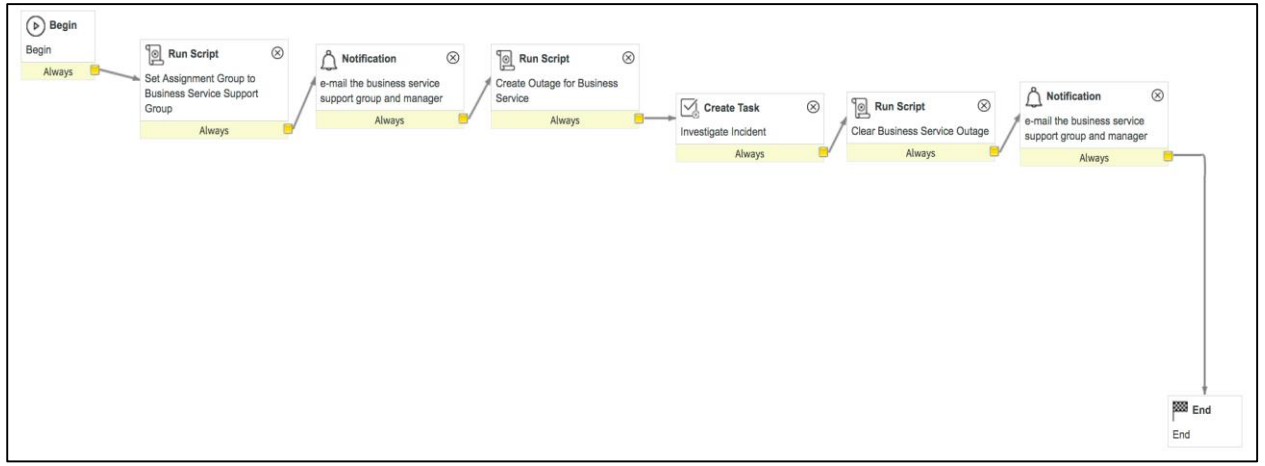
Lab Exercise 4

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Lab 4.0 – Manage Major Incidents

- Goal
  - Create a new incident workflow
  - Automatically assign the incident ticket to the group supporting the business service
  - Create and clear an outage for the business service
  - Send notifications of outage and subsequent service restoration
  - Learn to work with workflow scratchpad
  - Learn to “dot walk” within workflow activities
- Steps
  - Follow steps in Lab 4.0

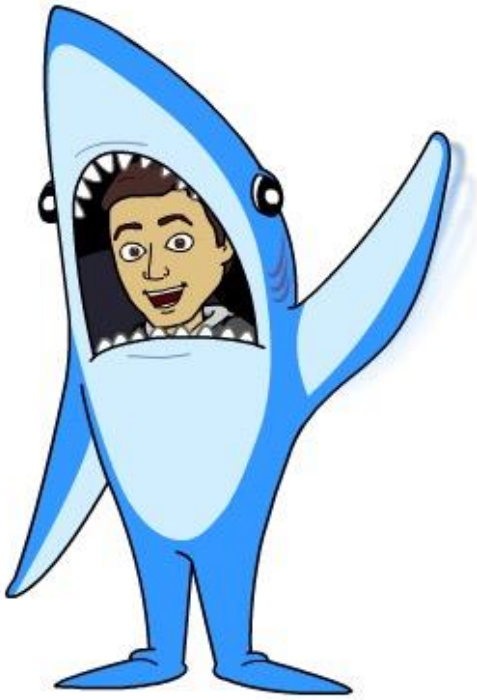




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Lab 4.0 – Lab Guide Updates

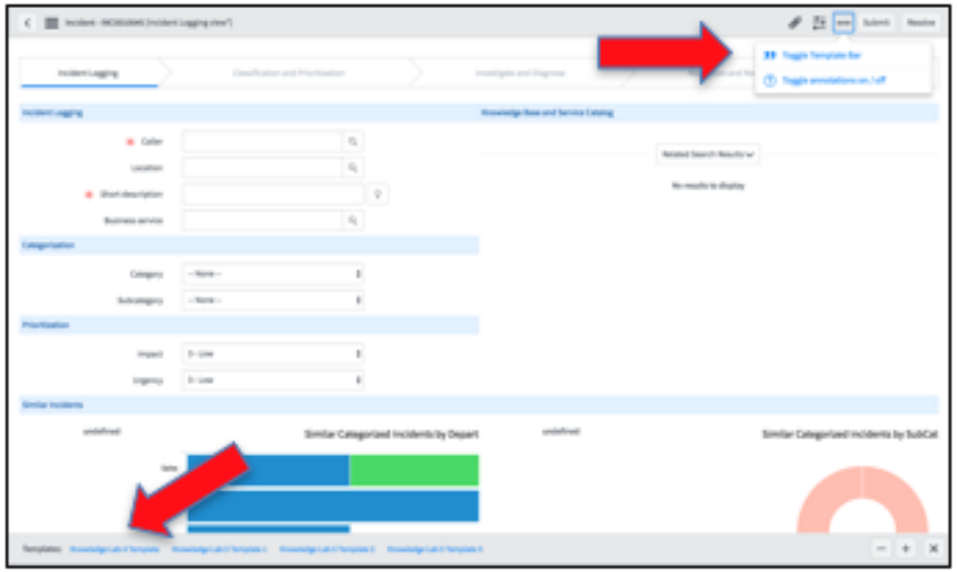
- Page 62, Step #3
  - Expand the **Notifications** item from the list, and drag and drop the **Notification** activity onto the Workflow Canvas, placing it on top of the line that connects **Create Outage for Business Service** with **end**

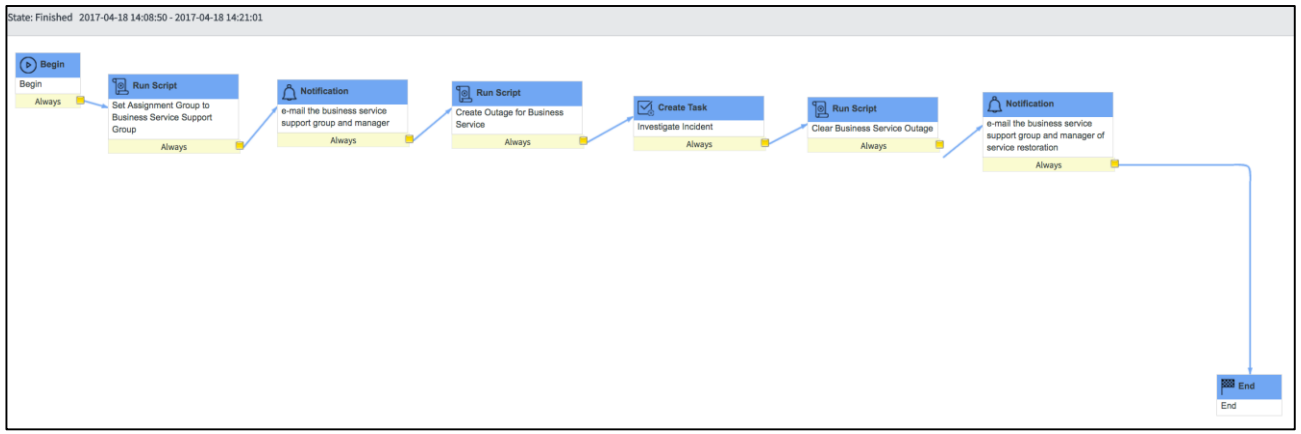


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Lab 4.1 – Validate your Work

- Goal
  - Validate that the Workflow created in Lab 4.0 works as expected
- Steps
  - Follow steps in Lab 4.1





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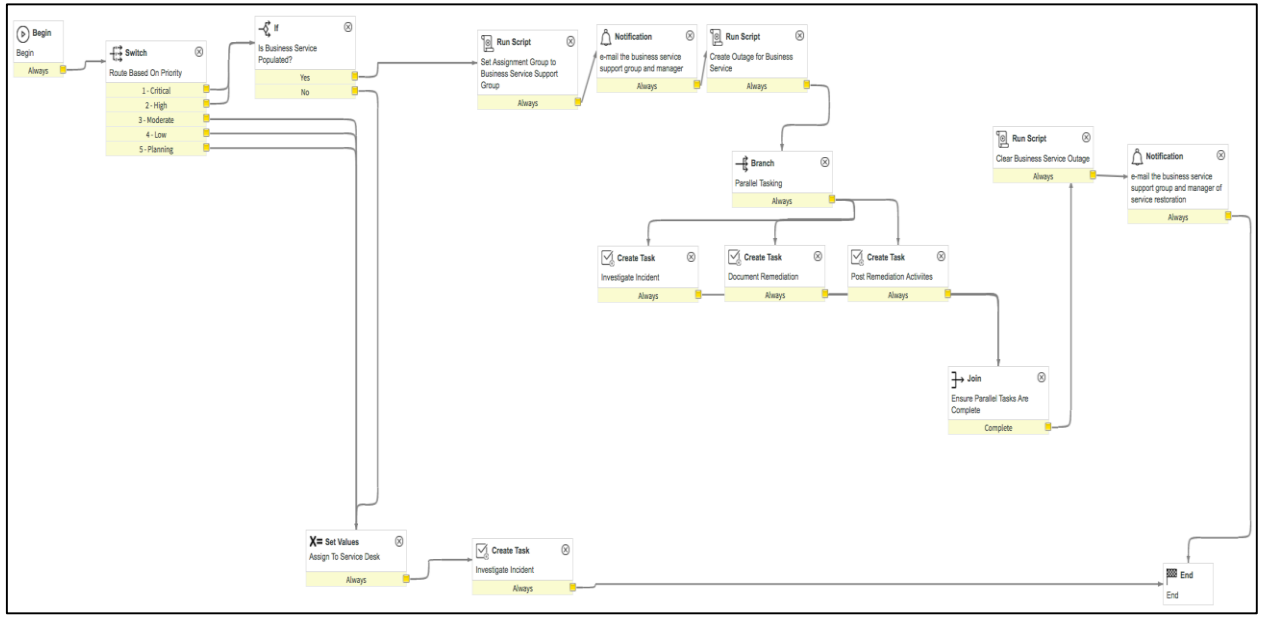
Use Conditional Logic for Routing

Lab Exercise 5

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Lab 5.0 – Use Conditional Logic for Routing

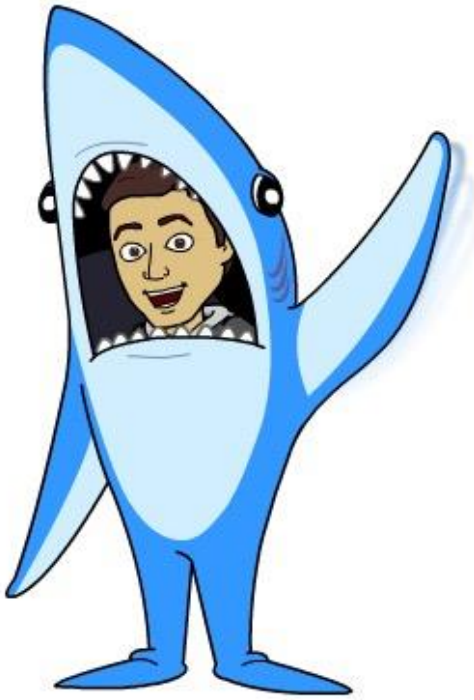
- Goal
  - Copy and then modify an existing workflow
  - Use conditional logic activities to make routing decisions for the workflow
  - Use concurrent workflow activities
- Steps
  - Follow steps in Lab 5.0



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Lab 5.0 – Lab Guide Updates

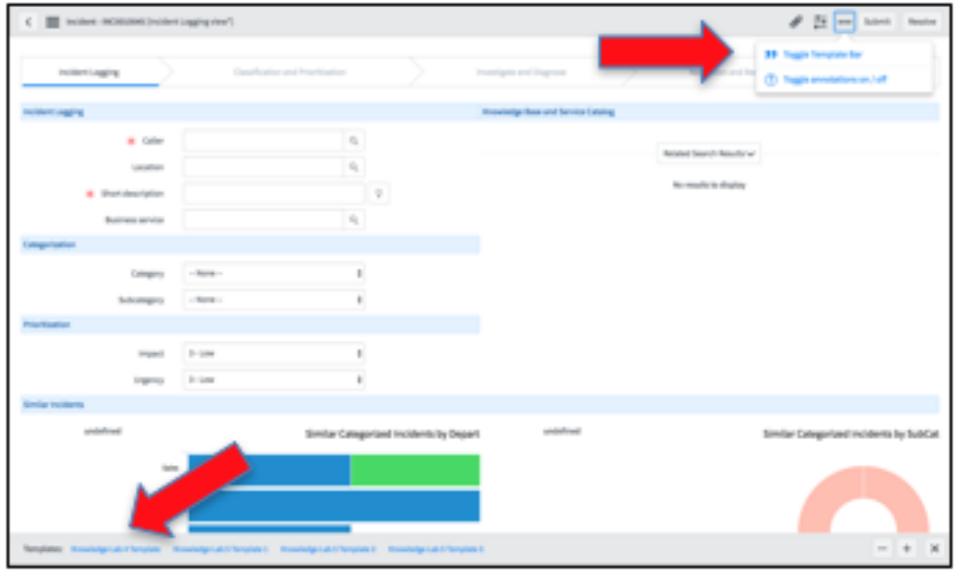
- Page 78, Step #5
  - Click **Submit**

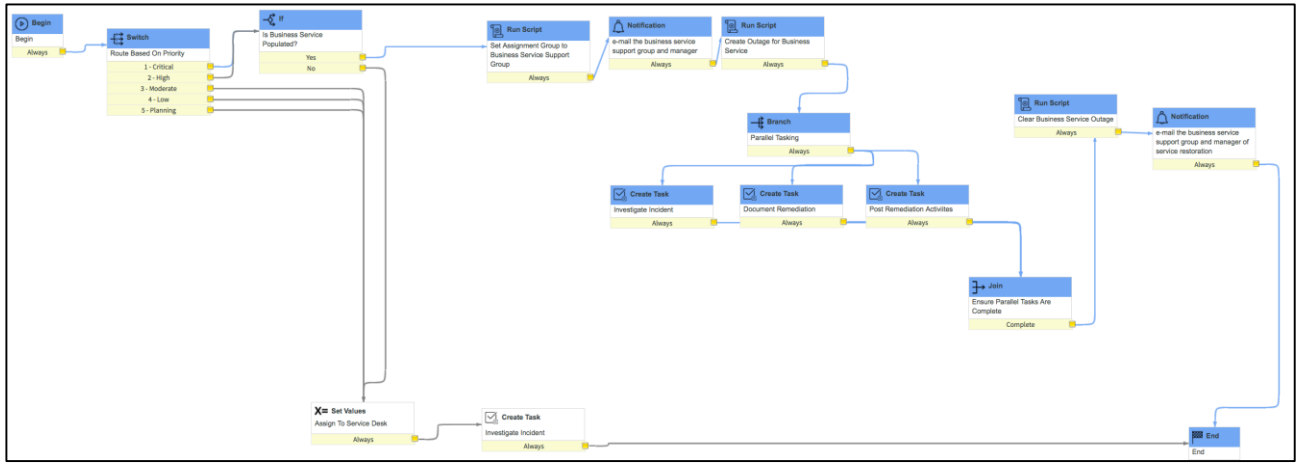


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Lab 5.1 – Validate Your Work

- Goal
  - Validate that the Workflow created in Lab 5.0 works as expected
- Steps
  - Follow steps in Lab 5.1





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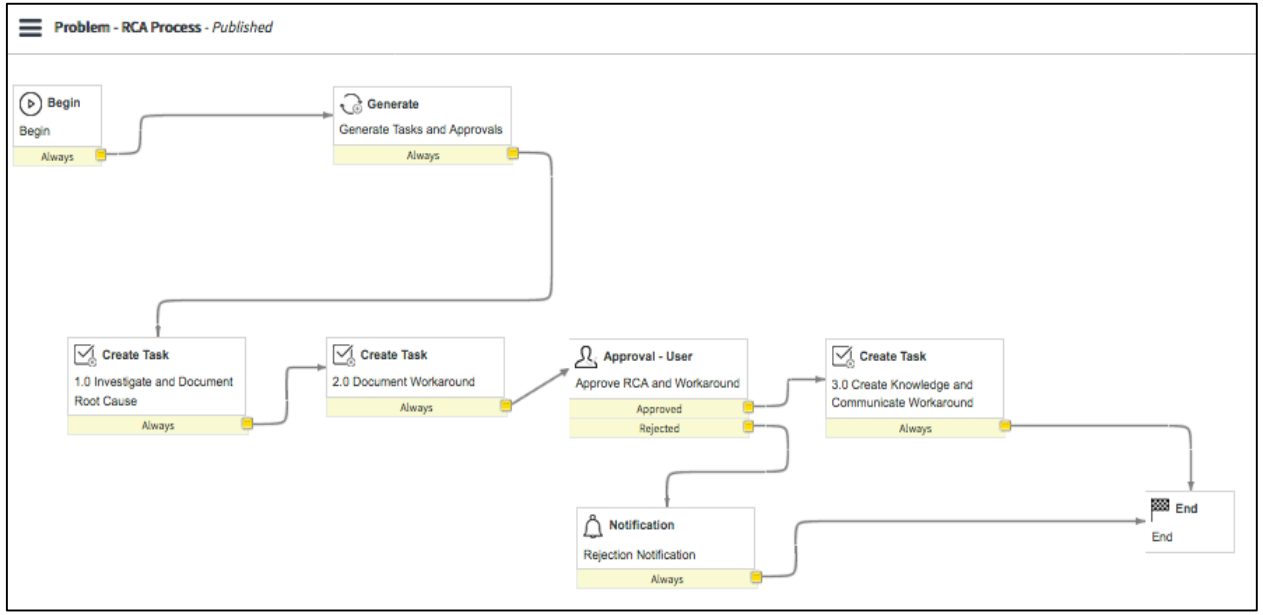
Automate Problem Management

Lab Exercise 6

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Lab 6.0 – Automate Problem Management

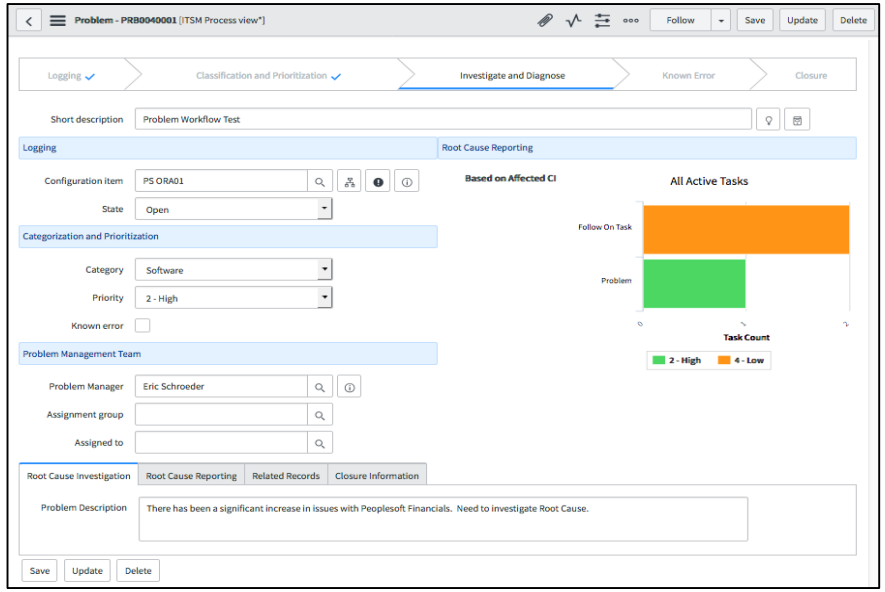
- Goal
  - Copy and then modify an existing workflow
  - Use conditional logic activities to make routing decisions for the workflow
  - Use concurrent workflow activities
- Steps
  - Follow steps in Lab 5.0

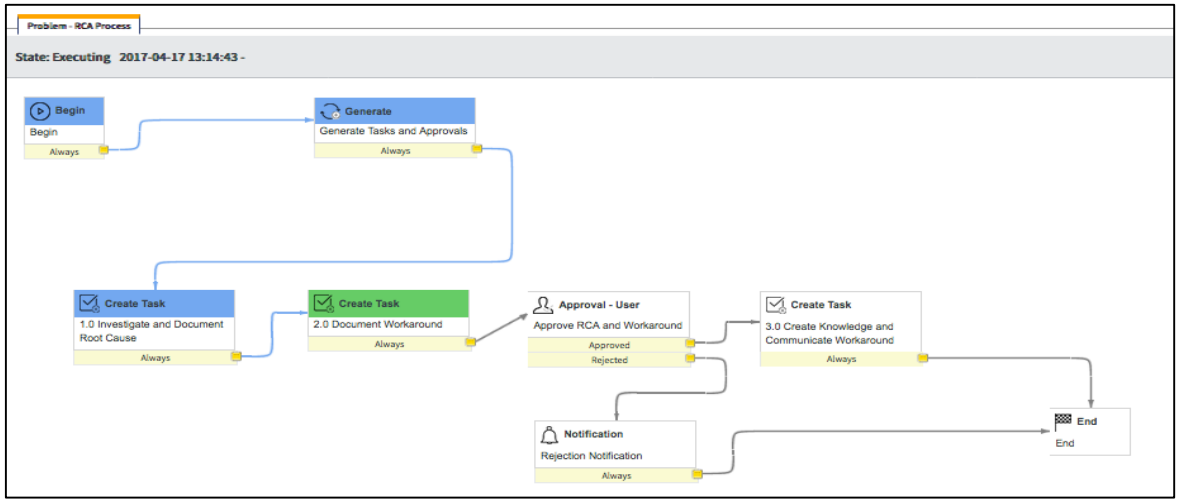


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Lab 6.1 – Validate Your Work

- Goal
  - Validate that the Workflow created in Lab 6.0 works as expected
- Steps
  - Follow steps in Lab 6.1





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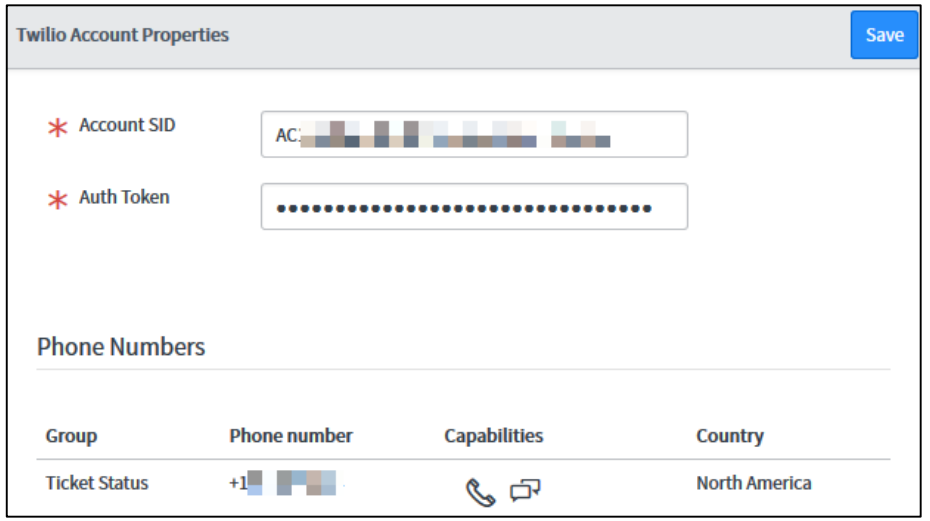
Orchestrate Workflow with Notify

Lab Exercises 7 - 9

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Lab 7.0 – Verify Notify Properties

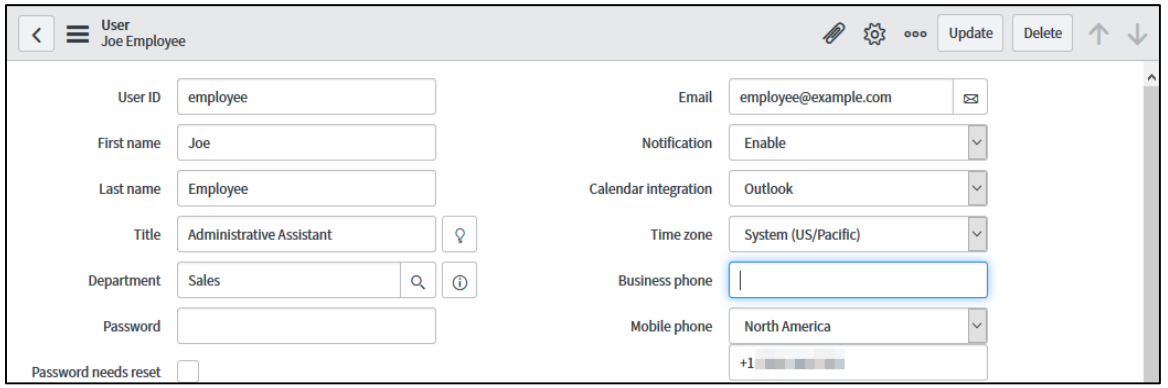
- Goal
  - Ensure Notify is set up properly
- Steps
  - Follow steps in Lab 7.0

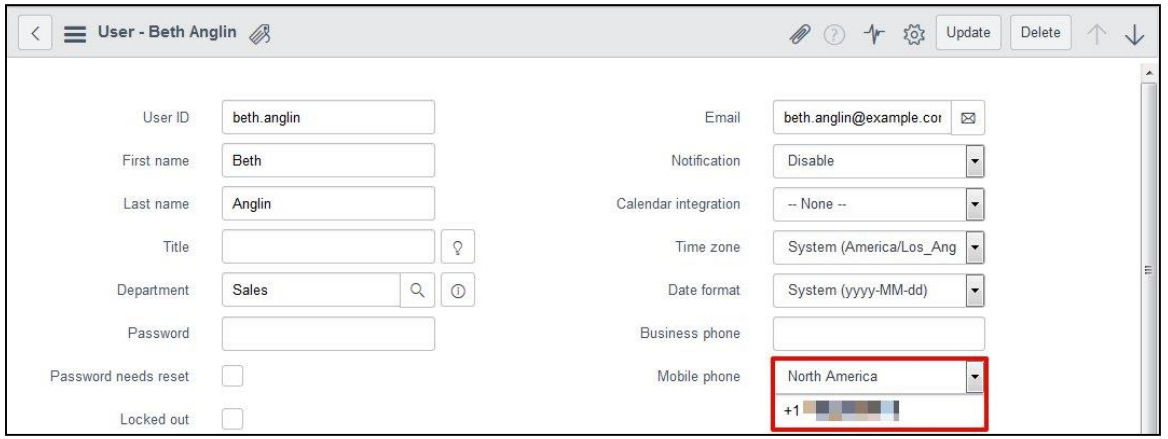


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Lab 7.1 – Update Users

- Goal
  - Text your instance to automatically update OOB users with your mobile phone:
    - Joe Employee
    - Beth Anglin
- Steps
  - Follow steps in Lab 7.1





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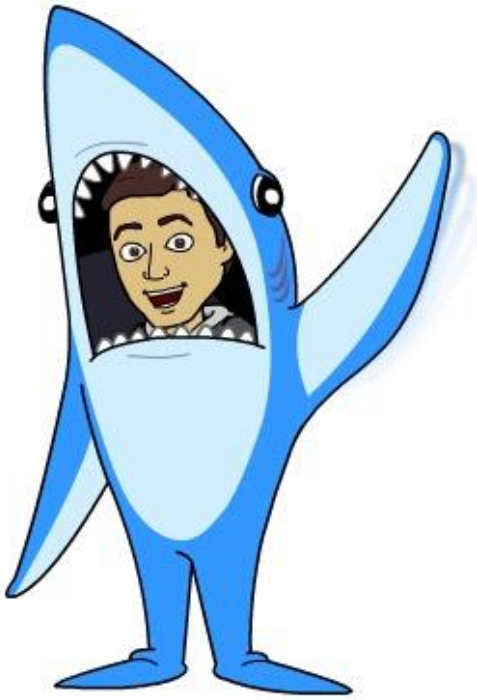
Lab 8.0 – Get Ready for the Lab

- Navigate to **Routing and Assignment -> Assignment Rule**

- Select the record where Name is **VIP Callers**

- Add an AND condition
  - **Short Description contains Disneyland**

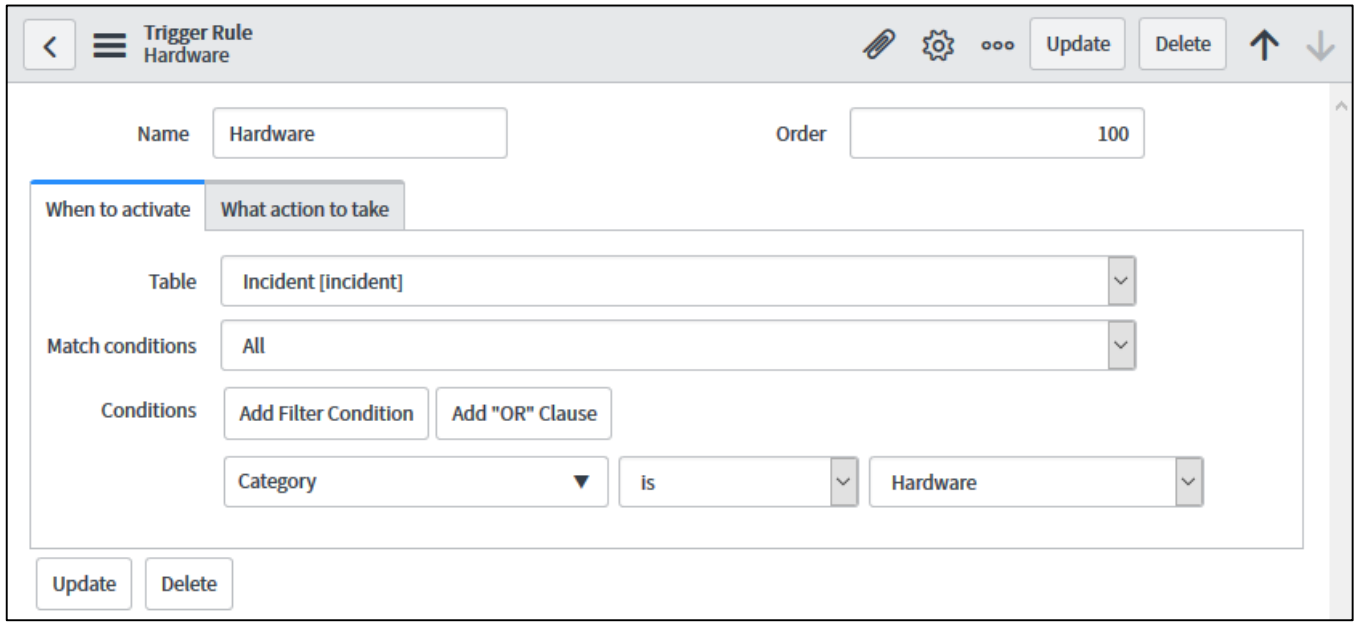
- Select **Update**



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Lab 8.0 – Create On-Call Rota and Trigger Rule

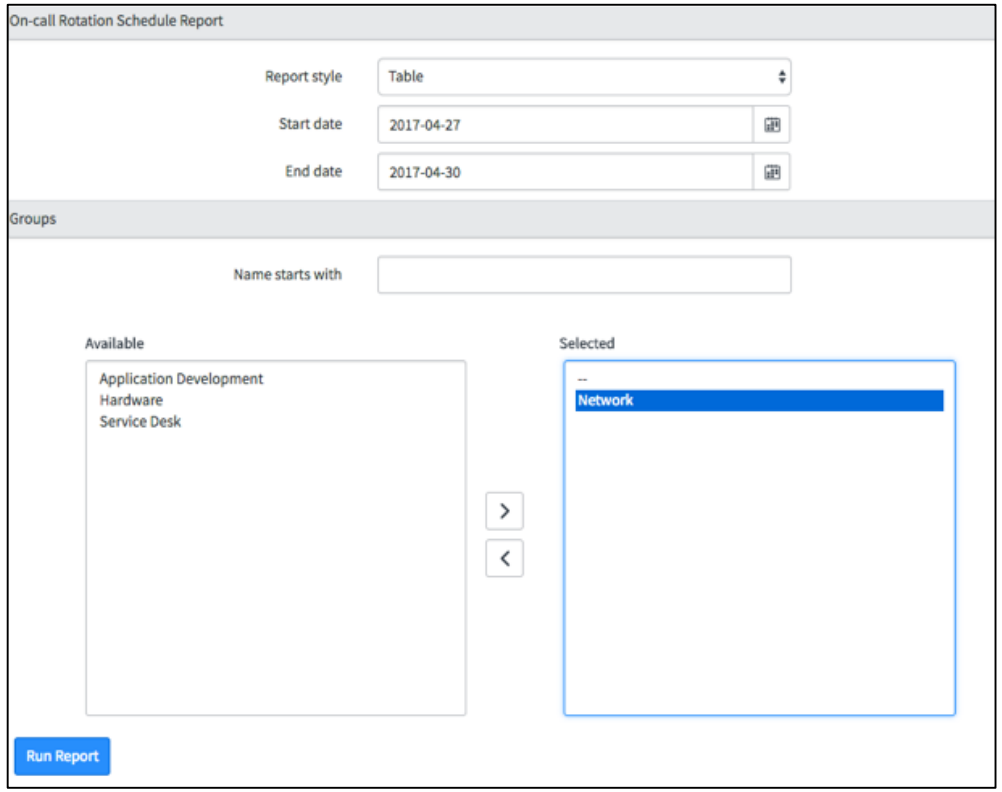
- Goal
  - Create a new On-Call Rotation for the Hardware team
- Steps
  - Listed in Lab 8.0

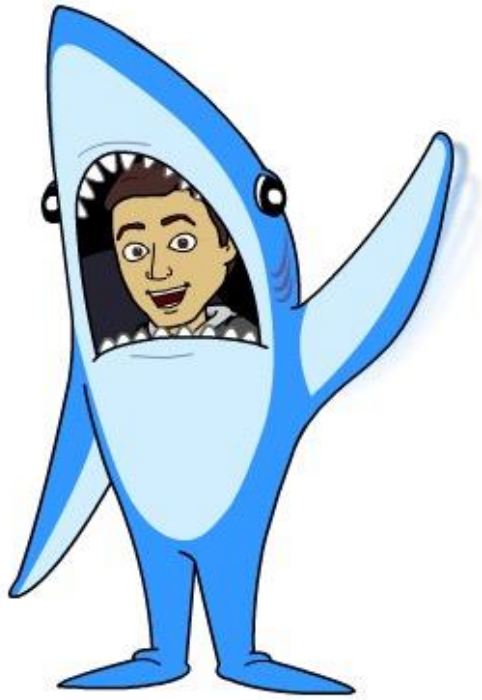


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Lab 8.0 – Lab Guide Updates

- Page 120, Step #14
  - Double-click **Network** to move it to the **Selected** list

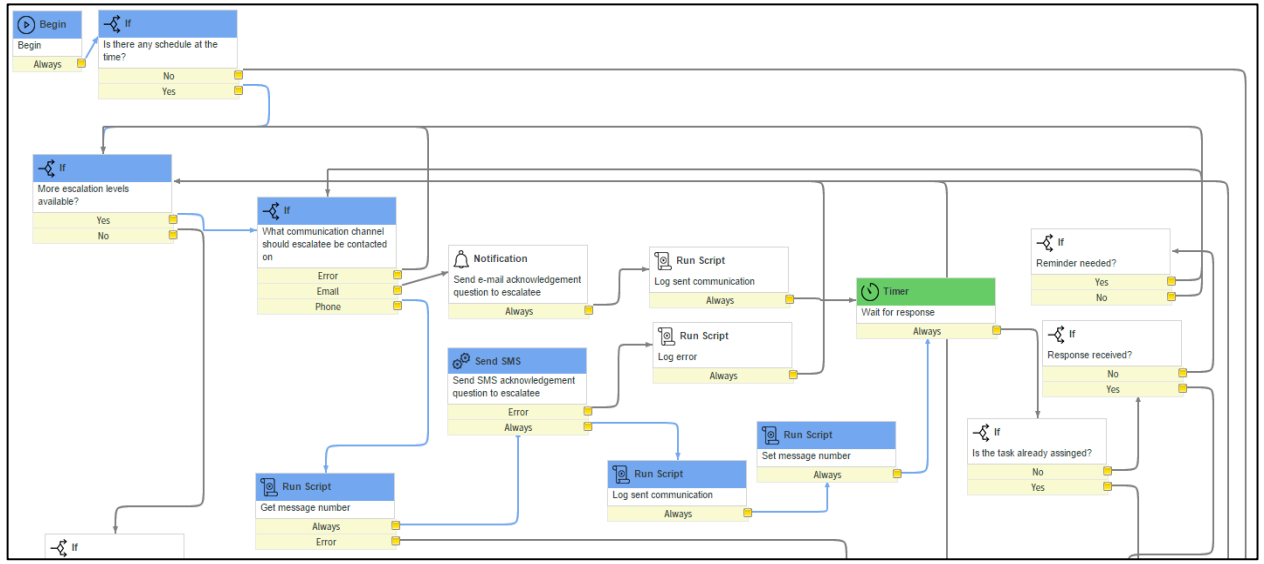


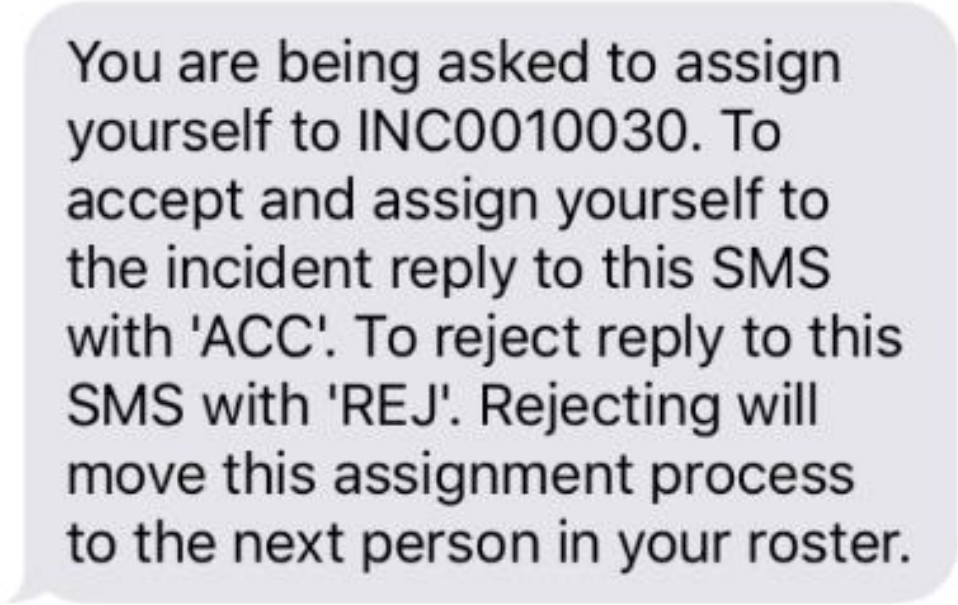


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Lab 8.1 – Test Hardware Rota

- Goal
  - Create an incident to test the new Hardware Rota created in Lab 8.0
- Steps
  - Listed in Lab 8.1

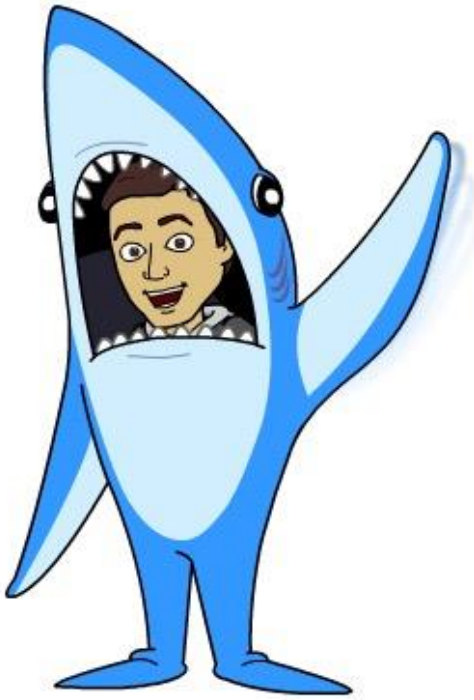




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Lab 8.1 – Lab Guide Updates

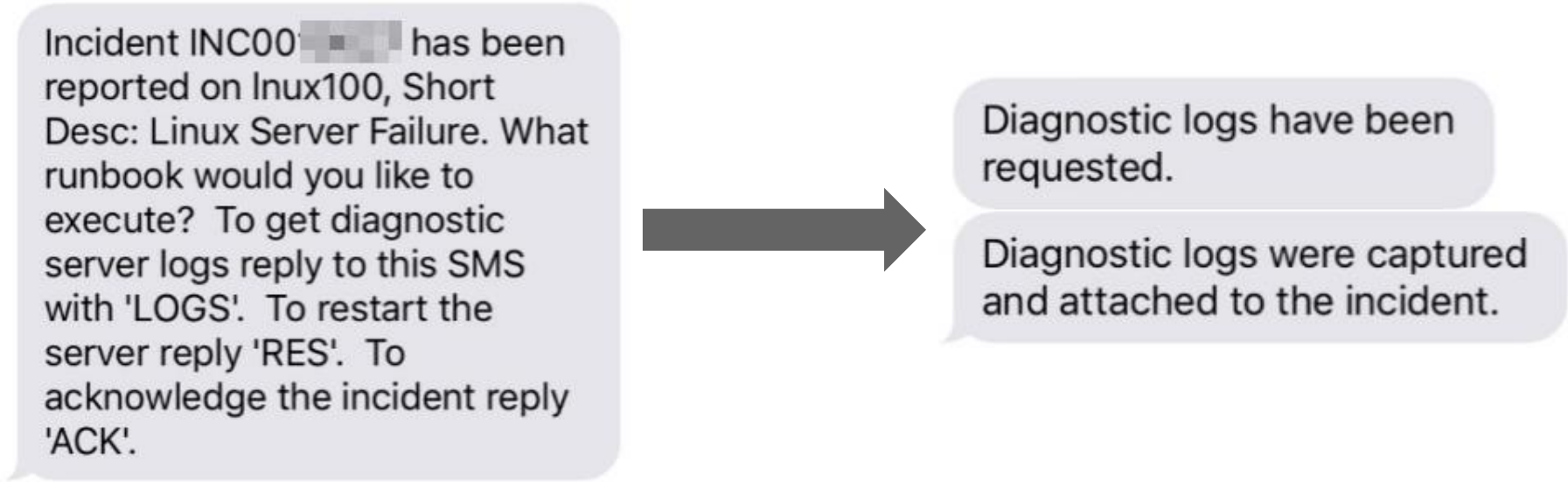
- Page 122, Step #3
  - Add **Joe Employee** to the **Caller** field
  - NOTE: **Assignment group** is not shown on this form view



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Lab 9.0 – Orchestration with Notify

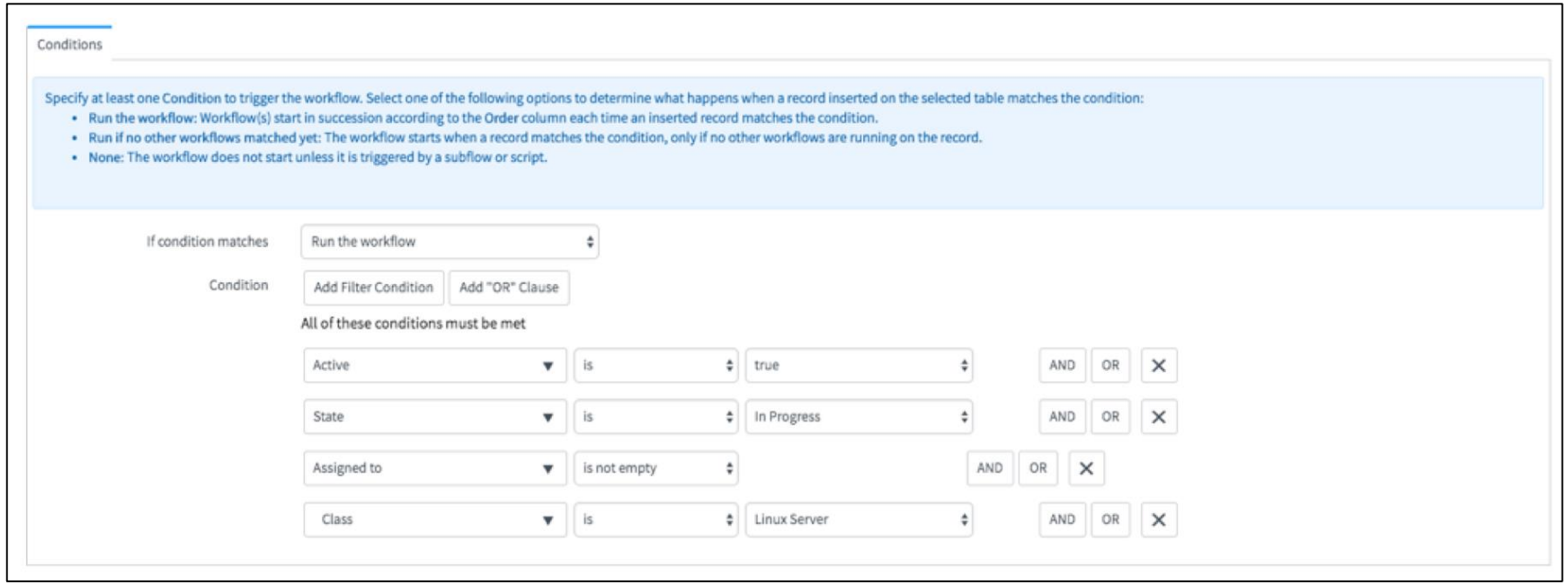
- Goal
  - Create workflow allowing incident assignee to take action on an incident via SMS
- Steps
  - Listed in Lab 9.0

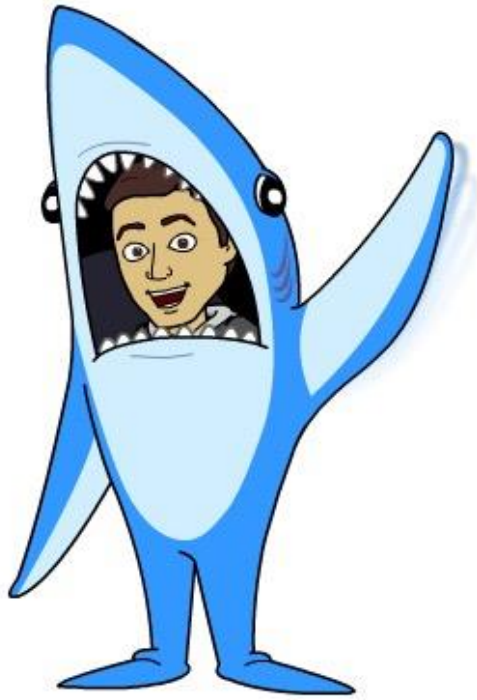


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Lab 9.0 – Lab Guide Updates

- Page 126, Step #5
  - State is '**In Progress**'





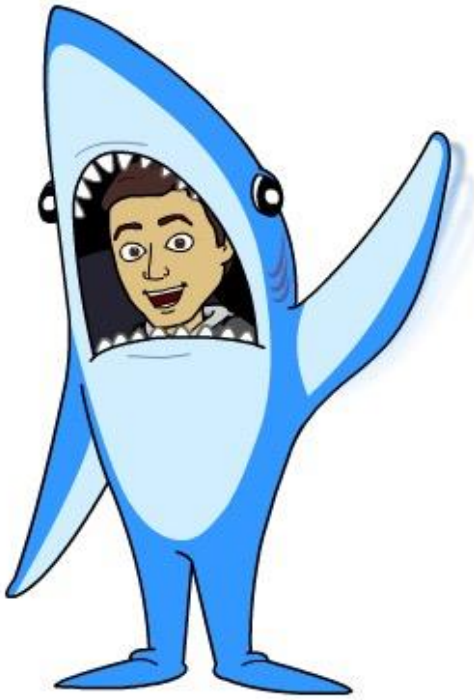
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Lab 9.0 – Lab Guide Updates

- Page 132, Step #24
  - Note: The script above can also be copied from the Lab Management application under the Lab Exercises section by clicking **Lab 9** Orchestration with Notify Scripts.

- Page 134, Step #30
  - Needs quotes around the **'res'**, should be updated to: **workflow.scratchpad.response == 'res'**

- Page 134, Step #32
  - Needs quotes around the **'ack'**, should be updated to: **workflow.scratchpad.response == 'ack'**

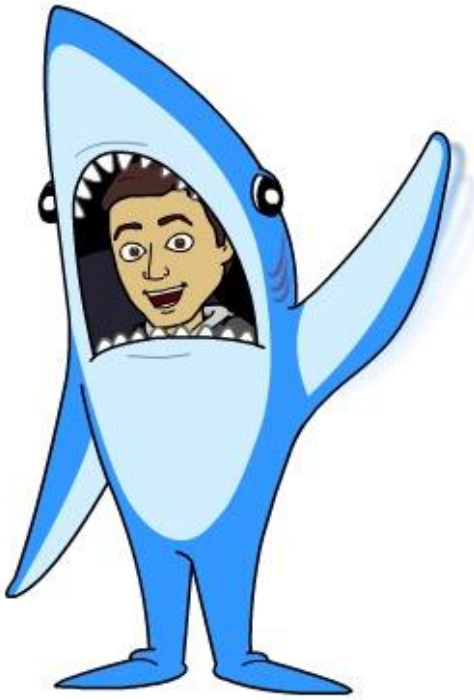


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Lab 9.0 – Lab Guide Updates

- Page 135, Multiple Steps
  - References to Lab 6 should be referring to **Lab 9**

- Page 141, Step #85
  - Add **Joe Employee** to the **Caller** field



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Q & A

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