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April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Lab Guide

Asset Management 101:

Cover Your Assets

(and Configuration Items!)

Ben Sweetser & Bryan Boyle

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14
itil / Knowledge14
employee / Knowledge14

Lab Goal

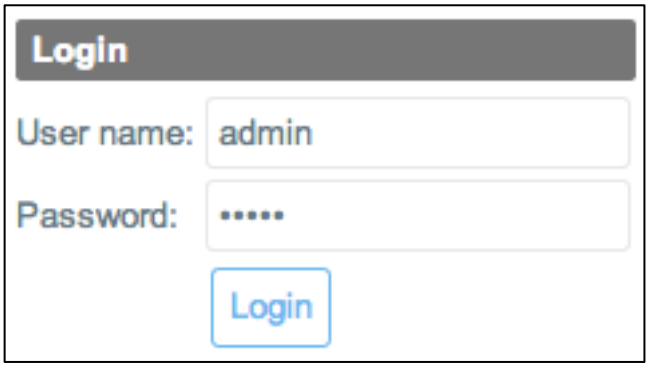
Not all assets are Configuration Items and not all Configuration Items are assets, but when a resource is both in your environment, you want to ensure that they synchronize properly.

Asset and CI Sync

Log on to Your Training Instance

1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover.



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Create a New Configuration Item

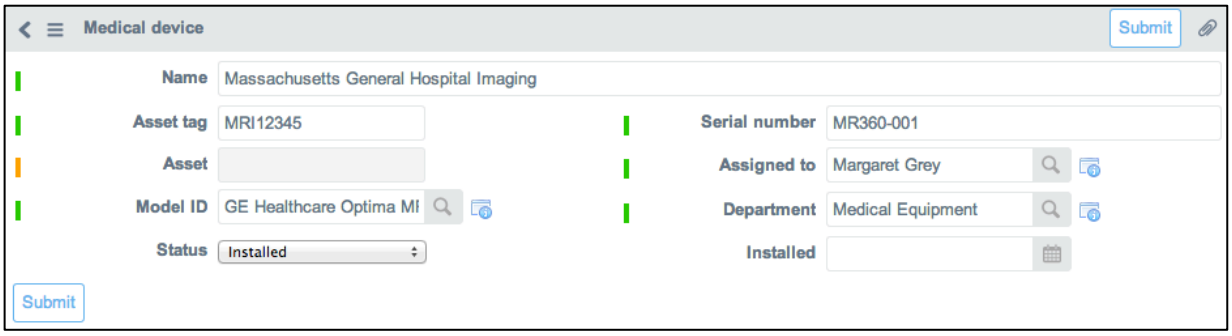
The biomed team wants to track medical equipment in ServiceNow. Enter in a Magnetic Resonance Imaging (MRI) machine as a CI. This CI record can be used to track tasks such as incidents or scheduled maintenance for the MRI and operational details like the firmware version.

1. Navigate to **Configuration > Medical Devices**.

2. Click **New**.

3. Complete the form as follows:

   Name: **Massachusetts General Hospital Imaging**
   Asset tag: **MRI12345**
   Serial number: **MR360-001**
   Model ID: **GE Healthcare Optima MR360 Advance**
   Assigned to: **Margaret Grey**
   Department: **Medical Equipment**



4. Right-click the form header and **Save**. What is the name of the Asset created?

5. Click the Reference Icon next to the **Asset** field to open the asset record.

6. Change the **Assigned to** in the asset record to **Amelia Caputo**.

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

8. Click the Reference Icon next to the **Configuration item** field to return to the CI record. What is the **Assigned to** value of the CI?

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Create a New Asset

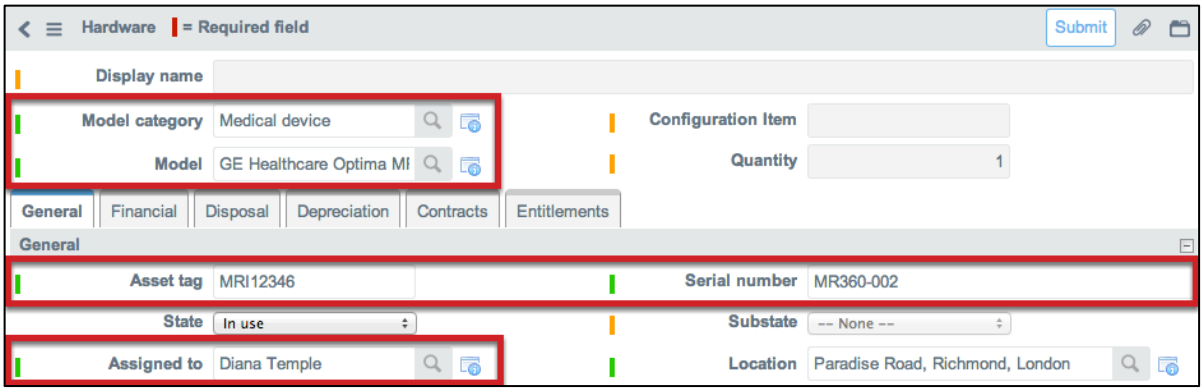
You just procured a new MRI asset and need to add it to ServiceNow. Add the device and view the corresponding CI.

1. Navigate to **Asset Management > Portfolio > Hardware Assets**.

2. Click **New**.

3. Complete the form as follows:

   Model Category: **Medical Device**
   Model: **GE Healthcare Optima MR360 Advance**
   Asset tag: **MRI12346**
   Serial number: **MR360-002**
   Assigned to: **Diana Temple**



4. Right-click the form header and **Save**. What is the name of the Configuration Item?

5. Notice the CI name. Assets do not have names, but CIs do. Click the Reference Icon next to the **Configuration Item** field to open the CI record.

6. Set the Name for the CI to **Royal London Hospital Imaging**.

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

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Lab Goal

Sometimes you may have a situation where you do not wish to create an asset automatically for a CI in your environment. This may be based on a particular model of device, or you may just want to set controls on which CIs have related assets in the environment.

Asset Tracking Strategy

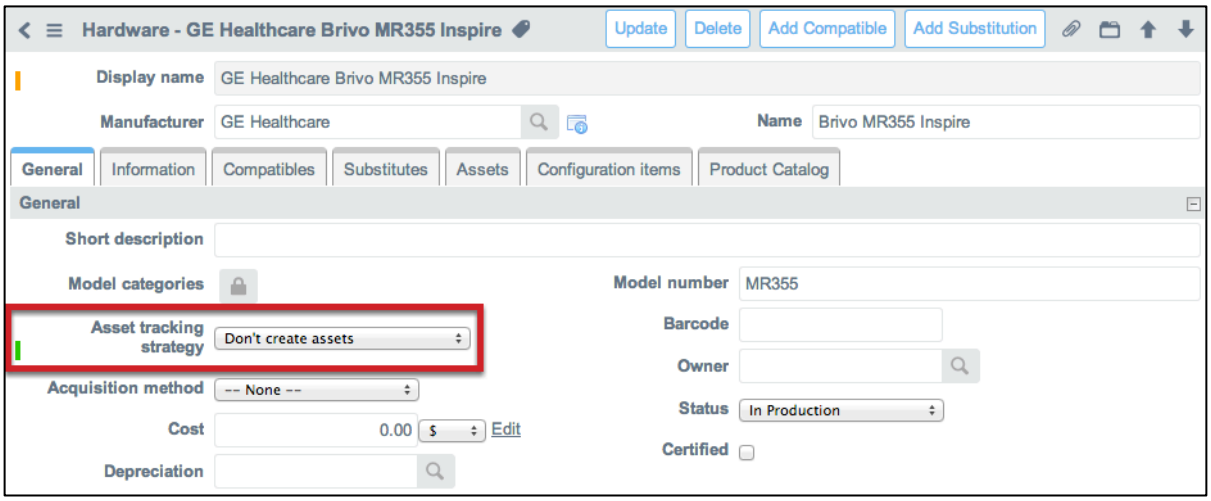
Define Model Asset Tracking Strategy

The biomed team supports some MRI devices not owned by the company. For these devices, you want to create CIs but not assets. The company does not purchase Brivo MR355 Inspire MRIs from GE Healthcare so you do not want to create assets for any of CIs of that model.

1. Navigate to **Product Catalog > Product Model > Hardware Models**.

2. Open **Brivo MR355 Inspire**.

3. Set the **Asset tracking strategy** to **Don't create assets**.



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4. Click **Update**.

5. Navigate to **Configuration > Medical Devices**.

6. Click **New**.

7. Complete the form as follows:

   Name: **Mayo Clinic Imaging**
   Serial number: **MR355-001**
   Model ID: **GE Healthcare Brivo MR355 Inspire**
   Assigned to: **Margaret Grey**
   Department: **Medical Equipment**

8. Right-click the form header and **Save**. Is an Asset created? Why or why not?

Enforce CI Verification

Another option to regulate the creation of assets from CIs is to set the flag to Enforce CI verification on the model category. With this option, no assets are created from any CIs of the model category until they are verified.

1. Navigate to **Product Catalog > Product Model > Model Categories.**

2. Open **Medical device**.

3. Select **Enforce CI Verification**.



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4. Click **Update**.

5. Navigate to **Configuration > Medical Devices**.

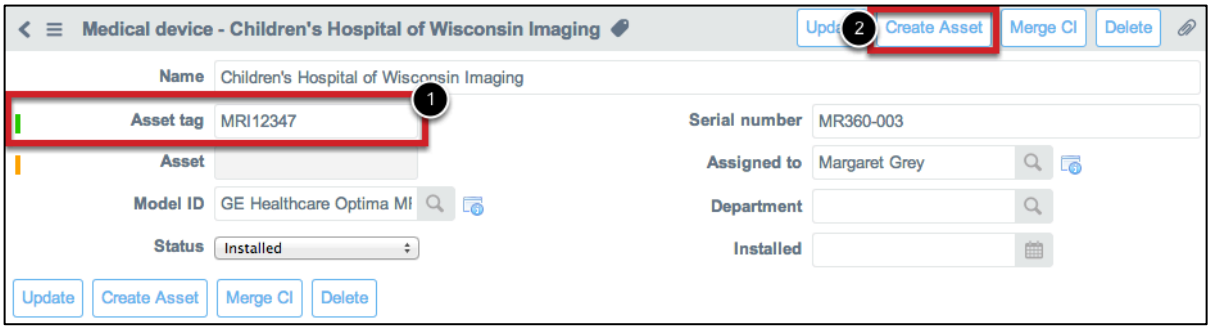
6. Click **New**.

7. Complete the form as follows:

   Name: **Children's Hospital of Wisconsin Imaging**
   Serial number: **MR360-003**
   Model ID: **GE Healthcare Optima MR360 Advance**
   Assigned to: **Margaret Grey**

8. Right-click the form header and **Save**. Is an Asset created? Why or why not?

9. Add the Asset Tag **MRI12347** and click **Create Asset**.



10. Open **Children's Hospital of Wisconsin Imaging** to verify an Asset record has been created.

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Verify Multiple CIs at Once

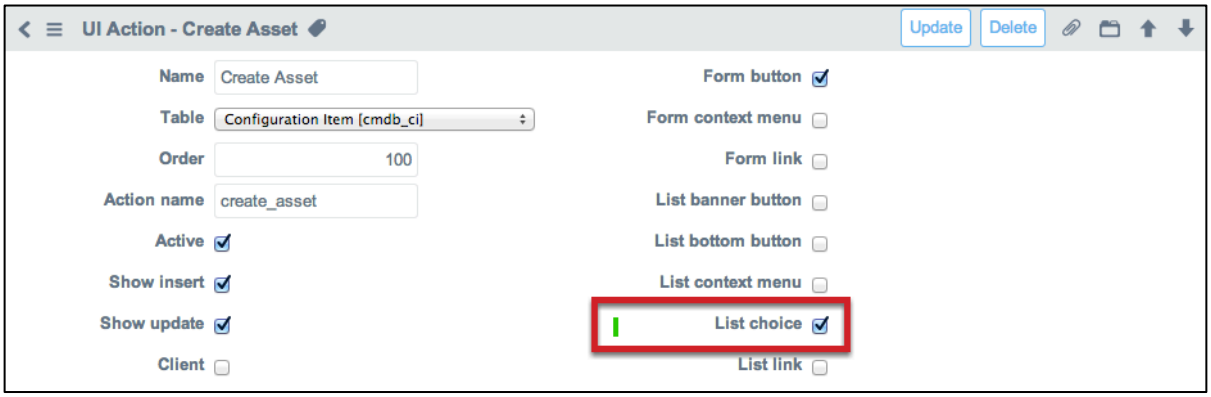
The Create Asset button is fine to verify a single CI at a time, but if you have multiple CIs to verify, you need a faster way to verify the records. **Enforce CI verification** uses a flag called **Requires verification** to prevent the creation of assets from CIs. If the flag is true, no asset is created. The Create Asset button sets the flag to false so assets are created. Update the UI Action to work as a choice from the list.

1. Navigate to **Configuration > Medical Devices**.

2. Right-click the list header and select **Personalize > UI Actions**.

3. Open **Create Asset**.

4. Select **List choice**.

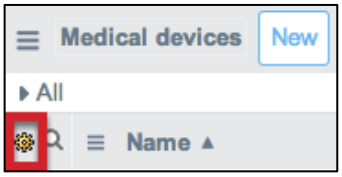


5. Click **Update**.

6. Navigate to **Configuration > Medical Devices**.

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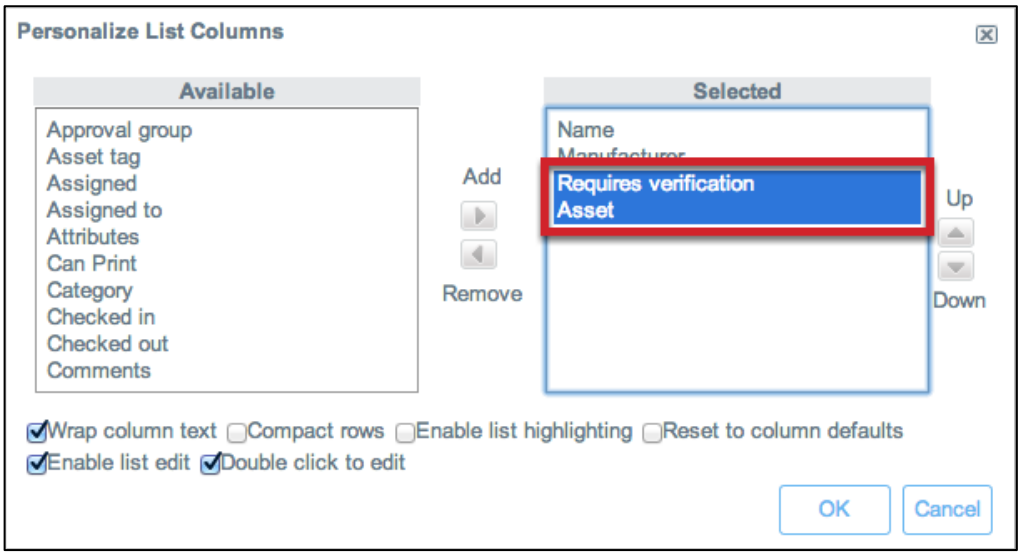
7. Click the **Personalize List** gear icon.



NOTE: This changes the list layout just for the logged in user.

8. Remove all Selected items except **Name** and **Manufacturer**.

9. Move **Requires verification** and Asset from Available to Selected.



10. Click **OK**. Notice the CI that does not have an asset listed. What is the value of **Requires verification**? Why?

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11. Create three new CIs to test the verification of multiple CIs at once as follows:

    Name: **St. Francis Memorial Hospital Imaging**
    Asset tag: **MRI12348**
    Serial number: **MR430S-001**
    Model ID: **GE Healthcare Optima MR430s 1.5T**

    Name: **Mount Sinai Hospital Imaging**
    Asset tag: **MRI12349**
    Serial number: **MR430S-002**
    Model ID: **GE Healthcare Optima MR430s 1.5T**

    Name: **Northwestern Memorial Hospital Imaging**
    Asset tag: **MRI12350**
    Serial number: **MR430S-003**
    Model ID: **GE Healthcare Optima MR430s 1.5T**

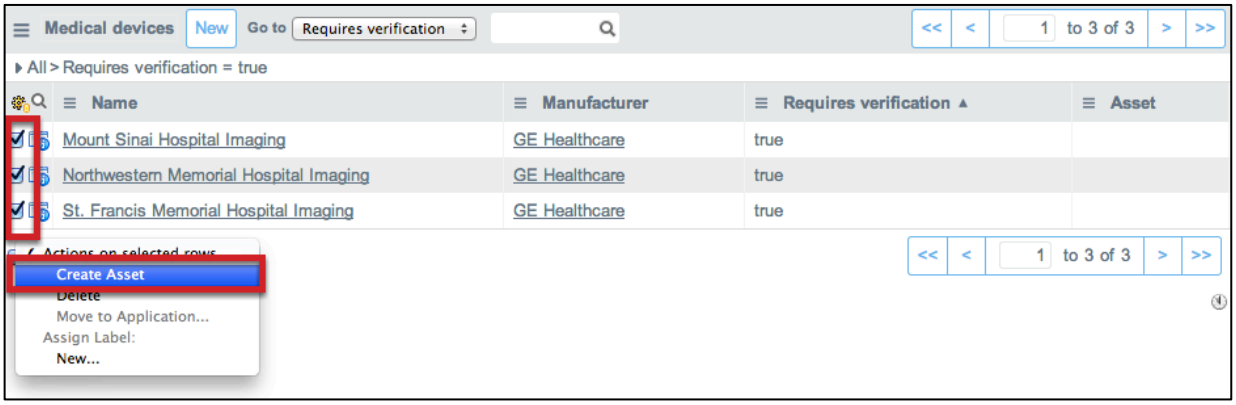
12. In the list of medical devices, what is the value of **Requires verification** for the newly added CIs?

13. Right-click one of the **true** values in the **Requires verification** column header and select **Show Matching**.

14. You have verified that the CIs should be assets. Select the three new CIs.

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15. Select the **Actions on selected rows…** pull down menu and select **Create Asset**.



16. What are the results?

17. Clear the filter on the list. Do the CIs now have associated assets?

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Lab Goal

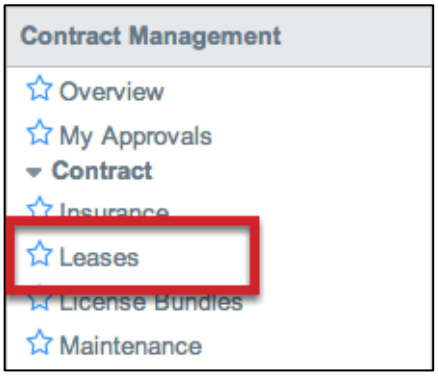
Contracts represent an important component of asset management to track expiration, terms and conditions, and identify the resources covered by the contract. In addition, contract management allows you to identify costs related to the contract and relate those costs back to the assets to get an understanding of what that asset costs your organization.

Lease Contract

Create a New Contract

Many of the medical devices you track are leased. You want to track the leased assets in ServiceNow.

1. Navigate to **Contract Management > Contract > Leases**.

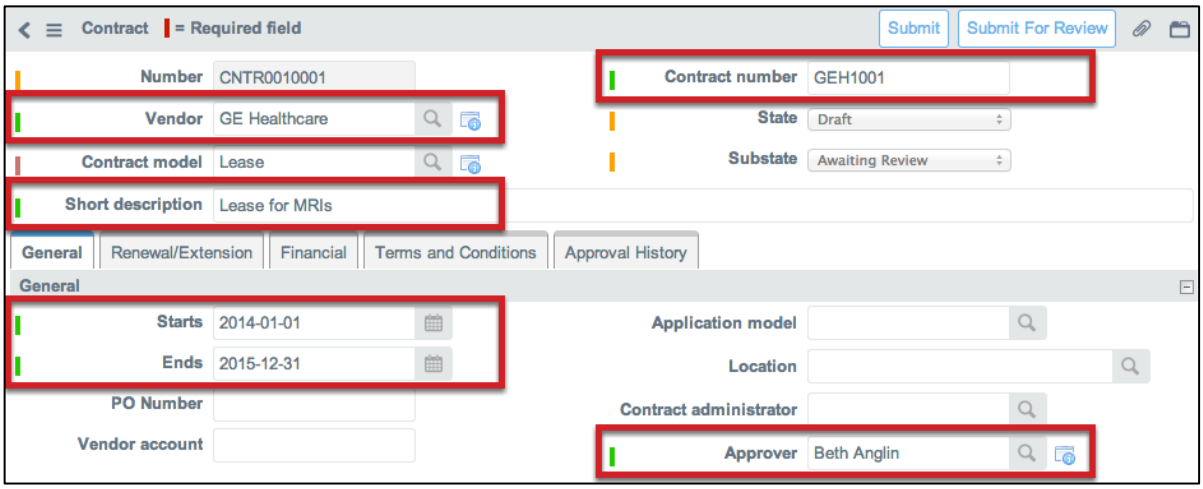


2. Click **New**.

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3. Complete the form as follows:

   Vendor: **GE Healthcare**
   Contract number: **GEH1001**
   Short description: **Lease for MRIs**
   Starts: **2014-01-01**
   Ends: **2015-12-31**
   Approver: **Beth Anglin**



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

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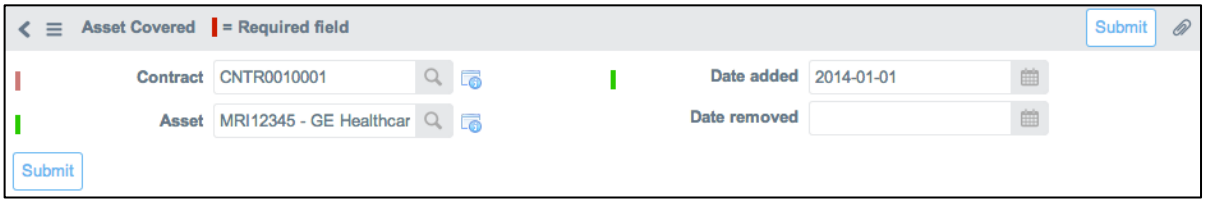
Add Covered Assets

Add the assets covered by the contract to keep track of them in the context of the contract.

1. In the **Assets Covered** related list, click **New**.

2. Complete the form as follows:

   Asset: **MRI12345 – GE Healthcare Optima MR360 Advance**
   Date added: **2014-01-01**



3. Click **Submit**.

4. Repeat these steps to add the asset **MRI12346 – GE Healthcare Optima MR360 Advance** with the same **Date added**.

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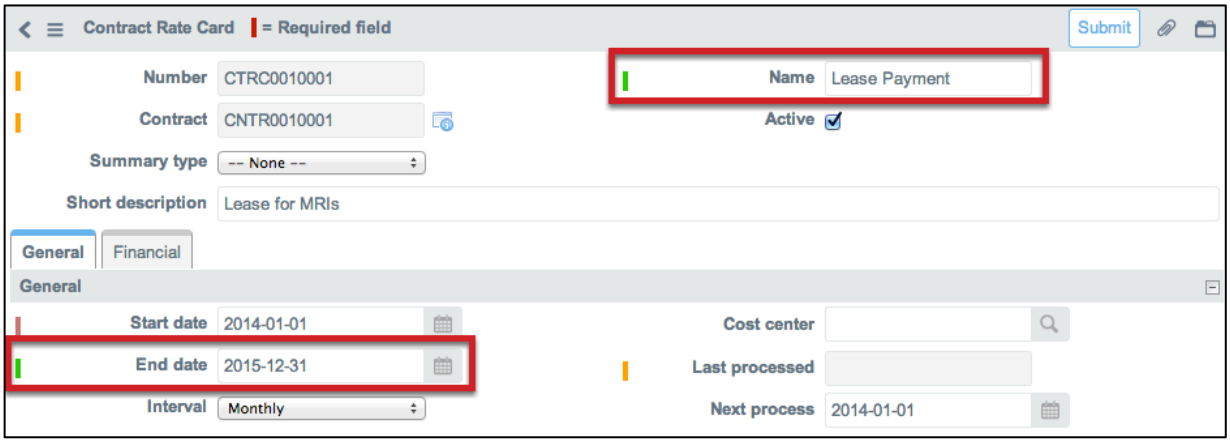
Add Contract Rate Cards

Contract rate cards allow you to identify costs associated with the contract and tie them back to assets or users. Here you configure a rate card on the MRI lease contract and assign assets to the rate card to distribute the contract costs to the assets.

1. In the **Contract Rate Cards** related list, click **New**.

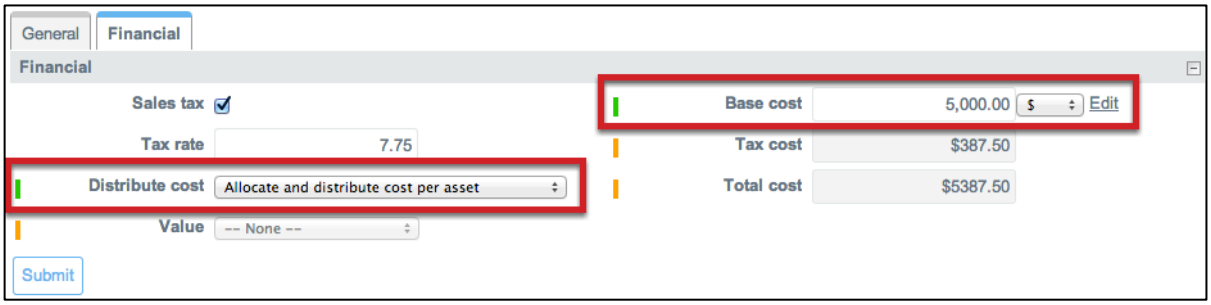
2. Complete the form as follows:

   Name: **Lease Payment**
   End date: **2015-12-31**



3. In the **Financial** form section, complete the form as follows:

   Base cost: **5000 | $**
   Distribute cost: **Allocate and distribute cost per asset**



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

5. In the **Assets Covered** related list, click **New**.

6. Click the magnifying glass next to the **Asset** field. How many assets display? Why?

7. Complete the form as follows:

   Asset: **MRI12345 – GE Healthcare Optima MR360 Advance**
   Date added: **2014-01-01**



8. Click **Submit**.

9. Repeat these steps to add the asset **MRI12346 – GE Healthcare Optima MR360 Advance**.

10. Click **Update**.

11. View the **Financial** form section. What is the Payment amount set to? Why?

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Move the Contract Through the Lifecycle

With the details on the contract completed, move it from its current Draft stage through approval to an Active stage.

1. What are the current **State** and **Substate** for the contract?

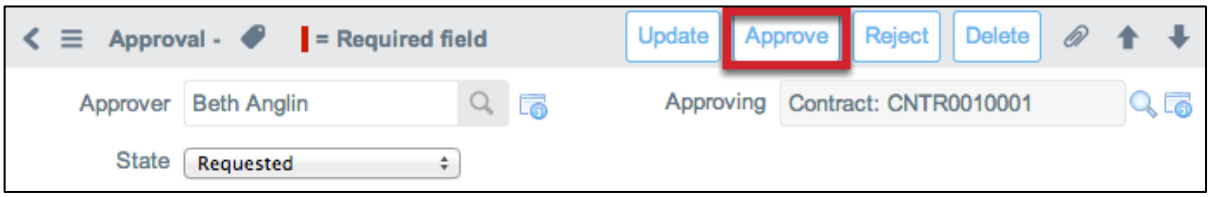
2. Click **Submit for Review**. What are the new **State** and **Substate**?

3. Click the Impersonate icon and impersonate **Beth Anglin**.

4. Navigate to **Contract Management > My Approvals**.

5. Open the record.

6. Click **Approve**.



7. Open the record again. In the Summary of Item being approved section, what are the **State** and **Substate**?

8. Impersonate **System Administrator**.

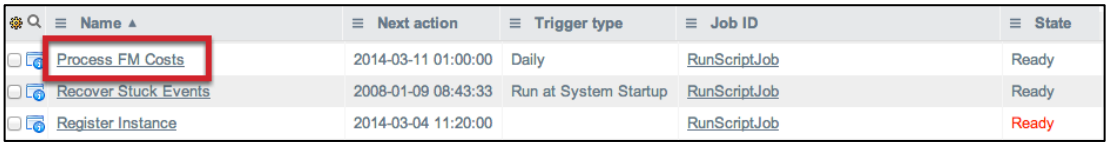
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Process the Costs

Financial management costs process nightly at 1:00 am, but you want to run the process now to see the results.

1. Navigate to **System Scheduler > Scheduled Jobs > Scheduled Jobs**.

2. Select the **Process FM Costs** record.



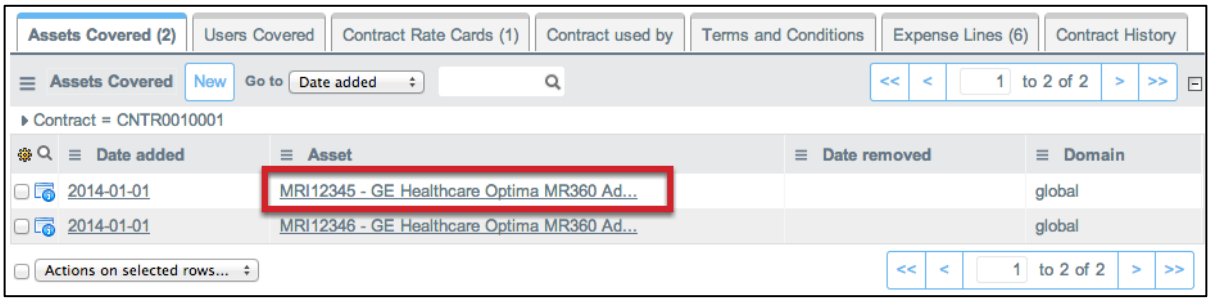
3. Set the Next action to ***<yesterday's date>***.

4. Click **Update**. The process takes a couple minutes to run. Refresh the Scheduled Jobs list until the **State** for **Process FM Costs** shows as **Ready**.

5. Navigate to **Contract Management > Contract > Leases** and open the record for the contract created earlier.

6. View the **Expense Lines** related list. How many entries are there? Why?

7. In the **Assets Covered** related list, click the asset name **MRI12345 – GE Healthcare Optima MR360 Advance**.



8. View the **Expense Lines** related list. How many entries are there? What are the entries for and what is the amount?

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Lab Goal

Contract management is important for financial management, even if your do not use it specifically to track assets. One example of this is a subscription contract for smart phones. Your organization may have a single contract with one or more mobile providers and different users may be covered for different lengths of time for various services. Here you have a contract with Verizon and some users to manage on this contract.

Mobile Subscription Contract

Create a Mobile Subscription Contract

Contracts are also used to cover users. With rate cards and covered users and assets, you can get as detailed as you need to manage your contracts. Mobile contracts are pretty common. As a company, you have a contract with a mobile provider that you can add users to and remove users from as necessary.

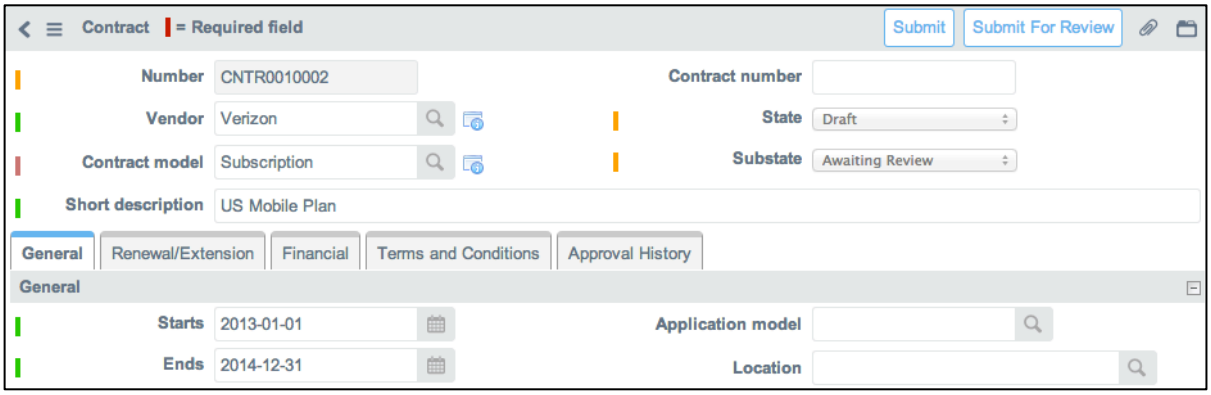
1. Navigate to **Contract Management > Contract > Subscriptions**.

2. Click **New**.

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3. Complete the form as follows:

   Vendor: **Verizon**
   Starts: **2013-01-01**
   Ends: **2014-12-31**
   Short description: **US Mobile Plan**
   Approver: **Beth Anglin**

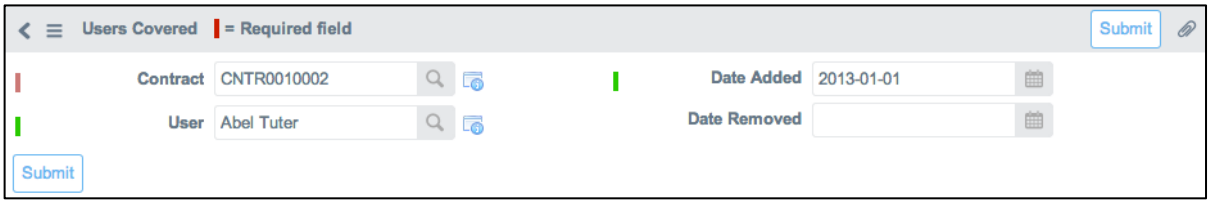


4. Right-click the form header and **Save**. Take note of the contract **Number**.

5. Under the **Users Covered** related list, click **New**.

6. Complete the form as follows:

   User: **Abel Tuter**
   Date added: **2013-01-01**



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7. Add three additional users as follows:

   User: **Barbara Hindley**
   Date added: **2013-01-01**

   User: **Caitlin Reiniger**
   Date added: **2013-01-01**

   User: **Damion Matkin**
   Date added: **2013-06-01**

Add Rate Cards for Various Mobile Services

Mobile contracts have a number of different options that may have different costs associated with them. For example, the contract can cover voice, data, messaging, and hotspot options that you need to track for different users. You need to create rate cards for these different options and identify when the users are covered with these options. You would normally add all the information, but focus on the items in bold for this lab.

Name	Voice	Data	Hotspot
Abel	**2013-01-01**	2013-01-01	**2013-10-15 – 2014-01-15**
Barbara	**2013-01-01**	2014-01-01	2014-01-01
Caitlin	**2013-01-01**		
Damion	**2013-06-01**	2013-08-01 – 2014-01-15	

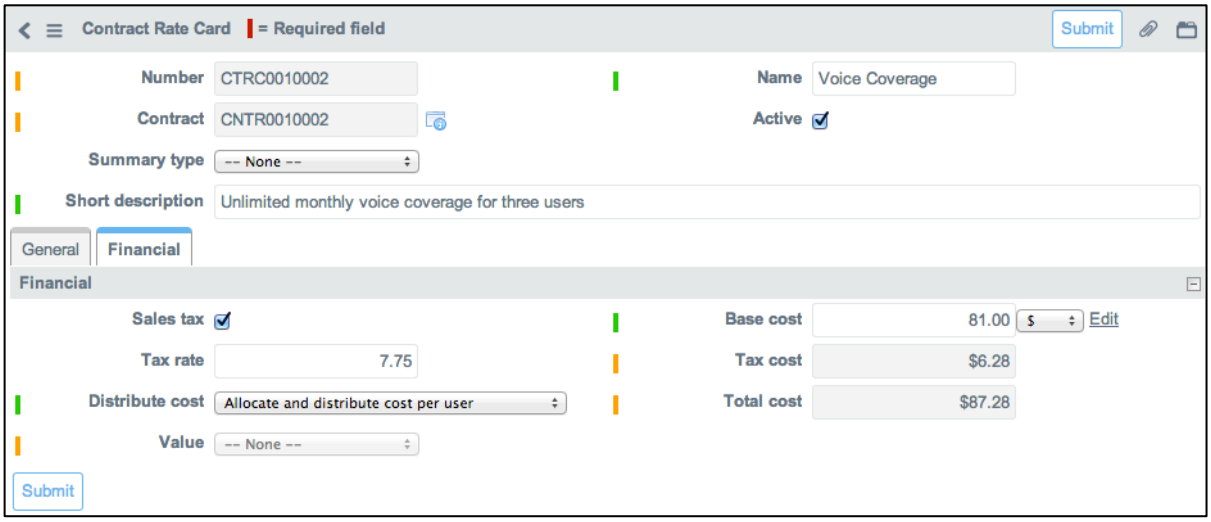
- Abel has been included on the voice and data plans under the contract since he was added, but only had hotspot coverage for a limited time when he was traveling more.
- Barbara had voice initially and later added data and hotspot coverage.
- Caitlin has only been covered under the voice plan since she was added to the contract.
- Damion had voice and data for the entire time he was on the contract.

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1. Under the **Contract Rate Cards** related list, click **New**.

2. Complete the form as follows:

   Name: **Voice coverage**
   Short description: **Unlimited monthly voice coverage for three users**
   Base cost: **$81.00**
   Distribute cost: **Allocate and distribute cost per user**



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

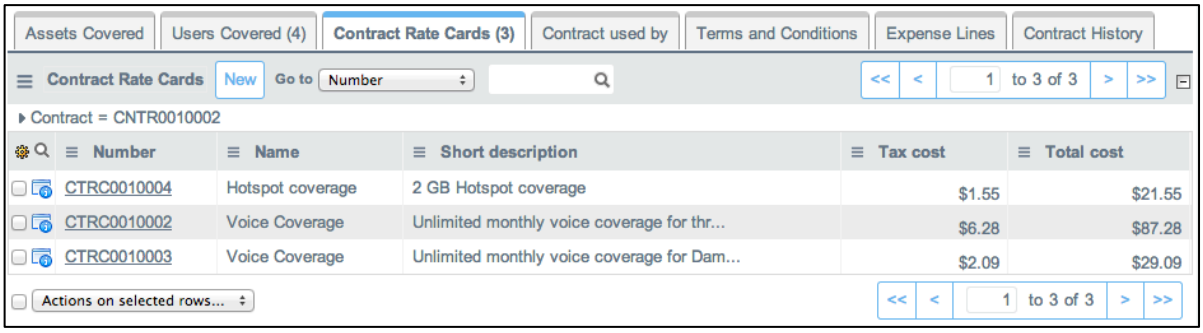
4. Under the **Rate Card Users** related list, add **Abel Tuter**, **Barbara Hindley**, and **Caitlin Reininger** with a Date Added of **2013-01-01**. NOTE: Unless you know the users will start and end this service at the same time, you should create separate rate cards for them.

5. Create another rate card for **Voice coverage** for **Damion Matkin** with a base cost of **$27** that starts on **2013-06-01**. Set the start date on the rate card and set distribute cost to **Allocate and distribute cost per user**.

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6. Create a rate card for **Hotspot coverage** for **Abel Tuter** with a base cost of **$20** that started on **2013-10-15** and ended on **2014-01-15**. Set the dates on the rate card and set distribute cost to **Allocate and distribute cost per user**.

7. You should have three Contract Rate Cards as follows:



Move the Contract Through the Lifecycle

With the details on the contract completed, move it from its current Draft stage through approval to an Active stage.

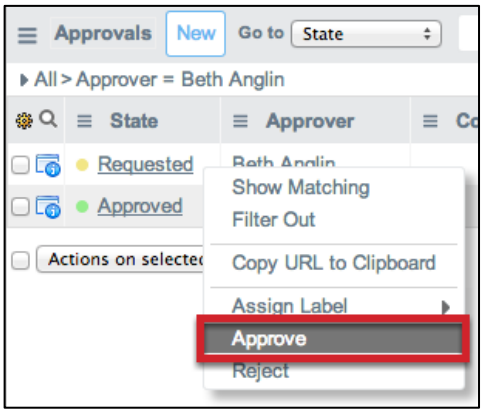
1. Click **Submit for Review**.

2. Click the Impersonate icon and impersonate **Beth Anglin**.

3. Navigate to **Contract Management > My Approvals**.

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4. Right-click the **Requested** approval and select **Approve**.



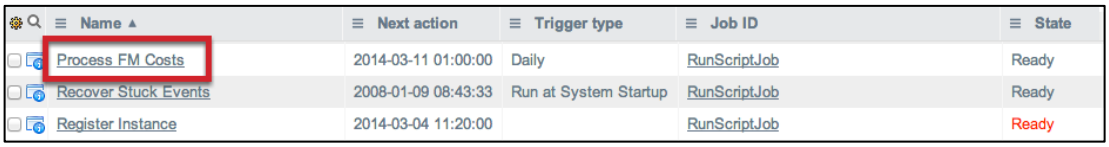
5. Impersonate **System Administrator**.

Process the Costs

Run the process now to see the results.

1. Navigate to **System Scheduler > Scheduled Jobs > Scheduled Jobs**.

2. Select the **Process FM Costs** record.



3. Set the Next action to ***<yesterday's date>***.

4. Click **Update**. The process takes a minute to run. Refresh the Scheduled Jobs list until the **State** for **Process FM Costs** shows as **Ready**.

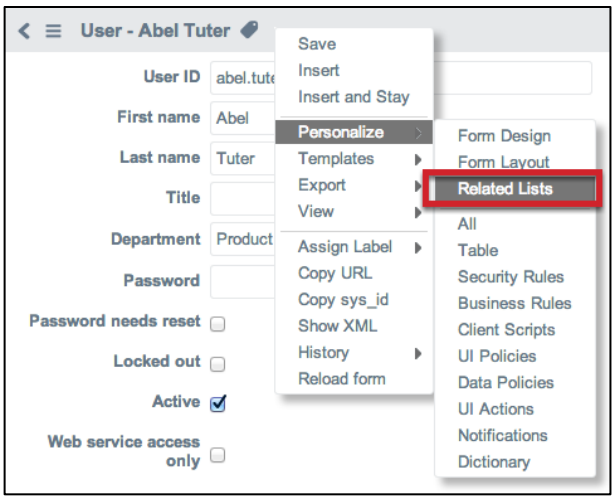
5. Navigate to **Contract Management > Contract > Subscriptions** and open the record for the contract created earlier.

6. View the **Expense Lines** related list. How many entries are there? Why?

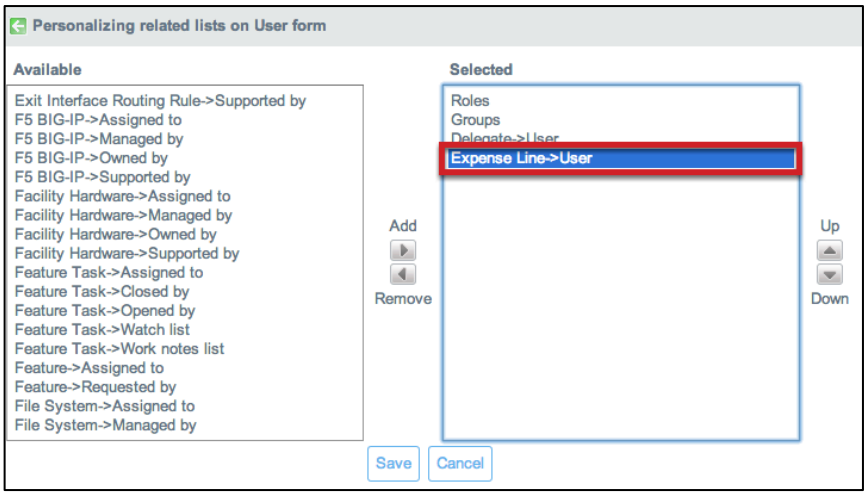
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7. In the **Users Covered** related list, click **Abel Tuter**.

8. The default User record does not display the Expense lines related list. Right-click the form header and select **Personalize > Related Lists**.



9. Add **Expense Line->User** to the Selected.



10. Click **Save**.

11. View the **Expense Lines** related list. How many entries are there? What are the entries for and what is the amount?

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