knowledge14

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

Lab Guide

Change 101:

Manage Approvals & Conflicts and Risk

Martin Wood & Lynda Rees

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

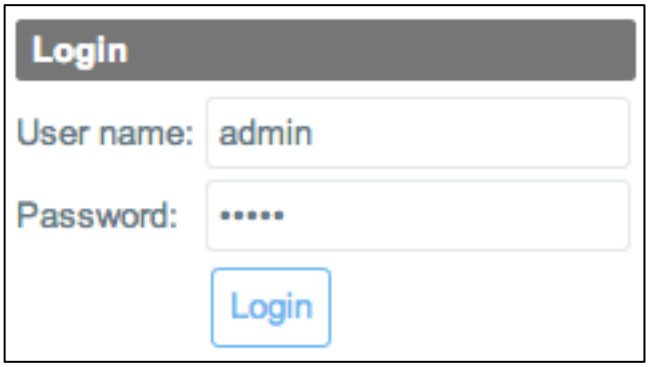
Adding a CI to a Change Request enables the full power of the ServiceNow CMDB. This explains how creating a Change Request enables you to perform several key checks – before it gets approved!

Lab 1
Conflict Detection and Service Identification

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.

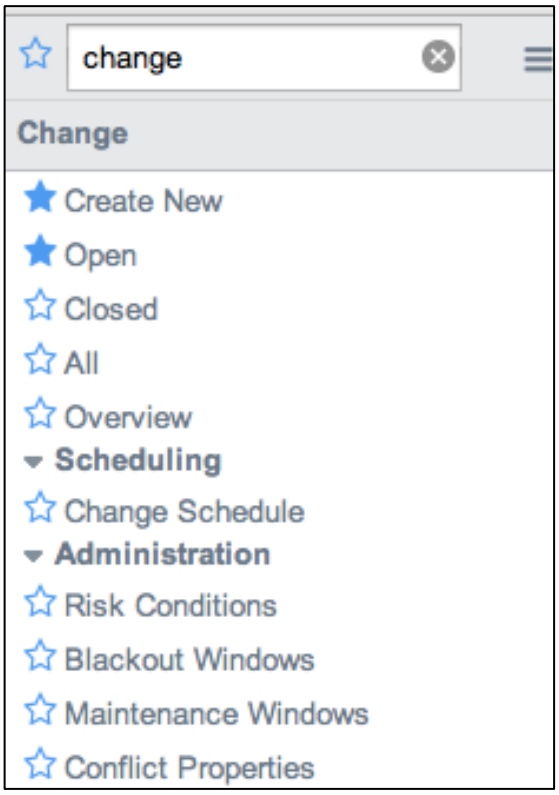


®2014 ServiceNow, Inc. All rights reserved.

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 little time.

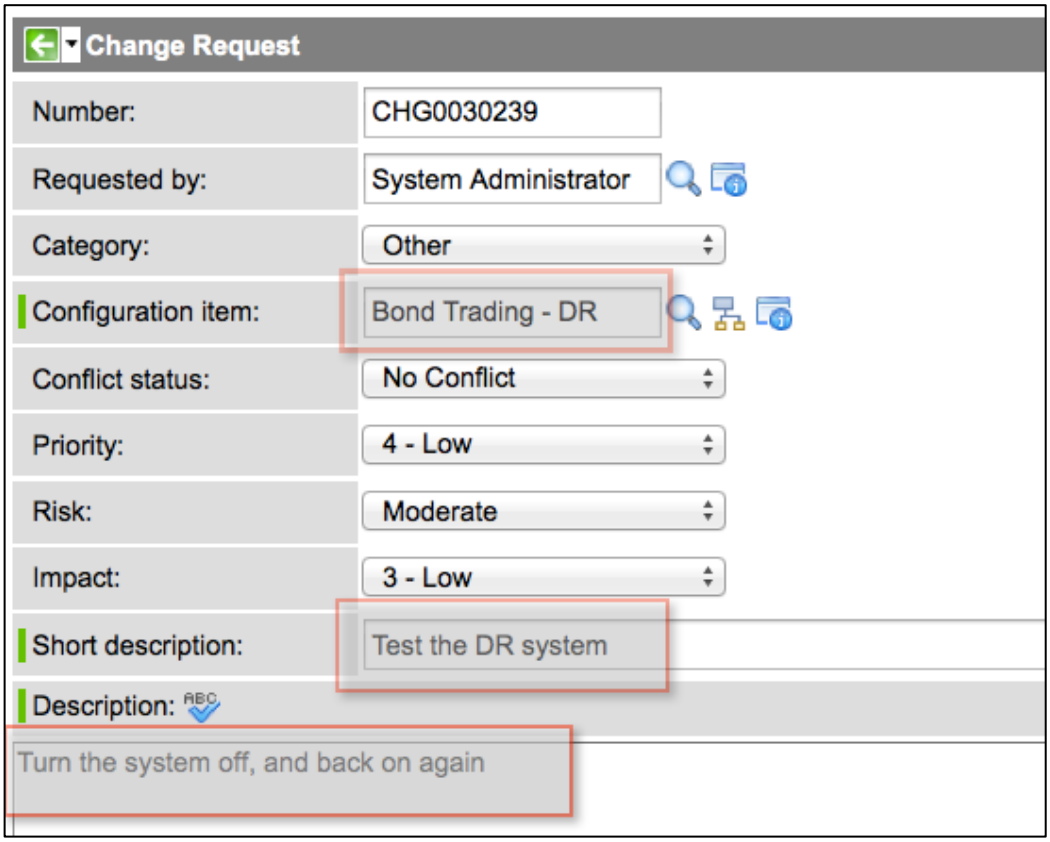
1. Navigate to Change > Create New.



®2014 ServiceNow, Inc. All rights reserved.

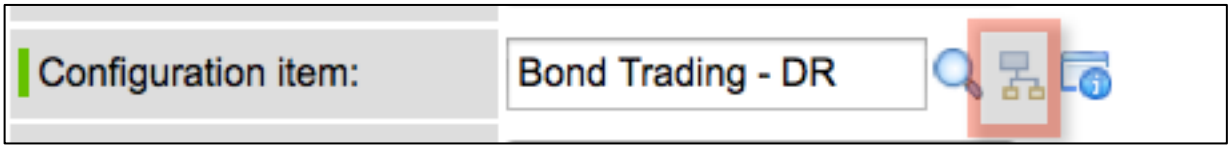
2. Complete the form as follows:

   Configuration item: **Bond Trading - DR**
   Short description: **Test the DR system**
   Description: **Turn the system off, and back on again**

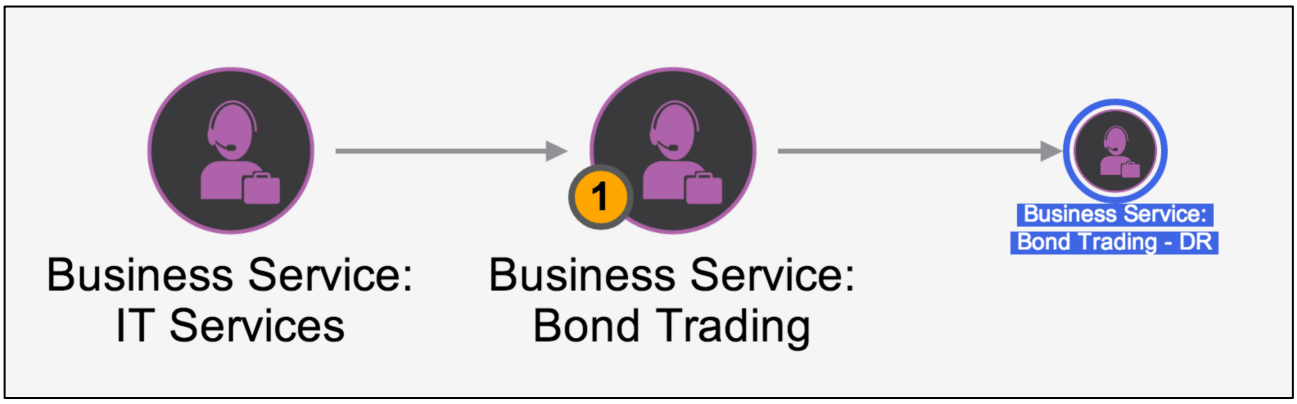


©2014 ServiceNow, Inc. All rights reserved.

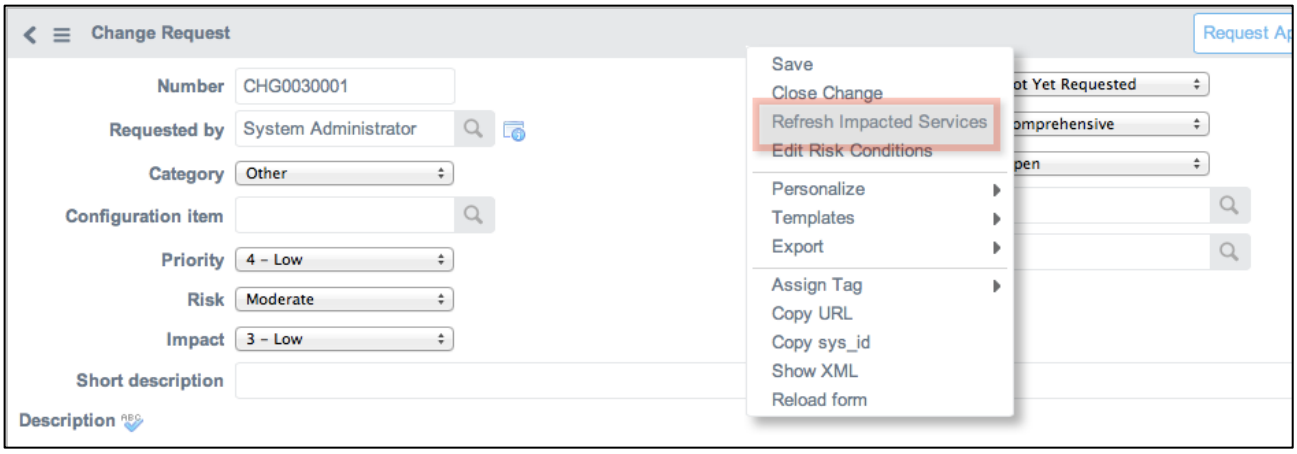
3. Click the **BSM icon** to view the Business Service Map.



This window lets you see that the **Bond Trading - DR** application provides services for Bond Trading and in turn IT Services.



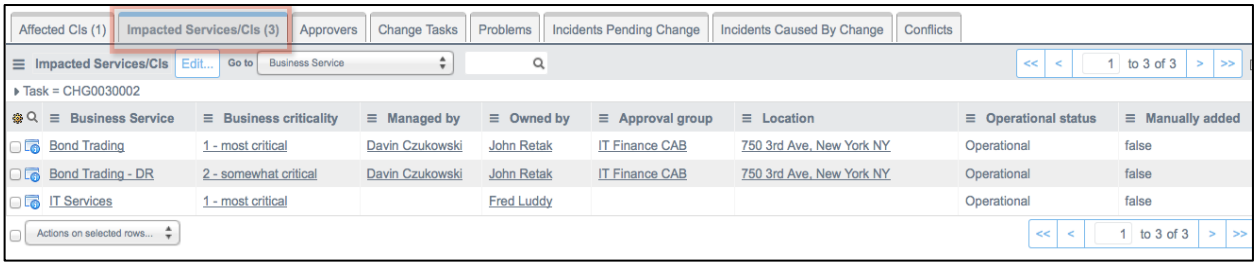
4. Right-click the Change form header, and **Refresh Impacted Services**.



©2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

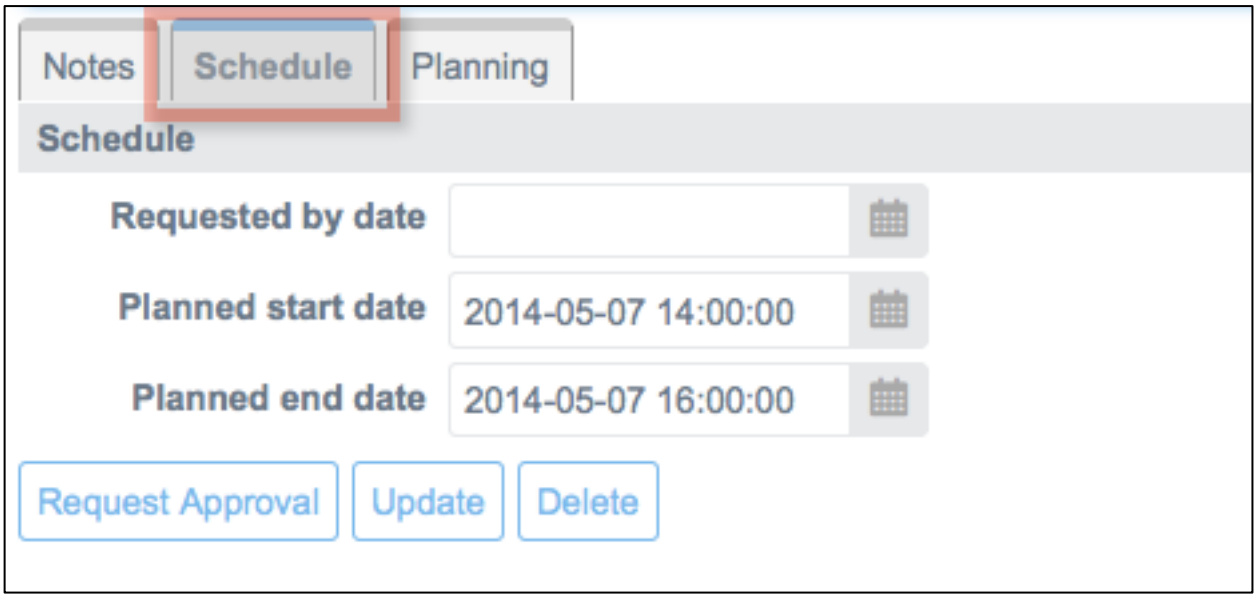
1. At the bottom of the form, the Impacted Services list should be populated.



Maintenance Windows

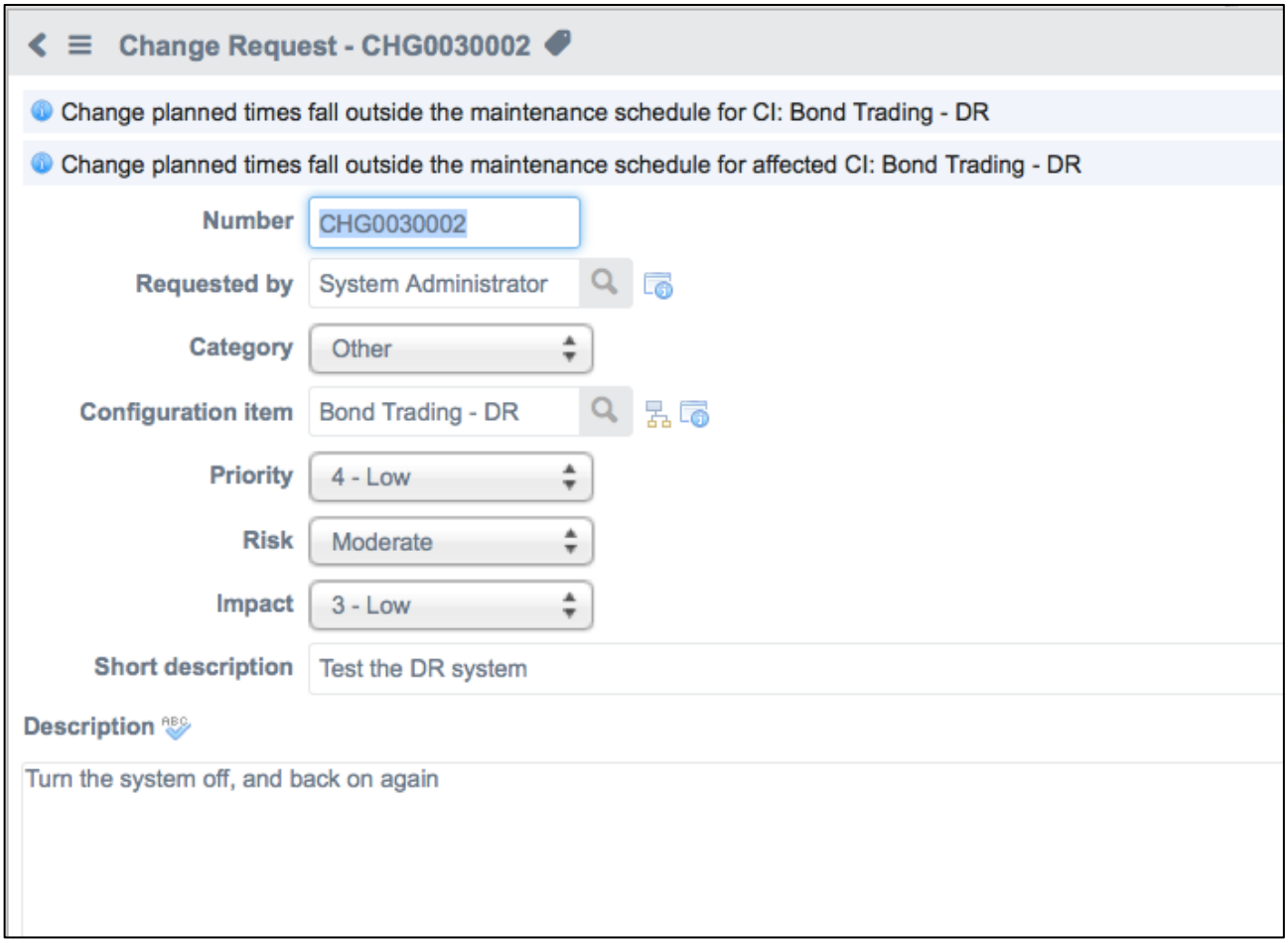
1. Complete the form as follows, click the menu icon and click **Save**.

   Planned start date: **2014-05-07 14:00:00**
   Planned end date: **2014-05-07 16:00:00**



®2014 ServiceNow, Inc. All rights reserved.

2. Your screen should display the following message:



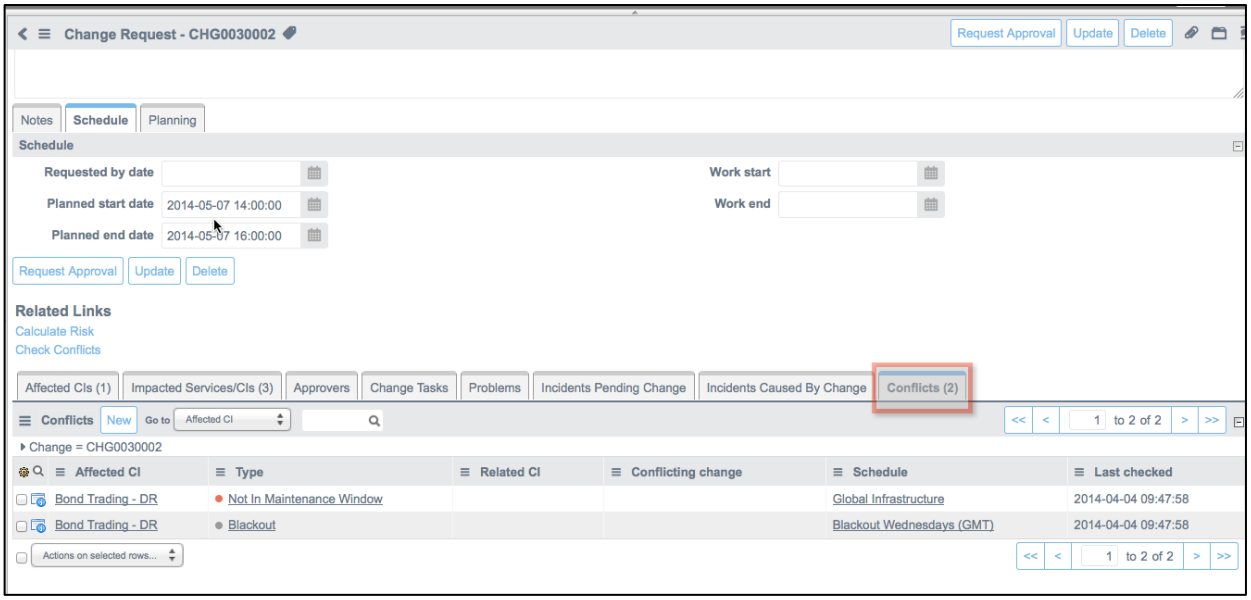
3. Click the **Check Conflicts** link at the bottom of the form.



©2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Your screen should look like this:

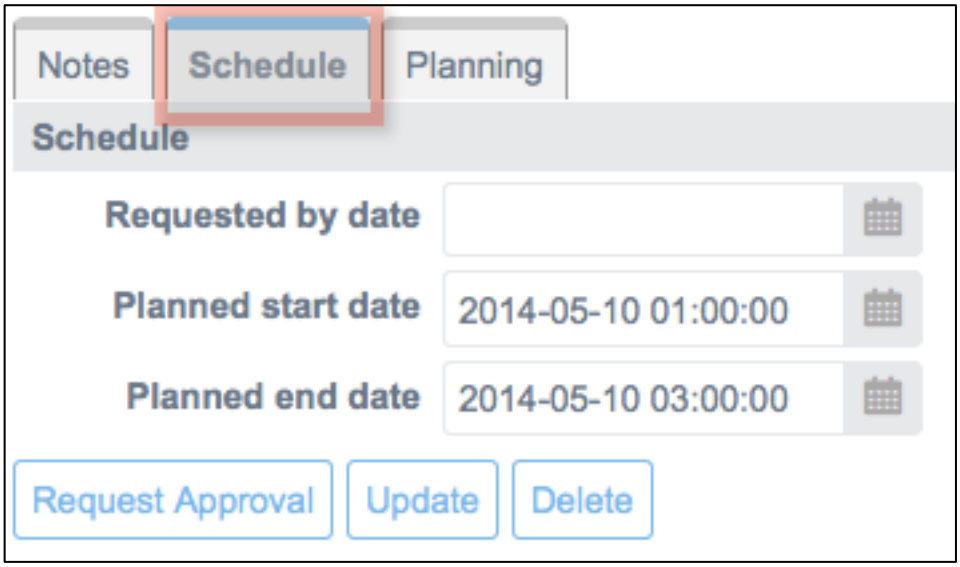


©2014 ServiceNow, Inc. All rights reserved.

No Conflicts

1. Complete the form as follows and click **Save**. (It is an early morning start!)

   Planned start date: **2014-05-10 01:00:00**
   Planned end date: **2014-05-10 03:00:00**



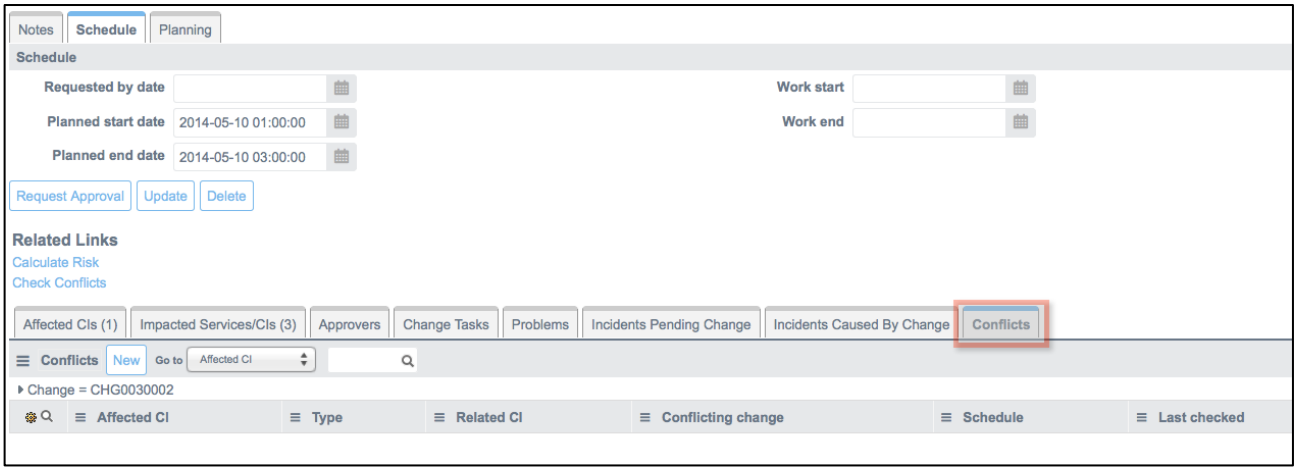
2. Click the **Check Conflicts** link at the bottom of the form.



®2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Your screen should look like this:

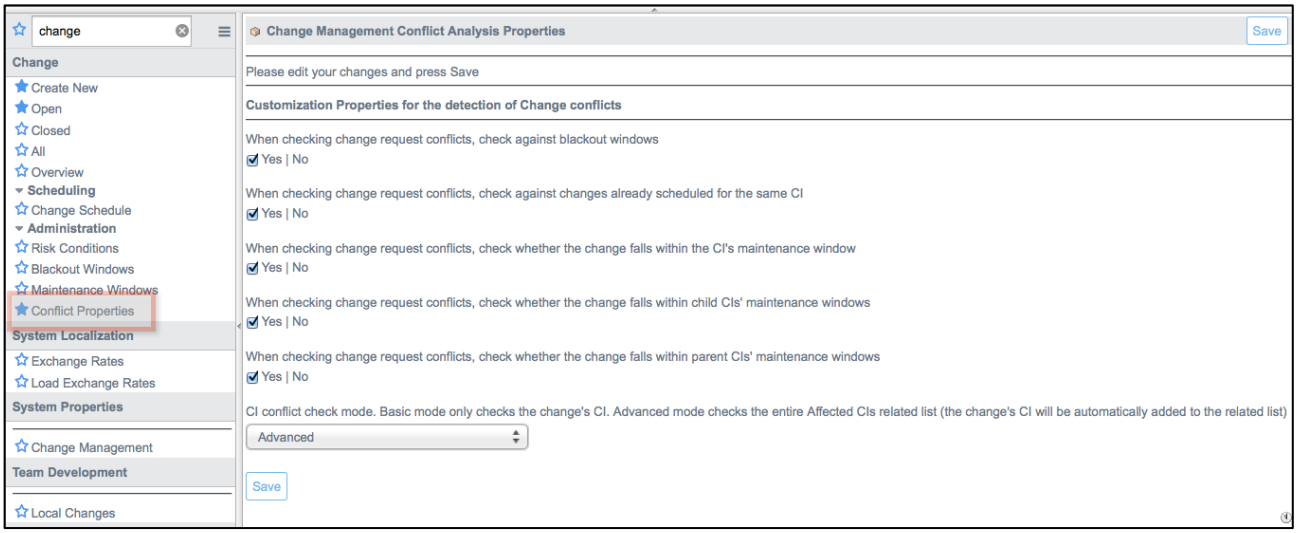


®2014 ServiceNow, Inc. All rights reserved.

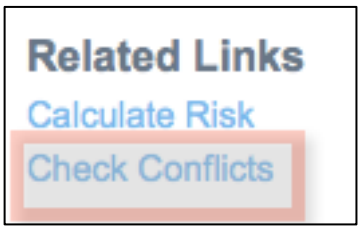
Conflict Detection Through Relationships

1. Navigate to **Change > Conflict Properties**, select the following options, and click **Save**.

   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**.



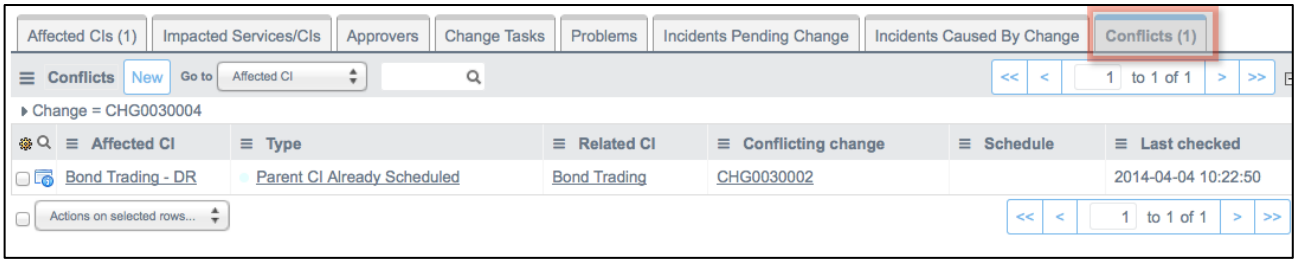
2. Navigate to your change record (probably **CHG003001**) and click **Check Conflicts**.



©2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Your screen should look like this:



Change Schedule

Sometimes you just need to see a visual representation of your 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 > Change Schedule**.

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

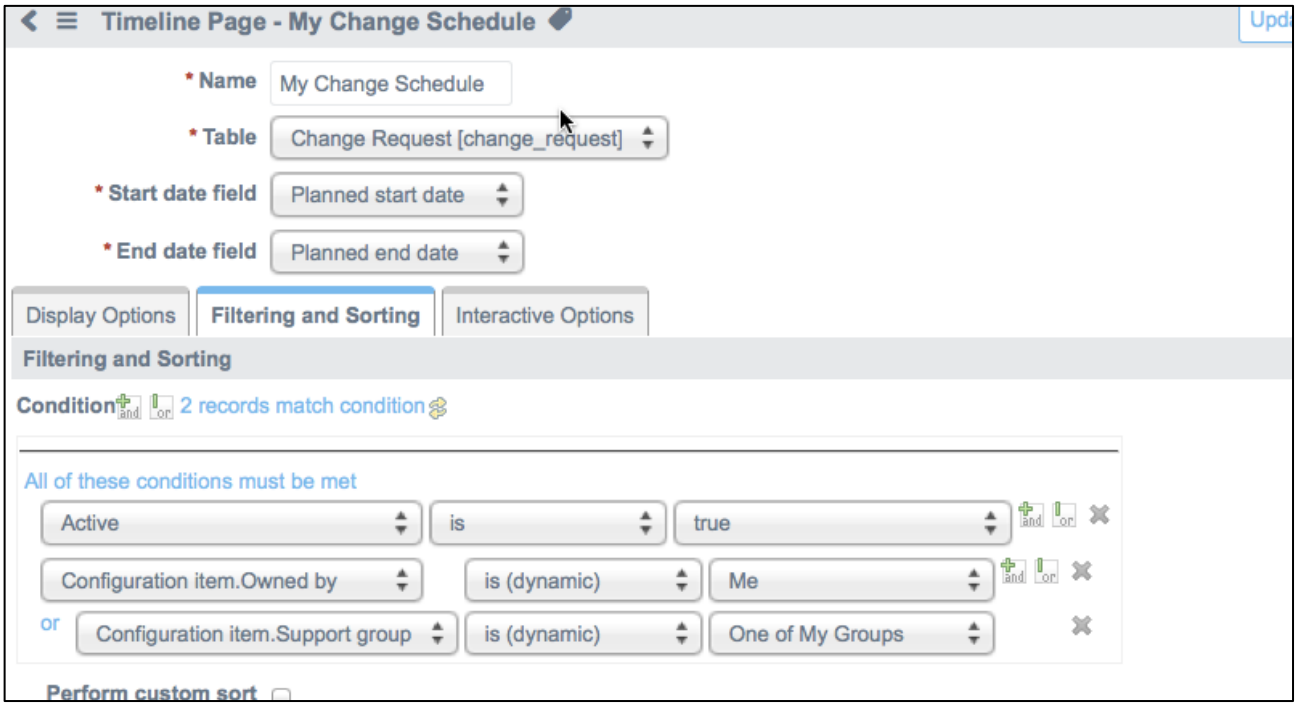
©2014 ServiceNow, Inc. All rights reserved.

3. Make the following changes, then click the **menu** icon, and click **Save**.

Name: **My Change Schedule**
Conditions:
Active - **is** - **True AND**
Configuration Item.Owned By - **is** (**dynamic**) - **Me OR**
Configuration Item.Support group - **is** (**dynamic**) - **One of My Groups**

HINT: In the **Condition** field, click the **and** icon.
Click **Show Related Fields**
Select **Configuration Item-->Configuration Item fields**
Select **Owned By**. Choose **is (dynamic)**

HINT: Click the **or** icon. Click **Show Related Fields** and
Select **Configuration Item—>Configuration Item** fields
Select **Support** group. Choose **is (dynamic)**

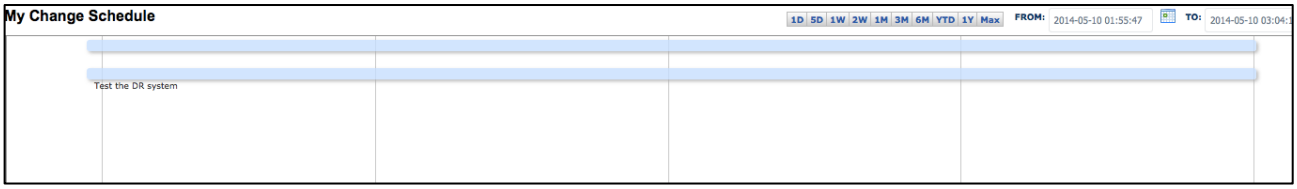


2. Once saved, please click the **View Timeline** button, or choose **Change > Change Schedule**

©2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Your screen should look like this:



®2014 ServiceNow, Inc. All rights reserved.

Lab Goal

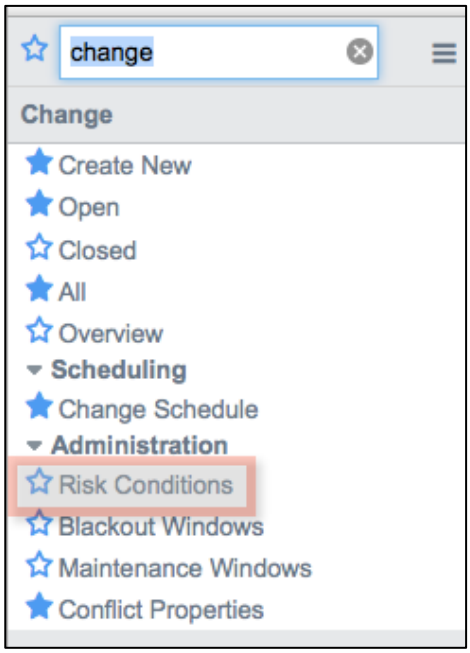
Change requesters must provide accurate information. But sometimes they need help to provide consistent answers to standard situations. Let's help them by automating.

Lab 2
Risk Conditions and Assessment

Setting a Risk Condition, and Seeing the Default Risk

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

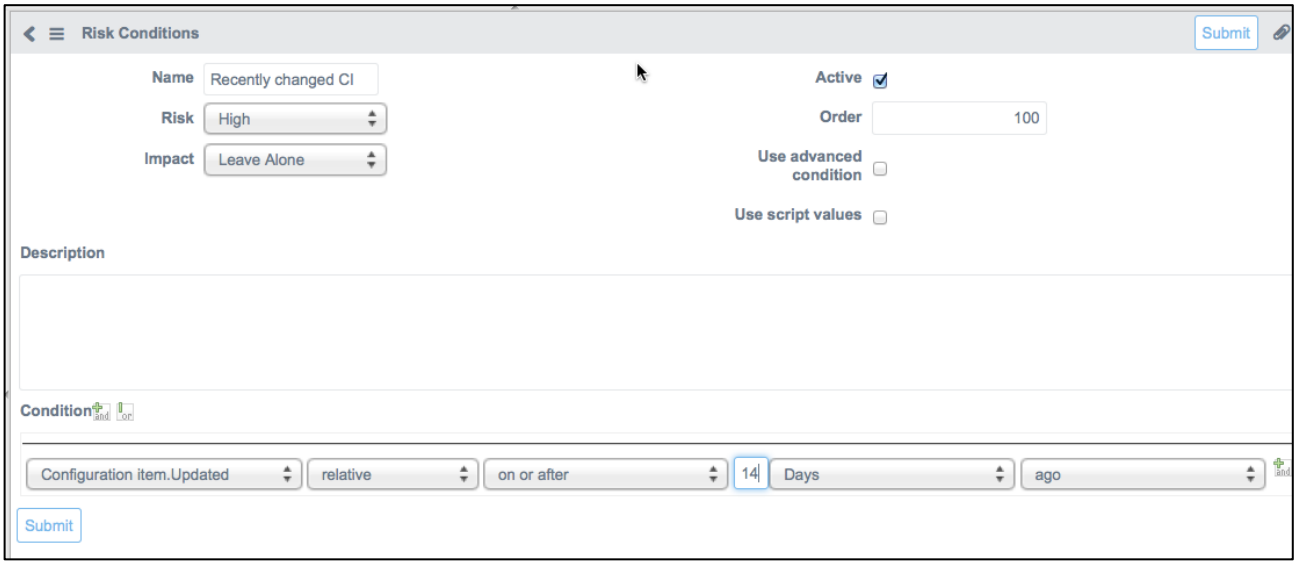
1. Navigate to **Change > Administration > Risk Conditions**. Click **New**.



©2014 ServiceNow, Inc. All rights reserved.

2. Find the appropriate fields on the form, fill in the following information, and click **Submit**:

   Name: **Recently changed CI**
   Risk: **High**
   Condition: **Configuration item.Updated - relative - on or after - 14 - Days – ago**



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

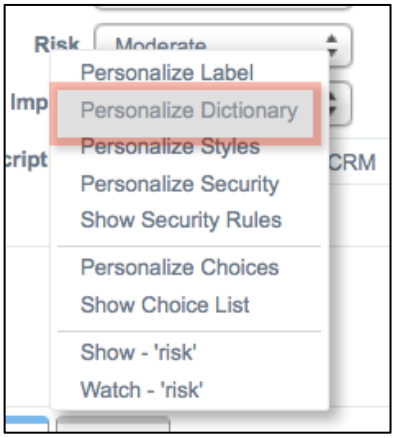
4. Find the appropriate fields on the form, fill in the following information, click the **menu** button, then choose **Save**.

   Configuration item: **Sales Force Automation**
   Short description: **Review options for our CRM**

5. Now let's make the risk field read only, so only the risk calculation system can update the value.

©2014 ServiceNow, Inc. All rights reserved.

6. Right-click the **Risk** label, and choose **Personalize Dictionary**.

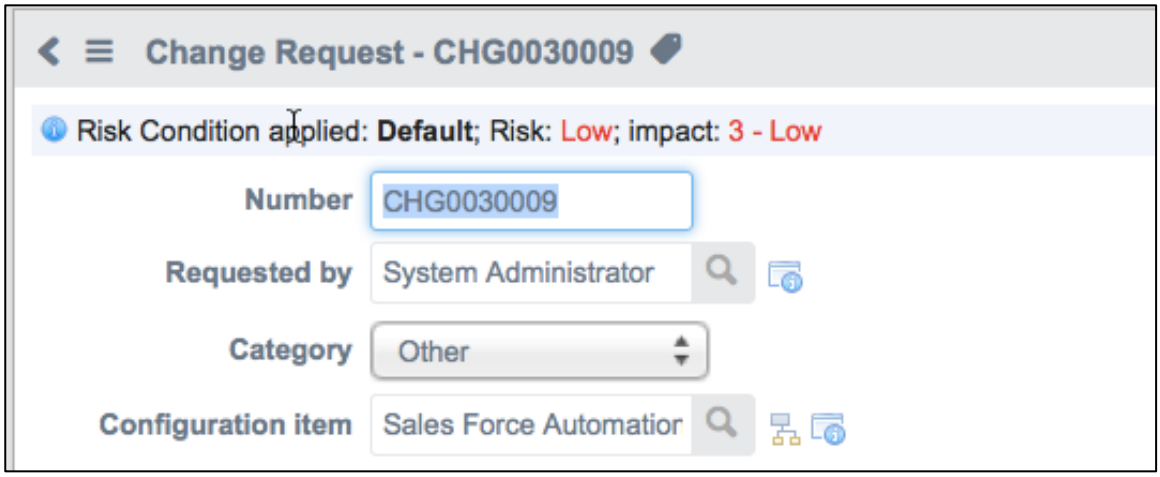


7. Select the **Read only** option, and click **Update**.

8. Click the **Calculate Risk** button.

Lab Success Verification

1. You should receive a message saying:
   Risk Condition applied: Default; Risk: Low; impact: 3 – Low.

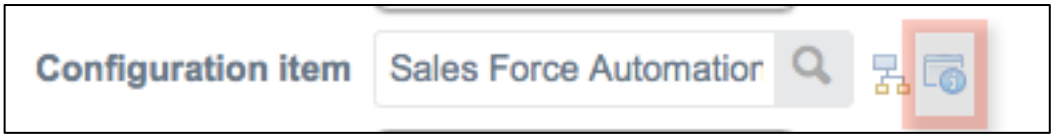


2. You should not be able to change the **Risk** field yourself, and it should be set to **Low**.

©2014 ServiceNow, Inc. All rights reserved.

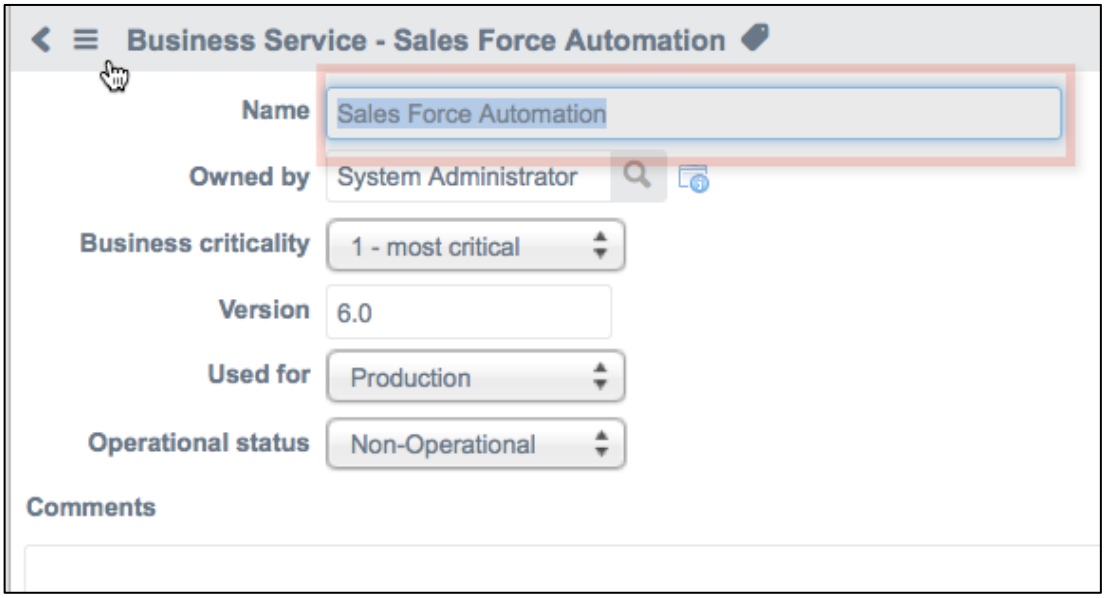
Changing a CI to Apply the Risk Condition

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



2. Change the following field, then click **Update**.

   Owned by: **System Administrator**



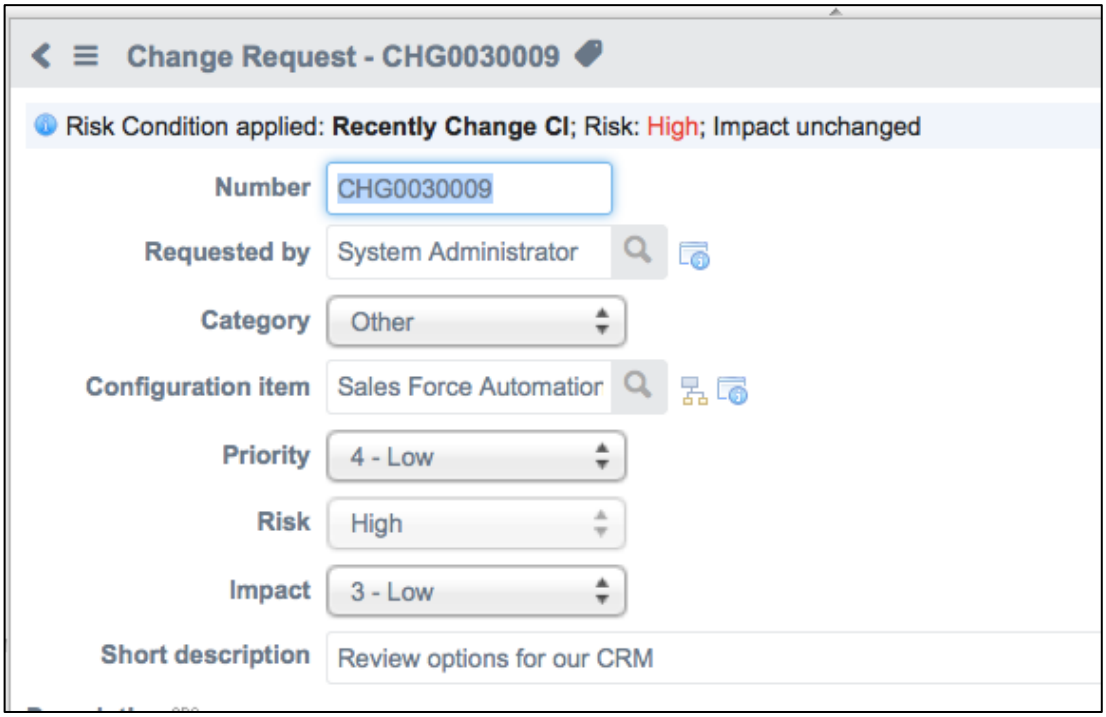
3. Click the **Calculate Risk** link at the bottom of the Change form.

©2014 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. You should receive a message saying:

   Risk Condition applied: **Recently changed CI**; Risk: **High**; **Impact unchanged**.

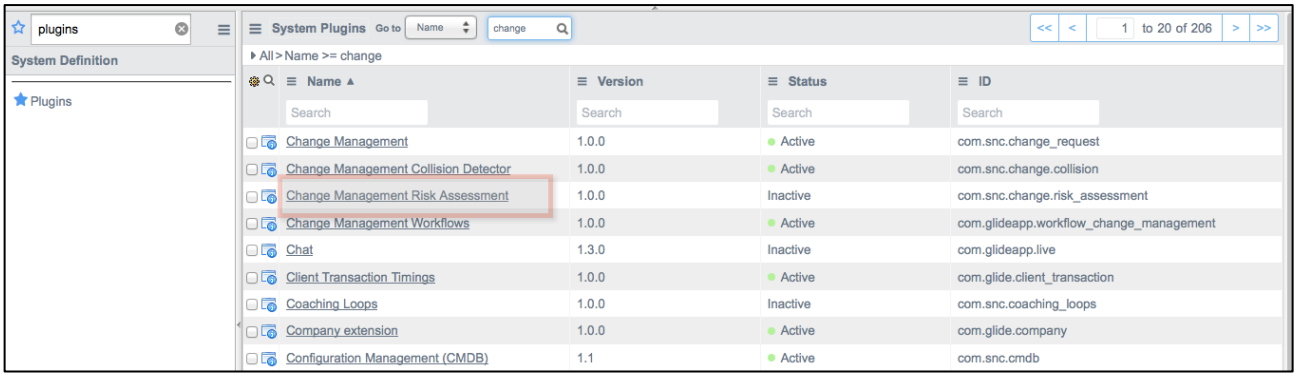


©2014 ServiceNow, Inc. All rights reserved.

Risk Assessment

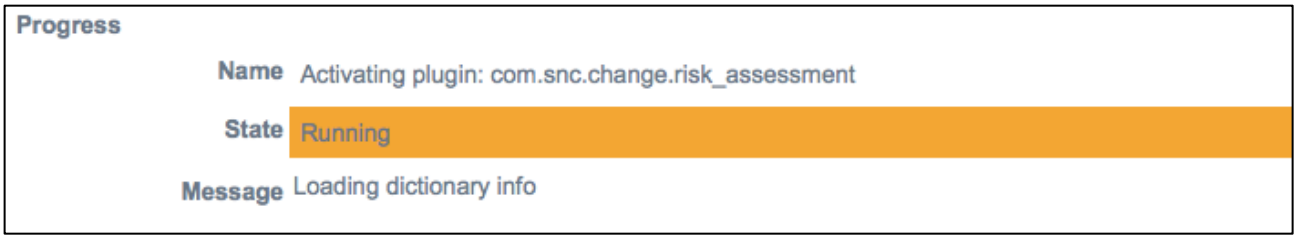
1. Navigate to **System Definition > Plugins**. In the search box, type in **Change** and press **Enter**.

2. Click **Change Management Risk Assessment**.



3. Click **Activate/Upgrade**, choose **Load demo data**, and click **Activate**.

4. Wait while the plugin loads, until you receive the message, **Plugin activated/upgraded with demo data**.

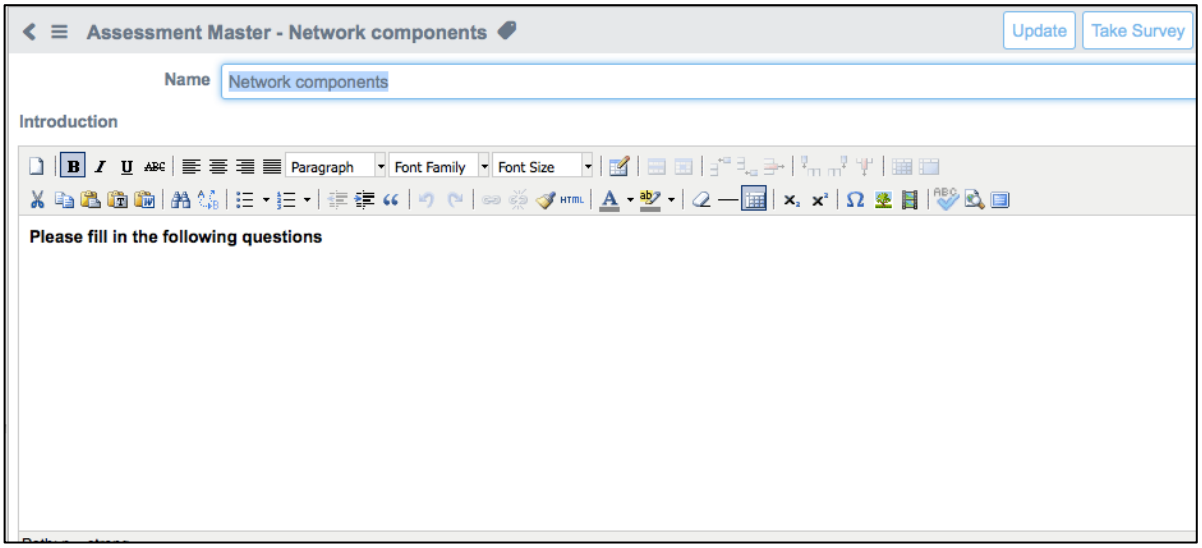


5. Navigate to **Change > Administration > Risk Assessment**, and click **New**.

©2014 ServiceNow, Inc. All rights reserved.

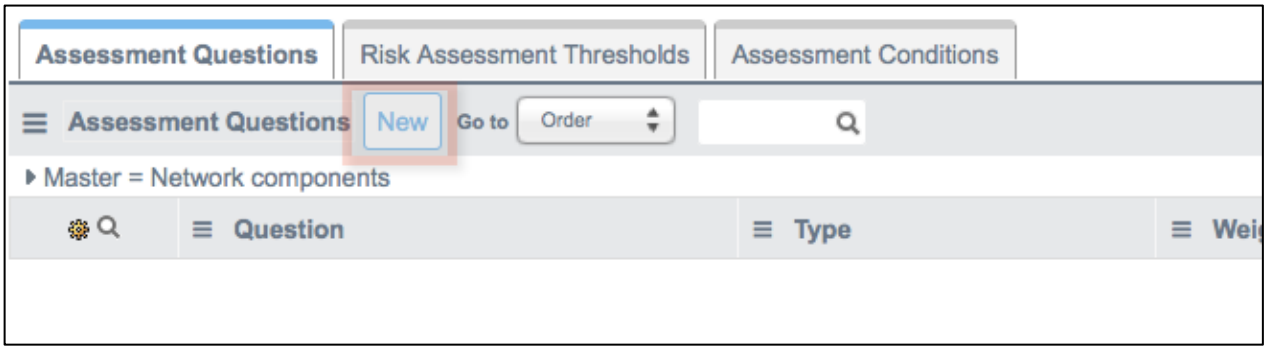
6. Find the appropriate fields on the form, fill in the information below, click the **menu** button, then choose **Save**.

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



7. Under **Assessment Questions**, click **New**. Find the appropriate fields on the form, fill in the information below, click the menu button, then choose **Save**.

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

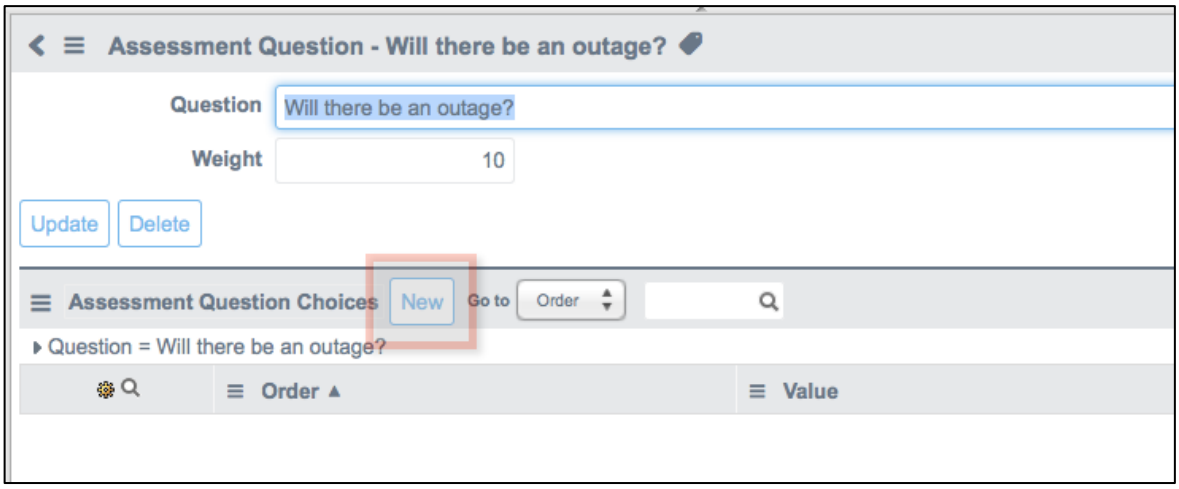


8. Under **Assessment Question Choice**, click **New**.

®2014 ServiceNow, Inc. All rights reserved.

9. Find the appropriate fields on the form, fill in the information, then click **Submit**.

   Value: **Yes**
   Score: **1**



10. Under **Assessment Question Choice**, click **New**.

11. Find the appropriate fields on the form, fill in the information below, then click **Submit**.

    Value: **No**
    Score: **0**

12. Click **Update** to return to the **Assessment Master**.

13. Under **Assessment Questions**, click **New**.

14. Find the appropriate fields on the form, fill in the information below.

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

15. Click the **menu** button, and choose **Save**.

©2014 ServiceNow, Inc. All rights reserved.

16. Under **Assessment Question Choice**, click **New**.

17. Find the appropriate fields on the form, fill in the information below, and click **Submit**.

    Value: **Yes**
    Score: **0**

18. Under **Assessment Question Choice**, click **New**.

19. Find the appropriate fields on the form, fill in the information below, and click **Submit**.

    Value: **No**
    Score: **1**

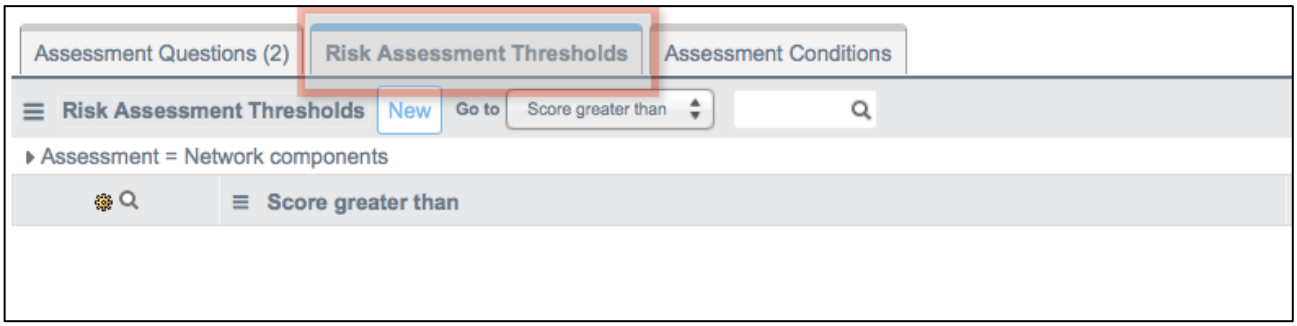
20. Click **Update** to return to the **Assessment Master**.

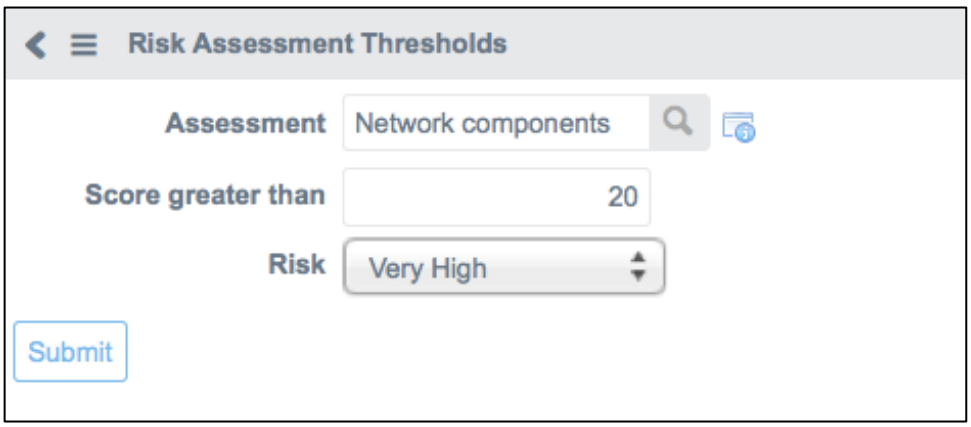
21. Under **Risk Assessment Thresholds**, click **New**.

®2014 ServiceNow, Inc. All rights reserved.

22. Find the appropriate fields on the form, fill in the information below, and click **Submit**.

    Score greater than: **20**
    Risk: **Very High**



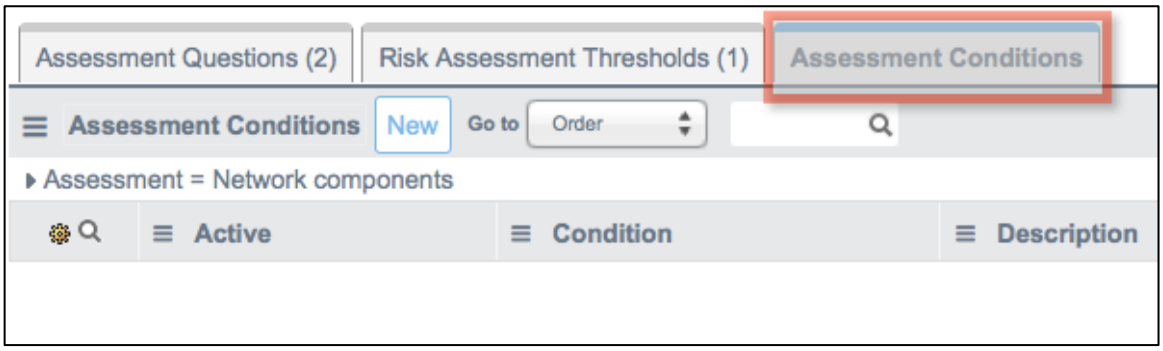


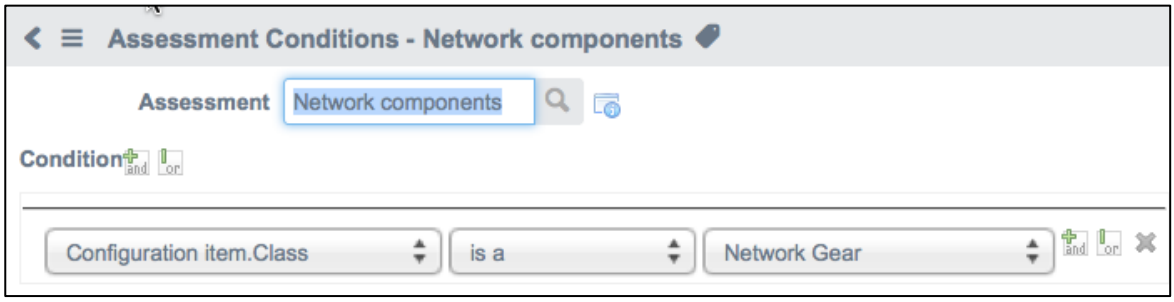
23. Under **Assessment Conditions**, click **New**.

©2014 ServiceNow, Inc. All rights reserved.

24. Find the appropriate fields on the form, fill in the information below, and click **Submit**.

    Condition: **Configuration item.Class - is a - Network Gear**
    *Ensure **is a** is used, not **is**.*
    Active: **<checked>**
    Order: 10





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

26. Find the appropriate fields on the form, fill in the information below, click the **menu** button, and choose **Save**.

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

27. Click the **Fill Out Risk Assessment** link at the bottom of the form.

©2014 ServiceNow, Inc. All rights reserved.

28. Choose the following options, and click **Submit**.

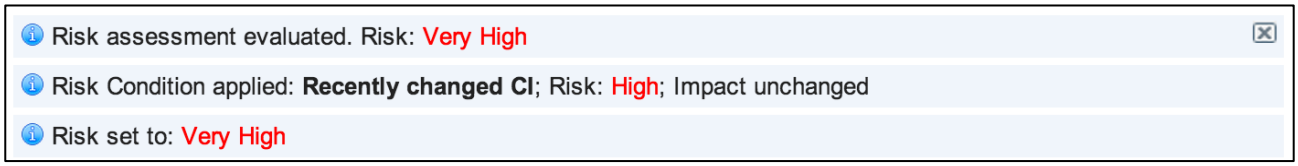
    Will there be an outage?: **Yes**
    Is this change recommended by the vendor?: **No**

29. Click **Execute Risk Calculation**.

Lab Success Verification

1. You should receive a message saying:

   Risk assessment evaluated. Risk: **Very High**
   Risk Condition applied: **Recently changed CI**; Risk: High; Impact unchanged
   Risk set to: Very High



©2014 ServiceNow, Inc. All rights reserved.

Lab Goal

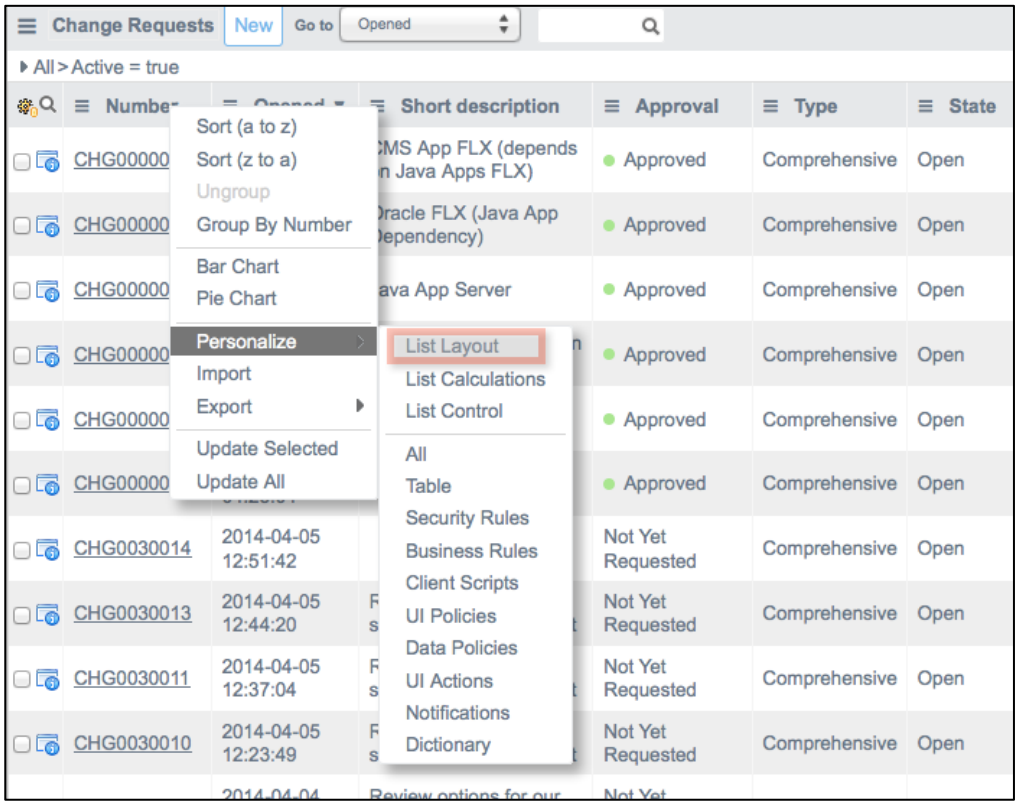
A typical change process will ask for approval from whoever manages the CI specified in the Change Request. Lets extend that to include the Change Advisory Board who looks after the Business Service.

Use the power of the CMDB to automate who will be working with tasks, and who will approve the change request.

Lab 3
Conflict detection and service identification

Perform Risk-Based Approval

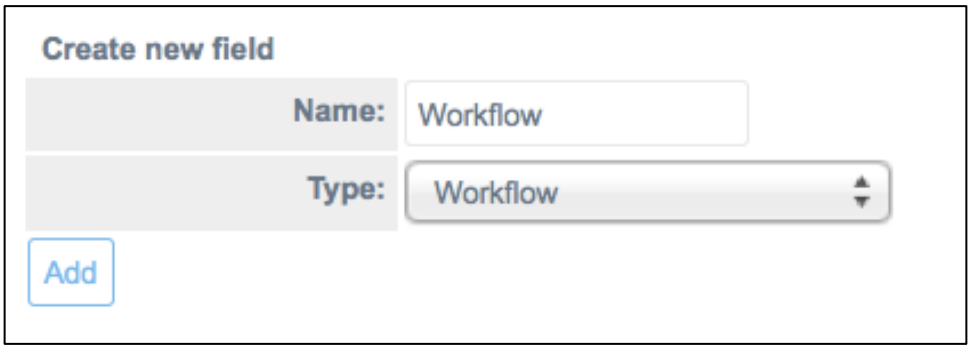
1. Navigate to **Change > Open**.
2. Right-click on the column headers, and choose **Personalize > List Layout**.



©2014 ServiceNow, Inc. All rights reserved.

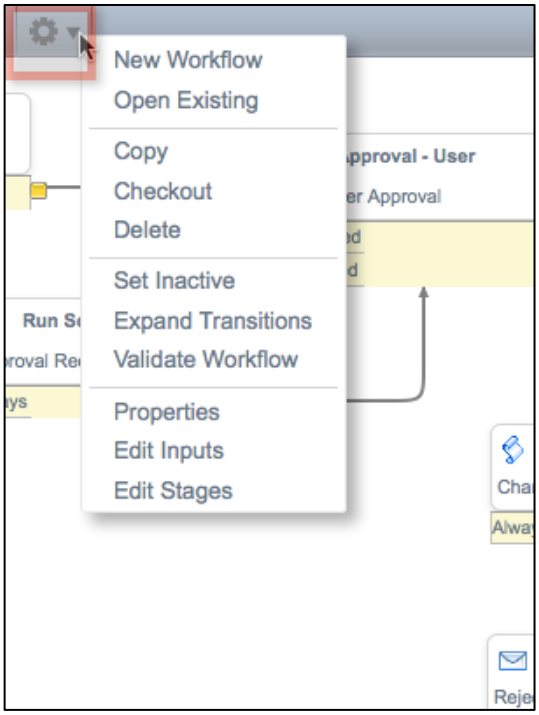
3. Under **Create new field**, fill in the information below. Choose **Add**, then **Save**.

   Name: **Workflow**
   Type: **Workflow**



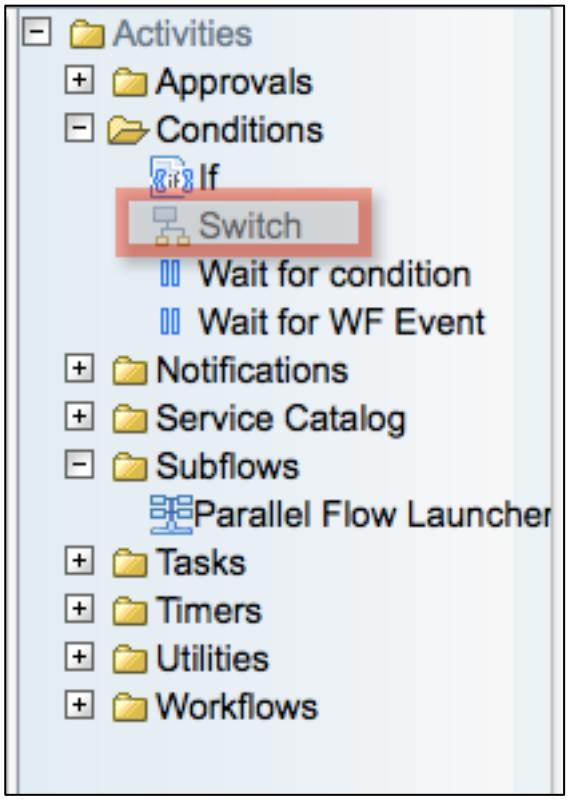
4. Navigate to **Workflow > Workflow Editor**. Click **Open**. Choose **Comprehensive Change**.

5. Click the **gear** icon, select **Checkout**.



®2014 ServiceNow, Inc. All rights reserved.

6. Expand the Conditions group, and drag the **Switch** activity onto the left of the screen, underneath the **Run Script/Approval Requested** activity.

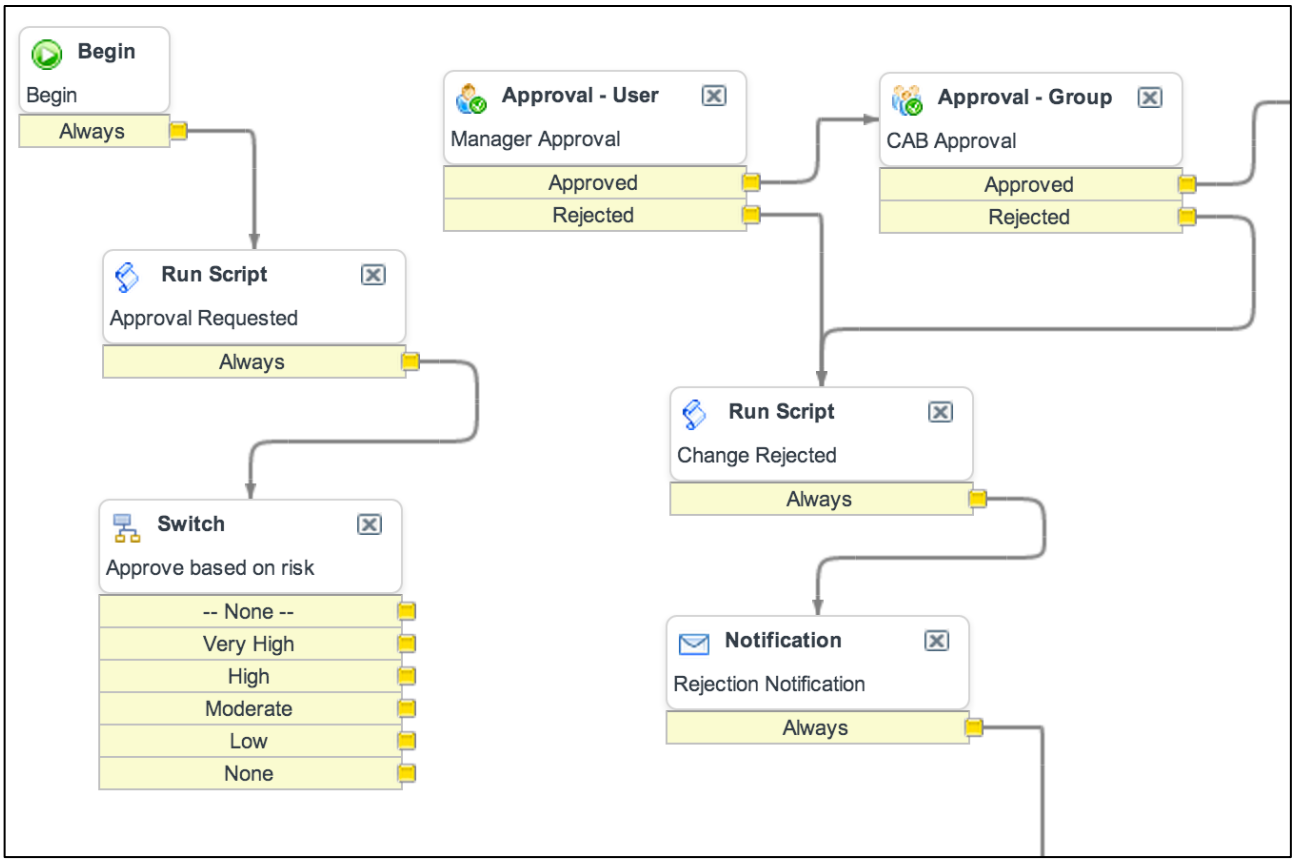


7. Set the following fields:

   Name: **Approve based on risk**
   Type: **Field**
   Field: **Risk**

©2014 ServiceNow, Inc. All rights reserved.

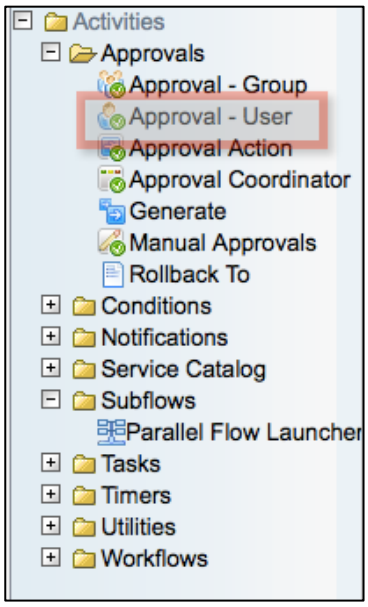
8. From the Run Script activity, move the connection to the Switch activity, and NOT to the Approval User activity.



9. Click the [**X**] on the **Manager Approval** activity to remove it.

©2014 ServiceNow, Inc. All rights reserved.

10. Expand the **Approvals** group, and drag the **Approval - User** activity on to the screen, underneath the **Switch** activity.



11. Set the following fields, and click **Submit**.

    Name: **Owner approval**
    Advanced: **<checked>**
    Additional approvers script:

```
answer = [];
var gr = new GlideRecord('task_cmdb_ci_service');
gr.addQuery('task', current.sys_id);
gr.query();
while (gr.next()) {
    answer.push(gr.cmdb_ci_service.owned_by + '')
}
```

12. Edit the **CAB Approval** activity, by doubling-clicking it.

©2014 ServiceNow, Inc. All rights reserved.

13. Set the following fields, and click **Submit**.

    Name: **Owner approval**
    Groups: **<empty>**
    HINT: Click the **padlock** icon to expand the field. Highlight the **CAB Approval** entry, and click the x.
    Advanced: **<checked>**
    Additional groups script:

```
answer = [];
var gr = new GlideRecord('task_cmdb_ci_service');
gr.addQuery('task', current.sys_id);
gr.query();
while (gr.next()) {
    answer.push(gr.cmdb_ci_service.change_control + '');
}
```

14. Create lines from the **Switch / Approve on Risk** activity:

    Drag from – **None --** to **Approval - User** / **Owner approval**
    Drag from **Very High** to **Approval - User** / **Owner approval**
    Drag from **High** to **Approval - User** / **Owner approval**
    Drag from **Moderate** to **Approval - Group / CAB Approval**
    Drag from **Low** to **Run Script / Change Approved**
    Drag from **None** to **Run Script / Change Approved**

15. Create lines from the **Approval - User / Owner approva**l activity:

    Drag from **Approved** to **Approval - Group / CAB Approval**
    Drag from **Rejected** to **Run Script / Change Rejected**

16. For each of **Create Task** activities, perform these actions. There are 4 in total. Double click each one to edit the activity, set the following fields, and click **Submit**.

    Advanced: **<checked>**
    Advanced Script: **task.assignment_group = current.cmdb_ci.support_group**

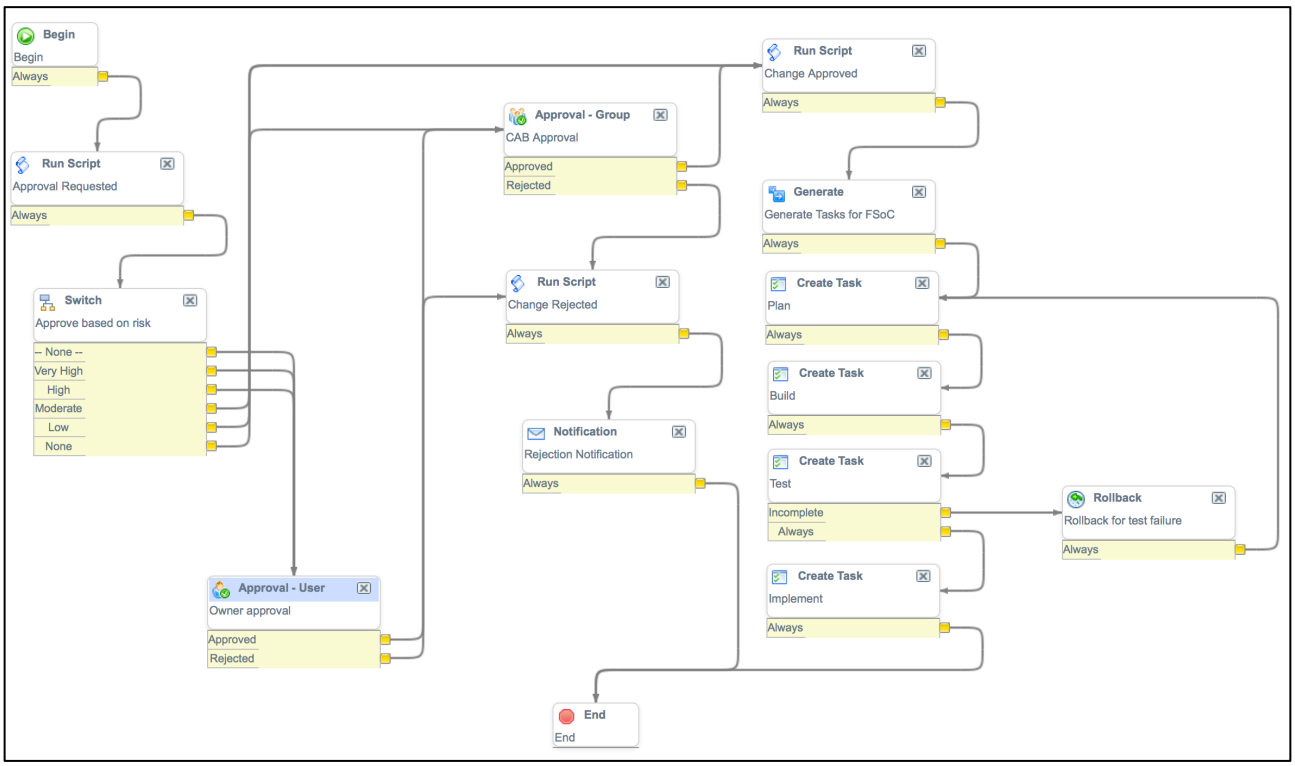
©2014 ServiceNow, Inc. All rights reserved.

17. Drag the boxes to adjust the lines to ensure the diagram is clear.

18. Click the **gear** icon, and select **Publish**.

Lab Success Verification

1. Your screen should look like this:



2. Close the workflow window to return the usual interface.

3. Navigate to **Change > Create New**, and set the following fields:

   Configuration item: **SAP AppSRV02**
   Short description: **Decommissioning of SAP server, due to reduced load**
   Planned start date: **2014-05-17 01:00:00**
   Planned end date: **2014-05-17 02:00:00**

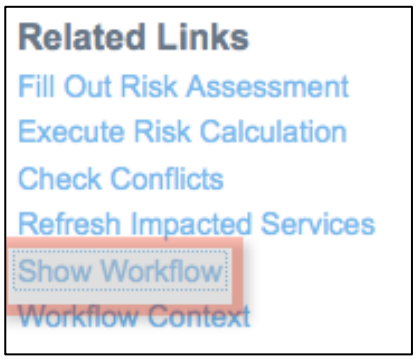
©2014 ServiceNow, Inc. All rights reserved.

4. Click the menu icon, and choose **Refresh Impacted Services**. Review the Impacted Services.

5. Click on **Execute Risk Calculation**. Ensure that **Risk** is **High**.

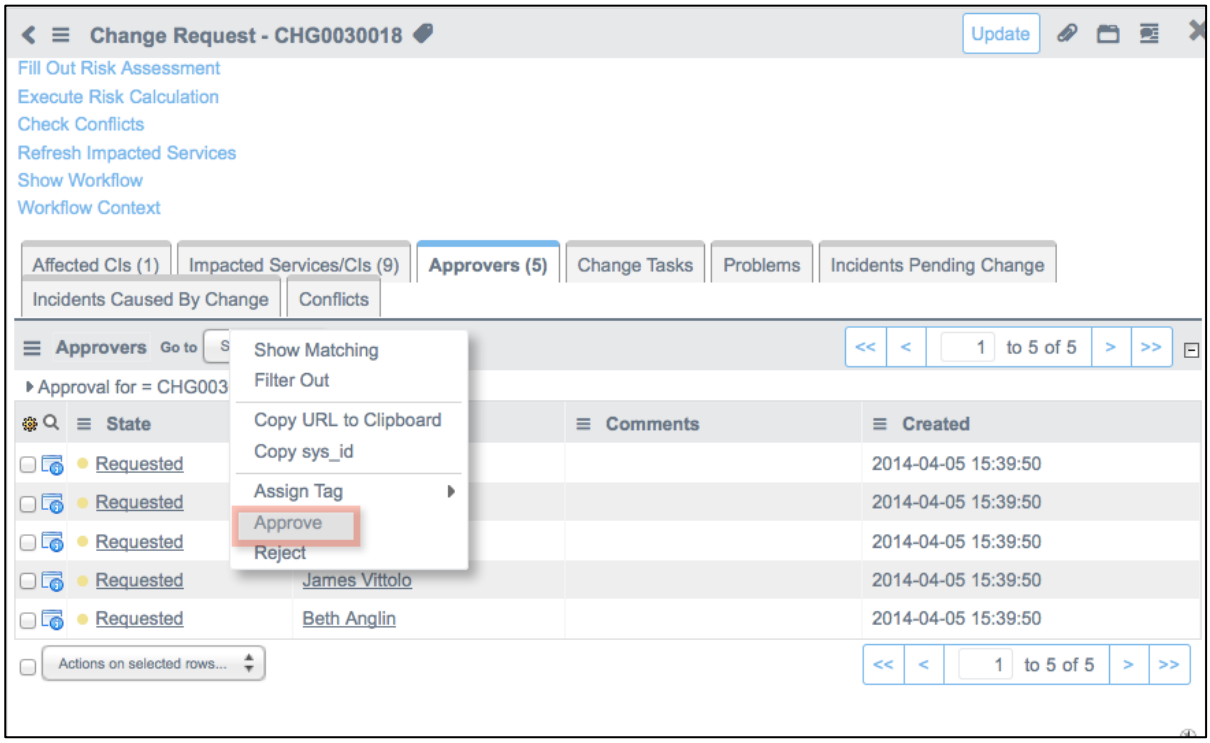
6. Click **Request Approval**.

7. Click **Show Workflow** to visualize the flow. When done, close the window.



®2014 ServiceNow, Inc. All rights reserved.

8. See in the Approvers tab that **James Vittolo** has been **Requested**. Right-click on the row and choose **Approve**.



9. Click **Show Workflow** to visualize the flow. When done, close the window.

10. See the Software group has been used as the **CAB** and all members have been requested. Right-click on **David Loo** and choose **Approve**.

11. Click **Show Workflow** to visualize the flow. When done, close the window.

12. Notice that four tasks have been created, and assigned to the **IT Securities** group.

13. For more validation, create another new Change, using the **bond_trade_ny** CI. It should follow a different flow.

©2014 ServiceNow, Inc. All rights reserved.