knowledge17

May 7–11, 2017 • Orange County Convention Center • Orlando, FL

Lab Guide

Mitigate Risk and Minimize the Impact of Change 101

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Default Login / Password: Knowledge17

admin / Knowledge17

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employee / Knowledge17

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Lab Goal

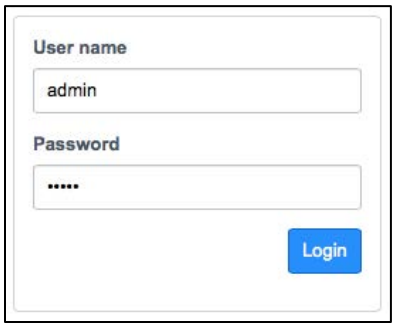
Adding a CI to a Change Request enables the full power of the ServiceNow CMDB. This lab explains how creating a Change Request enables you to perform several key checks for conflicts – before it gets approved.

This lab also looks at a forward schedule of a change calendar/timeline.

Lab 1.0 Conflict Detection and Service Identification

Log On to Your Training Instance

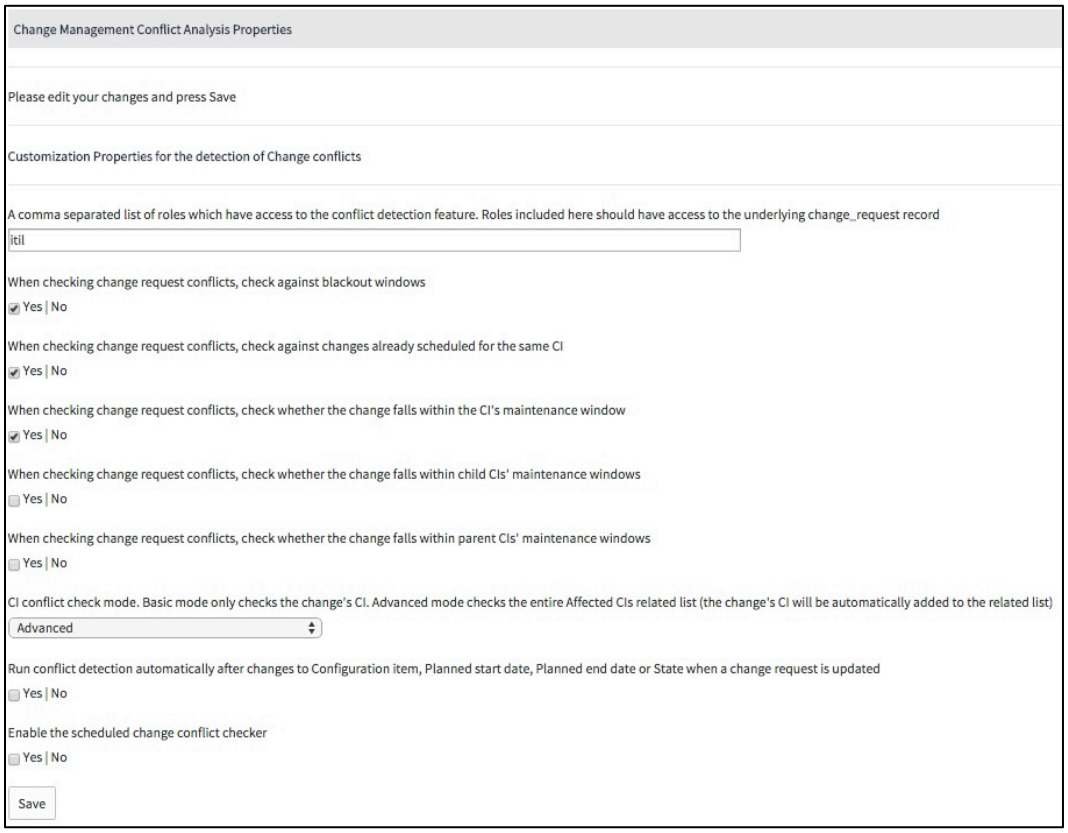
1. Use the instance URL provided to you.
2. Log on with the provided credentials.



Conflict Properties

1. Navigate to **Change > Administration > Conflict Properties**.

2. Set the Conflict Properties as follows:

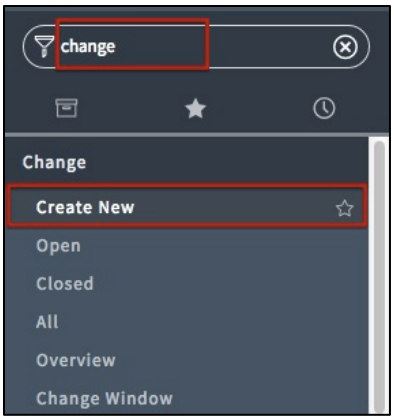


3. Click **Save**.

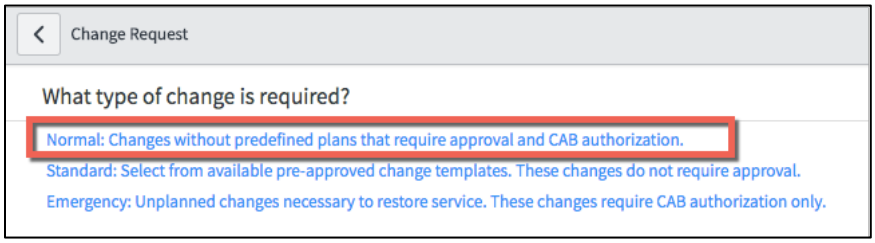
Create a New Change

We want to simulate a failure in our famous Bond Trading disaster recovery system, to find out what will happen. A change is needed because the system will be unavailable for a short period of time.

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

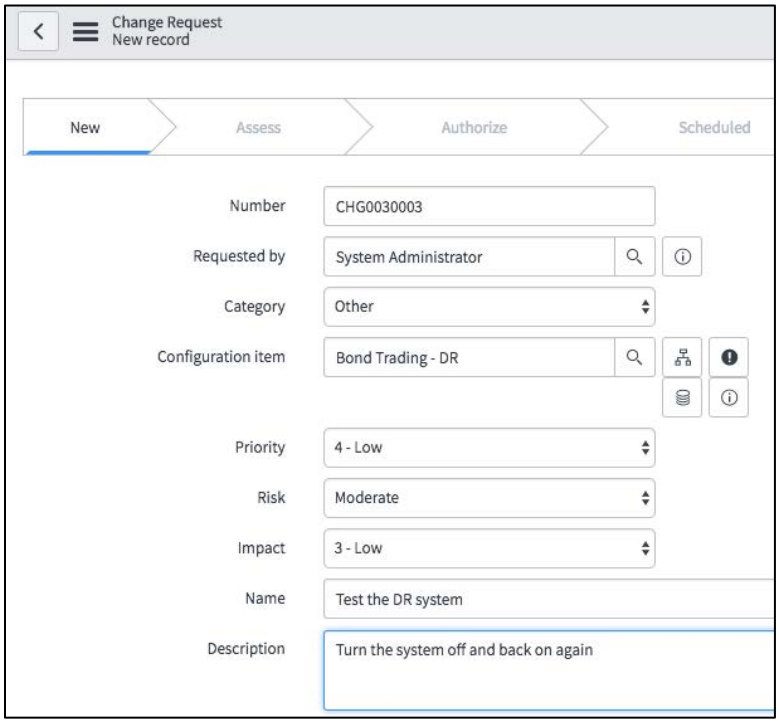


2. Select **Normal** from the Interceptor Change Request screen.



3. Complete the Change Request form as follows:

   Configuration Item: **Bond Trading - DR**
   Name: **Test the DR System**
   Description: **Turn the system off and back on again**



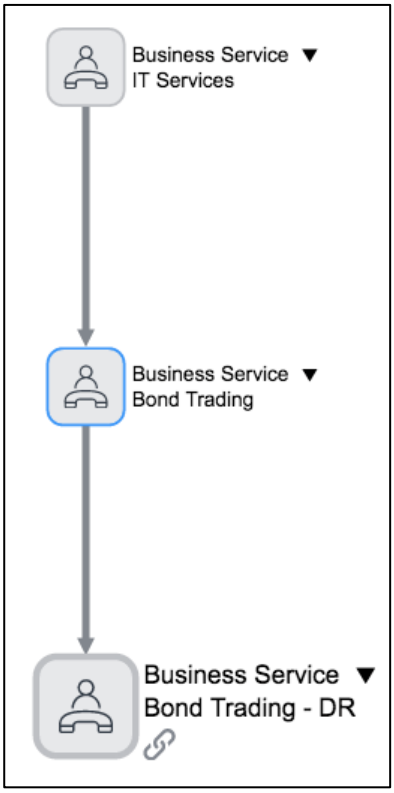
4. Make a note of the Change Request number CHG_ _ _ _ _ _ _ for later reference.

5. Click the **Open in Dependency Views** icon to view the CI Dependency map.



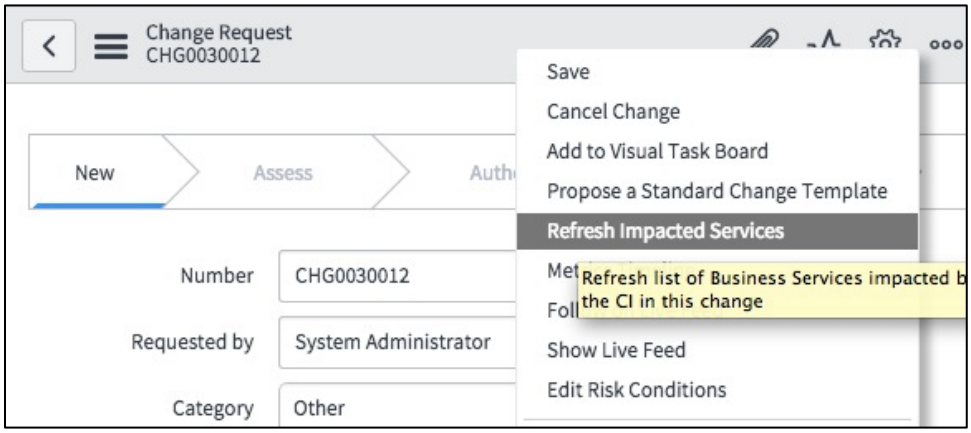
HINT! The default behavior is for ServiceNow to open the Business Service Map in a new tab. You may need to configure your browser to allow pop-up tabs.

6. This Dependency map shows that the **Bond Trading – DR** application provides services for Bond Trading and, in turn, for IT Services.



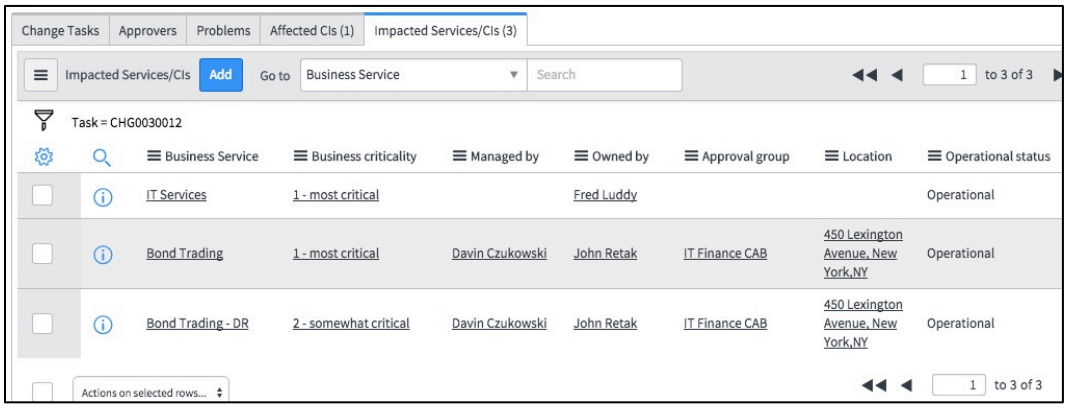
7. Close the Dependency Map window and return to the **Change Request**.

8. Right-click the Change Request form header and select **Refresh Impacted Services**.



Lab Success Verification

1. Scroll to the Change Request form to the **Impacted Services/CIs** related list, which look like the following example.

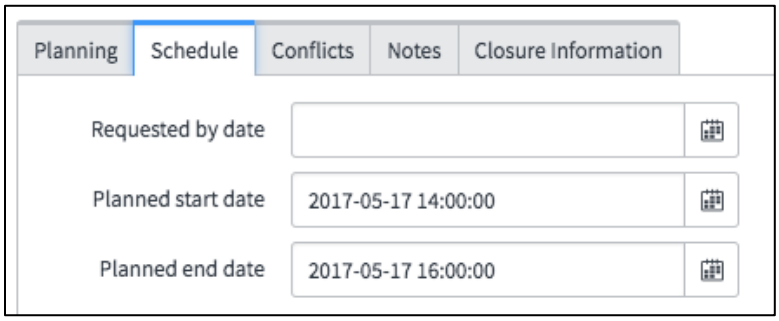


Maintenance Windows and Blackout Schedules

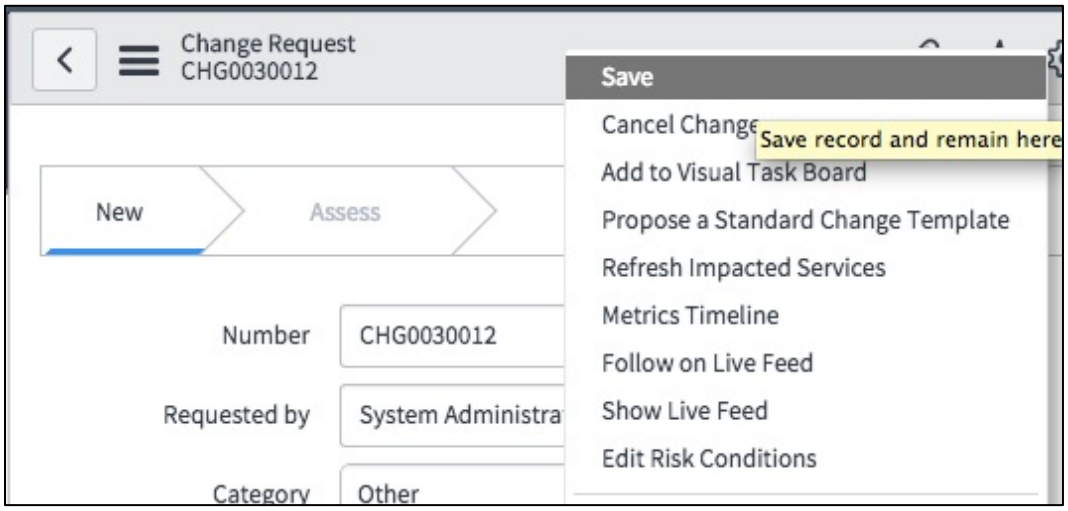
1. Scroll up the Change Request form to the Schedule tab and complete the date fields as follows:

   Planned start date: **2017-05-17 14:00:00**
   Planned end date: **2017-05-17 16:00:00**

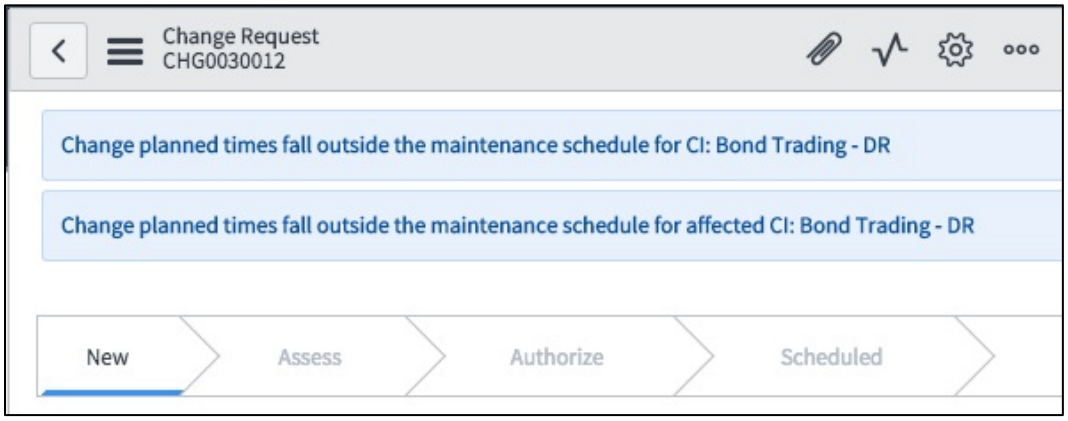
   HINT: *This date is a Wednesday.*



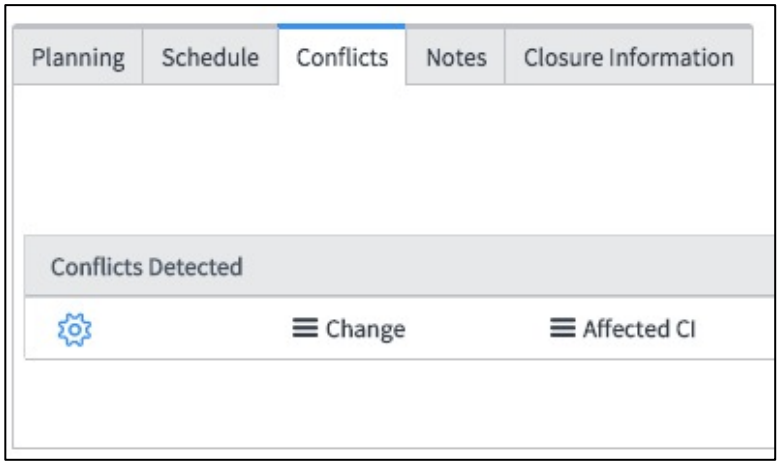
2. Right-click the form header and click **Save**.



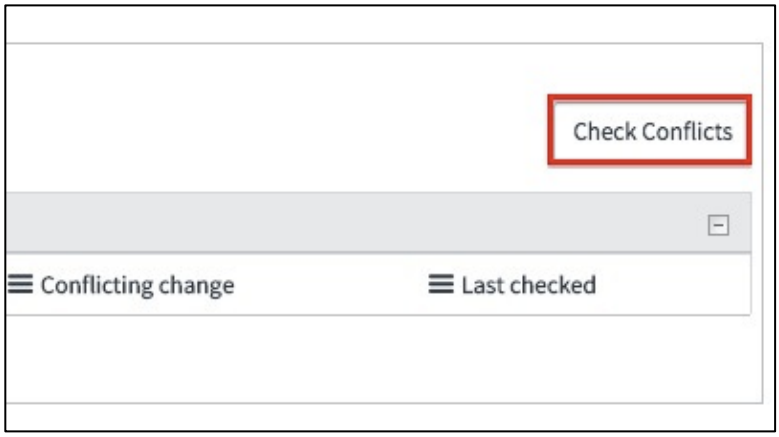
3. The screen should display the following messages:



4. Scroll to the Change Request form and click the **Conflicts** tab to open it.

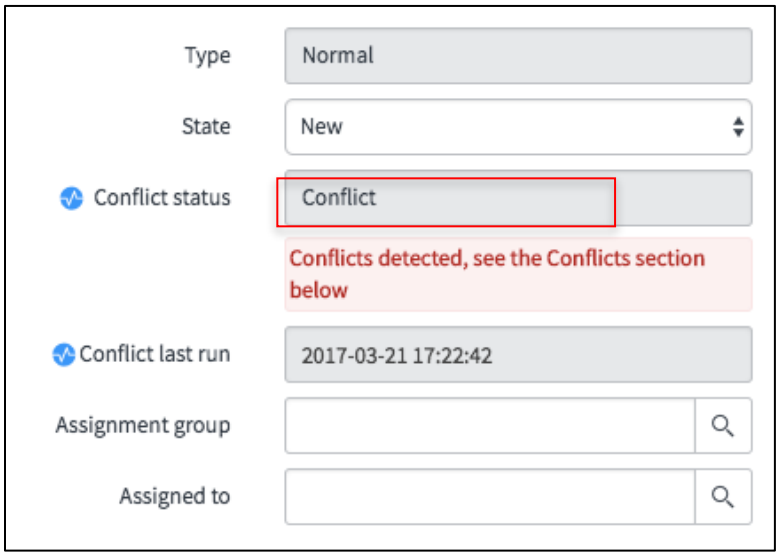


5. Click the **Check Conflicts** link on the right side of the Conflicts section.

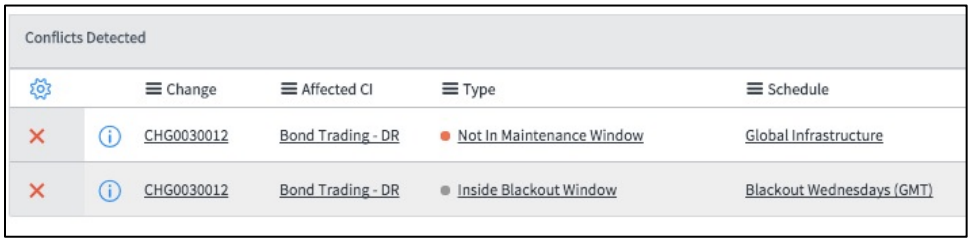


Lab Success Verification

1. Scroll to the top of the Change Request form. **Conflict status** should display the following message:



2. Scroll down the Change Request form to the **Conflicts** tab**,** which looks like the example.

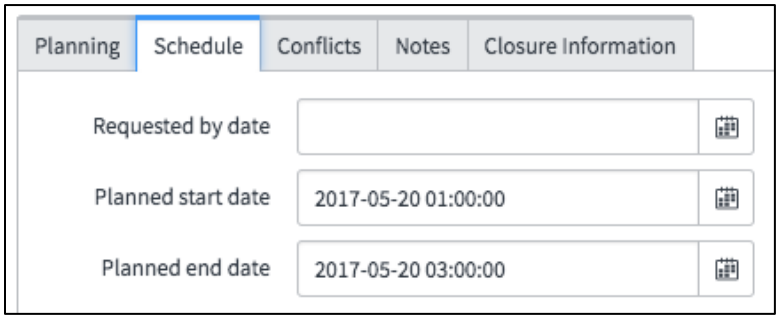


No Conflicts

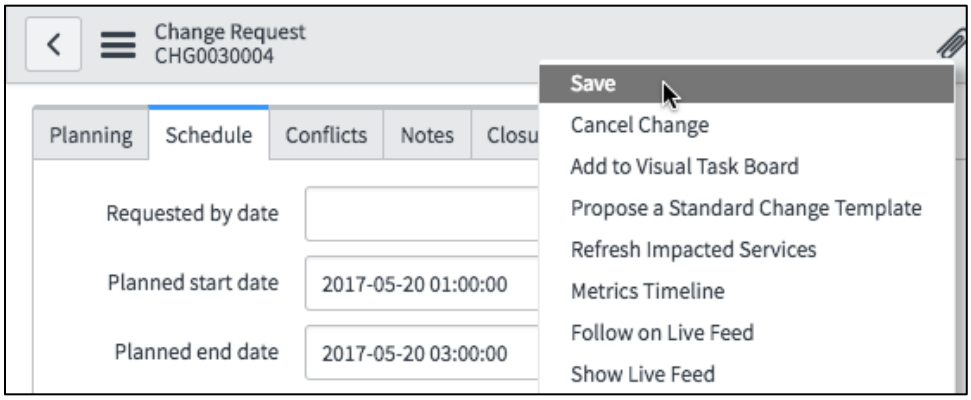
1. Scroll up the Change Request form to the **Schedule** tab and complete the date fields as follows:

   Planned start date: **2017-05-20 01:00:00**
   Planned end date: **2017-05-20 03:00:00**

   ***HINT**: This date is a Saturday.*



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



3. Scroll down the Change Request form and click **Check Conflicts** in the **Conflicts** tab.



Lab Success Verification

1. The screen should display no conflict messages, and Conflict status should display No Conflict:



2. Scroll down the Change Request form to the **Conflicts** tab, which should be empty.

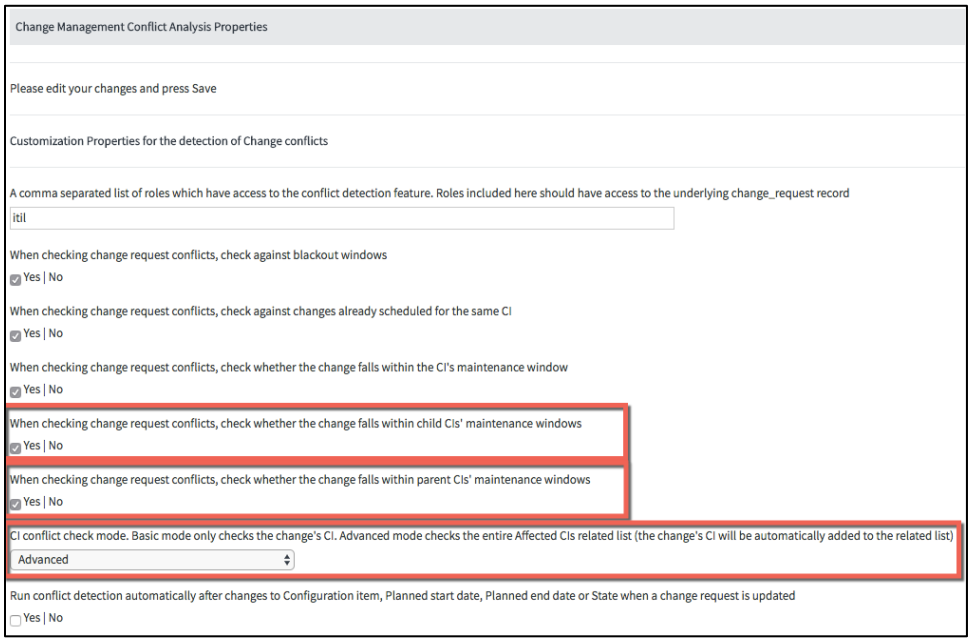
Conflict Detection Through Relationships

1. Navigate to **Change > Administration > Conflict Properties** and select the following options:

   When checking change request conflicts, check whether the change falls within child CI maintenance windows: **<checked>**.

   When checking change request conflicts, check whether the change falls within parent CI maintenance windows: **<checked>**.

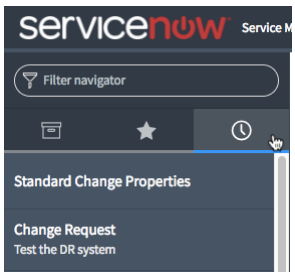
   CI conflict check mode: **Advanced**.



2. Click **Save**.

3. Navigate back to the open Change Record

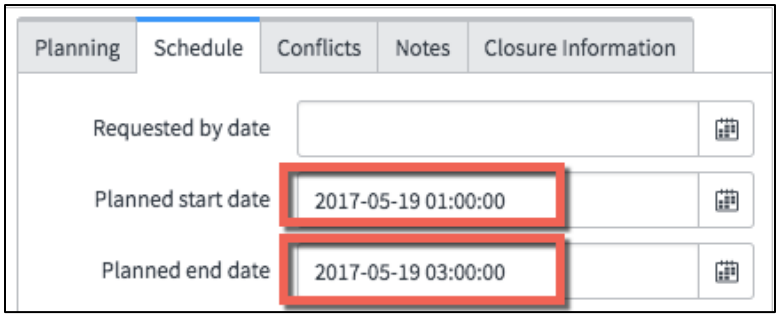
   ***HINT**: You can quickly get back to your change by using the History option.*



4. Scroll in the Change Request form to the **Schedule** tab and complete the date fields as follows:

   Planned start date: **2017-05-19 01:00:00**
   Planned end date: **2017-05-19 03:00:00**

   HINT: *This date is a Friday.*



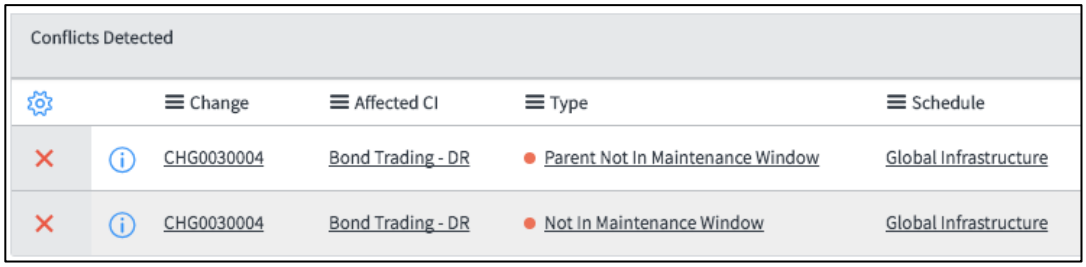
5. Click the **Conflicts** tab and click **Check Conflicts**.

Lab Success Verification

1. Conflict status should display the following message:



2. Scroll down the Change Request form to the **Conflicts** tab, which looks like the example.



HINT: *So what is driving these Conflicts? Take a look at* ***Change > Administration > Maintenance Schedules*** *and* ***Change > Administration > Blackout Schedules****. Here you can create your Maintenance schedules specific to your organization.*

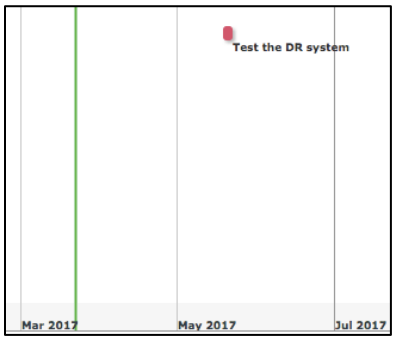
More information can be found here: *https://docs.servicenow.com/bundle/istanbul-it-service-management/page/product/change-management/task/t_CreateBlkoutMaintSched.html*

Change Schedule

Sometimes you need to see a visual representation of the CIs. Having a timeline that is filtered is much easier to use.

1. View the out-of-the-box Change Schedule by navigating to **Change > Schedules > Change Schedule**.
   The screen should display the Change Schedule with your planned change in May.

   HINT: *Hover over the change to see the Change Request number and Name.*



2. Navigate to **System UI > Timeline Pages**, and open **Change Schedule**.

3. Make the following changes to the form:

   Name: **My Change Schedule**

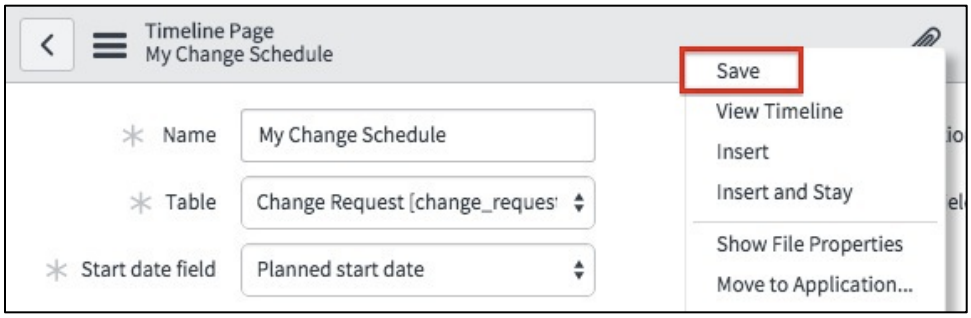
   Click the **Filtering and Sorting** tab and enter the following Conditions:
   Active – is – True AND
   Requested by is (dynamic) – Me OR
   Configuration Item.Support group – is (dynamic) – One of My Groups

   ***HINT**: For entering the 2nd Condition:*
   *In the 1st Condition field, click the **AND** icon*
   *Click the **-- Choose Fields --** drop-down list, then click **Show Related Fields***
   *Click the drop-down list again and select **Configuration Item —> Configuration Item** fields*
   *Click the drop-down list again, and select **Support group***
   *Click the **is** drop-down list and select **is (dynamic)***

4. Click the **Update count** icon to refresh the count based on your new filter.



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



***HINT:** Remember this when you get home – when we **Save** an existing record, this will OVERWRITE the existing record. To create a NEW record, click **Insert**.*

6. After saving, click **View Timeline**.



Lab Success Verification

1. The screen should display the Change Schedule in this manner. You may need to adjust the start and end times to reflect the 2017-05-20 date.



HINT: *Hover over either Change to see the associated Change Request number and Name.*

Lab Goal

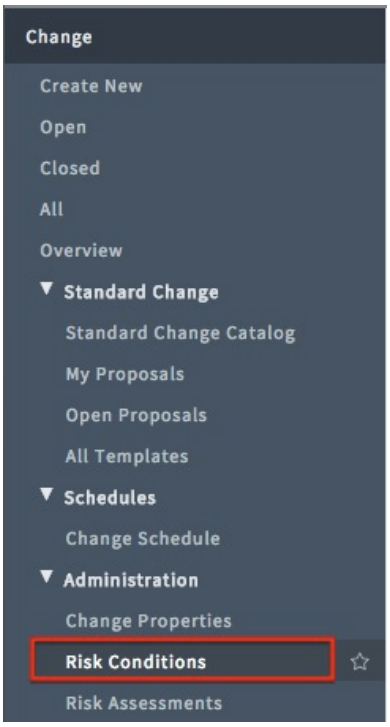
Change requesters must provide accurate information. But sometimes they need help to provide consistent answers to standard situations. This lab explains how to automate this process through risk conditions and risk assessments.

Lab 2.0 Risk Conditions and Assessments

Set a Risk Condition and See the Default Risk

Change Management wants to stop continual changes to a CI. They want to flag these changes as high risk.

1. Navigate to **Change > Administration > Risk Conditions**.



2. Click **New**.

3. Complete the Risk Conditions form as follows:

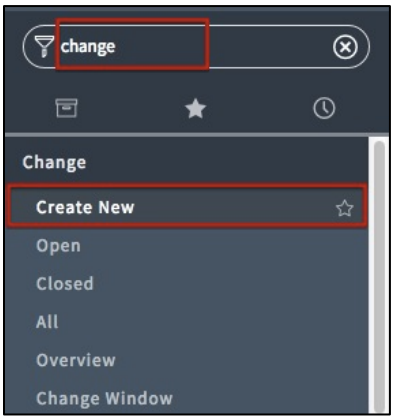
   Name: **Recently changed CI**
   Risk: **High**
   Description: **This Risk Condition will check if the related configuration item has been updated in the previous 7 days.**
   Condition: **Configuration item.Updated – relative – on or after – 7 – Days – ago**

   ***Hint**: For entering Condition*:
   *Click the **-- Choose Fields --** drop-down list, then click **Show Related Fields***
   *Click the drop-down list again and select **Configuration Item—> Configuration Item** fields*
   *Click the drop-down list again, and select **Updated***

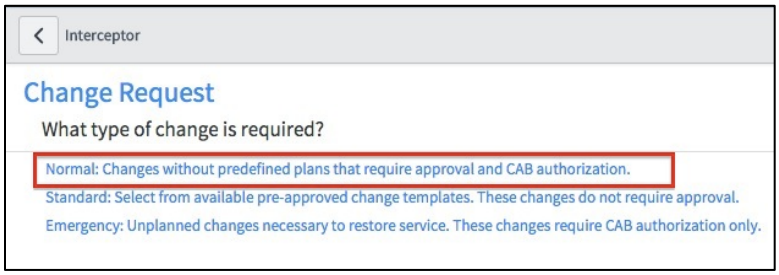


4. Click **Submit**.

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

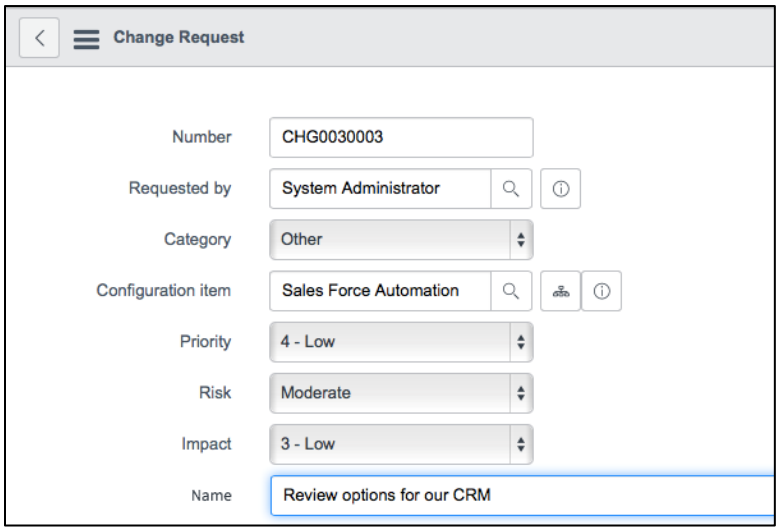


6. Select **Normal** from the **Interceptor Change Request** screen.

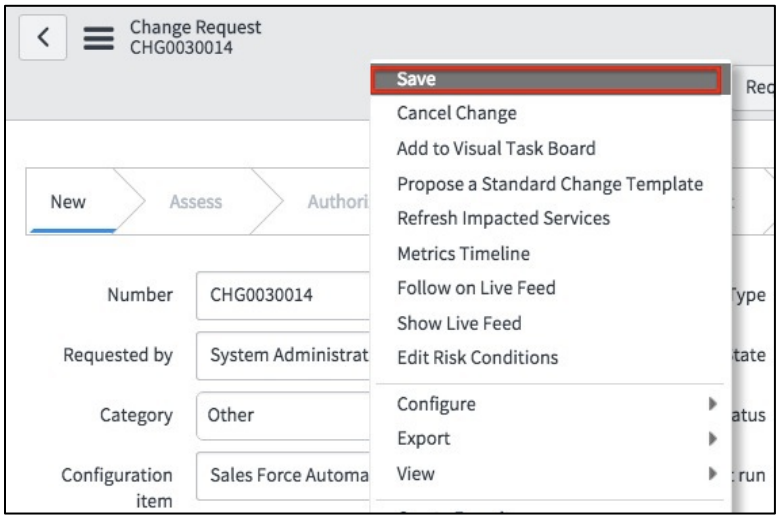


7. Complete the Change Request form as follows:

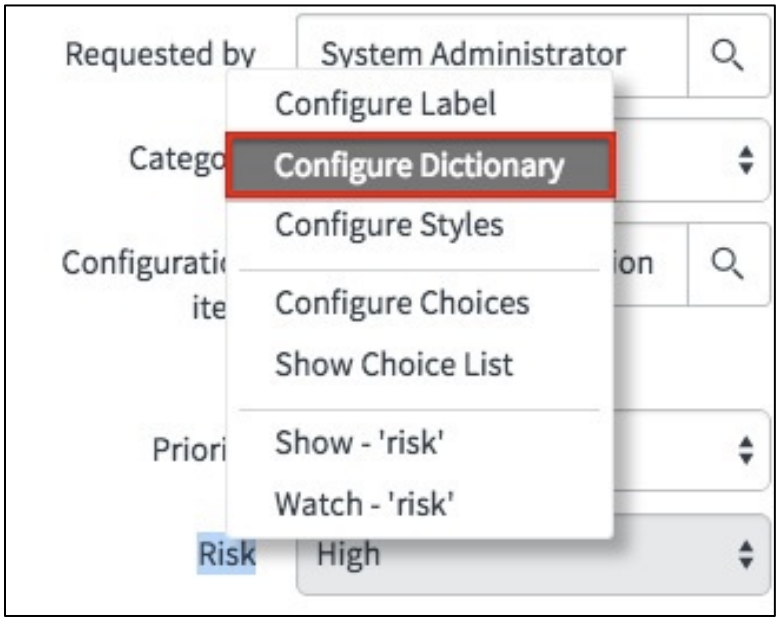
   Configuration item: **Sales Force *A*utomation**
   Name: **Review options for our CRM**



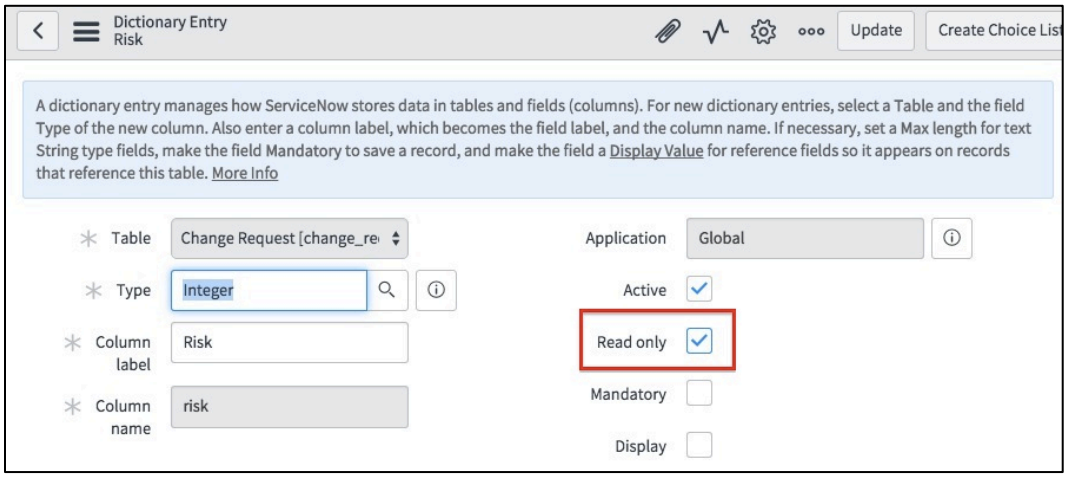
8. Right-click the **Change Request** form header and click **Save**.



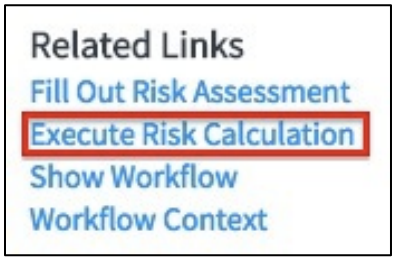
9. Make the risk field **Read only**, so only the risk calculation system can update the value. Right-click the **Risk** label, and choose **Configure Dictionary**.



10. Check the **Read only** option. Click **Update**.



11. Scroll down the Change Request form. Click the **Execute Risk Calculation** link.



Lab Success Verification

1. The screen should display a message similar to the example.
   Risk Condition applied: Default Risk: Low; impact: 3 - Low



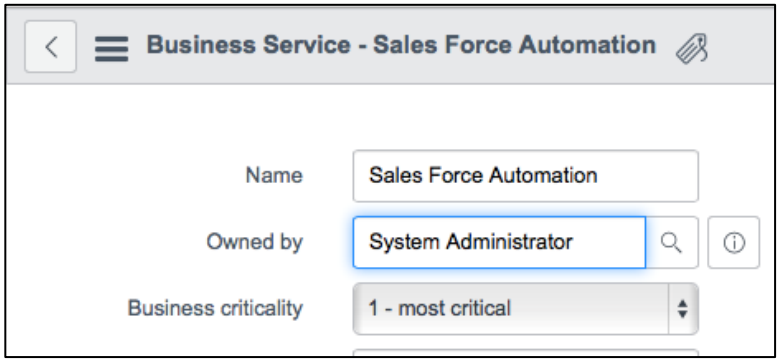
2. You should be unable to manually change the **Risk** field.

Change a CI to Apply the Risk Condition

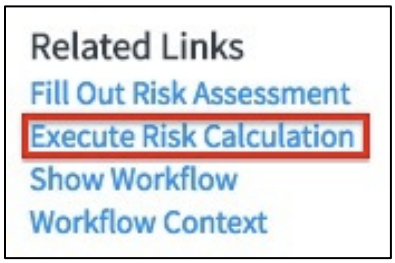
1. Click the **reference** icon next to **Sales Force Automation**.



2. Set the **Owned by** field to **System Administrator**. Click **Update**.

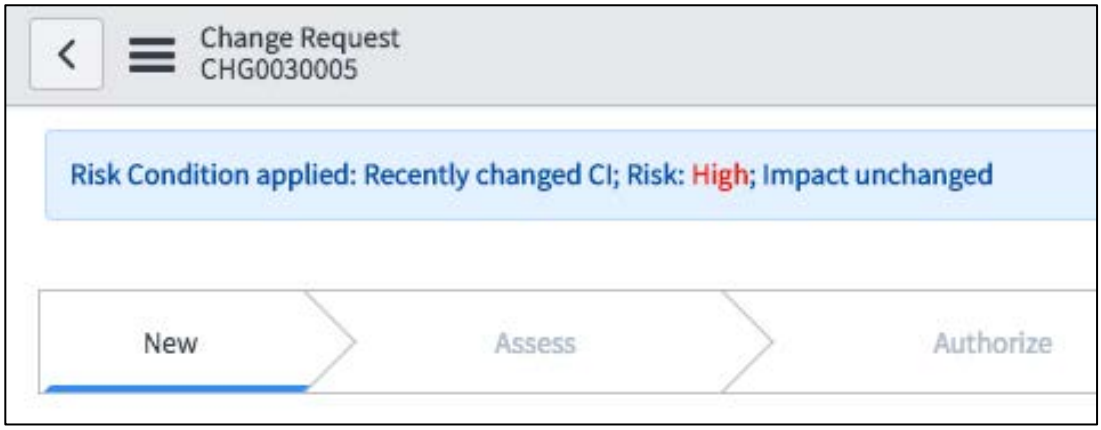


3. Scroll down the Change Request form. Click the **Execute Risk Calculation** link.



Lab Success Verification

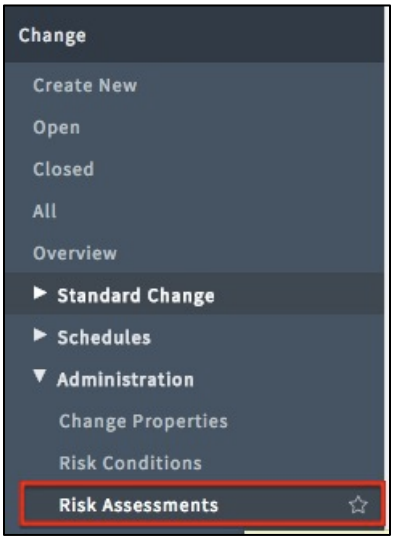
1. The screen should display the following message:
   Risk Condition applied: Recently changed CI; Risk: High; Impact unchanged



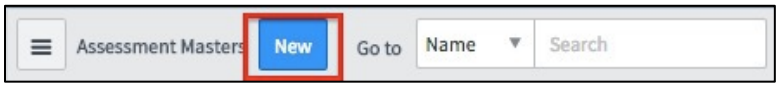
Risk Assessment

1. Navigate to **Change > Administration > Risk Assessments**.

   HINT: *Risk Assessments for Change Management requires the* ***Change Management – Risk Assessment*** *(com.snc.change.risk_assessment) plugin enabled. This plugin is enabled in your lab instance.*

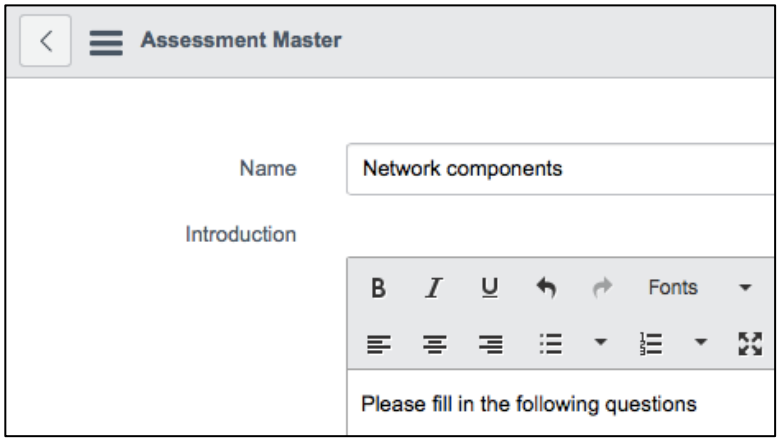


2. Click **New**.

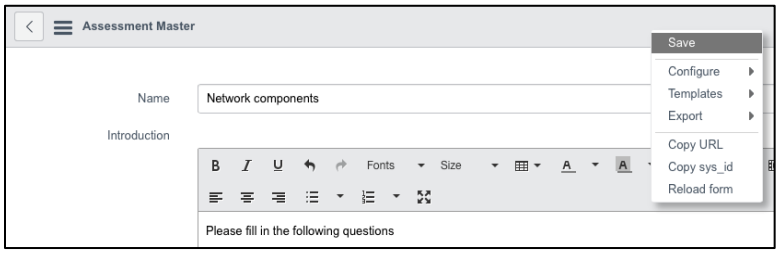


3. Complete the Assessment Master form as follows:

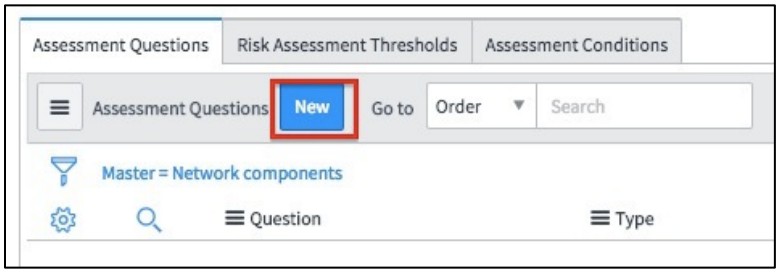
   Name: **Network components**
   Introduction: **Please fill in the following questions**



4. Right-click the Assessment Master form header and click **Save**.



5. Scroll to the **Assessment Questions** tab. Click **New**.



6. Complete the Assessment Question form as follows:

   Question: **Will there be an outage?**
   Weight: **10**



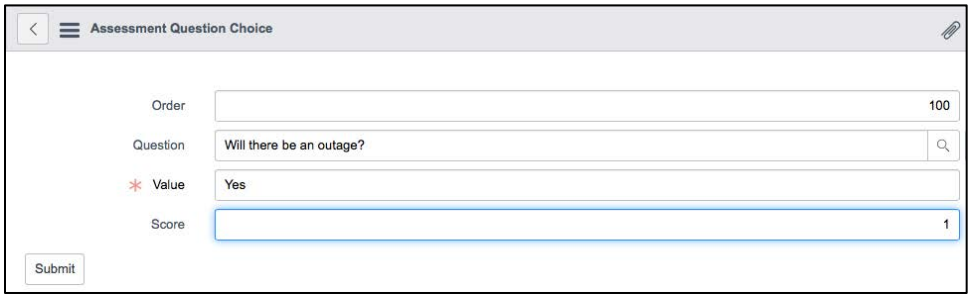
7. Right-click the form header and click **Save**.

8. Click **New** in the **Assessment Questions Choices** section.



9. Complete the Assessment Question Choice form as follows:

   Order: **100**
   Value: **Yes**
   Score: **1**



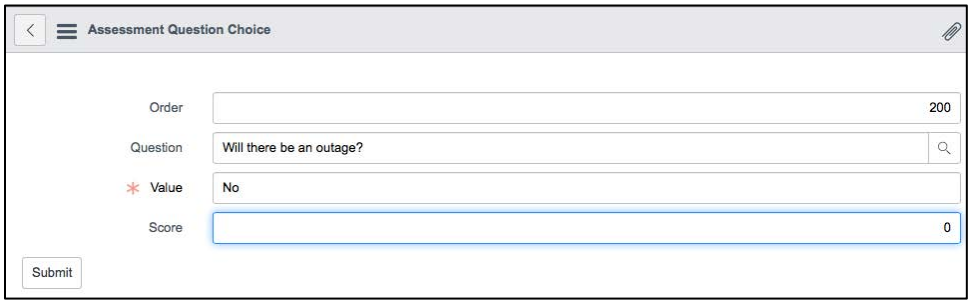
10. Click **Submit**.

11. Click **New** in the **Assessment Questions Choices** tab.



12. Complete the Assessment Question Choice form as follows:

    Order: **200**
    Value: **No**
    Score: **0**

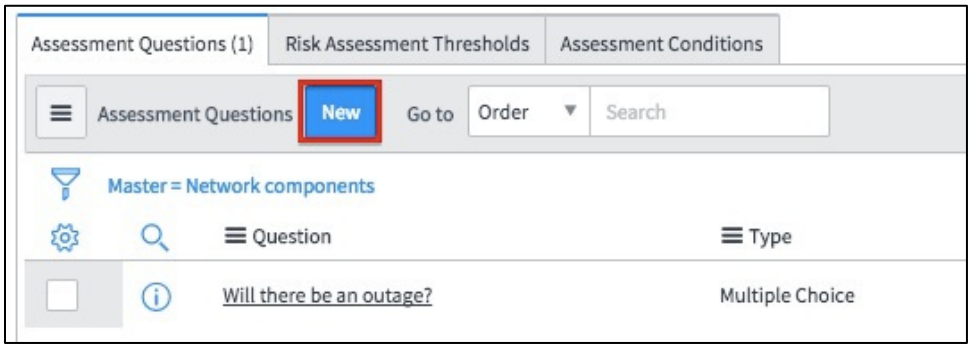


13. Click **Submit**.

14. Click **Update** to return to the Assessment Master form.

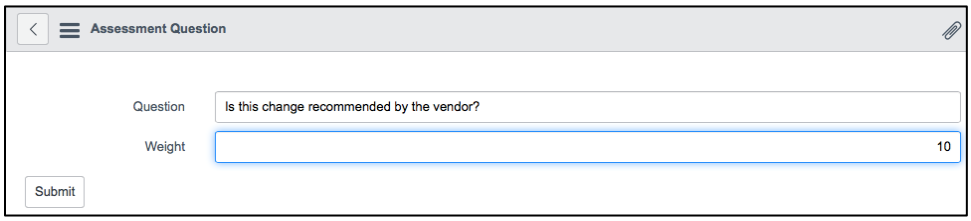


15. Click **New** in the **Assessment Questions** tab.



16. Complete the Assessment Question form as follows:

    Question: **Is this change recommended by the vendor?**
    Weight: **10**



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

18. Click **New** in the **Assessment Questions Choices** tab.



19. Complete the Assessment Question Choice form as follows:

    Order: **100**
    Value: **Yes**
    Score: **0**

20. Click **Submit**.

21. Click **New** in the **Assessment Questions Choices** section.

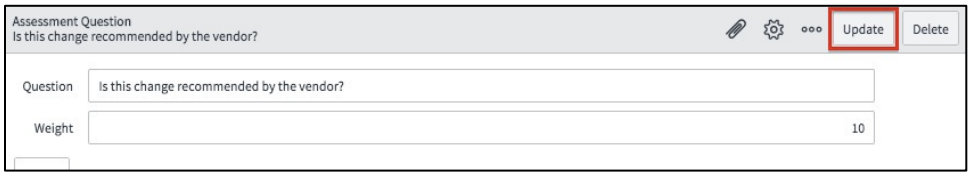


22. Complete the Assessment Question Choice form as follows:

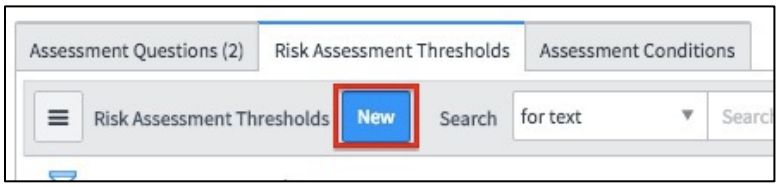
    Order: **200**
    Value: **No**
    Score: **1**

23. Click **Submit**.

24. Click **Update** to return to the **Assessment Master** form.

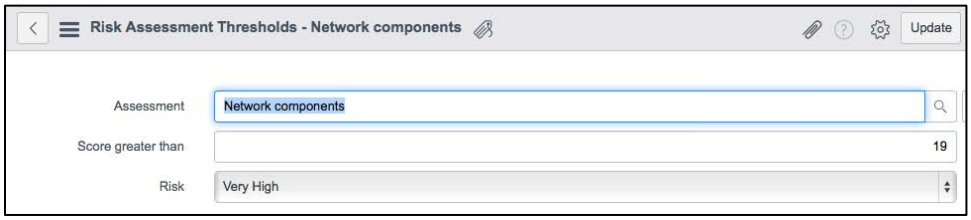


25. Click **New** in the **Risk Assessment Thresholds** tab.



26. Complete the **Risk Assessment Thresholds** form as follows:

    Score greater than: **19**
    Risk: **Very High**



27. Click **Submit**.

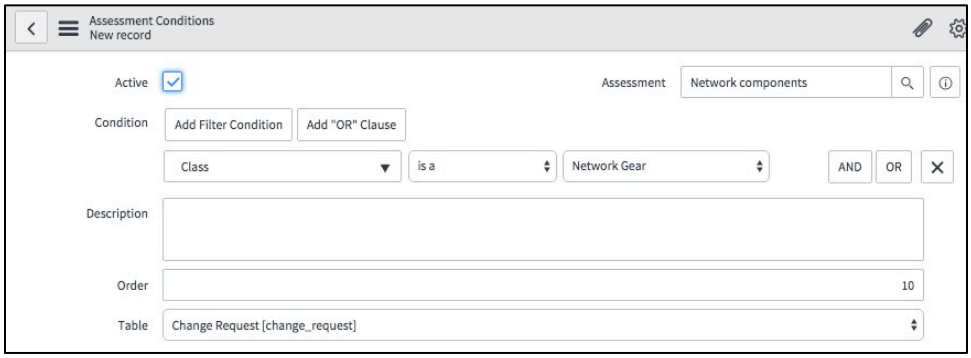
28. Click **New** in the **Assessment Conditions** tab.



29. Complete the Assessment Conditions form as follows:

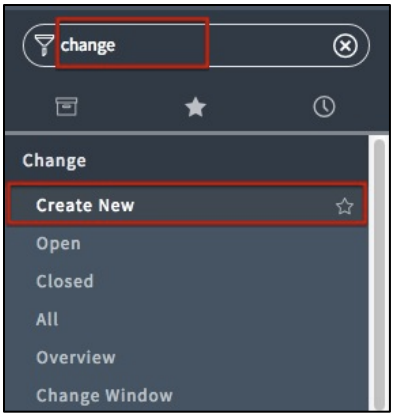
    Active: **<checked>**
    Condition: **Configuration item.Class – is a – Network Gear**
    *Ensure "**is a**" is used, not "**Is**".*
    Order: **10** *(**HINT**: default value is 100)*

    ***HINT**: For entering Condition:*
    *Click the **-- Choose Fields --** drop-down list, then click **Show Related Fields***
    *Click the drop-down list again and select **Configuration Item —> Configuration Item** fields*
    *Click the drop-down list again, and select **Class***

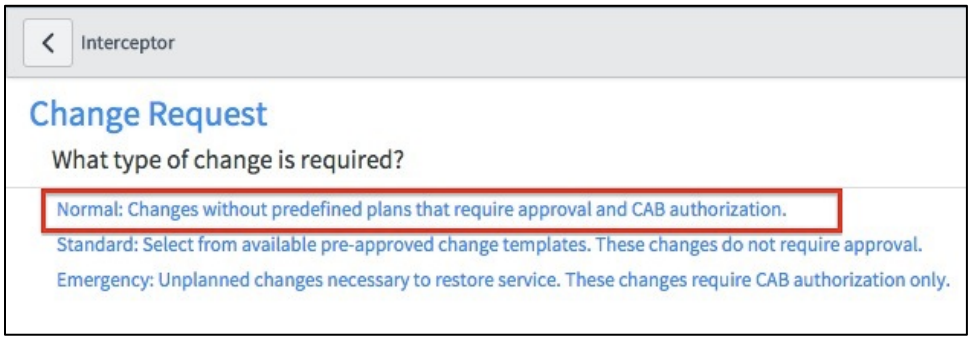


30. Click **Submit**.

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

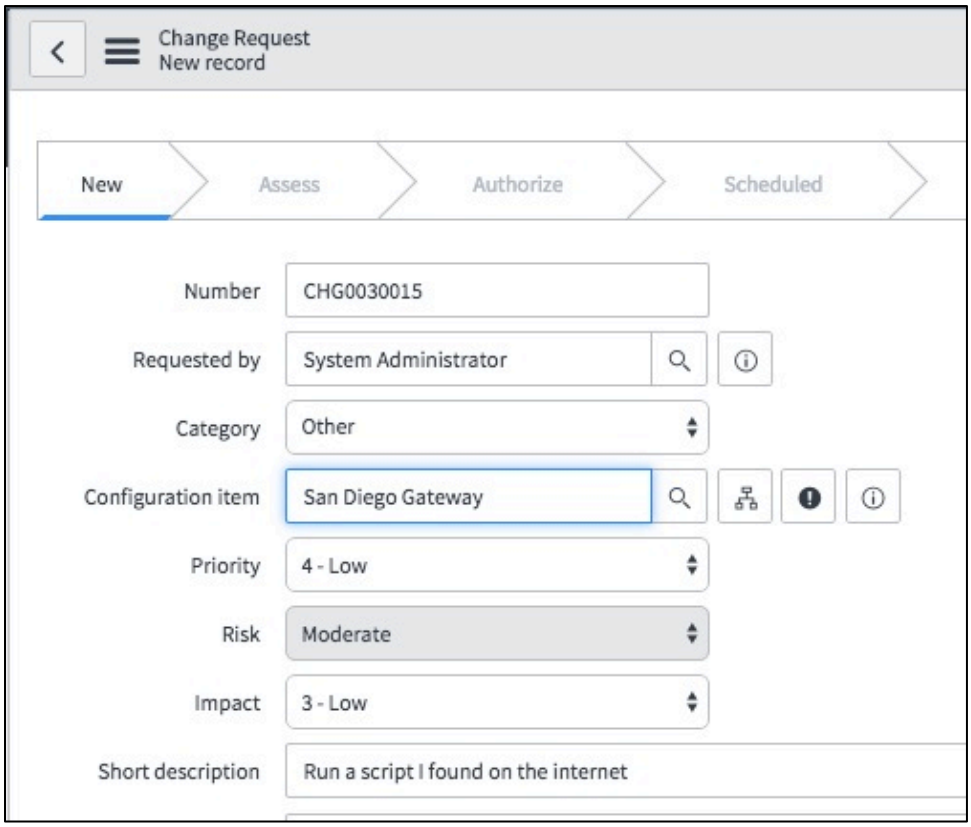


32. Select **Normal** from the **Interceptor Change Request** screen.

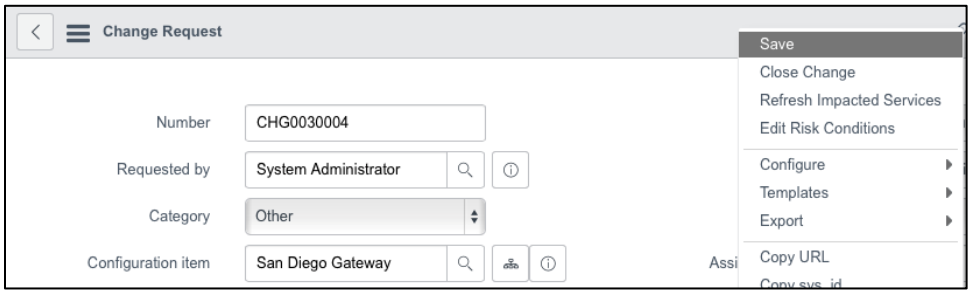


33. Complete the Change Request form as follows:

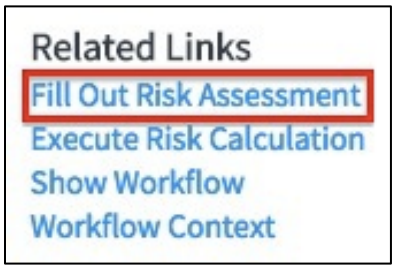
    Configuration item: **San Diego Gateway**
    Short description: **Run a script I found on the internet**



34. Right-click the Change Request form header and click **Save**.

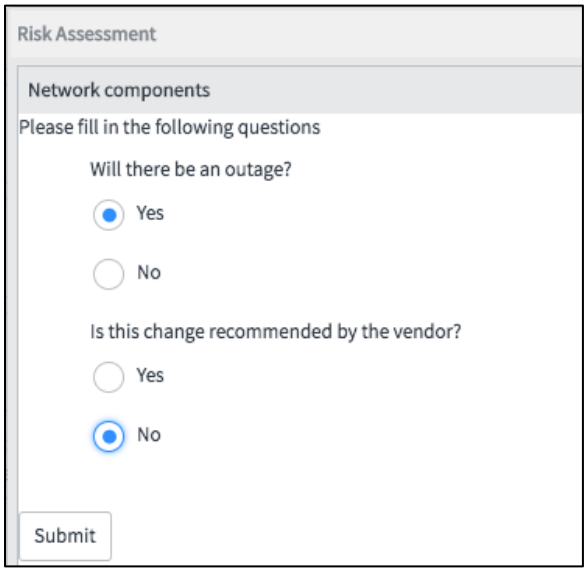


35. Scroll to Related Links and select **Fill Out Risk Assessment**.



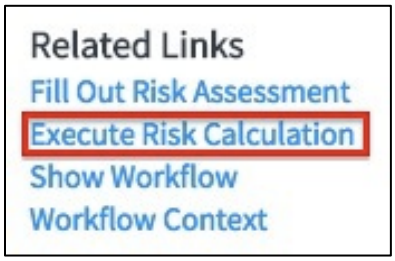
36. Complete the Risk Assessment form as follows:

    Will there be an outage? **Yes**
    Is this change recommended by the vendor? **No**



37. Click **Submit**.

38. Scroll to **Related Links** and select **Execute Risk Calculation**.



Lab Success Verification

1. You should receive a message saying:

   Risk assessment evaluated. Risk: Very High
   Risk Condition applied: Default; Risk; Low; Impact: 3 – Low
   Risk set to: Very High



Lab Goal

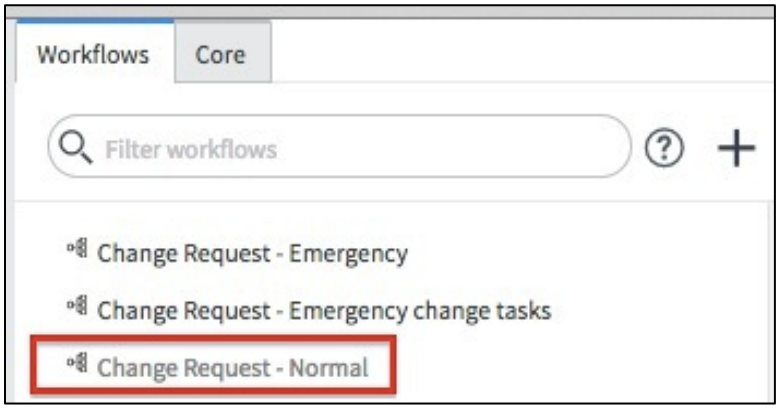
Lab 3.0 Change Approval Process

A typical change process asks for approval at varying levels for the Change Request. This could include the manager of the requester, a specified assignment group, a Change Advisory Board (CAB), or other. This lab explores some of the default behavior of the Change Request – Normal workflow.

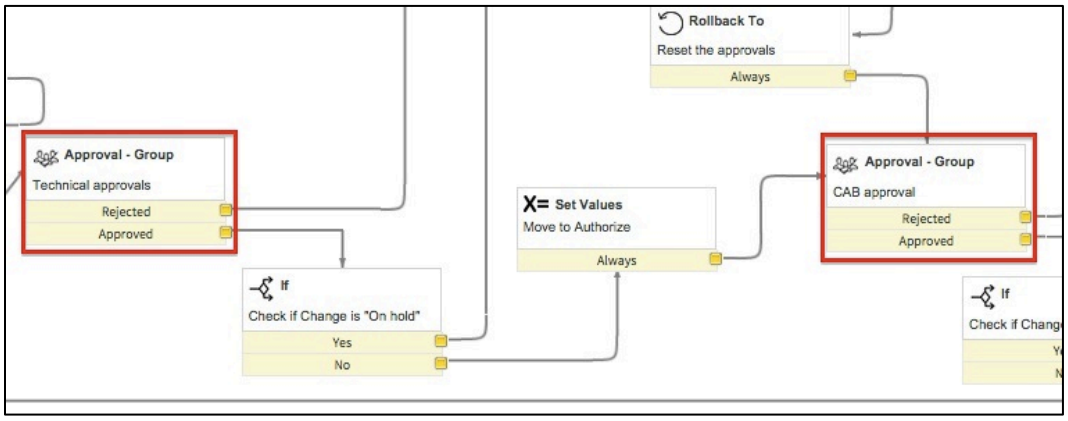
An advanced lab use case leverages the power of the CMDB to automate who approves the change request by dynamically adding approvers based on the Approval Group specified for the CI(s) in the CMDB.

Explore the Change Request – Normal Approval Process

1. Navigate to **Workflow > Workflow Editor**.
2. Click **Change Request – Normal** under the **Workflows** tab on the right side of the screen.



3. The default processing for the **Change Request – Normal** is first to do a group approval that is based on the Assignment Group selected on the request form. If this is approved, it then moves on to a CAB Approval.

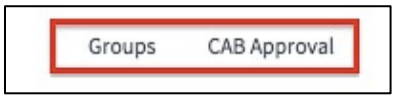


4. Double-click the first Approval – Group, **Technical approvals**. Notice in the Groups field that this is set dynamically from the Assignment Group (${assignment_group}) on the request.



5. Close the **Approval – Group** window.

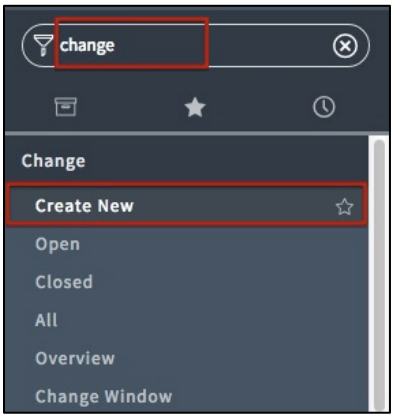
6. Double-click the second Approval – Groups, **CAB Approval**. Notice in the Groups field that this is set by the specified CAB Approval group on the request.



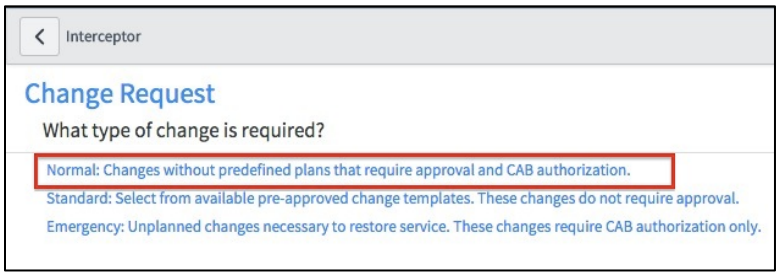
7. Close the **Approval – Group** window.

8. Close the workflow editor window and return to the main UI.

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

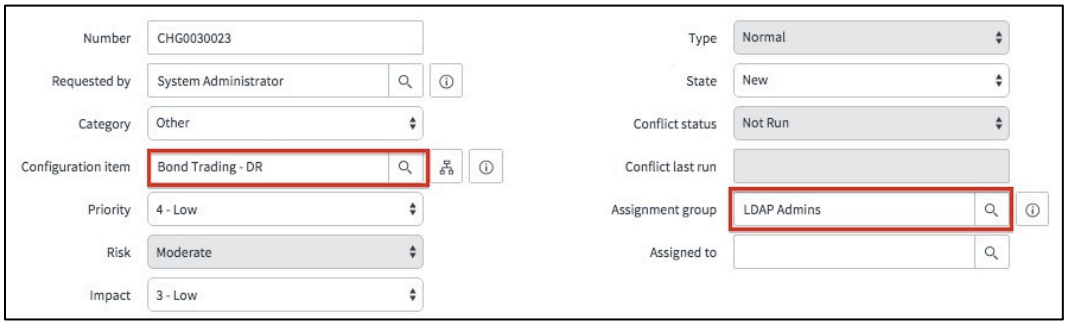


10. Select **Normal** from the Interceptor Change Request screen.

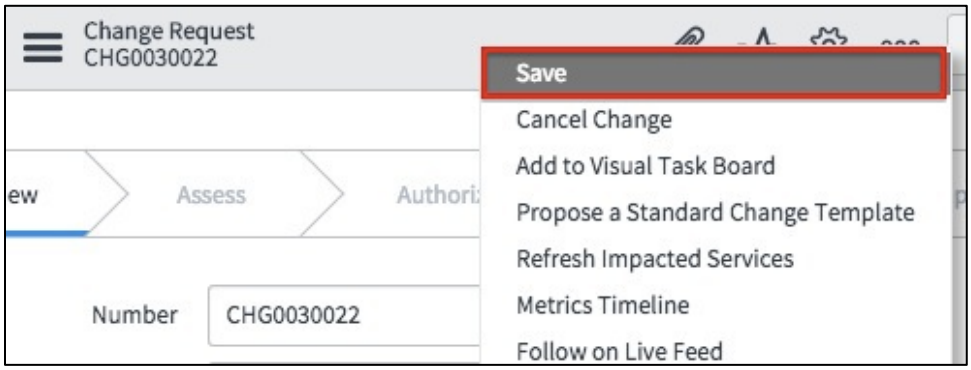


11. Fill out the following information on the Change Request form:

Configuration Item: Bond Trading – DR
Assignment Group: LDAP Admins



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

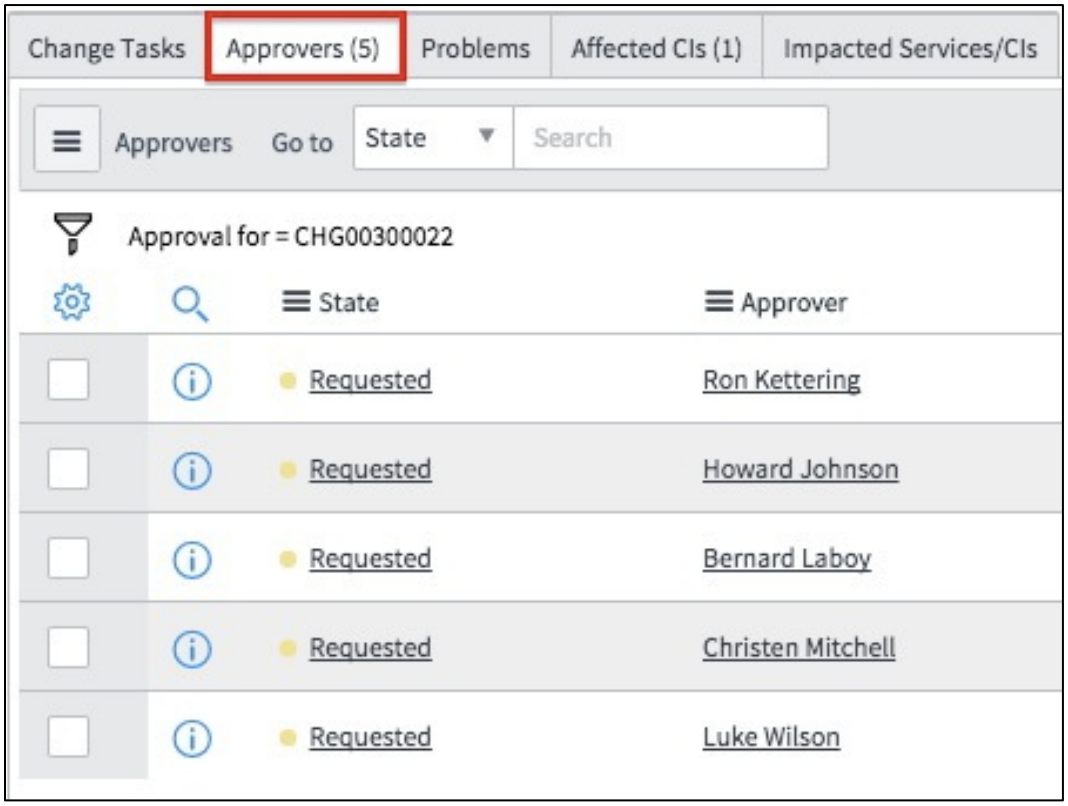


13. Select the **Request Approval** button on the menu bar.

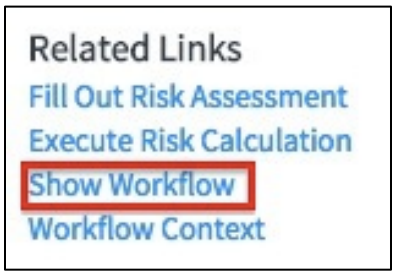


Lab Success Verification

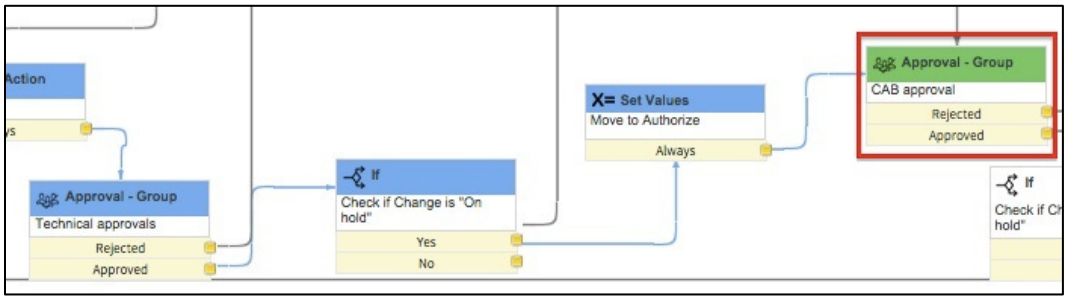
1. Scroll to the Related Lists and click the **Approvals** tab to see the approvers that have been added. In this case, you should see the ones from the **CAB Approval** group. Was this what we were expecting? This happened because the **LDAP Admins** group has no group members. The workflow therefore skipped the first approval and went straight to the **CAB Approval** stage.



2. Select **Show Workflow** from the Related Links.



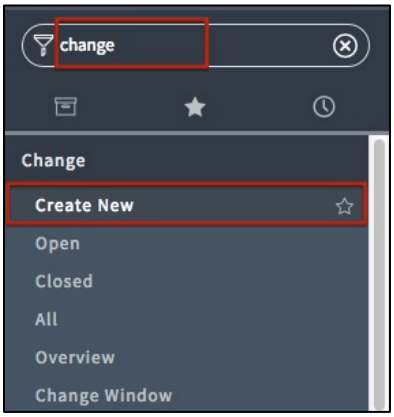
3. This shows that the workflow did indeed skip to the **CAB Approval** stage.



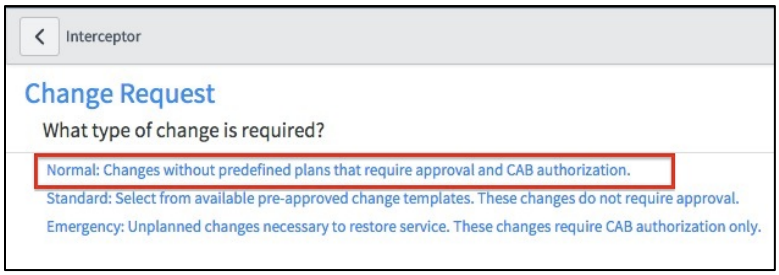
4. Close the workflow window.

Explore the Change Request – Normal Approval Process

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

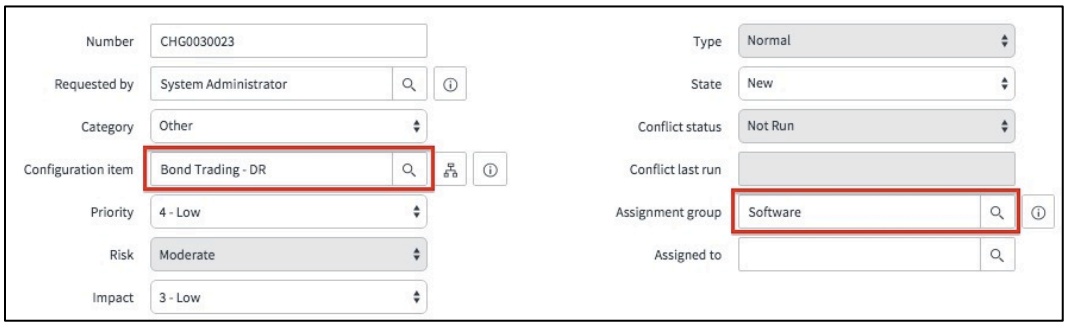


2. Select **Normal** from the Interceptor Change Request screen.

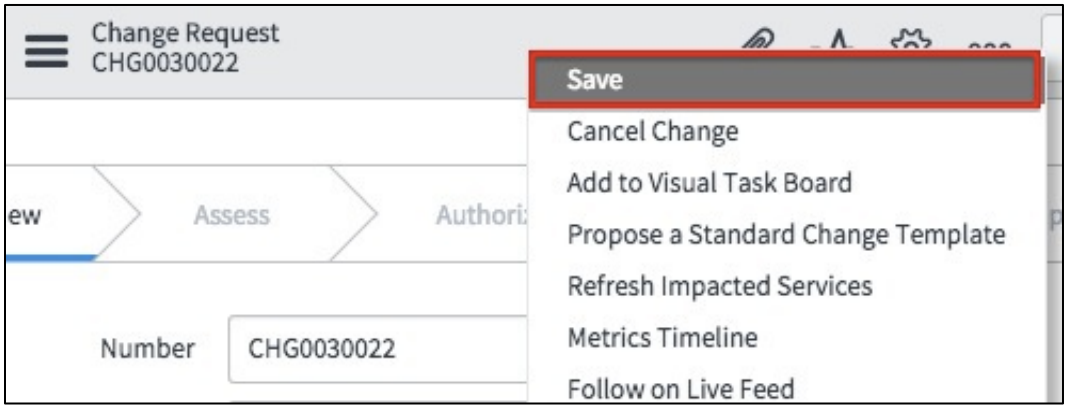


3. Fill out the following information on the Change Request form:

   Configuration Item: Bond Trading – DR
   Assignment Group: Software



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

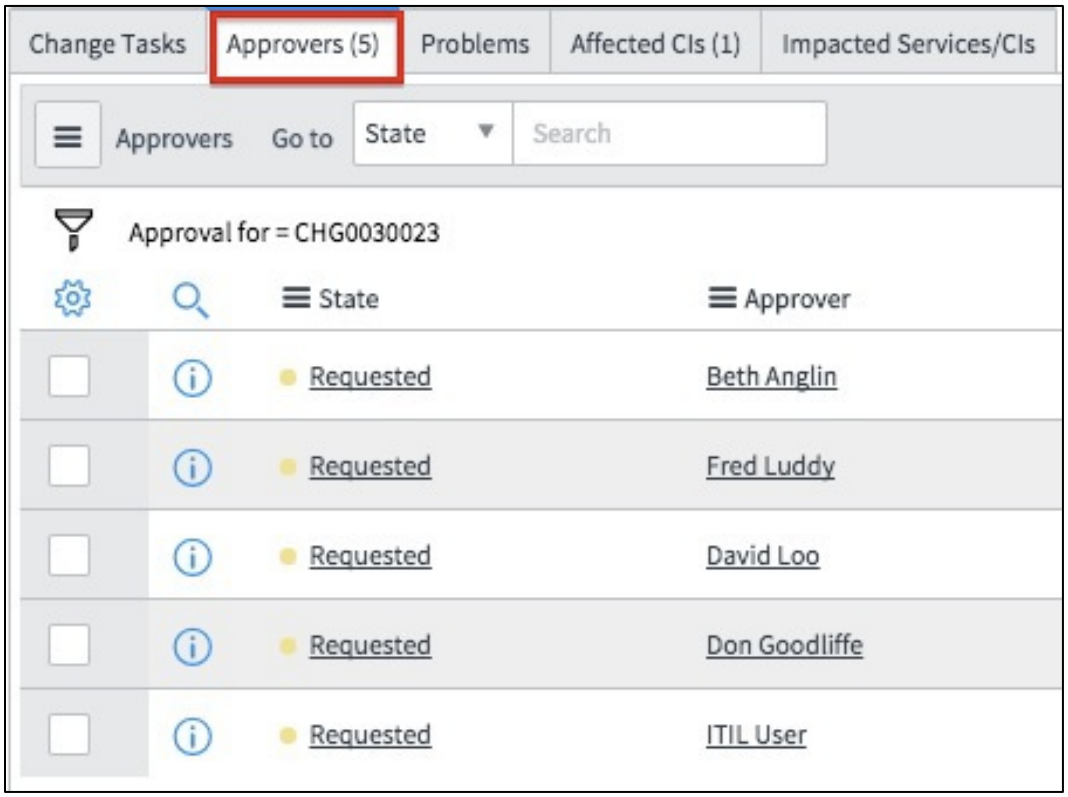


5. Select the **Request Approval** button from the menu bar.

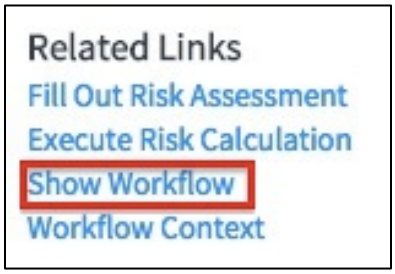


Lab Success Verification

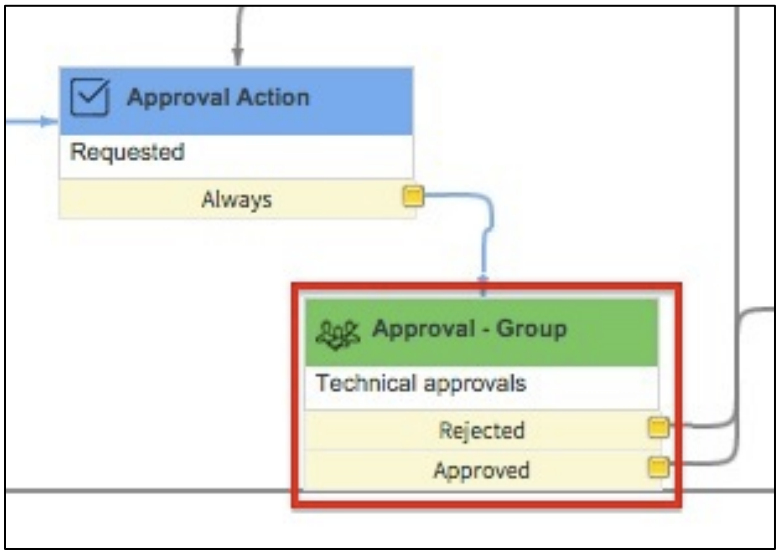
1. Scroll to the Related Lists and click the **Approvals** tab to see the approvers that have been added. In this case, you should see the ones from the **Software** group.



2. Select **Show Workflow** from the Related Links.



3. This shows that the workflow did stop at the first **Approval – Group** this time, as expected.



4. Close the **Workflow** window.

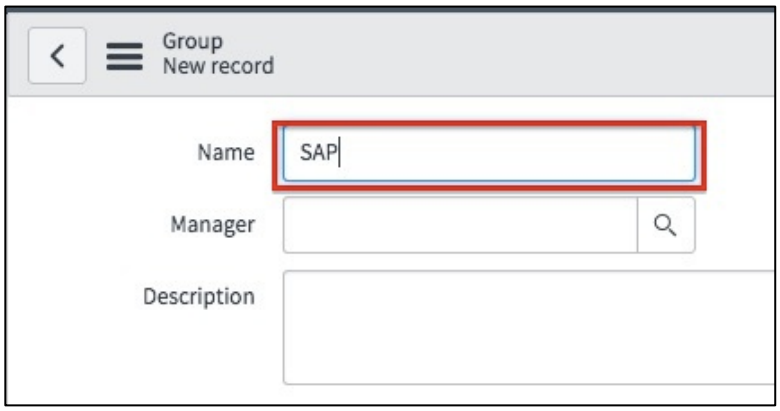
Change Request – Normal Approval Process with Advanced Approval Script

1. First, create a new Group called SAP that has unique approvers, different from those in the other standard demo data groups. Navigate to **User Administration > Groups**.

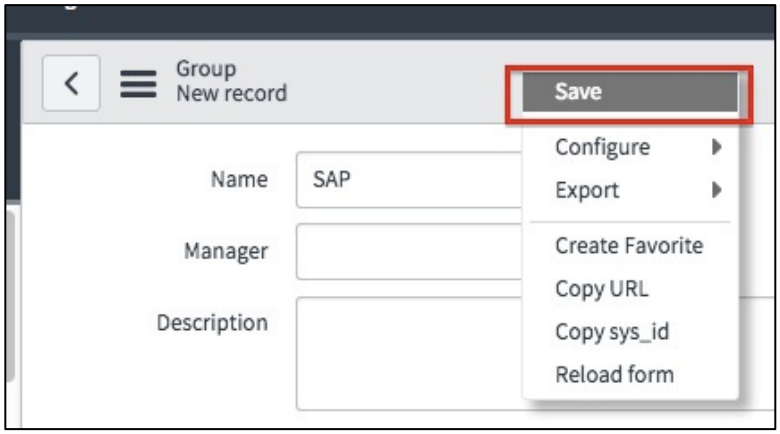
2. Click **New**.



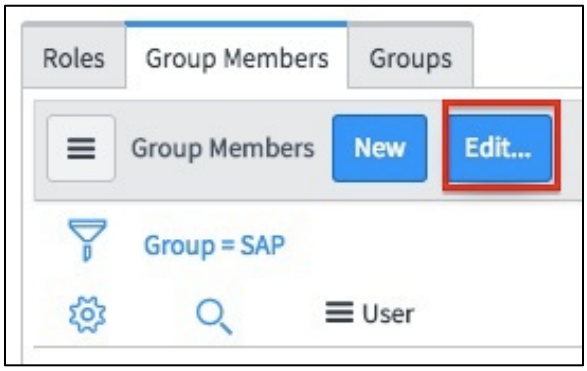
3. Enter **SAP** in the Name field.



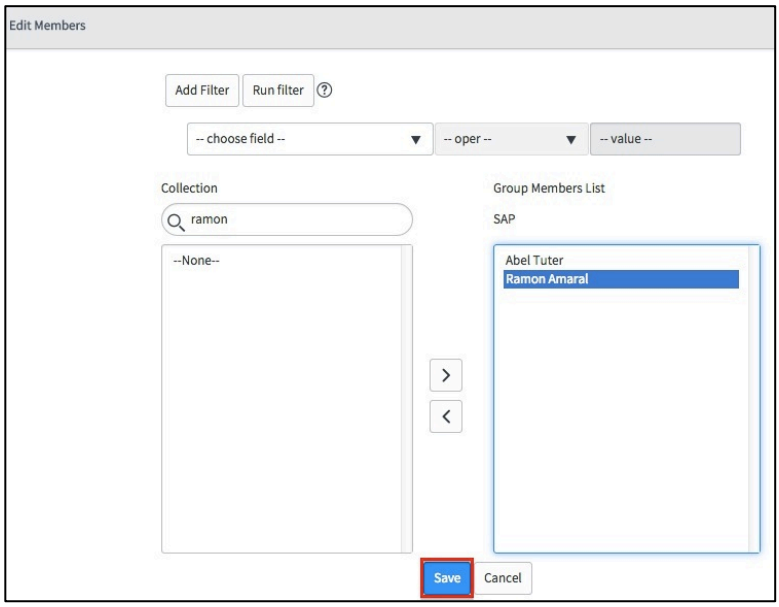
4. Right-click the header and select **Save**.



5. Scroll to the **Related Lists** and select the **Group Members** tab and then select **Edit**.



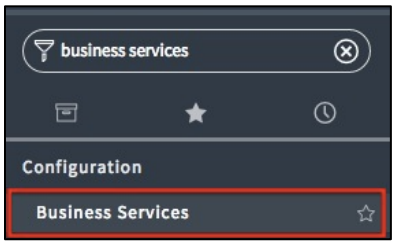
6. Select **Abel Tuter** and **Ramon Amaral** and move them to the right side using the **arrow** button. Click **Save**.



7. Click **Update**.



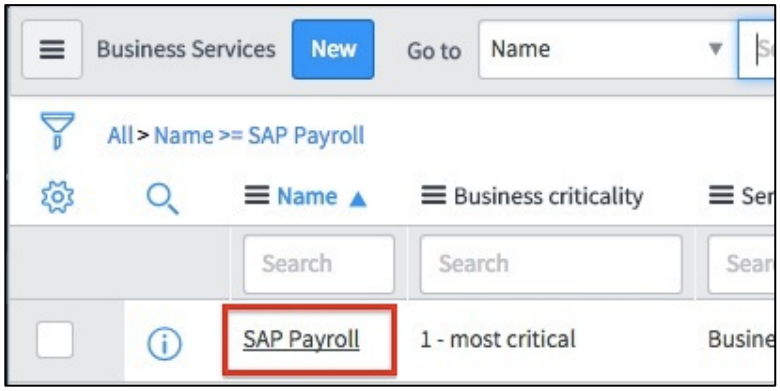
8. Navigate to **Configuration > Business Services**.



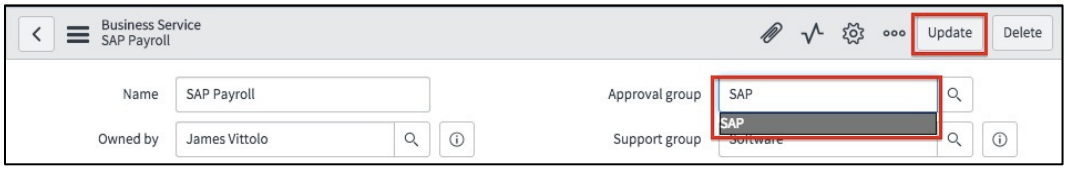
9. Select **Name** in the **Go To** box and then enter **SAP Payroll** in the search box. Press **Return**.



10. Click on **SAP Payroll**.

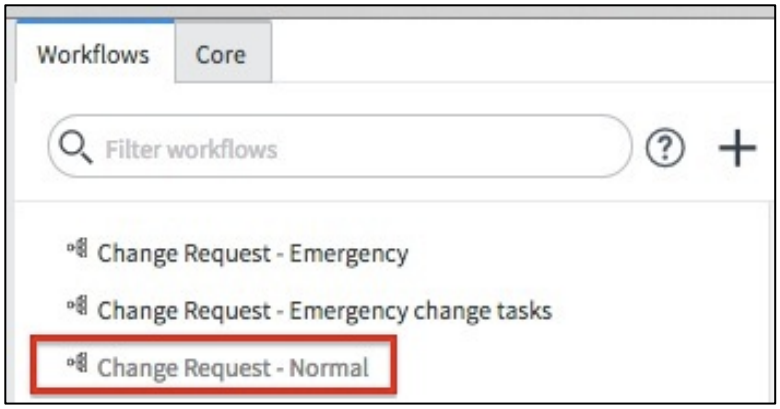


11. Select **SAP** group in the **Approval Group** field and click **Update**.

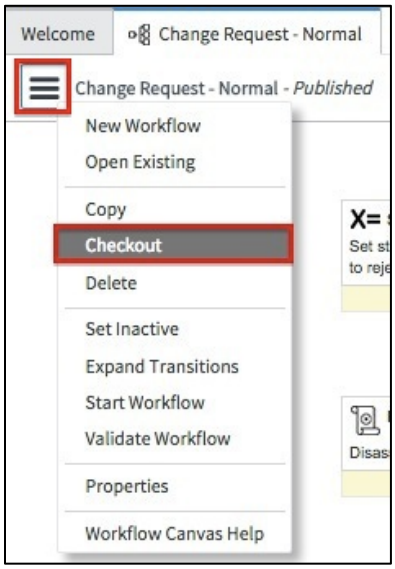


12. Navigate to **Workflow > Workflow Editor**.

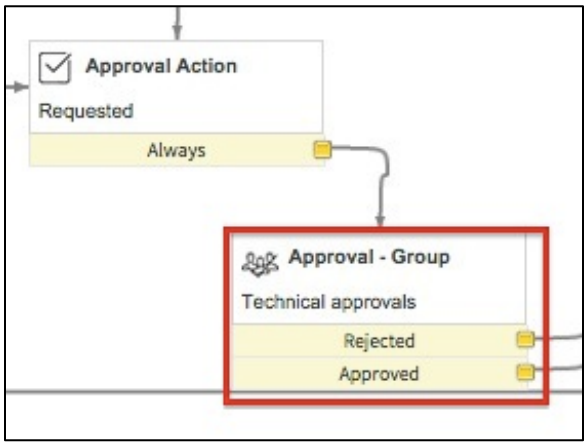
13. Click **Change Request – Normal** under the **Workflows** tab on the right side of the screen.



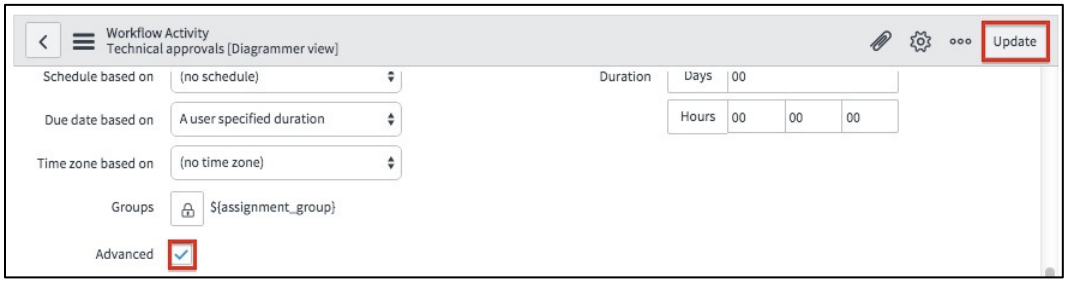
14. Click the **Workflow Actions** button (3 horizontal lines) at the upper left and select **Checkout**.



15. Double-click the first **Approval – Group** called **Technical approvals**.



16. Scroll to and select the **Advanced** check box. Click **Update**.



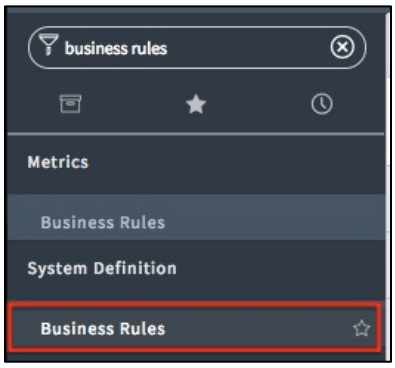
17. The following script should already be in the **Additional Groups script** window. If it is not, enter it. Click **Update**.

```
var answer = [];

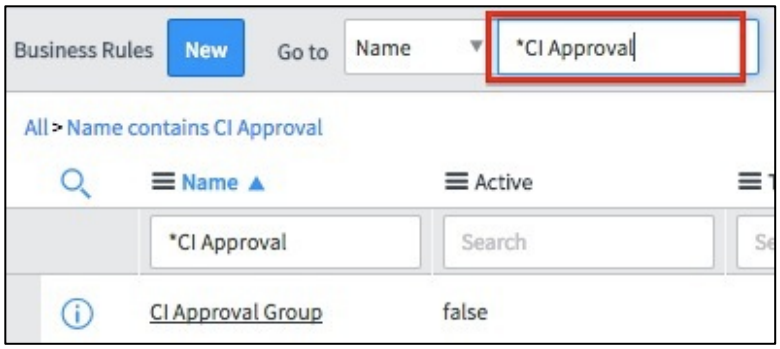
if (current != null) {
     var thisTask = current.sys_id;
     var affectedItem = new GlideRecord('task_ci');
     affectedItem.addQuery('task', thisTask);
     affectedItem.query();

     while (affectedItem.next()) {
          var itemName = affectedItem.ci_item.getDisplayValue();
          var approvalGroup = affectedItem.ci_item.change_control.getDisplayValue();
          answer.push(affectedItem.ci_item.change_control);
     }
}
```

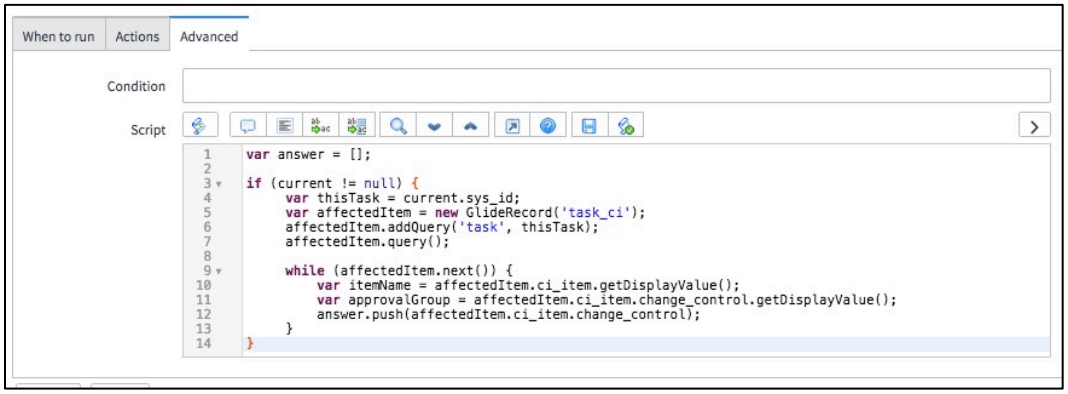
***HINT**: If you do need to enter the script, you can cut and paste it from the Business Rule script called **CI Approval Group**. To get it, navigate to **System Definition > Business Rules**.*



18. Search for the Business Rule called **CI Approval Group**.



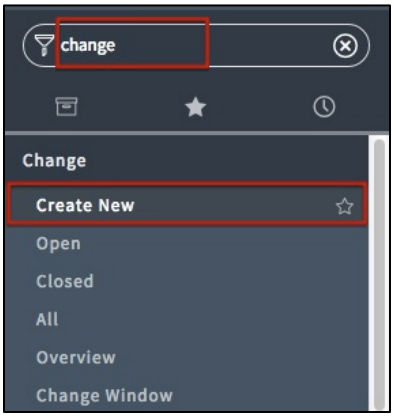
19. Click the **CI Approval Group** link. Click the **Advanced** tab in the new window to get to the script that can be cut and pasted.



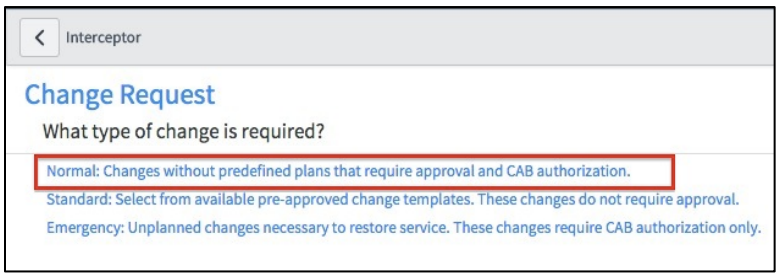
20. Click the **Workflow Actions** button (3 horizontal lines) at the upper left and select **Publish**.

21. Close the workflow editor window.

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

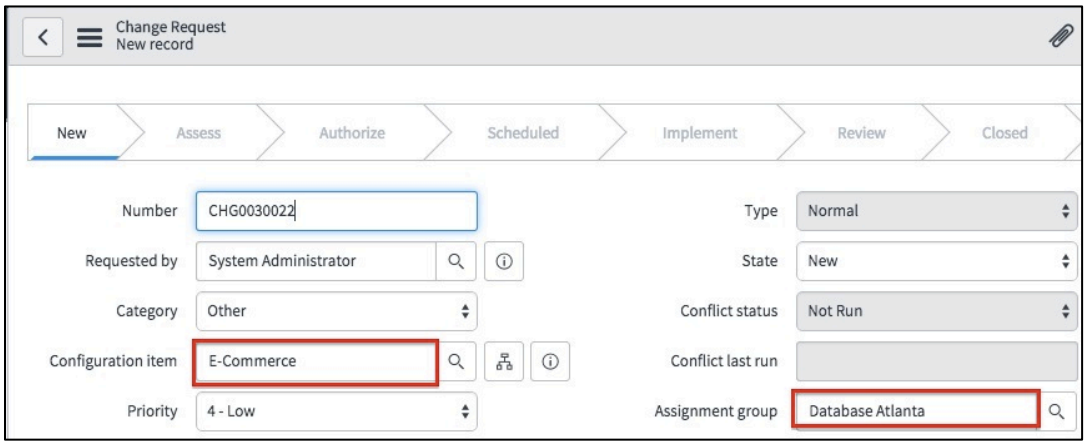


23. Select **Normal** from the Interceptor Change Request screen.

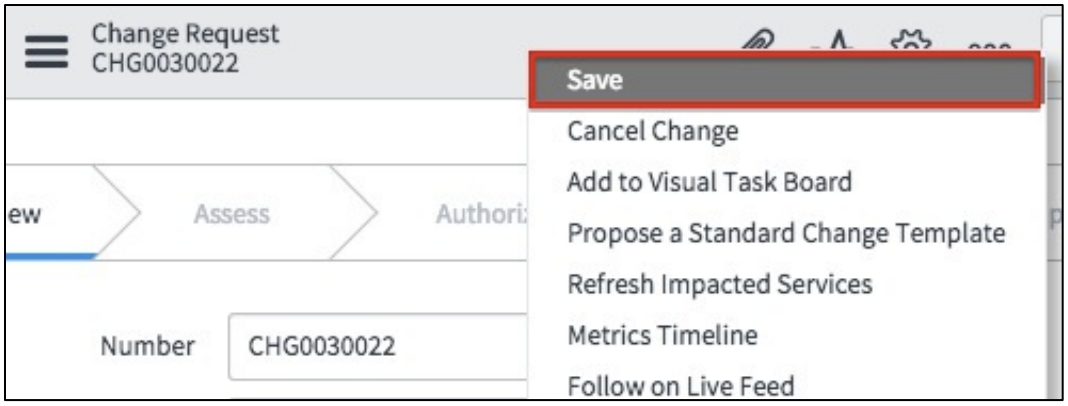


24. Fill out the following information on the Change Request form.

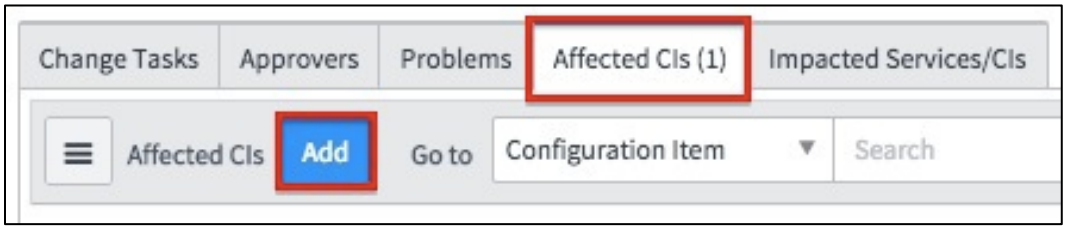
    Configuration Item: **E-Commerce**
    Assignment Group: **Database Atlanta**



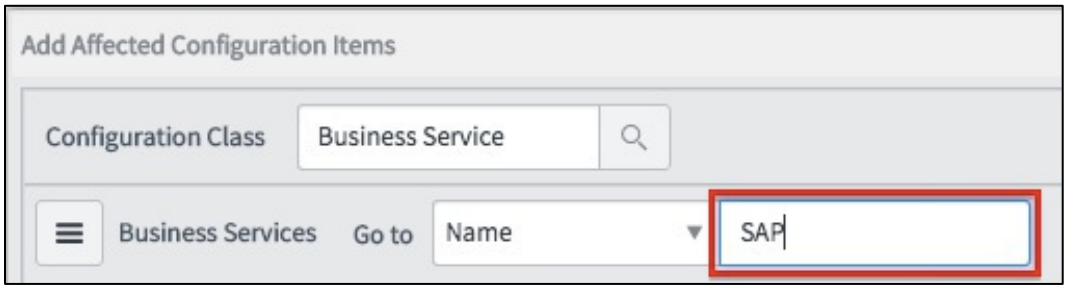
25. Right-click the form header and click **Save**.



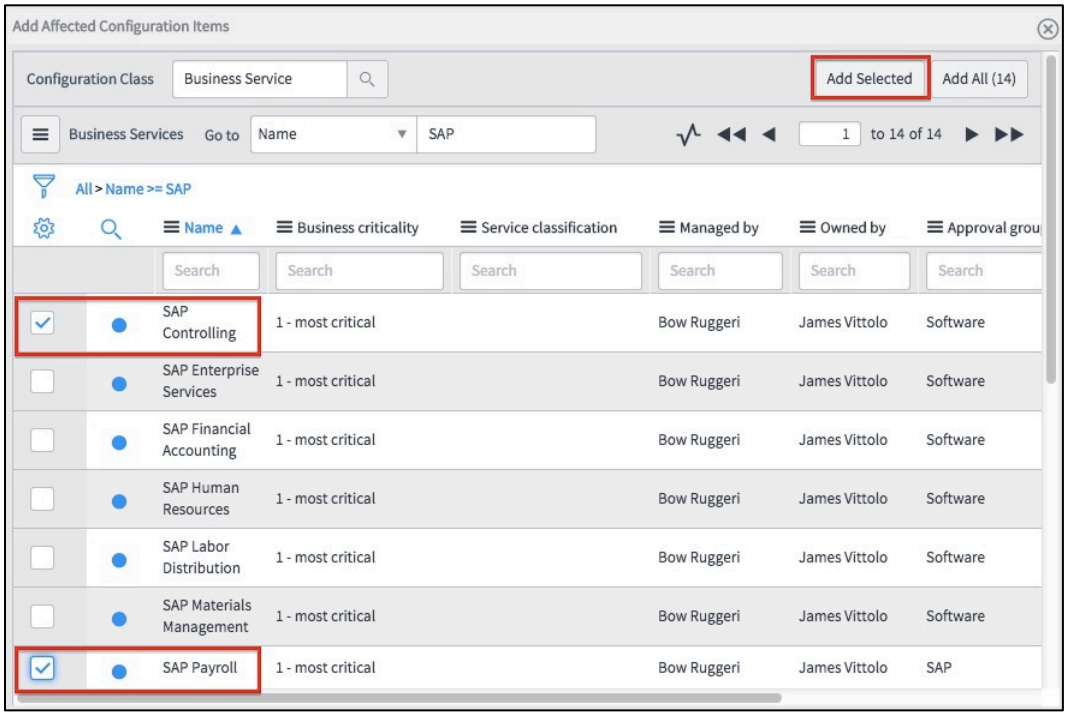
26. Scroll to the Related Lists and click the **Affected CIs** tab. Click **Add**.



27. Select **Name** in Go To and type **SAP** in the search box. Press **Return**.



28. Select **SAP Payroll** and **SAP Controlling**. Click **Add Selected**.

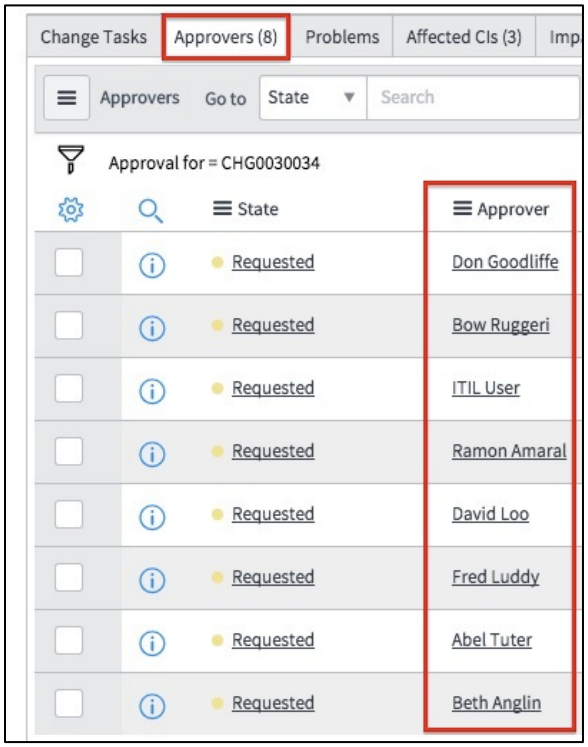


29. Select the **Request Approval** button.



Lab Success Verification

1. Scroll to the **Approvers** tab and click it.



You should have **Bow Ruggeri** (Database Atlanta group); **Abel Tuter** and **Ramon Amaral** (SAP group); and **Beth Anglin**, **David Loo**, **Don Goodliffe**, **Fred Luddy**, and **ITIL User** (Software group). The SAP and Software groups are added dynamically by the script you entered. The approvers are pulled from the Approval Group field on the CMDB CI records for SAP Payroll and SAP Controlling.