knowledge15
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Asset 101:

The Secret Life of Company Assets

Ben Sweetser & Bryan Boyle

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

Lab 1.1 Asset Creation

Though the lifecycle of an Asset truly begins at the request, that is not always where an Asset begins its tracked life in ServiceNow. You may create them manually, import them from a procurement or inventory system, or discover active items on your network. This lab explains the ways to create an Asset.

This lab uses supporting files that you can download as a zip file from **https://servicenow.box.com/k15asset101**.

In this lab, you log in or impersonate these users:

Username	Name	Password
admin	System Administrator	Knowledge15
sam.isphun	Sam Isphun	Knowledge15
bertie.luby	Bertie Luby	Knowledge15

Log on to Your Training Instance

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

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Create an Asset Manually

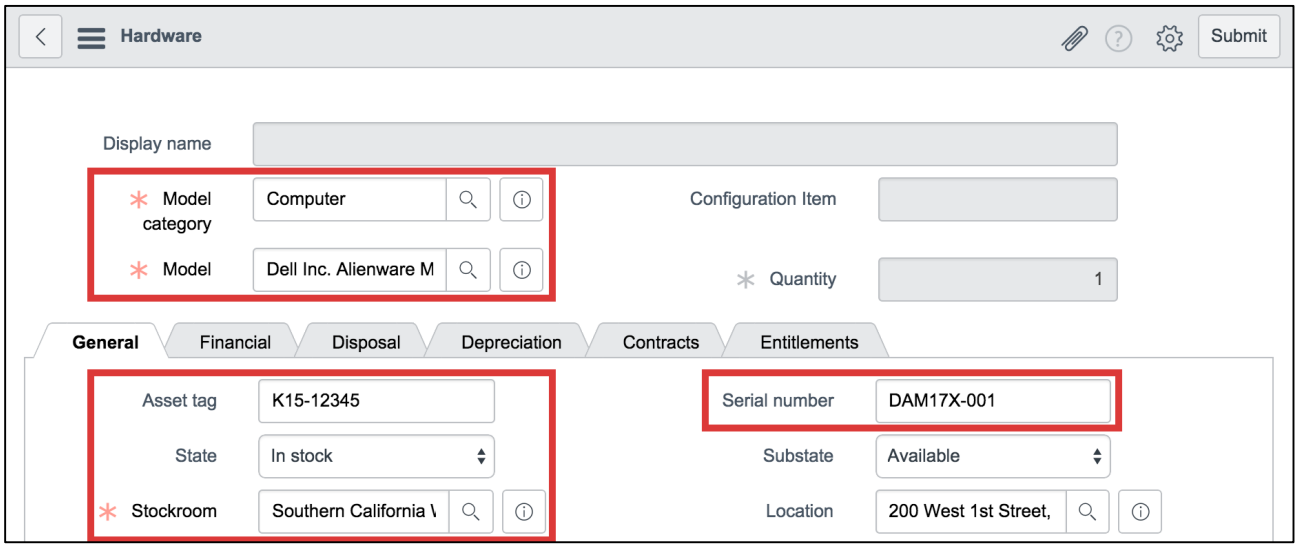
One method to add Assets is manually. In this lab, you add two new assets, one that is in stock and another that is put into use right away.

1. As System Administrator, navigate to **Asset > Portfolios > Hardware Assets**.

2. Click **New**.

3. Complete the form as follows:

   Model category: **Computer**
   Model: **Dell Inc. Alienware M17x**
   Asset tag: **K15-12345**
   Serial number: **DAM17X-001**
   State: **In stock**
   Stockroom: **Southern California Warehouse**



4. Click the form header menu and **Save**.

5. What is the Display name? What is the Configuration Item?

   Note: The default name for the Configuration Item created from an Asset is the Model. Discovery sources update this with the hostname of the computer.

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6. Repeat this process to create another asset with details as follows:

   Model category: **Computer**
   Model: **Dell Inc. Alienware M17x**
   Asset tag: **K15-23456**
   Serial number: **DAM17X-002**
   Assigned to: **Amelia Caputo**

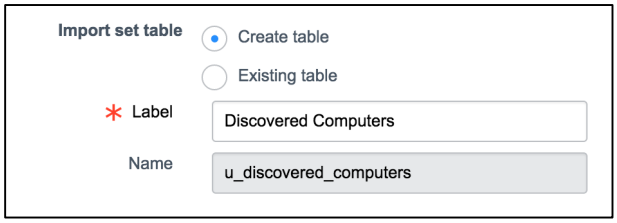
7. Click **Submit**.

"Discover" Assets

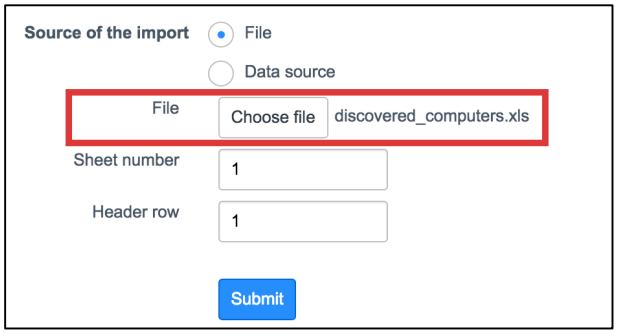
Discovery sources capture information about items that are operational in your network. Because of this, it does not directly create Assets. It creates Configuration Items (CIs). Regardless of the discovery source used, when you bring the information into ServiceNow, it updates resources that already exist and creates new records for those that do not already exist. In this section, you import some simple discovered data.

1. Navigate to **System Import Sets > Load Data**.

2. For the **Import set table**, select **Create table** and Label it **Discovered Computers**.



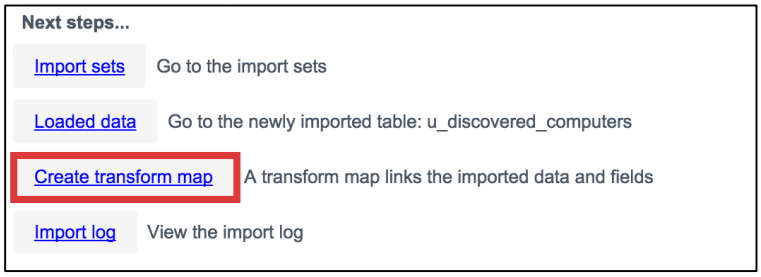
3. Under **Source of the import**, select **Choose file** and find the **discovered_computers.xls** file included with the lab files.



4. Click **Submit**.

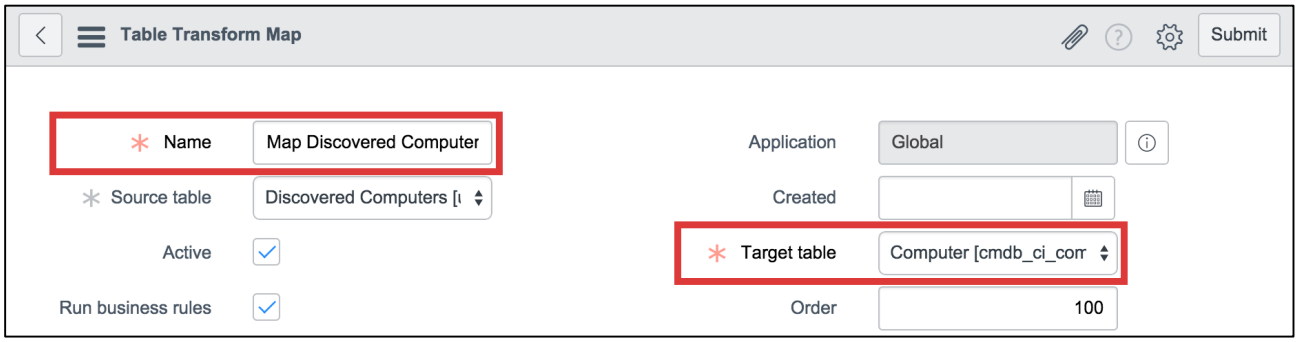
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5. Under **Next steps…**, click **Create transform map**.



6. Complete the Table Transform Map form as follows:

   Name: **Map Discovered Computers**
   Target table: **Computer [cmdb_ci_computer]**

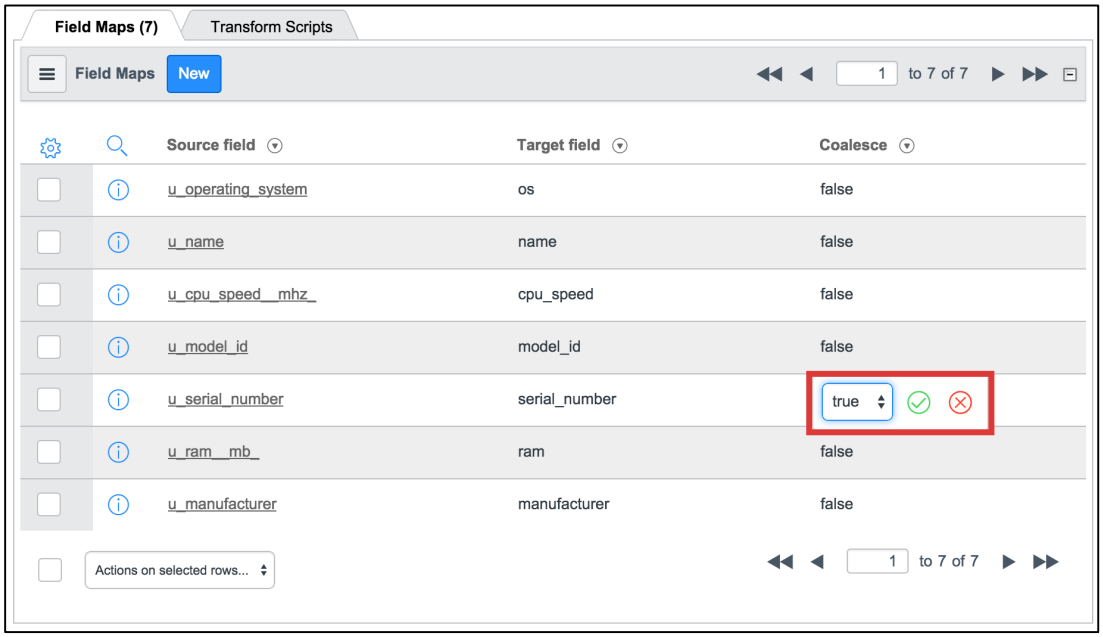


7. Click the form header menu and **Save**.

8. Under Related Links, click **Auto Map Matching Fields**.

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9. In the **Field Maps** related list, find **u_serial_number** and set Coalesce to **true**.



Note: Coalesce identifies the field as a value to match imported data with records that already exist in ServiceNow. When it matches, the import updates the existing record.

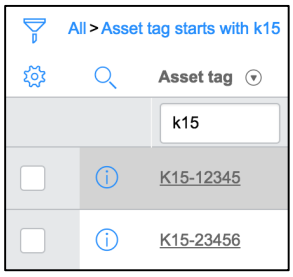
10. Click the green check mark to commit the Coalesce value.

11. Under Related Links, click **Transform**. This opens a window to select what transforms to use.

12. Click **Transform**.

13. Navigate to **Asset > Portfolio > Hardware Assets**.

14. Find assets with an Asset tag that **starts with K15**.

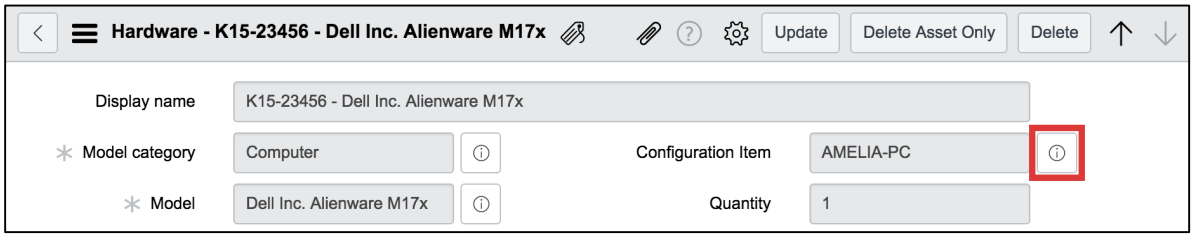


15. Open the record with the Asset tag **K15-23456**.

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16. What is the Configuration Item?

17. Click the **reference icon** next to the **Configuration Item** field.



18. Compare the information in the **Computer** form with the imported data in the **discovered_computers.xls**.

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Lab Goal

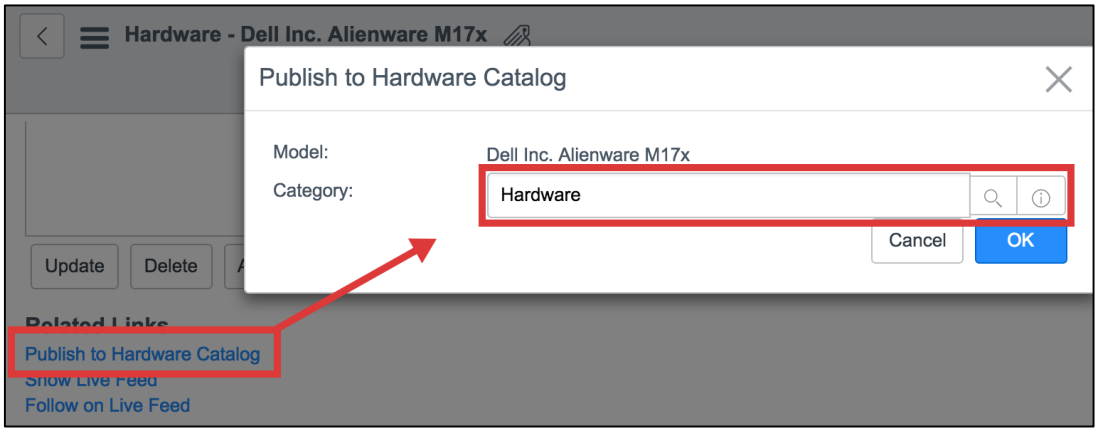
To manage the complete asset lifecycle more effectively in ServiceNow, leverage the Service Catalog to start management of the lifecycle from the request. This lab explains how to leverage the Service Catalog as part of the Asset Lifecycle.

Lab 2.1 Request and Procure

Make a Model Available to Request

Models act as the connector between assets, CIs, and catalog items. To extend management to the request, publish the Model to a catalog.

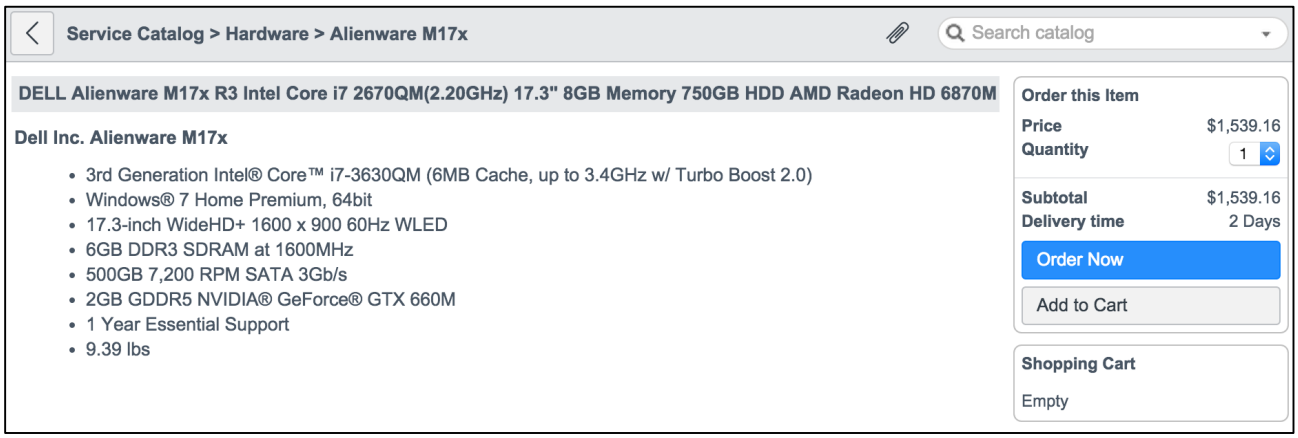
1. Navigate to **Product Catalog > Product Models > Hardware Models**.
2. Find and open the **Alienware M17x** record.
3. Notice the **Short description** and **Cost** in the General form section and the **Description** in the Product Catalog form section are populated. These are used in the Service Catalog.
4. Under Related Links, click **Publish to Hardware Catalog**.
5. For the Category, enter **Hardware**.



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6. Click **OK**. You are now in the Service Catalog record for the Alienware M17x.
7. Set the Workflow to **Deploy Asset**.

   Note: The Workflow field is available to Users with the Role **catalog_admin**.
8. Click the form header menu and **Save**.
9. Click **Try It**.
10. View the catalog entry.



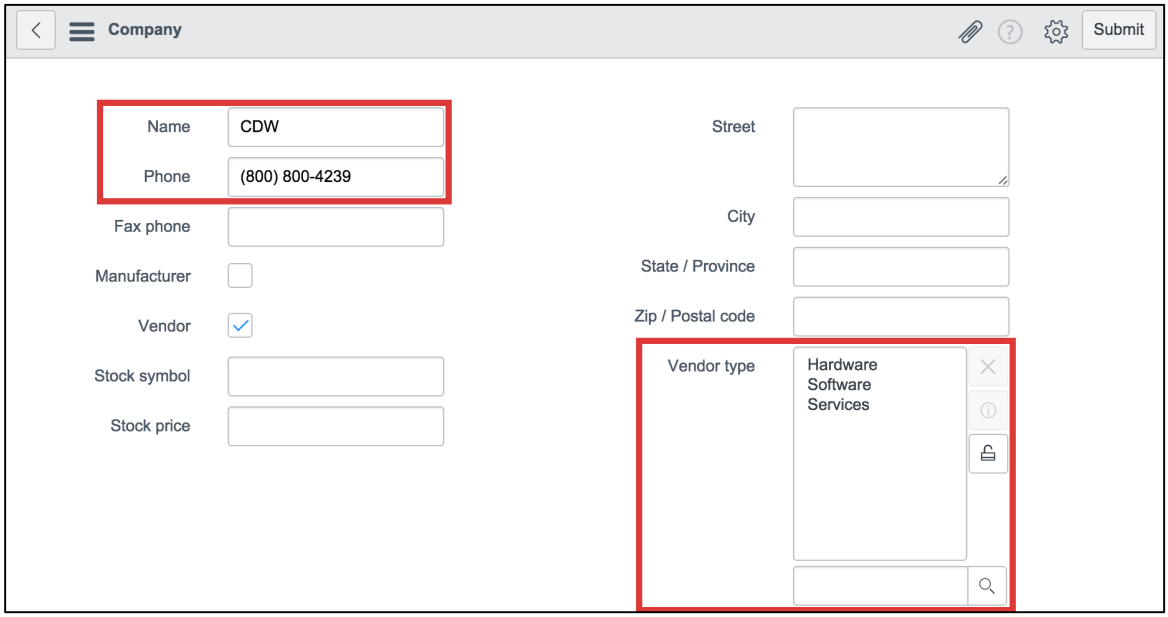
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Import Vendor Catalog Items

You do a lot of business with vendor CDW and want to quickly add some items from their catalog so you can select to purchase from them when you perform your procurement process. Before you can begin, you need to add CDW as a vendor in your instance. Then you want to import a spreadsheet provided by your vendor contact.

1. Navigate to **Product Catalog > Catalog Definitions > Vendors**.
2. Click **New**.
3. Complete the **Company** form as follows:

   Name: **CDW**
   Phone: **(800) 800-4239**
   Vendor type: click the lock and add **Hardware**, **Software**, and **Services**



4. Click **Submit**.
5. Navigate to **System Import Sets > Load Data**.

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6. Complete the form as follows:

   Import set table: **Create table**
   Label: **Vendor Catalog Items**
   Source of the import: **File**
   File: choose **cdw_vendor_cat_items.xls**

7. Click **Submit**.

8. Under **Next steps…**, click **Create transform map**.

9. Complete the Table Transform Map form as follows:

   Name: **Vendor Catalog Map**
   Target table: **Vendor Catalog Item [pc_vendor_cat_items]**

10. Click the form header menu and **Save**.

11. Under Related Links, click **Auto Map Matching Fields**.

12. Under the Field Maps related list, find **u_product_id** and set Coalesce to **true**. This matches import data to vendor items that already exist in the system.

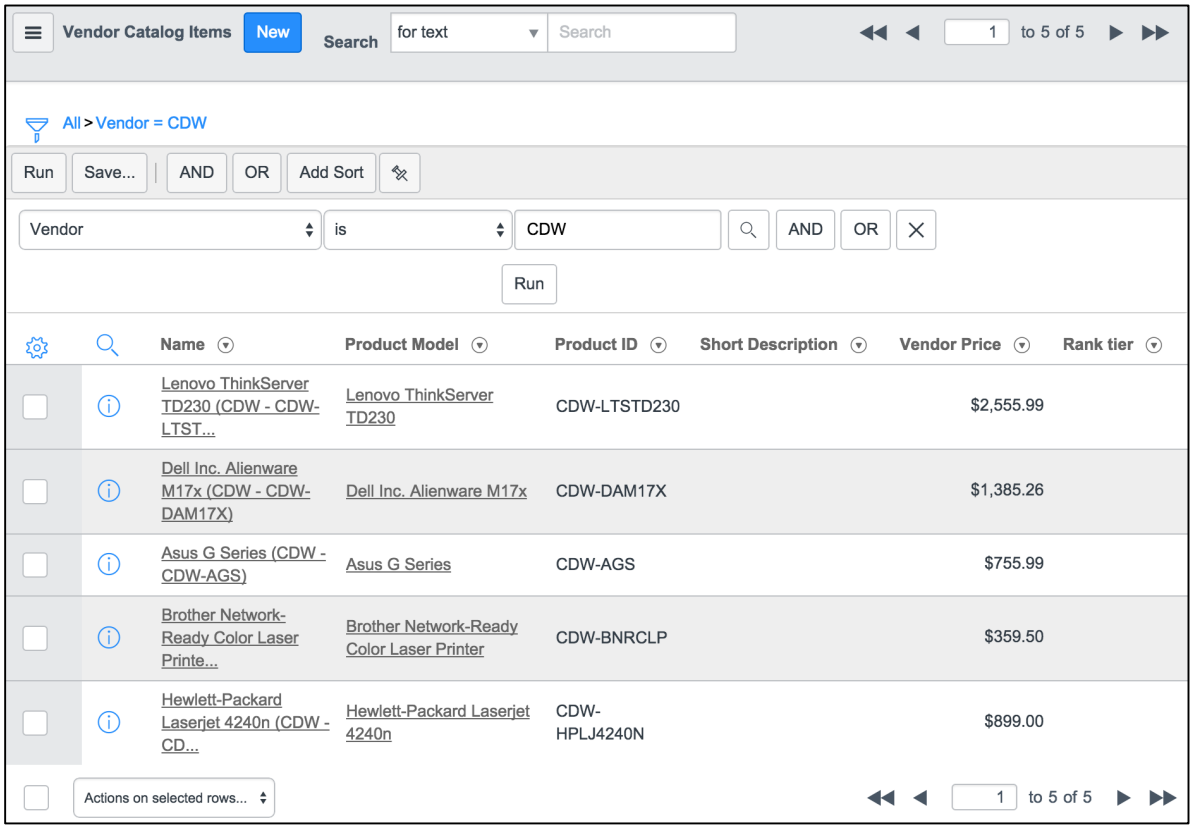
13. Under Related Links, click **Transform**. This opens a window that allows you to select what Transform maps to apply.

14. Click **Transform**.

15. Navigate to **Product Catalog > Product Models > Vendor Items.**

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16. Filter the list to only show items where the **Vendor | is | CDW**.



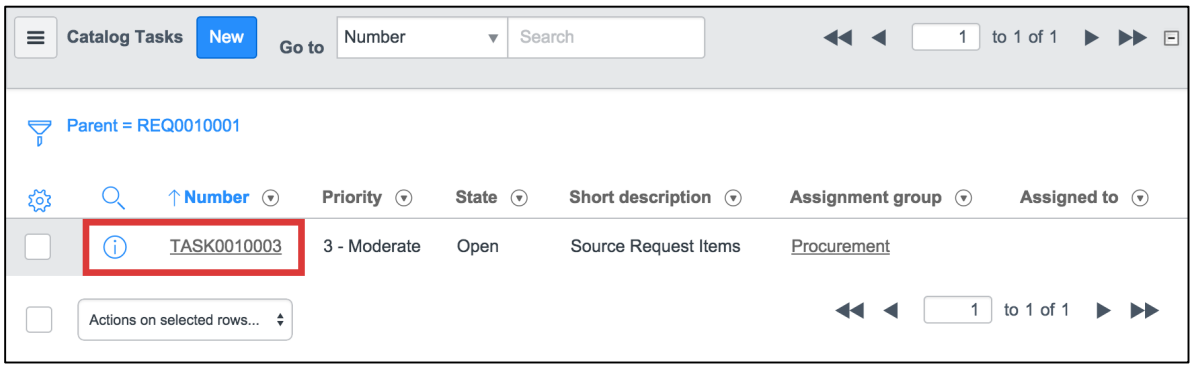
Source Assets

Assets need to come from somewhere. When the process you use to source assets is linked to your asset system, you can better leverage assets you already own. When your procurement process connects directly into your asset repository, you can manage the asset lifecycle more easily. In this section, you request a new computer and step through the process to source the new asset from a vendor.

1. Navigate to **Self-Service > Service Catalog**.
2. Select **Hardware**.
3. Select **Alienware M17x**.
4. Click **Order Now**.
5. Navigate to **Procurement > Requests > Requests**.

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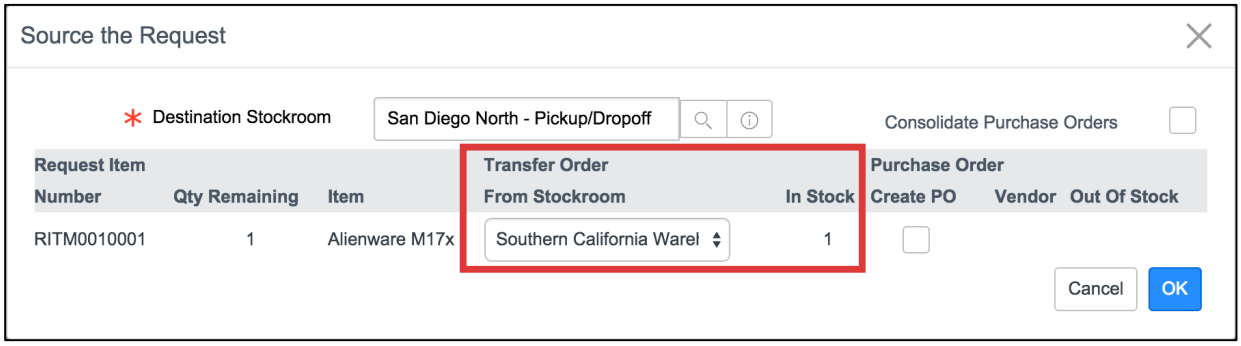
6. Find and open the newest request.
7. Under the **Approvers** related list, notice there is an approval that needs to be made. This is because the request is greater than $1000. This is a default that can be changed.
8. Right-click the requested approval and select **Approve** to override the approval.
9. Under the **Catalog Tasks** related list, click the **TASK Number**.



10. Click **Source Request**.



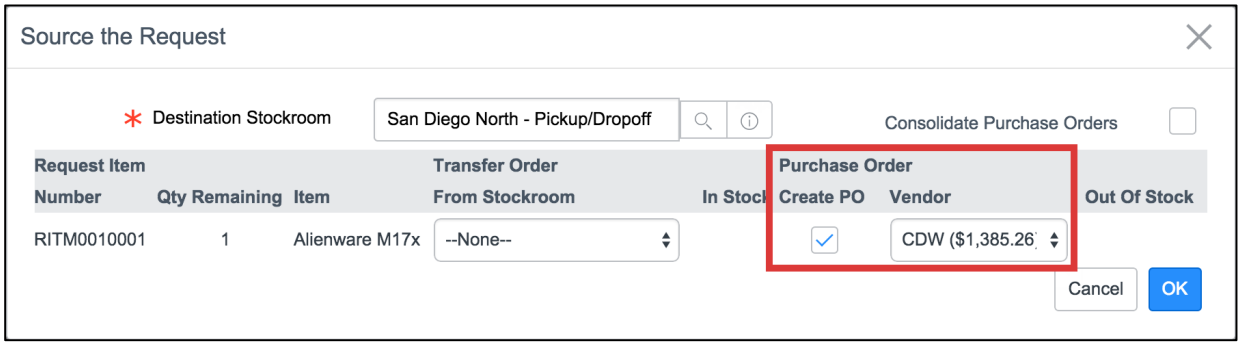
11. Set the Destination Stockroom to **San Diego North – Pickup/Dropoff**.
12. Under From Stockroom, select **Southern California Warehouse**. How many of these computers are already in stock?



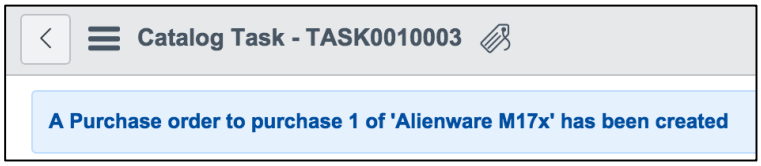
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13. You decide not to use the one in stock and instead want to order a new one. Select options as follows:

    Create PO: **checked**
    Vendor: **CDW ($1,385.26)**



14. Click **OK**.



15. Click **Update**.

16. Under the **Purchase Orders** related list, click the **PO Number**.

17. Click **Order**.

18. Under Related Links, click **Create assets prior to delivery**.

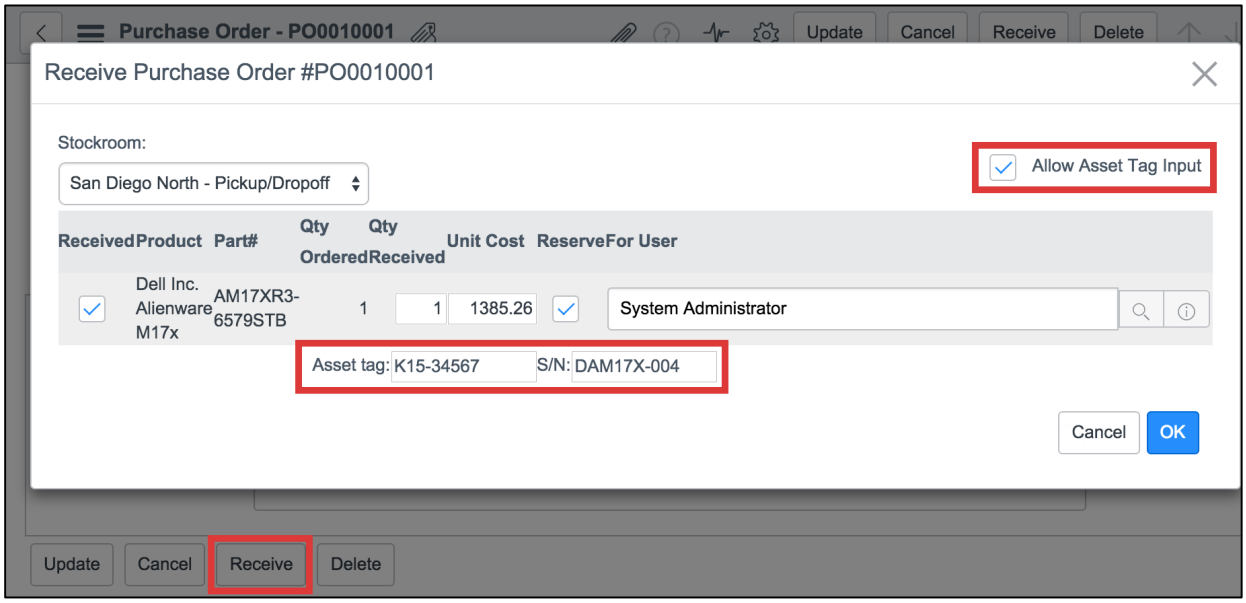
19. Under the **Assets** related list, what are the **State** and **Cost** of the asset?

20. Click **Receive**.

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21. Complete the Receive Purchase Order form as follows:

    Allow Asset Tag Input: **checked**
    Asset tag: **K15-34567**
    S/N: **DAM17X-004**



22. Click **OK**.

23. Click **Update**.

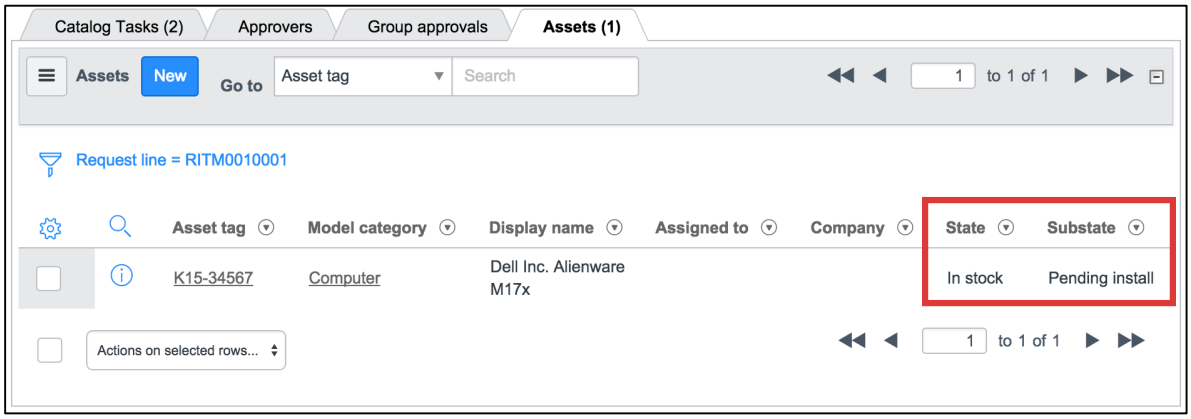
Prepare the Asset and Deploy It

The Deploy Asset Workflow assigned to the Catalog Item earlier contains steps to prepare the asset and deploy it. This simple workflow tracks the preparation and delivery process and updates the Asset record as needed.

1. Under the **Requested Items** related list, click the **RITM Number**.
2. Under the **Catalog Tasks** related list, click the **TASK Number**.
3. View the Description and then click **Close Task**.

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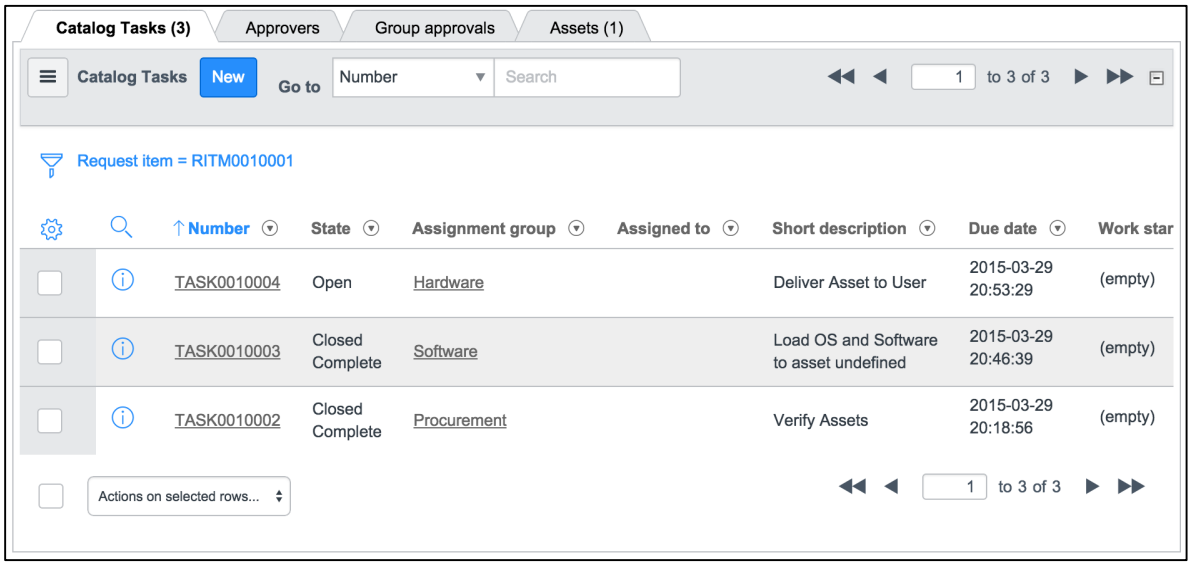
4. Under the **Assets** related list, what are the **State** and **Substate** for the Asset?



Note: This related list does not display on the Requested Item form by default, but has been added here for you to facilitate progress in the lab.

5. Under the **Catalog Tasks** related list, click the **TASK Number** for the Open Catalog Task. What is the description for this task?

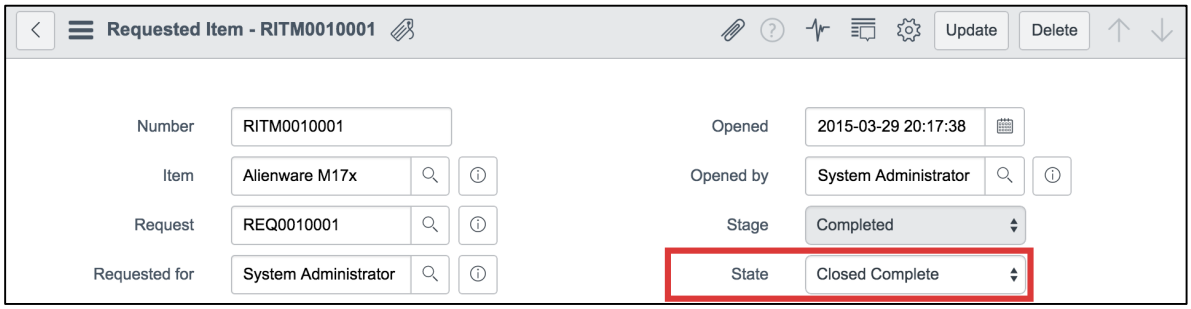
6. Click **Close Task**. What is the next Task to complete?



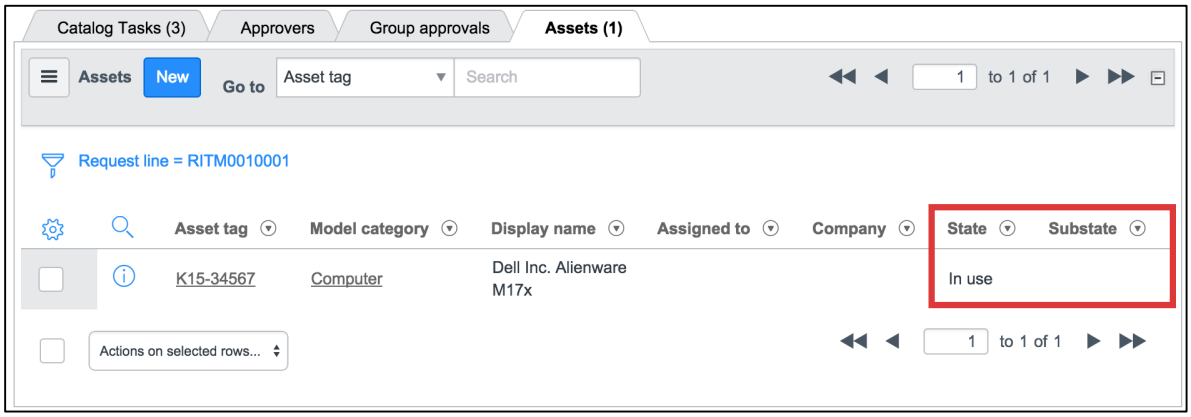
7. **Close** the Task to Deliver the Asset.

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8. What is the **State** of the Requested Item?



9. Under the **Assets** related list, what are the **State** and **Substate** of the Asset now?



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Lab Goal

People of many roles and backgrounds attend Knowledge. With this in mind, the lab now breaks into three directions. You may choose which is most applicable to you based on your role and experience.

Details for each of the three paths are listed below with the appropriate page number.

Lab 3.0 Choose Your Own Lab Adventure

Lab 3.1 System Administrator – page 18

System Administrators need to be familiar with the needs of Asset Managers so they can configure and leverage ServiceNow platform capabilities effectively, such as Workflows, to support Asset Management processes. The System Administrator path in the lab covers how a System Administrator can apply one of the processes used by the Desktop and Data Center Asset Manager in the other two paths. This includes Workflows to retire an asset when it has reached the end of its useful life along with an appropriate way to launch this Workflow.

Lab 3.2 Desktop Asset Manager – page 34

This path covers all end user devices and looks at the process as it relates to the end user as well as the Asset Manager. The process begins with a user who is scheduled for a device refresh. The user begins this process when he notices that his device is scheduled for retirement and accesses the Service Catalog to request his new device. Then the Asset Manager handles the lifecycle processes to procure the new device and properly retire the old device with the process set up by the System Administrator.

Lab 3.3 Data Center Asset Manager – page 44

While there are similarities between desktop and data center asset management, there are subtle differences. This path explores those differences from the request through the retirement.

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Lab Goal

This path in the lab is for System Administrators. If you have not taken the System Administration course or do not have equivalent experience, consider the other paths.

This process uses a Change Request to track all the steps in the retirement of an asset.

Lab 3.1
System Administrator

Load Update Set

An Update Set with the foundation for the Asset Retirement is available with the supporting materials to get you started. In this section, you load the update set that contains these updates:

- **Reason** field added to the Change Request form
- **Retire asset** added as a choice option for the **Reason** field
- A Condition added to the Routine Change Workflow so it does not run when the Reason for the Change Request is Retire asset
- A new Workflow called Retire Asset with the start of the process completed:
  - Auto-approval for the routine change
  - Tasks to back up user data and wipe the drive
  - Paths for what to do with the asset if it is leased or purchased

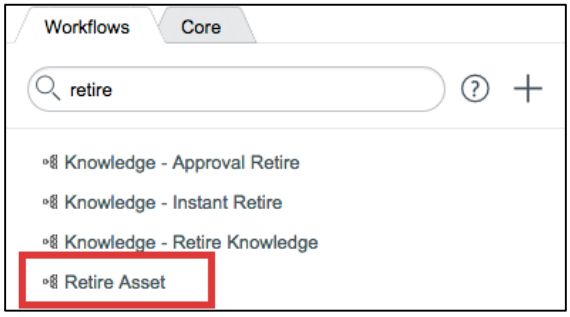
1. In the supporting files, find **AssetRetireSysAdmin.xml**.
2. Navigate to **System Update Sets > Retrieved Update Sets**.
3. Under Related Links, click **Import Update Set from XML**.
4. Click **Choose File** and select the **AssetRetirement.xml**.
5. Click **Upload**.
6. Click **AssetRetireSysAdmin**.
7. Click **Preview Update Set**.
8. Click **Commit Update Set**.

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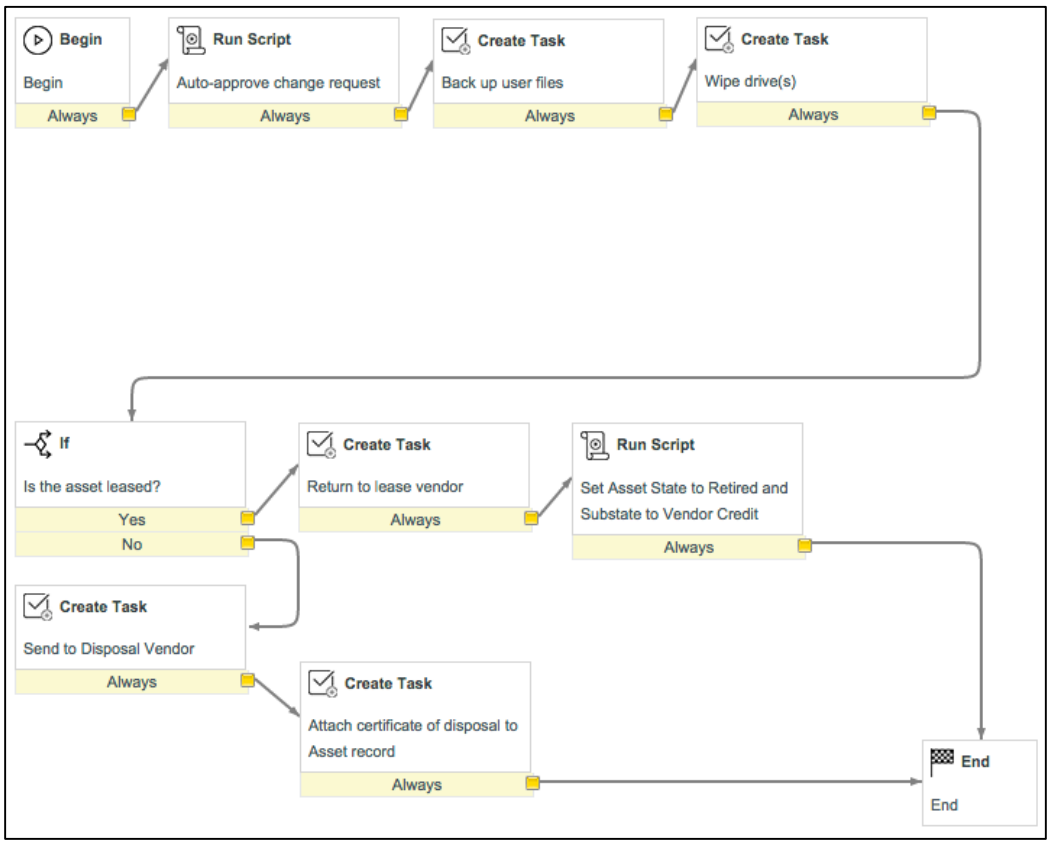
Open and View the Workflow

The Workflow to retire an asset is already started. Open the Workflow and view what it does.

1. Navigate to **Workflow > Workflow Editor**.
2. Under the **Workflows** tab, find and open the **Retire Asset** Workflow.

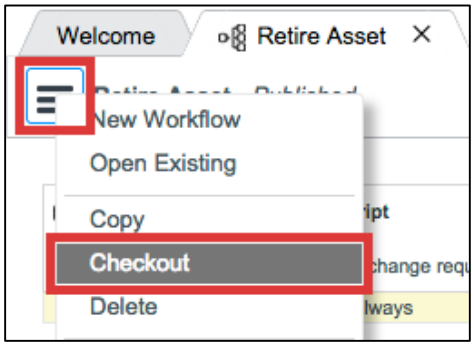


3. Note the current process the Workflow follows.



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4. Under the Workflow Actions menu, select **Checkout**.



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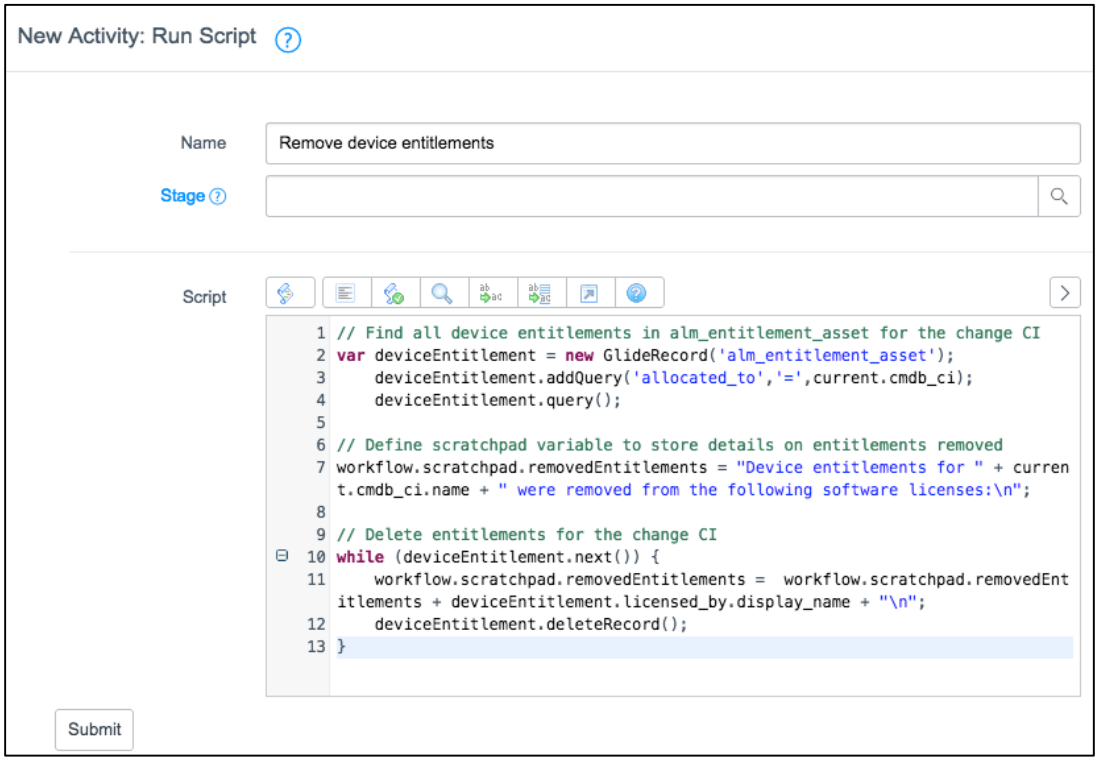
Automate Entitlement and Installation Removal

With the hard drive of the asset wiped in the fourth activity, there is no longer any software installed to the device and it no longer makes sense to have software entitled to the CI. However, the removal of this information needs to be tracked. The Workflow can automate the removals. After the entitlement and installation information is removed, write the details of the removal to the Change Request Work notes.

1. From the Core tab, drag the **Utilities > Run Script** Activity to the Workflow between **Create Task – Wipe drive(s)** and **If – Is the asset leased?**

2. Complete the form as follows:

   Name: **Remove device entitlements**
   Script: Copy and paste the script from the ***remove_entitlements.txt*** file.



   Note: This script finds entitlements allocated to this device, deletes them, and writes this information to **workflow.scratchpad.removedEntitlements**.

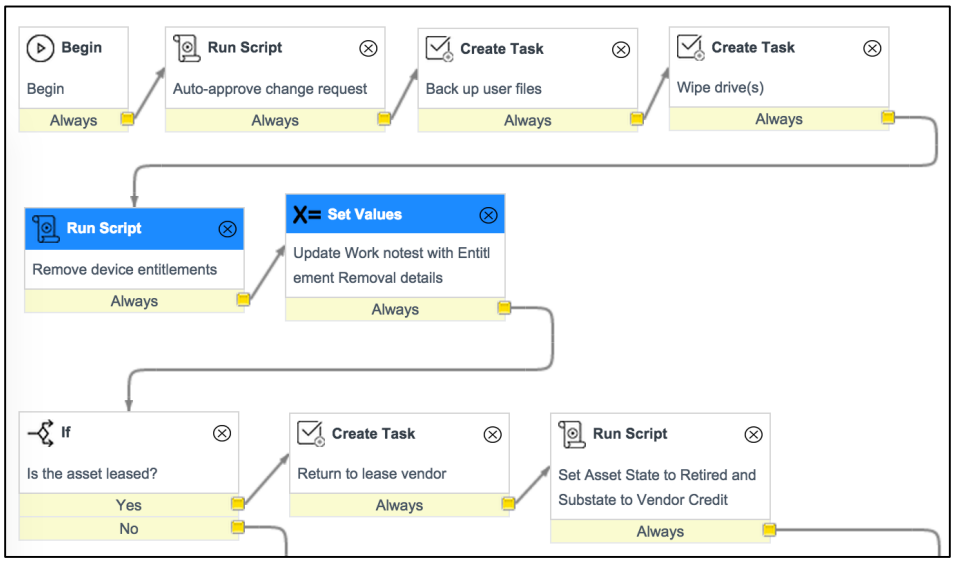
3. Click **Submit**.

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4. Add a **Set Values** Activity to the Workflow between **Remove device entitlements** and **Is the asset leased** with details as follows:

   Name: **Update Work notes with Entitlement Removal details**
   Set these values: **Work notes | ${workflow.scratchpad.removedEntitlements}**

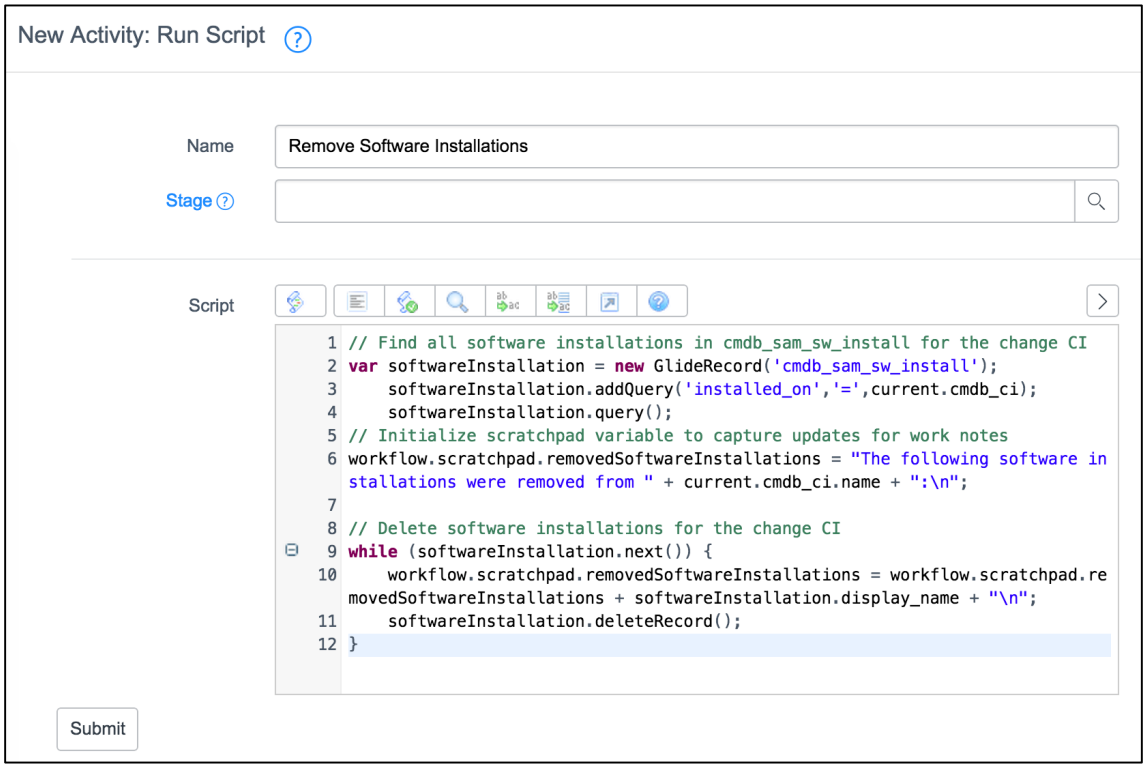
5. The Workflow should now look similar to the example.



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6. Add a **Run Script** Activity to the Workflow between the new **Set Values** and **Is the asset leased** with details as follows:

   Name: **Remove Software Installations**
   Script: Copy and paste the script from the ***remove_software.txt*** file.



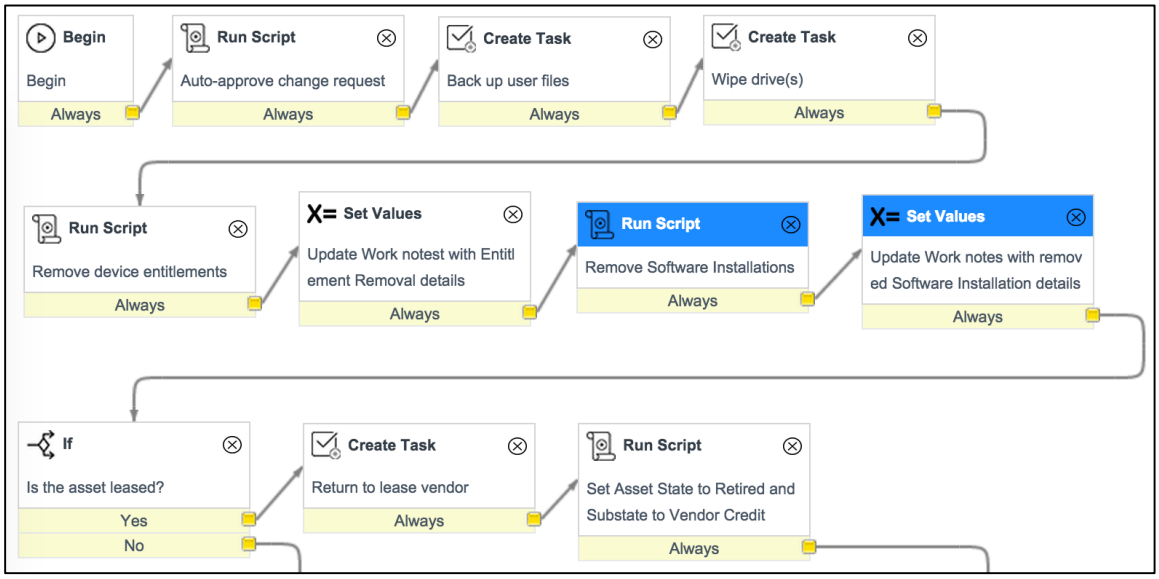
   Note: This script finds entitlements allocated to this device, deletes them, and writes this information to **workflow.scratchpad.removedSoftwareInstallations**.

7. Add a Set Values Activity to the Workflow next with details as follows:

   Name: **Update Work notes with removed Software Installation details**
   Set these values: **Work notes | ${workflow.scratchpad.removedSoftwareInstallations}**

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8. The Workflow should now look similar to the example.



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Update Asset State

After the Asset is returned to the lease vendor or disposed, you need to update the Asset State field appropriately. This can be automated. The update after the lease return is created for you. Create one for the disposal.

1. Add a **Run Script** Activity to the Workflow between the **Create Task – Attach certificate of disposal to Asset record** and **End** Activities with details as follows:

   Name: **Set Asset State to Retired and Substate to Disposed**
   Script: Copy and paste the script from the ***set_asset_state_disposed.txt*** file.



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2. The Workflow should look similar to the example.



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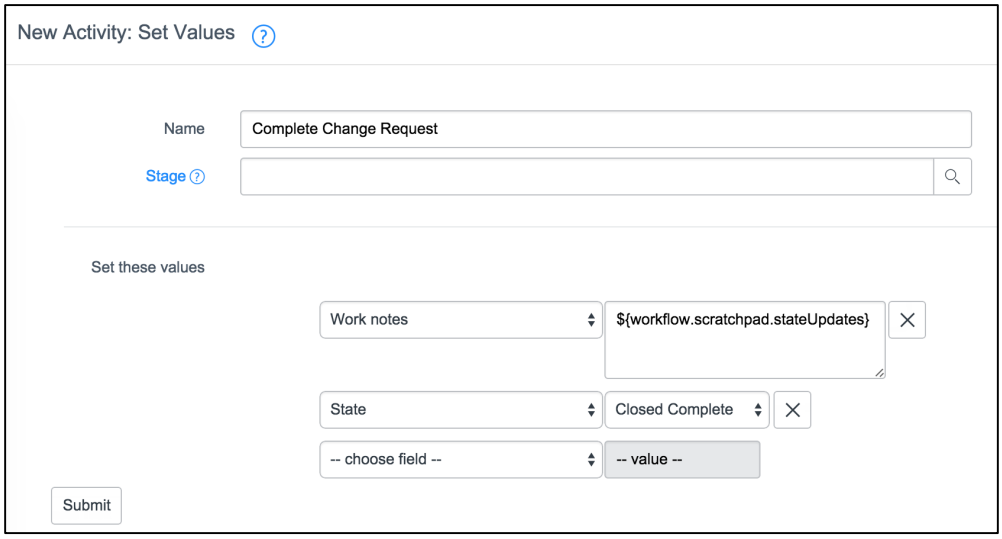
Complete the Workflow

Two tasks remain in the Workflow: to write the final update to the Change Request Work notes and close the Change Request. This can be done with a single Activity.

1. Add a **Set Values** Activity to the Workflow canvas.

2. Complete the New Activity: Set Values form as follows:

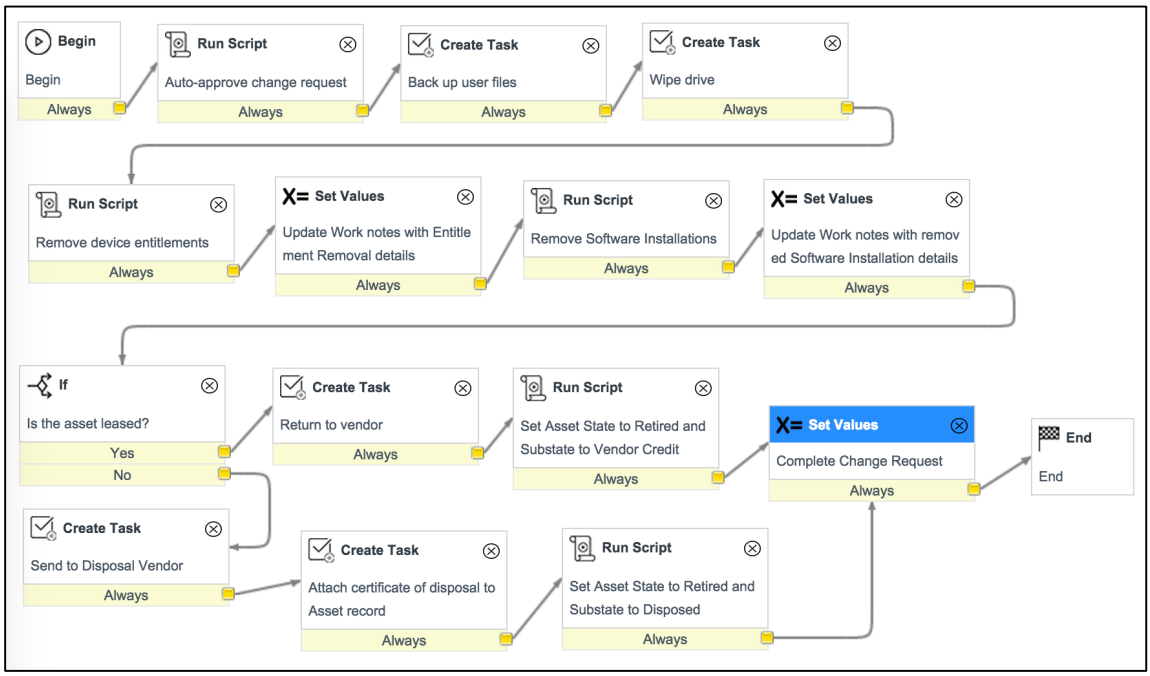
   Name: **Complete Change Request**
   Set these values: **Work notes | ${workflow.scratchpad.stateUpdates}**
   State | Closed Complete



3. Click **Submit**.

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4. Adjust and create transitions so the two **Run Script** Activities that update the Asset State point to this new **Set Values** Activity, and create a transition from this Activity to **End**.



5. **Publish** the Workflow.

Create a UI Action to Launch Asset Retirement

With the process defined in the Workflow, you now need a way to start this process to retire an asset. You decide to create a UI Action and make it available as a Related Link on the Asset form and from a list of assets. Because this process is specific to hardware retirement, apply this UI Action to the **Hardware [alm_hardware]** table.

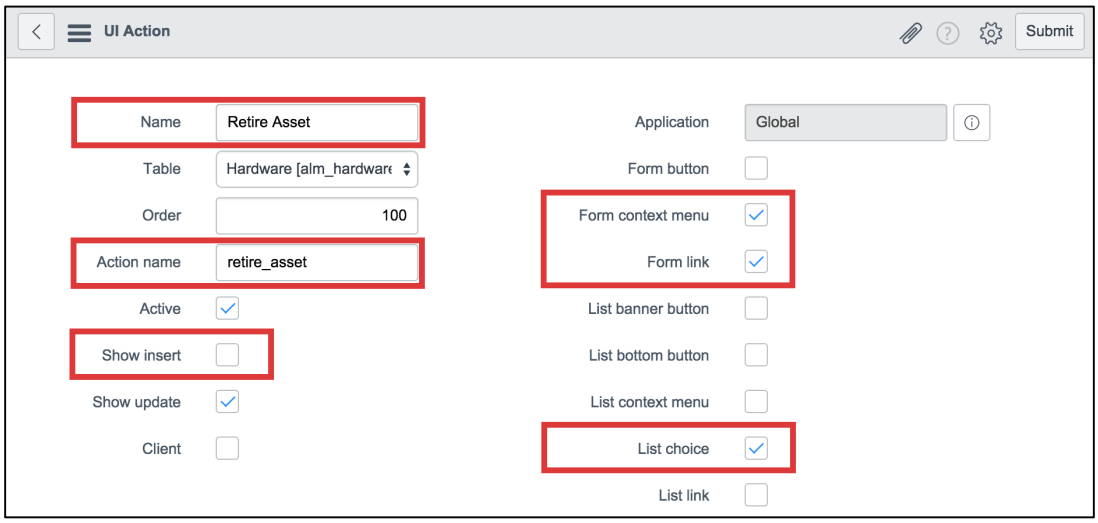
This UI Action creates the change request, captures who the asset was assigned to, and updates the State of the Asset to **In stock – Pending disposal**.

1. Navigate to **Asset > Portfolios > Hardware Assets**.
2. Click a column header menu and select **Configure > UI Actions**.
3. Click **New**.

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4. Complete the top of the UI Action form as follows:

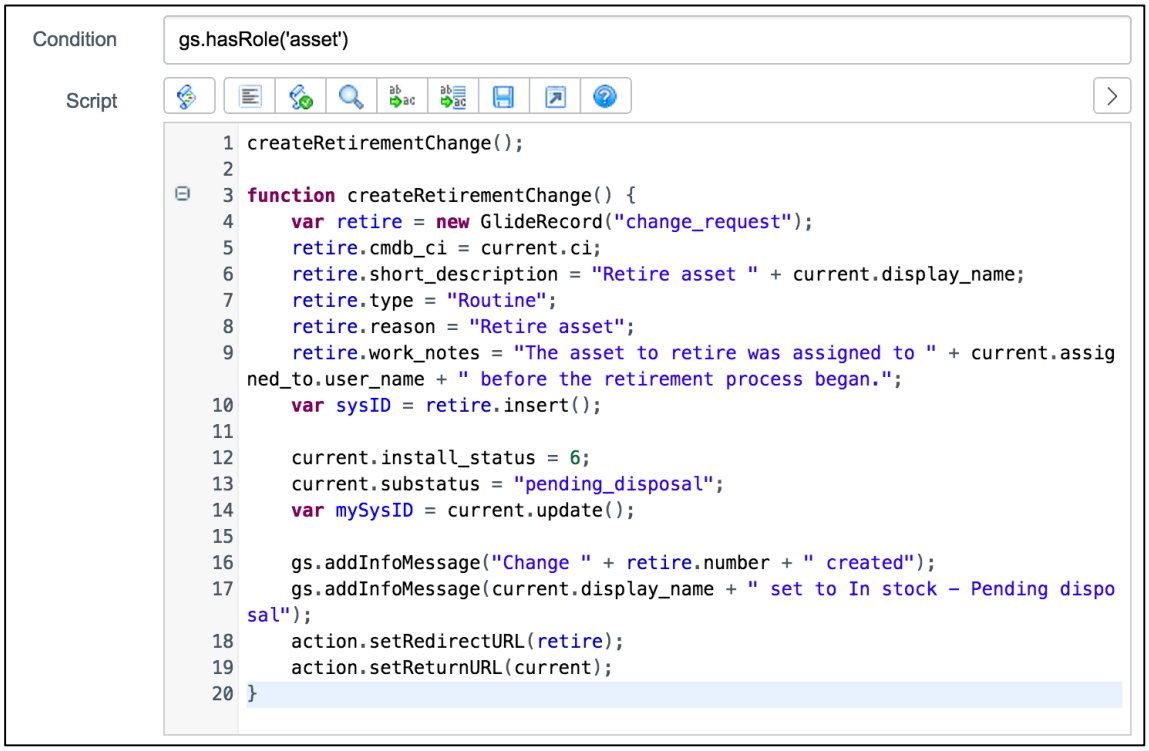
   Name: **Retire Asset**
   Action name: **retire_asset**
   Show insert: **unchecked**
   Form context menu: **checked**
   Form link: **checked**
   List choice: **checked**



5. Set the Condition to **gs.hasRole('asset')**.

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6. Set the script as follows. Copy and paste the script from the ***retire_asset_ui_action.txt*** file.




```
createRetirementChange();

function createRetirementChange() {
    var retire = new GlideRecord("change_request");
    retire.cmdb_ci = current.ci;
    retire.short_description = "Retire asset " + current.display_name;
    retire.type = "Routine";
    retire.reason = "Retire asset";
    retire.work_notes = "The asset to retire was assigned to " + current.assig
ned_to.user_name + " before the retirement process began.";
    var sysID = retire.insert();

    current.install_status = 6;
    current.substatus = "pending_disposal";
    var mySysID = current.update();

    gs.addInfoMessage("Change " + retire.number + " created");
    gs.addInfoMessage(current.display_name + " set to In stock - Pending dispo
sal");
    action.setRedirectURL(retire);
    action.setReturnURL(current);
}
```

Note: This UI Action performs several actions: Creates a Change Request with the appropriate settings, writes the Assigned to from the Asset into the Work notes, updates the State of the Asset, and creates some information messages.

7. Click **Submit**.

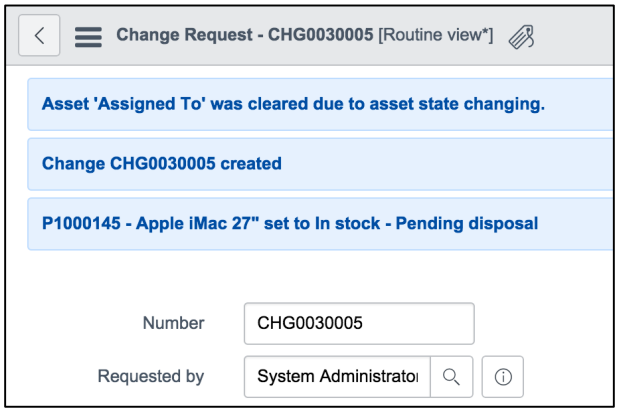
Test Asset Retirement

With all the pieces in place, you can now test retirement.

1. Navigate to **Asset > Portfolio > Hardware Assets**.
2. Find and open the asset with Asset tag **P1000145**.
3. Under Related Links, click **Retire Asset**.

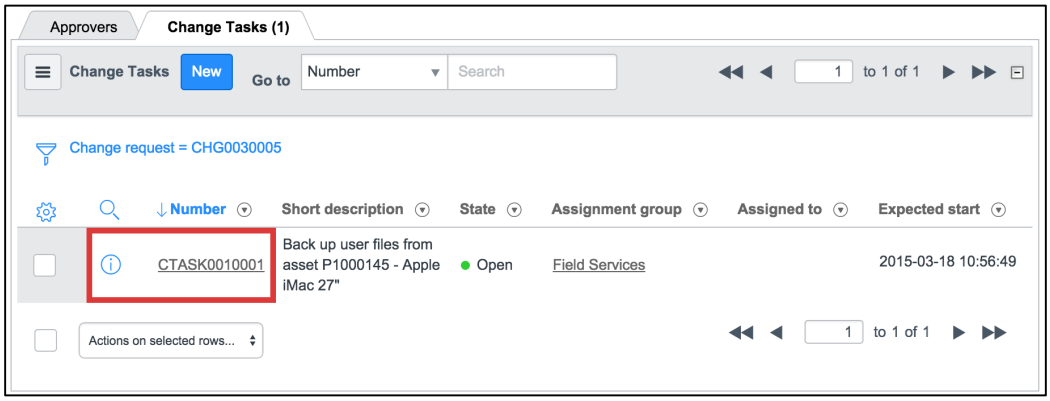
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4. The link creates a new Change Request and opens it in the window.



Note: The asset is set to a State of **In stock** with a substate of **Pending disposal** until you complete the Change Request. The **Assigned to** field is cleared when the state changes, but the process writes the value from **Assigned to** into the Change Request's Activity log for future reference.

5. In the Change Tasks related list, click the **CTASK Number**.



6. View the Task details and then click **Close Task**.

7. Notice a new Task is created. Open the **new** Task.

8. View the Task details and then click **Close Task**.

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9. After the drive is wiped, several tasks are automated to remove entitlements and installation information from ServiceNow. View the details in the Activity log.



10. Under the Change Tasks related list, open the **new** Task.

11. View the Task details and then click **Close Task**.

12. View and close the final **Change Task**.

13. What are the State of the **Change Request** and the last **Activity** in the log?

14. Click the **reference icon** next to the **Configuration Item** field to open the CI record.

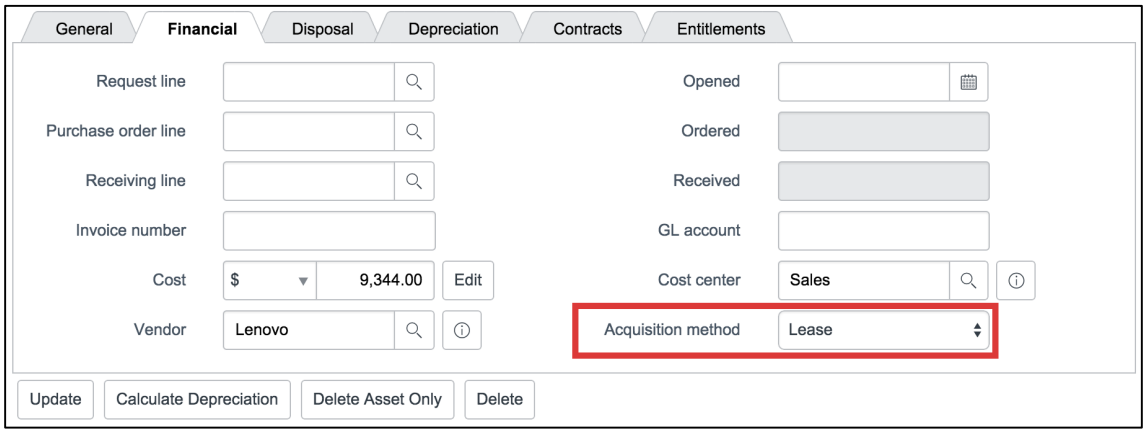
15. Click the reference icon next to the **Asset** field to open the **Asset record**. What are the State and Substate for the asset now?

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Retire a Leased Asset

To ensure that leased assets are not mistakenly sent to the disposal vendor, the Workflow checks for how the asset was acquired and adjusts the steps after the drive is wiped to return the item to the Vendor. Set the Acquisition method for an asset to Lease and then retire that asset to see how the process varies.

1. Find and open the asset with Asset tag **P22877**.
2. In the **Financial** form section, set Acquisition method to **Lease**.



3. Click the form header menu and **Save**.
4. Complete the Retire Asset process as performed previously. How does the Workflow differ from a purchased asset?

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Lab Goal

Though the lifecycle of an asset truly begins at the request, that is not always where an asset begins its tracked life in ServiceNow. As you begin to work with your assets, you may manually create them, import them from a procurement or inventory system, or discover active items on your network.

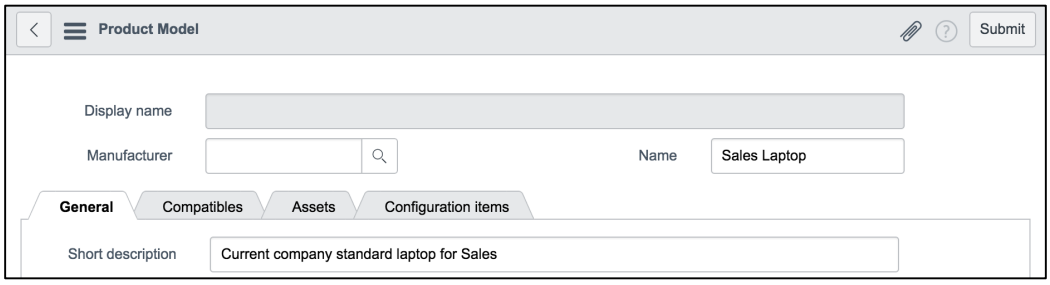
Lab 3.2 Desktop Asset Manager

Create a Bundle to Abstract the Catalog

Bundles are useful to easily create assets, either from the catalog or other processes, but they can also be used to provide a way to allow end users to select items based on your current standard. In this example, you create a Sales Laptop catalog item that is the current Apple MacBook 13" model, but changes over time. Use a bundle that contains only a single item for this. As the model for your Sales Laptop changes over time, you can change the master item in the bundle. Then users know they only need to access the Sales Laptop item for the latest option.

1. As **Sam Isphun**, navigate to **Product Catalog > Product Models > Bundled Models**.
2. Click **New**.
3. Complete the Product Model form as follows:

   Name: **Sales Laptop**
   Short description: **Current company standard laptop for Sales**



4. Click the form header menu and **Save**. Notice there are no options to Publish to Hardware Catalog or specify Product Catalog details.

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5. Set the Class to **Hardware Model** and **Save** again. Notice the catalog options are now available.

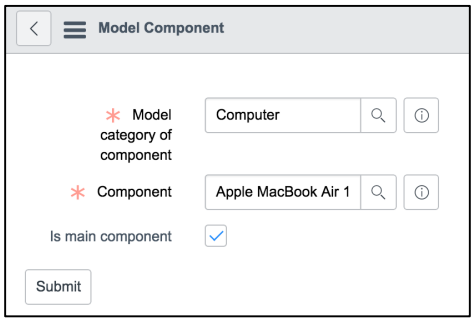
   Note: The **Class** field is not on this form by default but has been added here. If you add it to forms, be sure to restrict access to it to the appropriate roles.

6. In the Product Catalog form section, set the Description to **Current Sales Laptop: 2015 Apple MacBook Air 13”** and **Save** again.

7. Under the Model Components related list, click **New**.

8. Complete the Model Component form as follows:

   Model category of component: **Computer**
   Component: **Apple MacBook Air 13”**
   Is main component: **checked**



9. Click **Submit**.

10. Under Related Links, click **Publish to Hardware Catalog**.

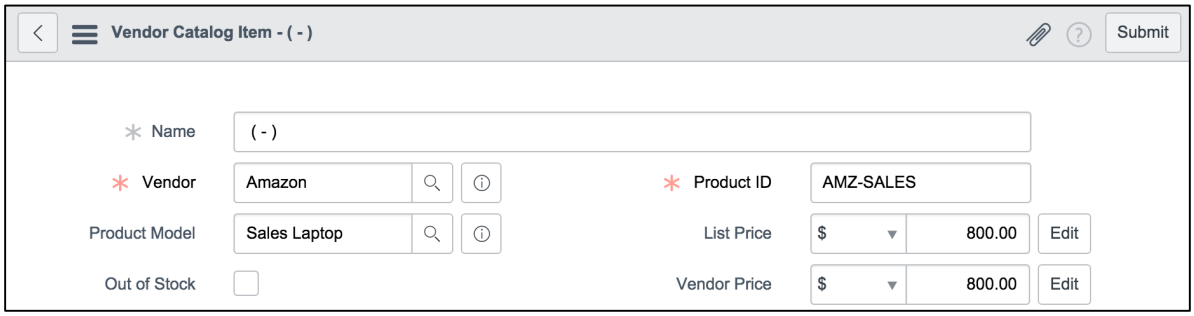
11. Set the Category to **Hardware** and click **OK**.

12. Under the **Vendor Catalog Items** related list, click **New**.

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13. Complete the Vendor Catalog Item form as follows:

    Vendor: **Amazon**
    Product Model: **Sales Laptop**
    Product ID: **AMZ-SALES**
    List Price: **$ | 800.00**
    Vendor Price: **$ | 800.00**

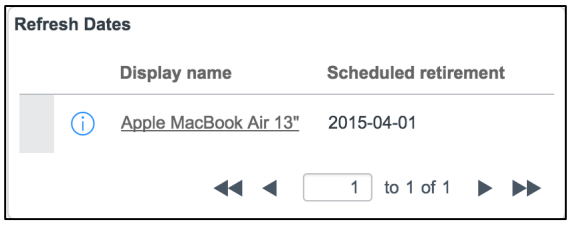


14. Click **Submit**.

Request a Computer Refresh

Bertie Luby recently hit his three-year anniversary with the company and checks to see if he is due for a computer refresh. After he determines that he is due for a refresh, he goes to the Service Catalog to select his new Sales Laptop.

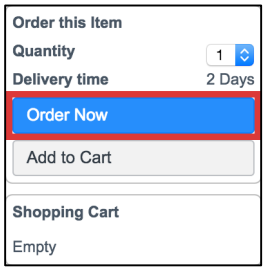
1. As **Bertie Luby**, navigate to **Self-Service > My Assets**.
2. What is the Scheduled retirement date for Bertie's current laptop?



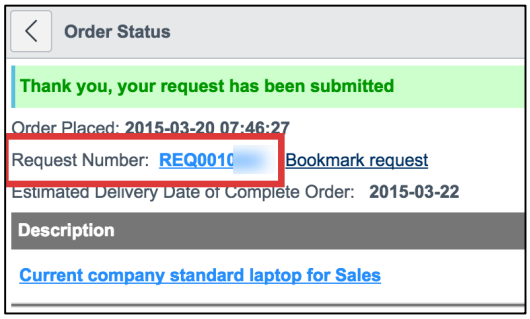
3. Navigate to **Self-Service > Service Catalog**.
4. Click **Hardware**.
5. Click **Sales Laptop**.

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6. Click **Order Now**.



7. Take note of the **Request Number**.



Fulfill the Request

With the request in the system, the item now needs to go through the fulfillment. This item may come from existing stock or need to be procured and then deployed.

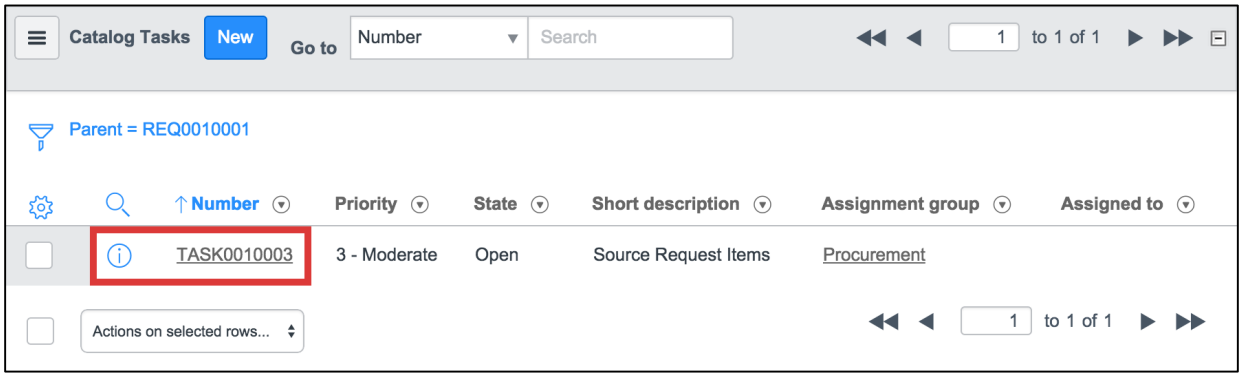
1. As **Sam Isphun**, navigate to **Procurement > Requests > Requests**.

2. Find and open Bertie's request.

   Note: For simplicity in the lab, this item is below the default approval threshold of $1000 and does not require approval.

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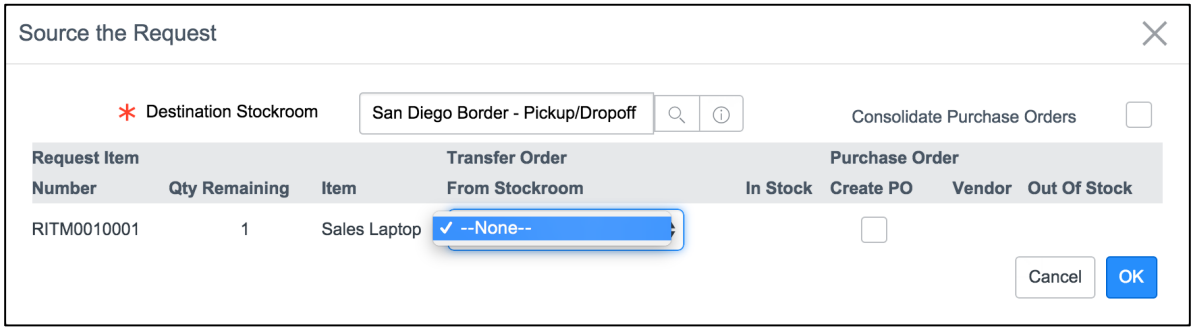
3. Under the **Catalog Tasks** related list, click the **TASK Number**.



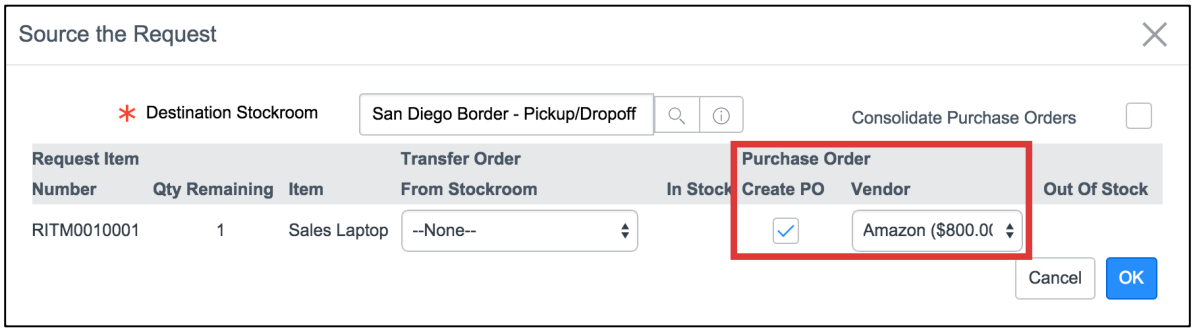
4. Click **Source Request**.

5. Set the Destination Stockroom to **San Diego Border – Pickup/Dropoff**.

6. Are there any of these items in stock? How can you tell?



7. Select **Create PO** and **Vendor Amazon ($800.00)**.



8. Click **OK**.

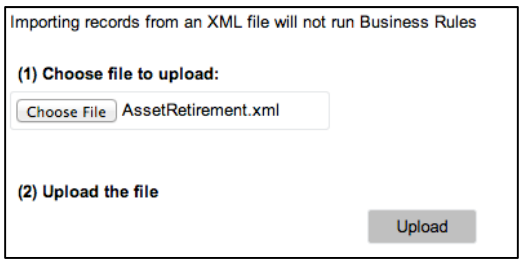
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Load Update Set

At this point, you could continue through the Purchase Order process and deploy the asset. You did this earlier in the lab and are welcome to go through that process again, but the refresh has other components: Another important aspect of the refresh process is the retirement of Bertie's old asset.

The System Administrator created the resources needed to support the Asset Retirement process in the environment. Load the updates into the system and view the Workflow just to see what the process looks like.

1. In the supporting files, find **AssetRetirement.xml**.
2. As **System Administrator**, navigate to **System Update Sets > Retrieved Update Sets**.
3. Under Related Links, click **Import Update Set from XML**.
4. Click **Choose File** and select the **AssetRetirement.xml**.



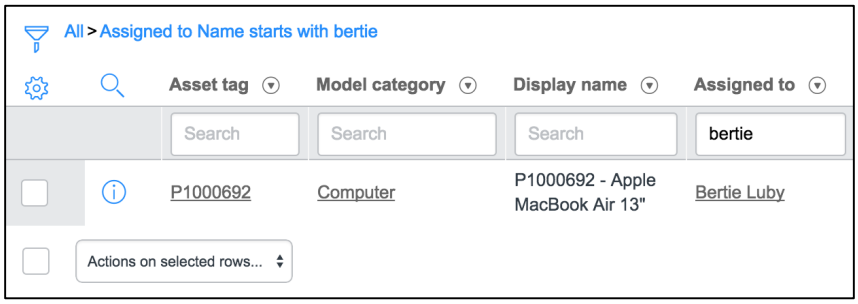
5. Click **Upload**.
6. Click **Asset 101**.
7. Click **Preview Update Set**.
8. Click **Commit Update Set**.
9. When the commit completes, click **Close**.

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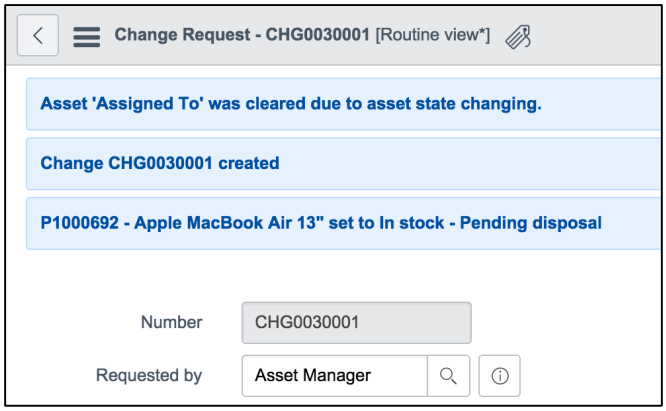
Retire Purchased Asset

Bertie's old laptop needs to be retired. Find the asset and step through the Asset Retirement process the System Administrator built.

1. As **Sam Isphun**, navigate to **Asset > Portfolio > Hardware Assets**.
2. Find and open the asset Assigned to **Bertie Luby**.



3. Under Related Links, click **Retire Asset**.
4. The link creates a new Change Request and opens it in the window.



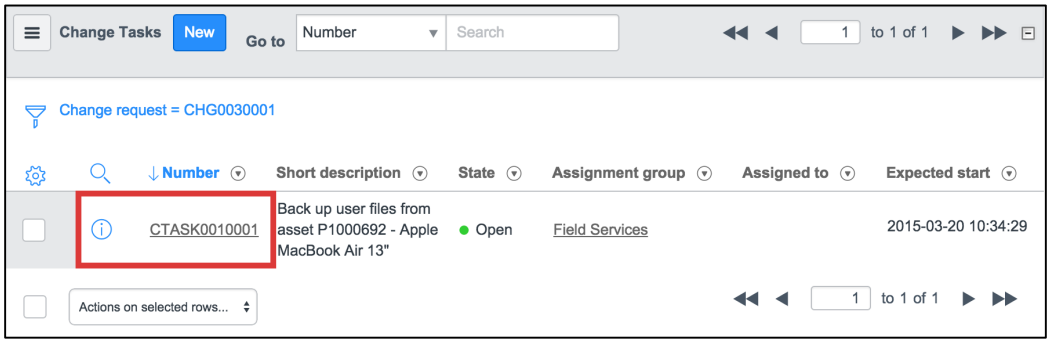
Note: The asset is set to a State of **In stock** with a substate of **Pending disposal** until you complete the Change Request. The **Assigned to** field is cleared when the state changes, but the process writes the value from **Assigned to** into the Change Request's **Activity log** for future reference.

> The asset to retire was assigned to bertie.luby before the retirement process began.

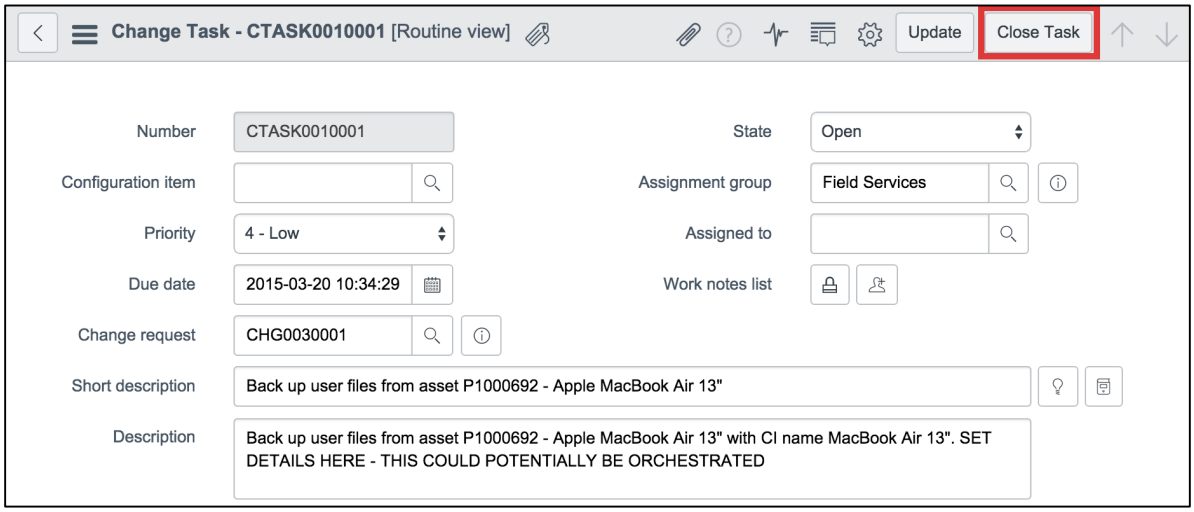
To work with Change Requests, asset managers require the **itil** role.

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5. In the Change Tasks related list, click the task **Number**.



6. View the Task details and then click **Close Task**.



7. Notice a new Change Task is created. Open the **new Task**.

8. View the Task details and then click **Close Task**.

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9. After the drive is wiped, several tasks are automated to remove entitlements and installation information from ServiceNow. View the details in the Activity log.



10. Under the Change Tasks related list, open the **new Task**.

11. View the Task details and then click **Close Task**.

12. View and close the final **Change Task**.

13. What are the **State** of the Change Request and the last **Activity** in the log?

14. Click the reference icon next to the **Configuration Item** field to open the CI record.

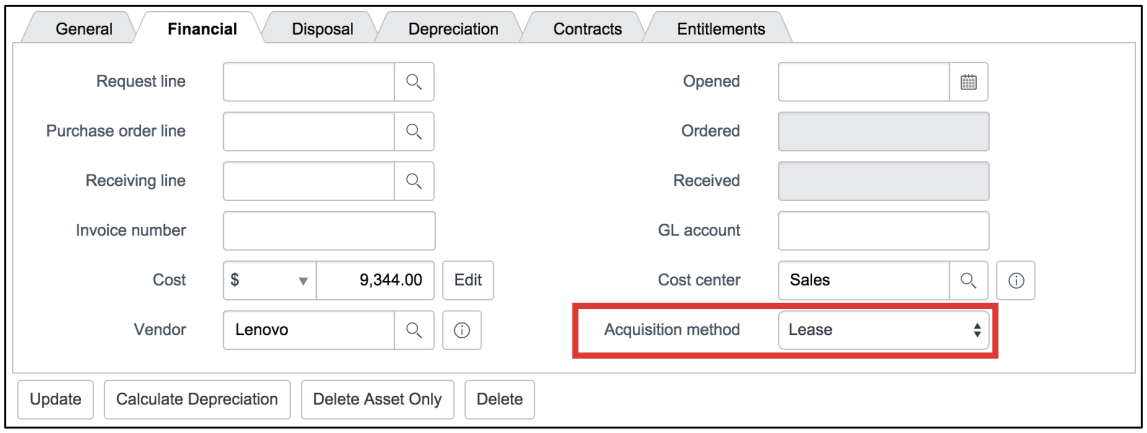
15. Click the reference icon next to the **Asset** field to open the Asset record. What are the State and Substate for the asset now?

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Retire Leased Asset

To ensure that leased assets are not mistakenly sent to the disposal vendor, the Workflow checks for how the asset was acquired and adjusts the steps after the drive is wiped to return the item to the Vendor. Set the Acquisition method for an asset to Lease and then retire that asset to see how the process varies.

1. Find and open the asset with Asset tag **P22877**.
2. In the **Financial** form section, set Acquisition method to **Lease**.



3. Click the form header menu and **Save**.
4. Complete the Retire Asset process as performed previously. How does the Workflow differ from a purchased asset?

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Lab Goal

While there are similarities between the asset management of end user devices and data center devices, data center asset management has some unique challenges specific to its environment. In this lab, you look at the hardware lifecycle for data center assets and some of the challenges involved.

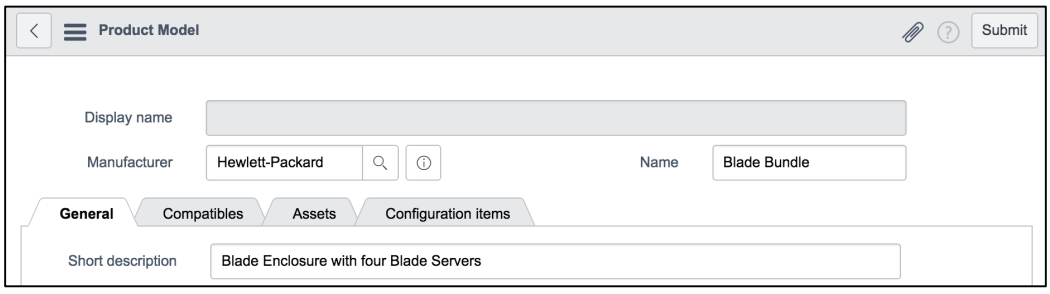
Lab 3.3 Data Center Asset Manager

Create a Bundle for an Enclosure with Blades

You regularly purchase and lease blades from your vendor as a bundle at a discounted price. You want to create a bundle to support the creation of the enclosure with the blade servers purchased with it. Bundles provide the ability to track leased servers and enclosures together as well, even though they may move around the environment over time.

1. As Sam Isphun, navigate to **Product Catalog > Product Models > Bundled Models**.
2. Click **New**.
3. Complete the Product Model form as follows:

   Manufacturer: **Hewlett-Packard**
   Name: **Blade Bundle**
   Short description: **Blade Enclosure with four Blade Servers**



4. Click the form header menu and **Save**. Notice there are no options to Publish to Hardware Catalog or specify Product Catalog details.

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5. Set the Class to **Hardware Model** and **Save** again. Notice the catalog options are now available.

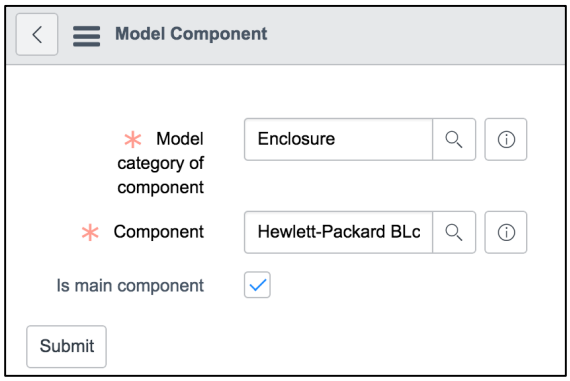
   Note: The Class field is not on this form by default but has been added here. If you add it to forms, be sure to restrict access to it to the appropriate roles.

6. In the Product Catalog form section, set the Description to **HP BLc3000 enclosure with four HP ProLiant BL460c Gen8 blade servers** and click **Save** again.

7. Under the Model Components related list, click **New**.

8. Complete the Model Component form as follows:

   Model category of component: **Enclosure**
   Component: **Hewlett-Packard BLc3000 Platinum Enclosure**
   Is main component: **checked**



   Note: The Enclosure CI Type and Model Category do not exist in the system by default. If you work with Enclosures, create the appropriate CI class in your environment.

9. Click **Submit**.

10. Under the Model Components related list, click **New**.

11. Complete the Model Component form as follows:

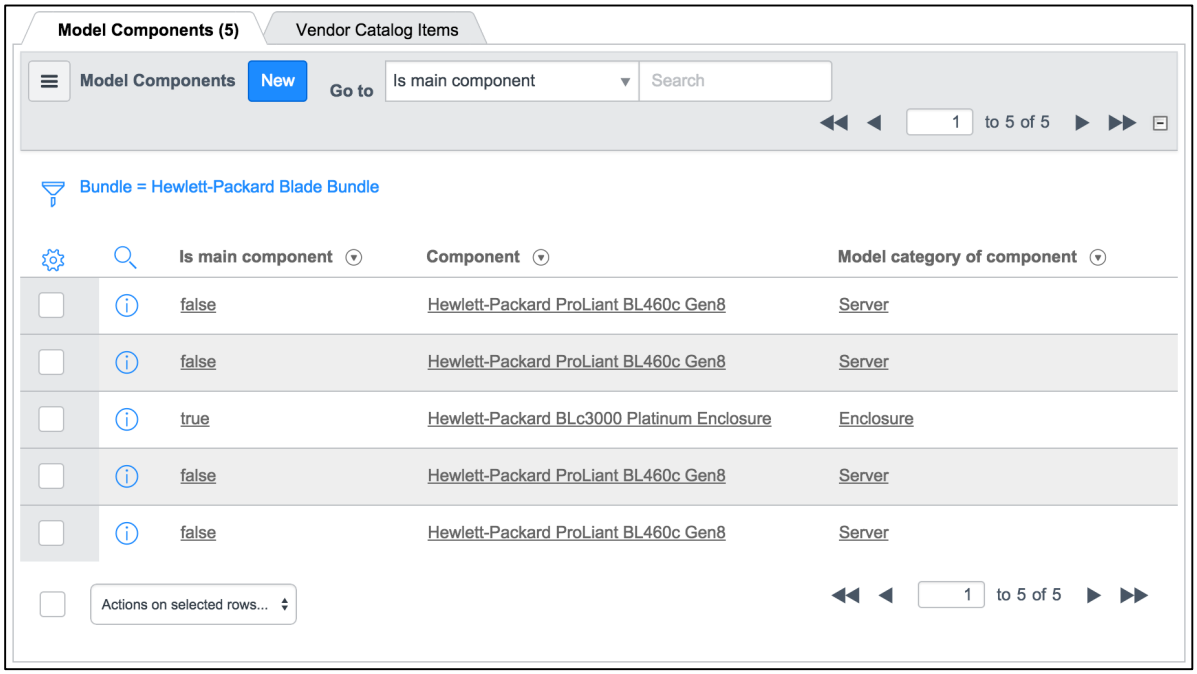
    Model category of component: **Server**
    Component: **Hewlett-Packard ProLiant BL460c Gen8**

12. Click the form header menu and **Save**.

13. Click the form header menu and **Insert and Stay** two times.

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14. Click the form header menu and **Insert**. You should now have the Enclosure and four blades.



15. Under Related Links, click **Publish to Hardware Catalog**.

16. Set the Category to **Hardware** and click **OK**.

17. Set the Workflow to **Deploy Asset**.

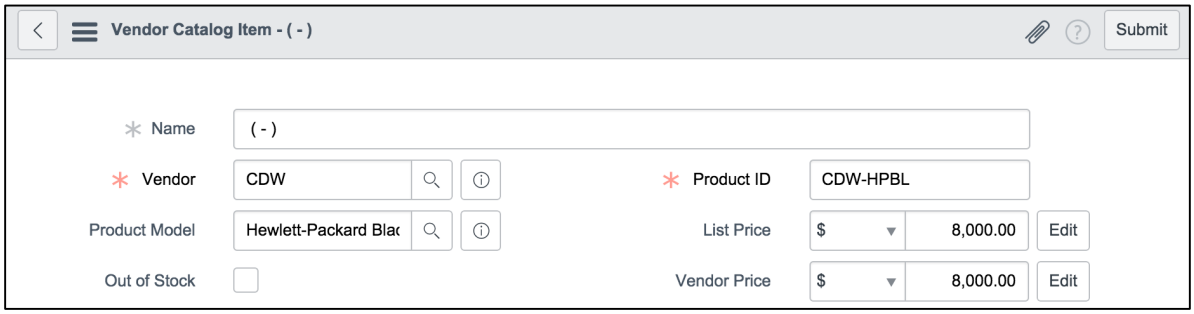
18. Click the form header menu and **Save**.

19. Under the **Vendor Catalog Items** related list, click **New**.

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20. Complete the Vendor Catalog Item form as follows:

    Vendor: **CDW**
    Product Model: **Hewlett-Packard Blade Bundle**
    Product ID: **CDW-HPBL**
    List Price: **$ | 8000.00**
    Vendor Price: **$ | 8000.00**



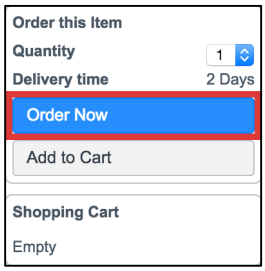
21. Click **Submit**.

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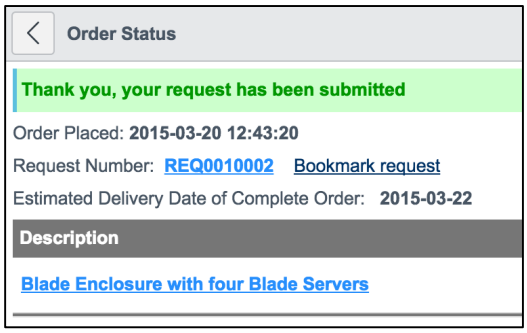
Request Data Center Hardware

You have a current project that requires a new set of Servers. You decide to invest in a new enclosure with blade servers to replace an older server in the environment. Go through the request and procurement process to obtain the needed servers.

1. As Sam Isphun, navigate to **Self-Service > Service Catalog**.
2. Click **Hardware**.
3. Click **Blade Bundle**.
4. Click **Order Now**.



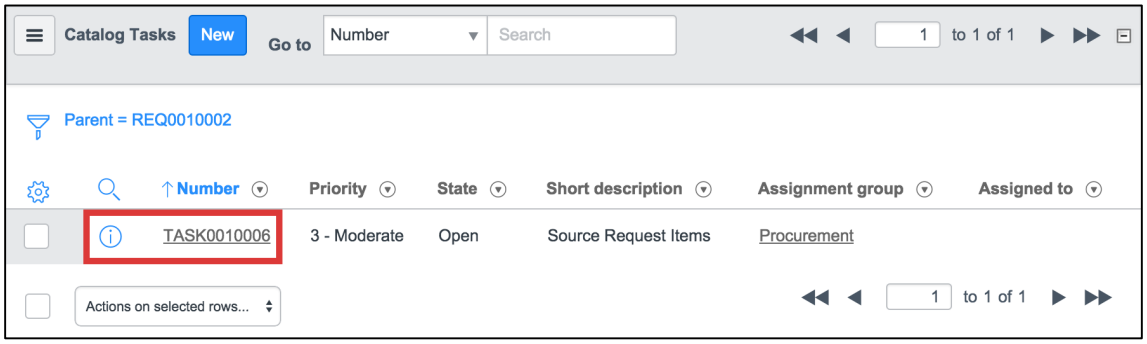
5. Click the **REQ** Number.



Note: For simplicity in the lab, this item was not given a price, so it is below the default approval threshold of $1000 and does not require approval.

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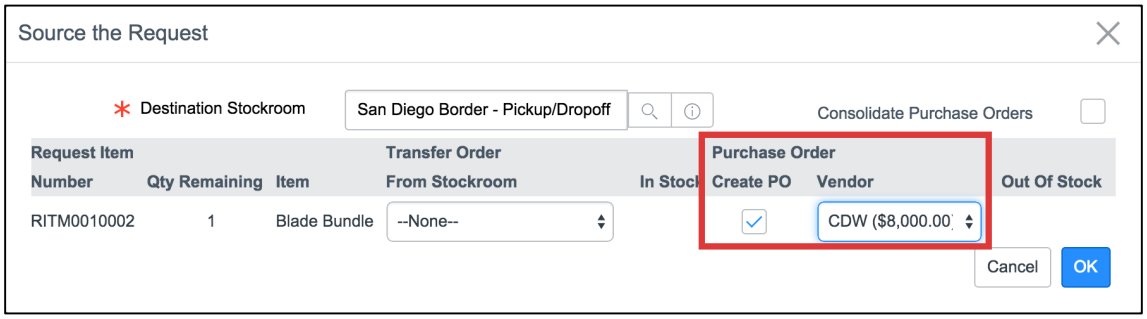
6. Under the **Catalog Tasks** related list, click the task Number.



7. Click Source Request.

8. Set the Destination Stockroom to **San Diego Border – Pickup/Dropoff**.

9. Select **Create PO** and **Vendor CDW ($8,000.00)**.



10. Click **OK**.

11. Click **Update**.

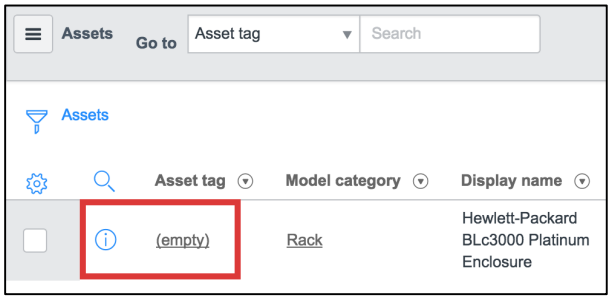
12. Under the **Purchase Orders** related list, open the **PO record**.

13. Click **Order**.

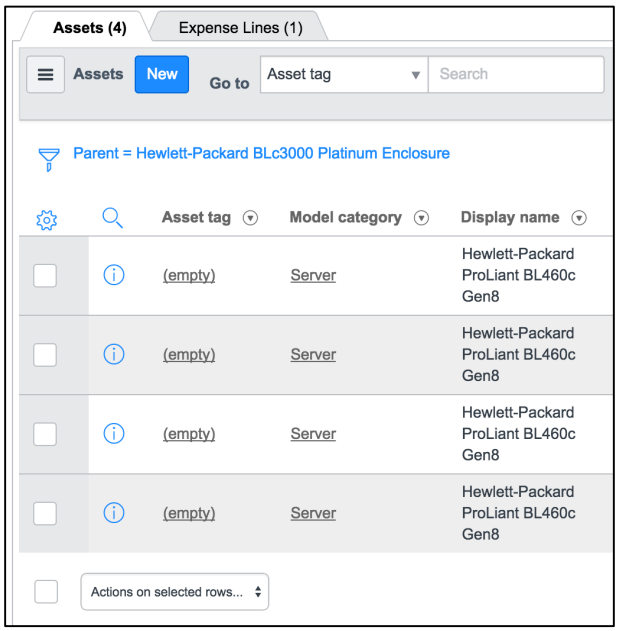
14. Under Related Links, click **Create assets prior to delivery**.

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15. Under the **Assets** related list, open the record.



16. Notice the Blade servers are listed as children under the enclosure.



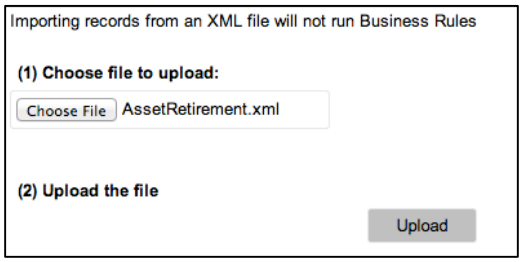
Note: Each of these servers has its own related Configuration Item. If the Server moves to a different location in the environment, the asset record is still related to the original enclosure. If this were a leased item, you could use this information to find items when it is time to return the leased equipment.

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Load Update Set

The System Administrator created the resources necessary to support the Asset Retirement process in the Cloud Dimensions environment. Load the updates into the system and view the Workflow just to see what the process looks like.

1. In the supporting files, find **AssetRetirement.xml**.
2. As System Administrator, navigate to **System Update Sets > Retrieved Update Sets**.
3. Under Related Links, click **Import Update Set from XML**.
4. Click **Choose File** and select the **AssetRetirement.xml**.



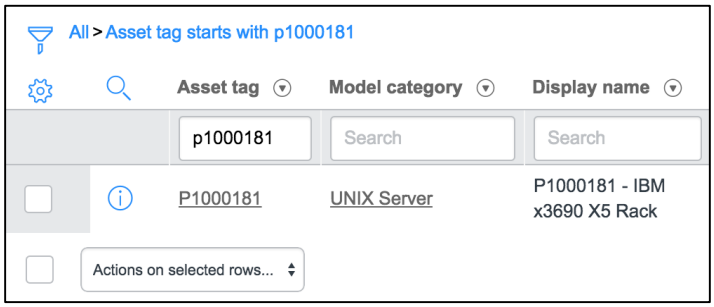
5. Click **Upload**.
6. Click **Asset Retirement Workflow**.
7. Click **Preview Update Set**.
8. Click **Commit Update Set**.

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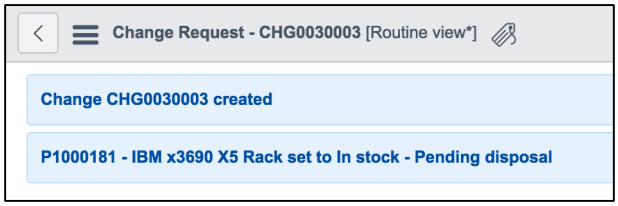
Retire a Server

With the workflow in place to support the asset retirement process, retire the old server you want to replace with the new blade servers.

1. As Sam Isphun, navigate to **Asset > Portfolio > Hardware Assets**.
2. Find and open the asset with Asset tag **P1000181**.



3. Under Related Links, click **Retire Asset**.
4. The link creates a new Change Request and opens it in the window.

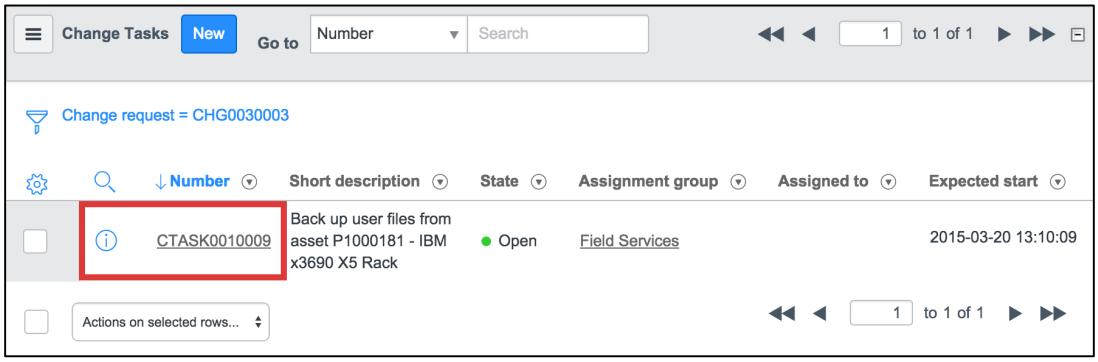


Note: The asset is set to a State of **In stock** with a substate of **Pending disposal** until you complete the Change Request. If populated, the Assigned to field is cleared when the state changes, but the process writes the value from Assigned to into the Change Request's Activity log for future reference.

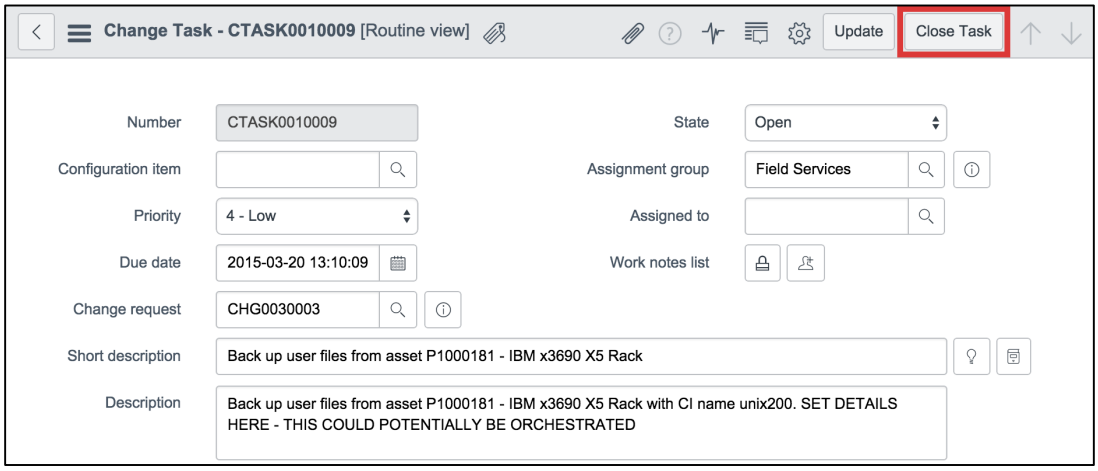
To work with Change Requests, asset managers require the **itil** role.

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5. In the Change Tasks related list, click the **CTASK Number**.



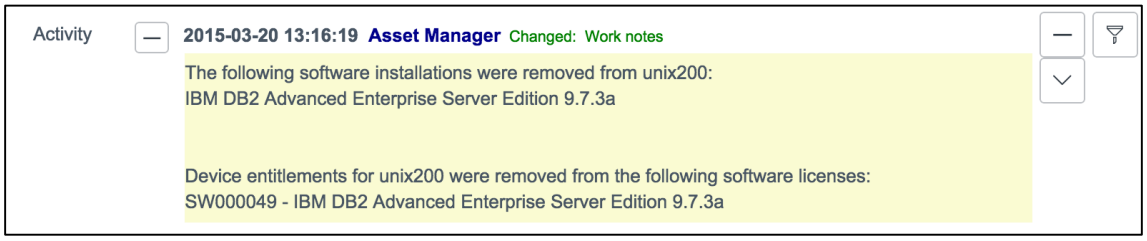
6. View the Task details and click **Close Task**.



7. Notice a new Change Task is created. Open the **new Task**.

8. View the Task details and then click **Close Task**.

9. After the drive is wiped, several tasks are automated to remove entitlements and installation information from ServiceNow. View the details in the Activity log.



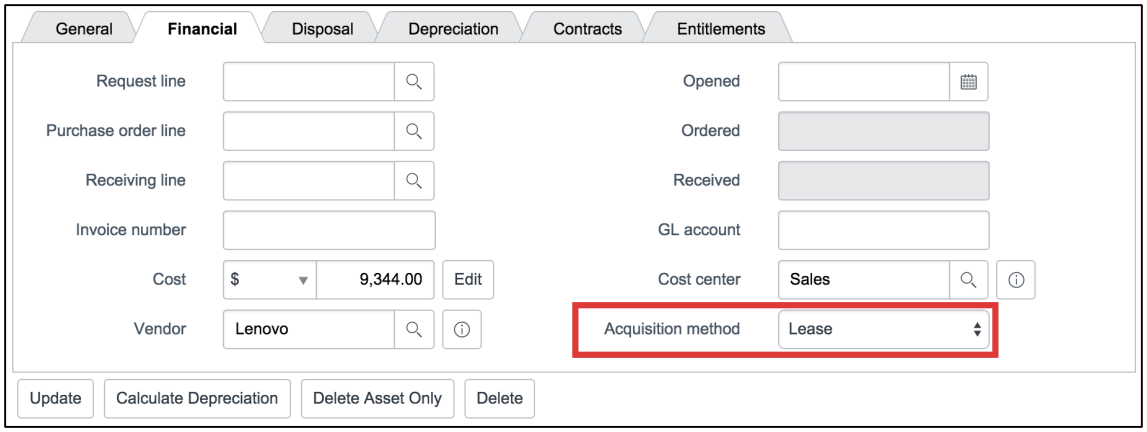
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10. Under the Change Tasks related list, open the **new Task**.
11. View the Task details and then click **Close Task**.
12. View and close the final **Change Task**.
13. What are the **State** of the Change Request and the last **Activity** in the log?
14. Click the reference icon next to the **Configuration Item** field to open the CI record.
15. Click the reference icon next to the **Asset** field to open the Asset record. What are the State and Substate for the asset now?

Retire Leased Asset

To ensure that leased assets are not mistakenly sent to the disposal vendor, the Workflow checks for how the asset was acquired and adjusts the steps after the drive is wiped to return the item to the Vendor. Set the Acquisition method for an asset to Lease and then retire that asset to see how the process varies.

1. Find and open the asset with Asset tag **P22877**.
2. In the **Financial** form section, set Acquisition method to **Lease**.



3. Click the form header menu and **Save**.
4. Complete the Retire Asset process as performed previously. How does the Workflow differ from a purchased asset?

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