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

Lab Guide

Change 101:

Manage Approvals and Conflicts and Risk

Tim Norman & Martin Wood

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

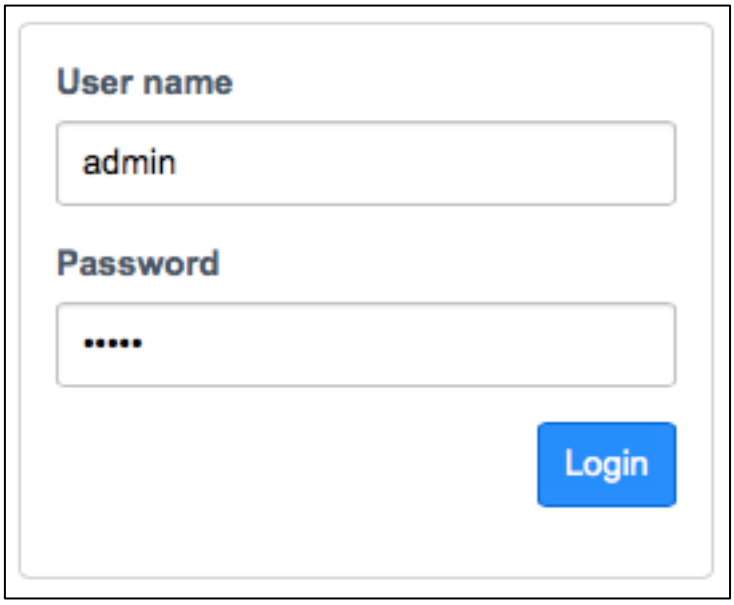
Adding a CI to a Change Request enables the full power of the ServiceNow CMDB. This lab explains how creating a Change Request enables you to perform several key checks – before it gets approved.

Lab 1
Conflict Detection and Service Identification

Log on to Your Training Instance

1. Use the instance URL provided to you through the lab registration system.
2. Log on with the following username and password:

   User name: **admin**
   Password: **Knowledge15**

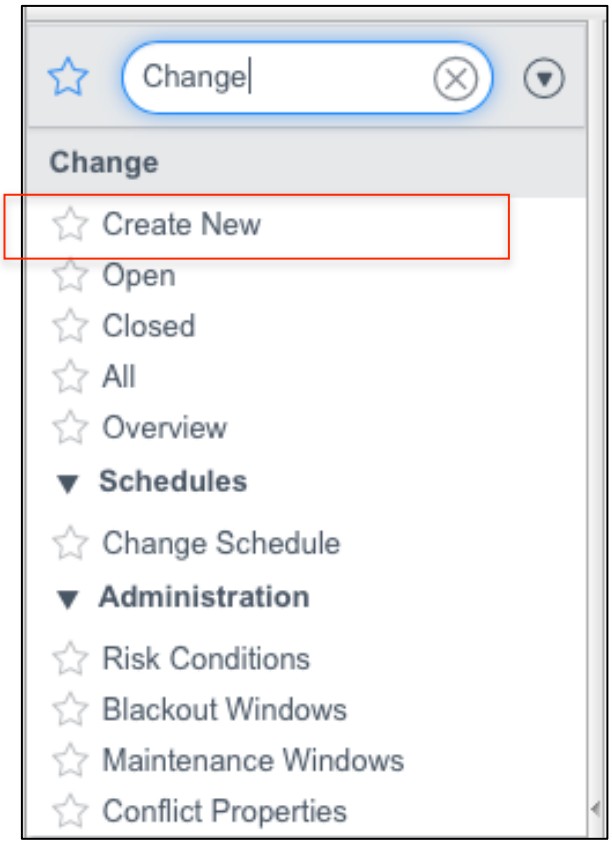


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Create a New Change

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

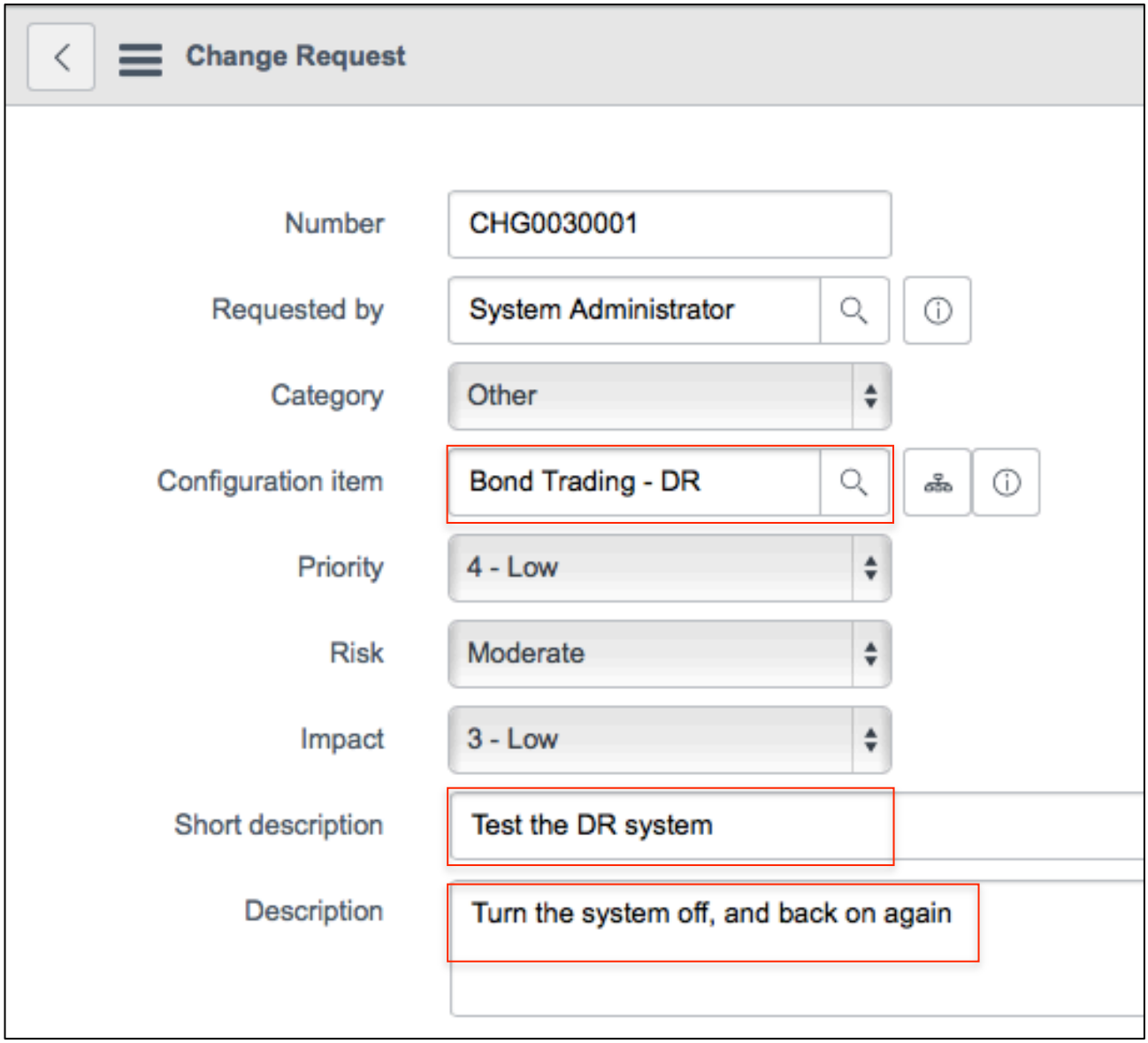
1. Navigate to **Change > Create New**.



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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**



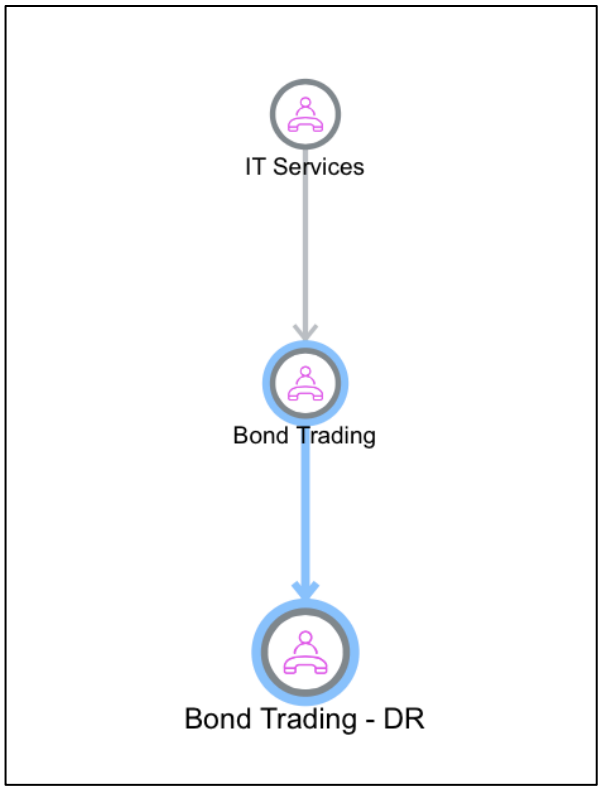
3. Make a note of the Change Request number CHG_ _ _ _ _ _ _ _ for later reference.

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4. Click the **Show CI Map** icon to view the Business Service Map



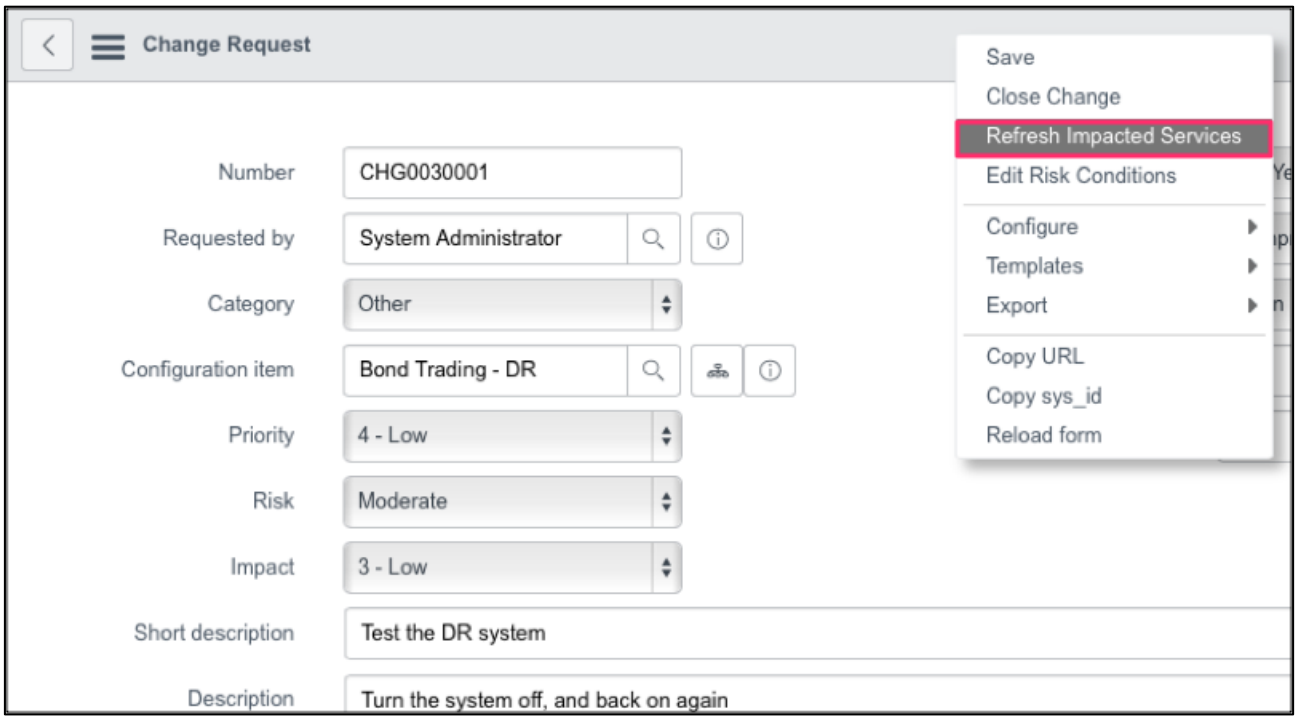
5. This CI Map, or Business Service Map, shows that the **Bond Trading – DR** application provides services for Bond Trading and, in turn, for IT Services.



6. Close the CI Map window and return to the **Change Request**.

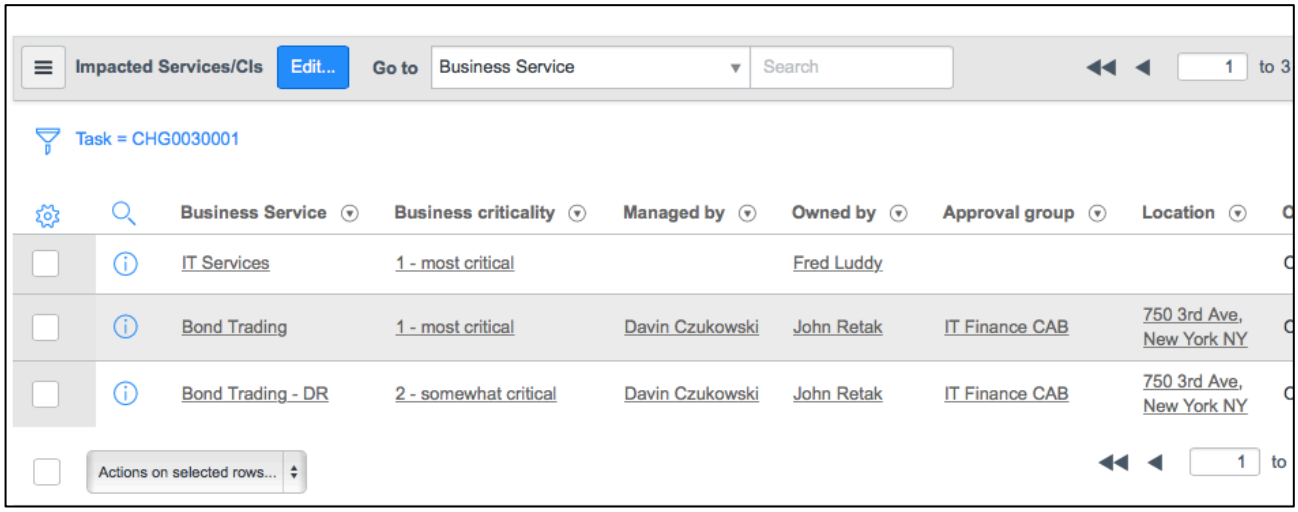
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7. Right-click the Change Request form header and select **Refresh Impacted Services**



Lab Success Verification

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

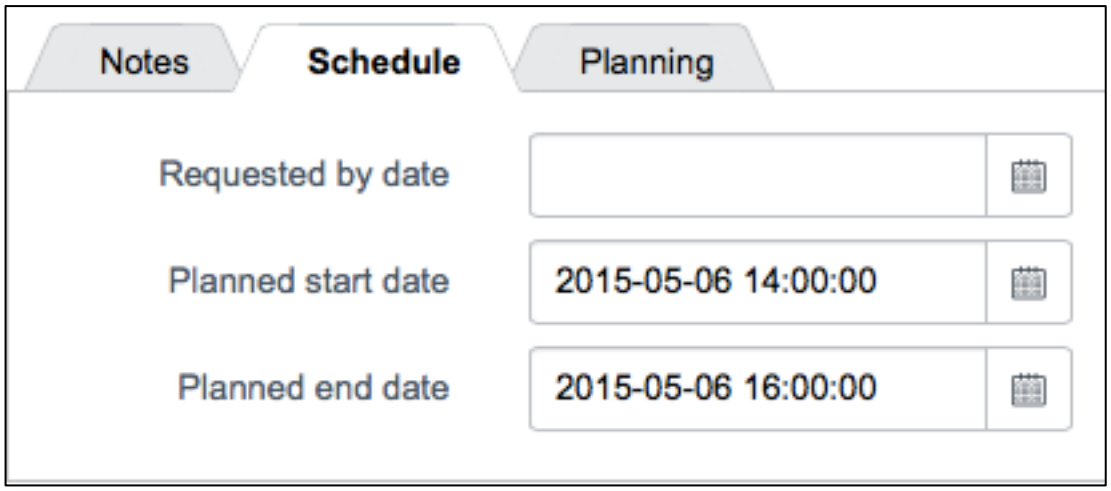


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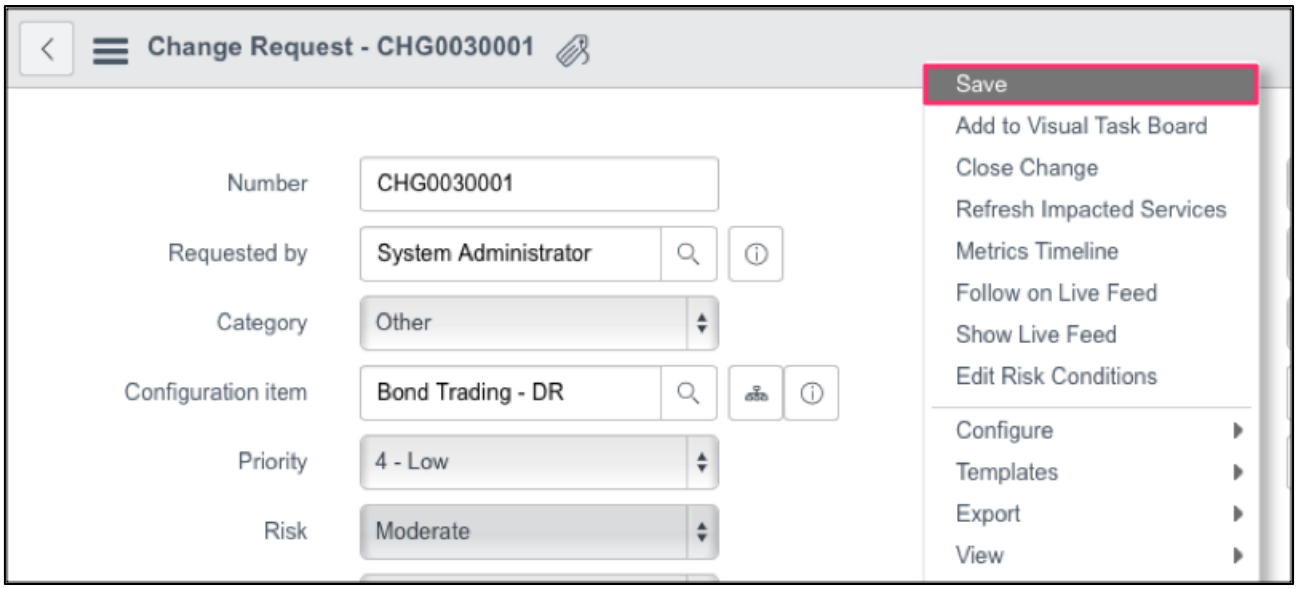
Maintenance Windows

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

   Planned start date: **2015-05-06 14:00:00**
   Planned end date: **2015-05-06 16:00:00**

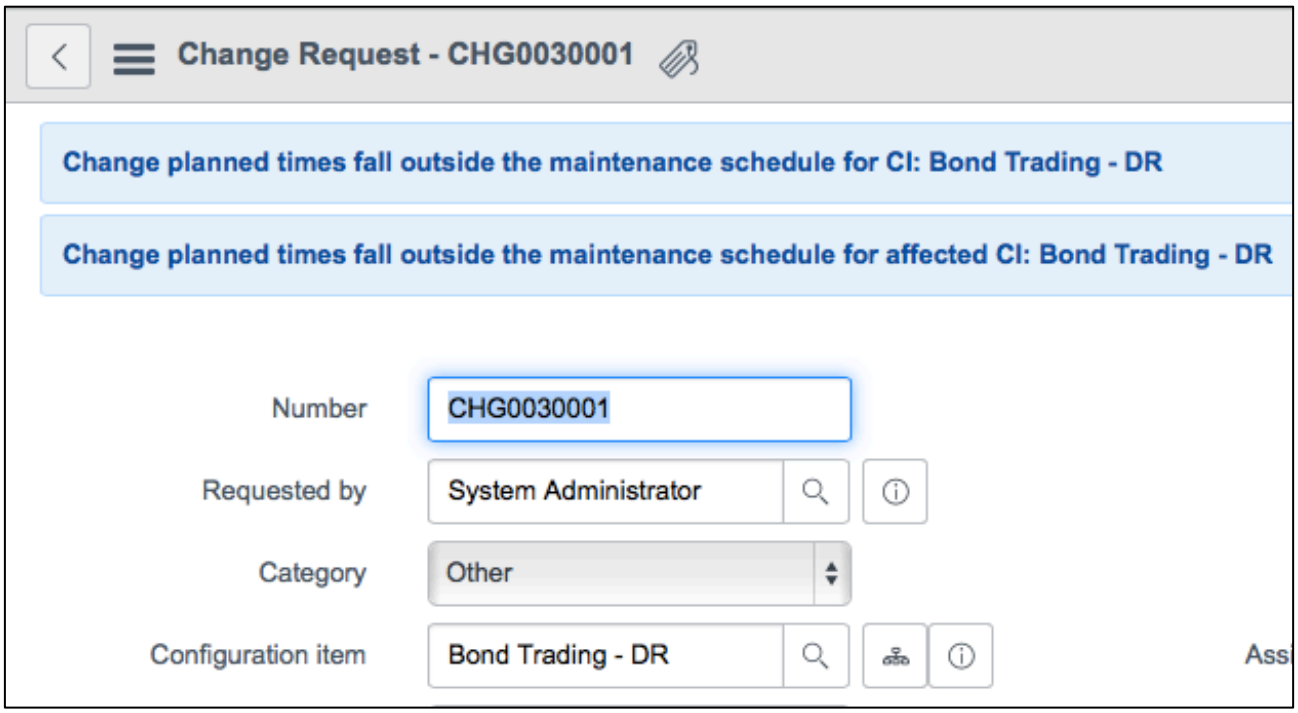


2. Right click the form header and click **Save**.

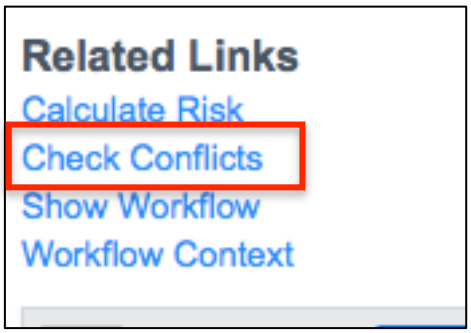


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3. The screen should display the following messages:



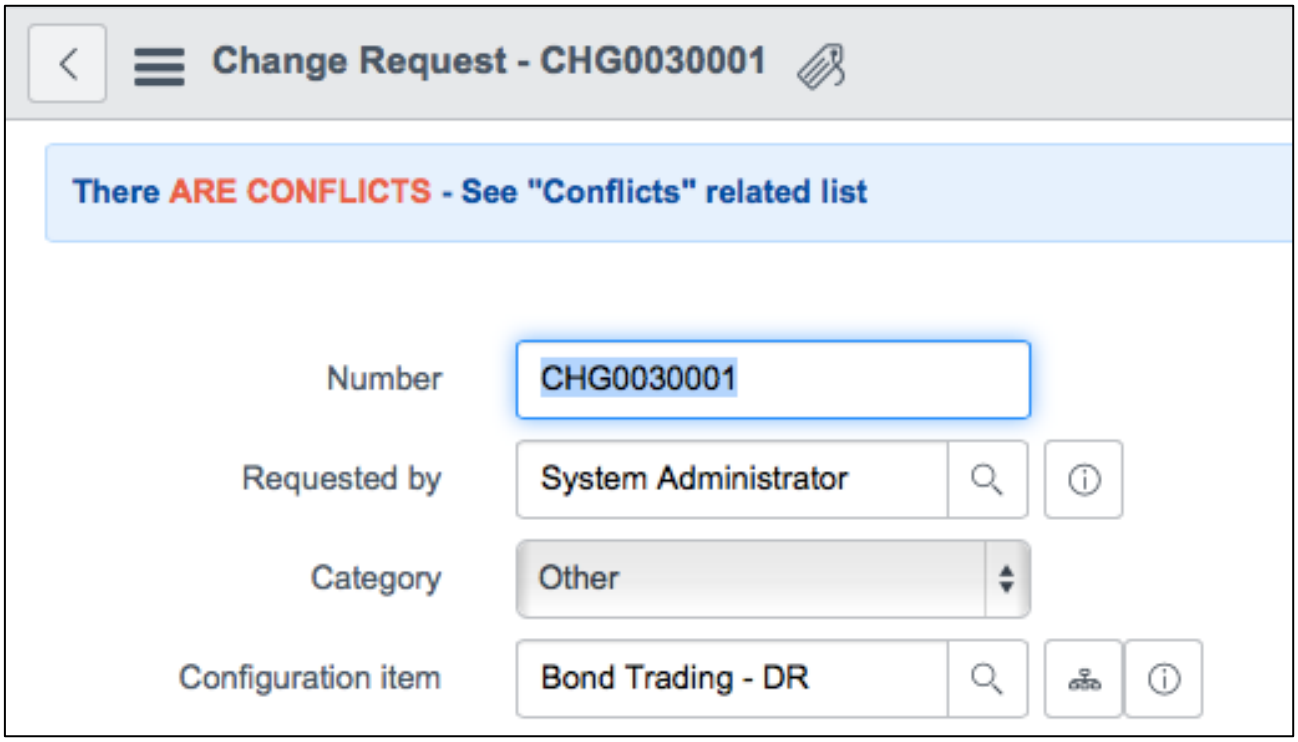
4. Scroll down the Change Request form and click the **Check Conflicts** link.



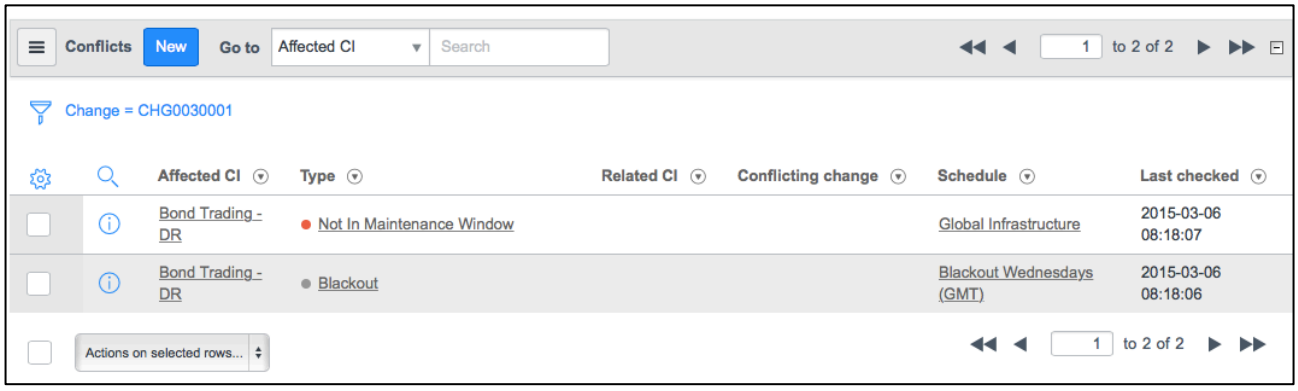
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Lab Success Verification

1. The screen should display the following message:



2. Scroll down the Change Request form to the **Conflicts** tab which should look like the example.

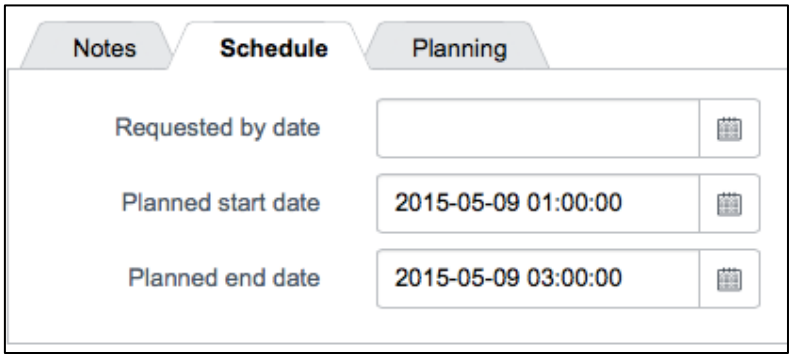


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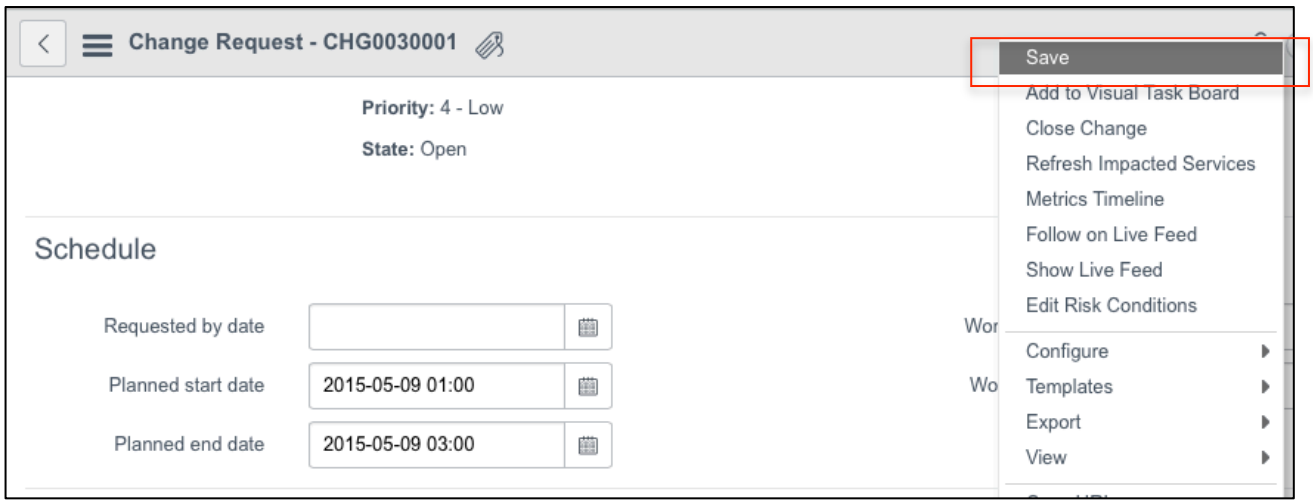
No Conflicts

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

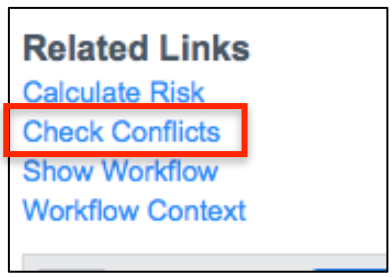
   Planned start date: **2015-05-09 01:00:00**
   Planned end date: **2015-05-09 03:00:00**



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



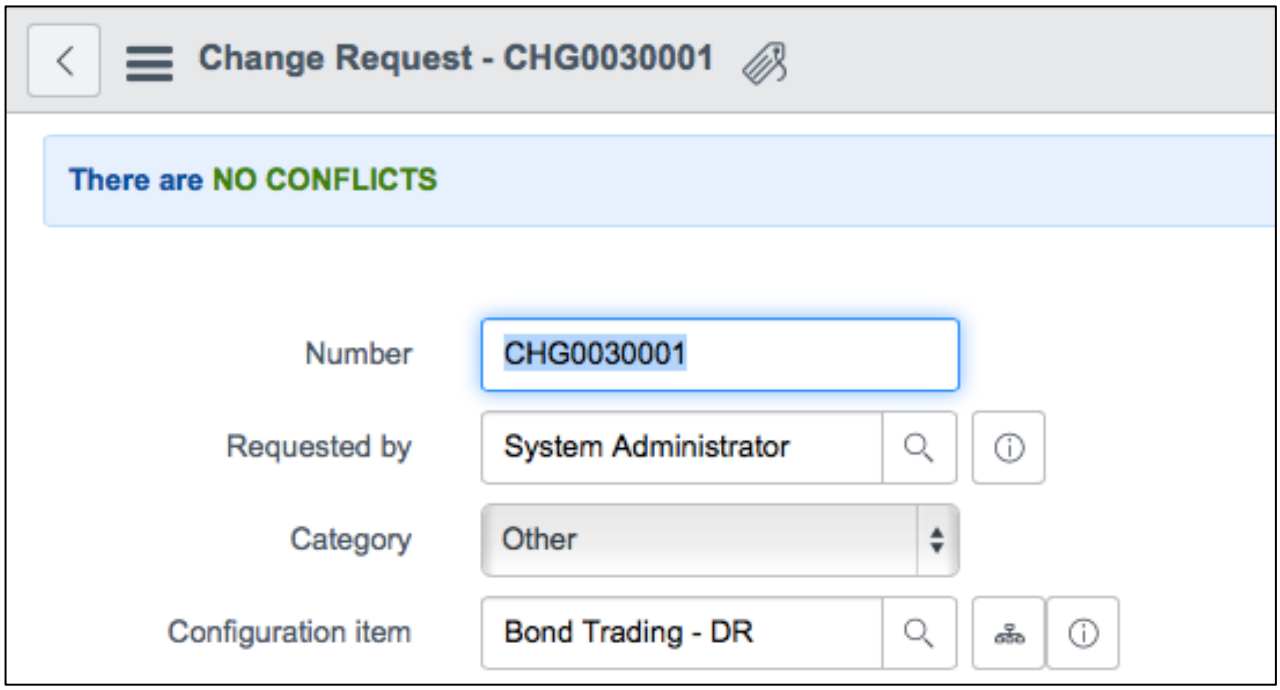
3. Scroll down the Change Request form and click **Check Conflicts**.



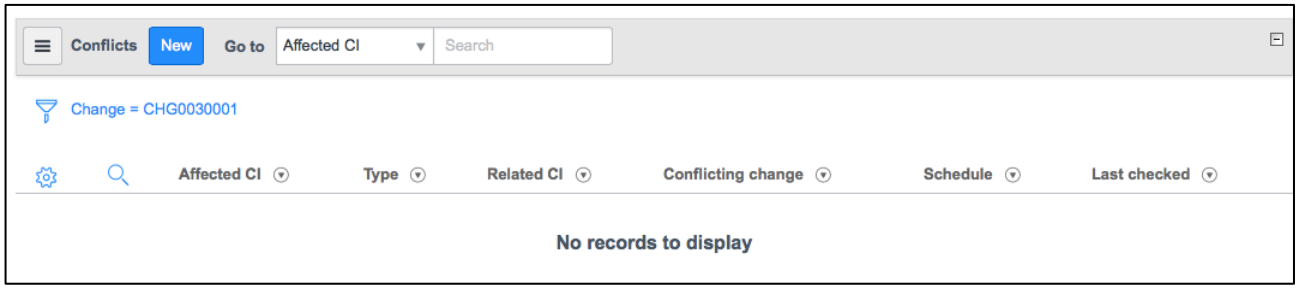
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Lab Success Verification

1. The screen should display the following message:



2. Scroll down the Change Request form to the **Conflicts** tab which should look like the example.



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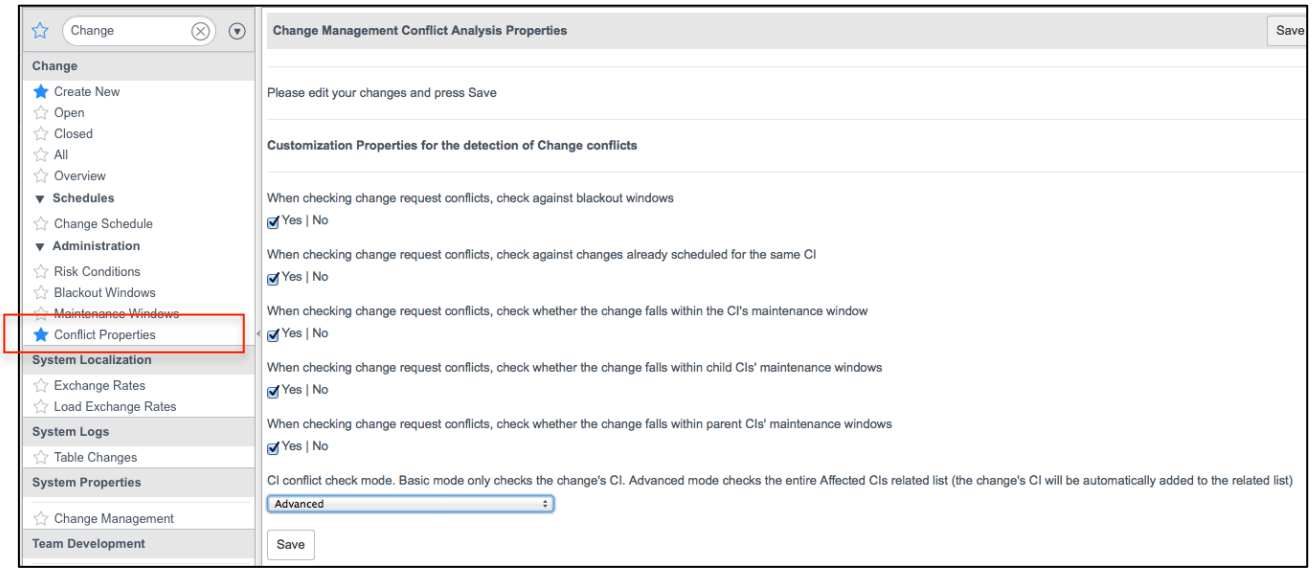
Conflict Detection Through Relationships

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

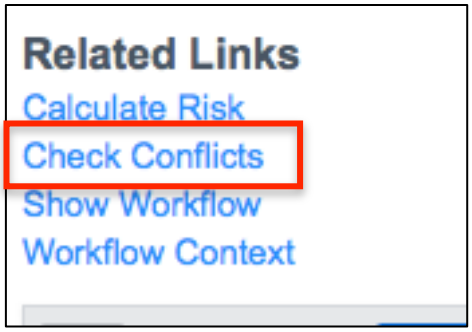
   When checking change request conflicts, check whether the change falls within child CI maintenance windows: **<checked>**

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

   CI conflict check mode: **Advanced**.



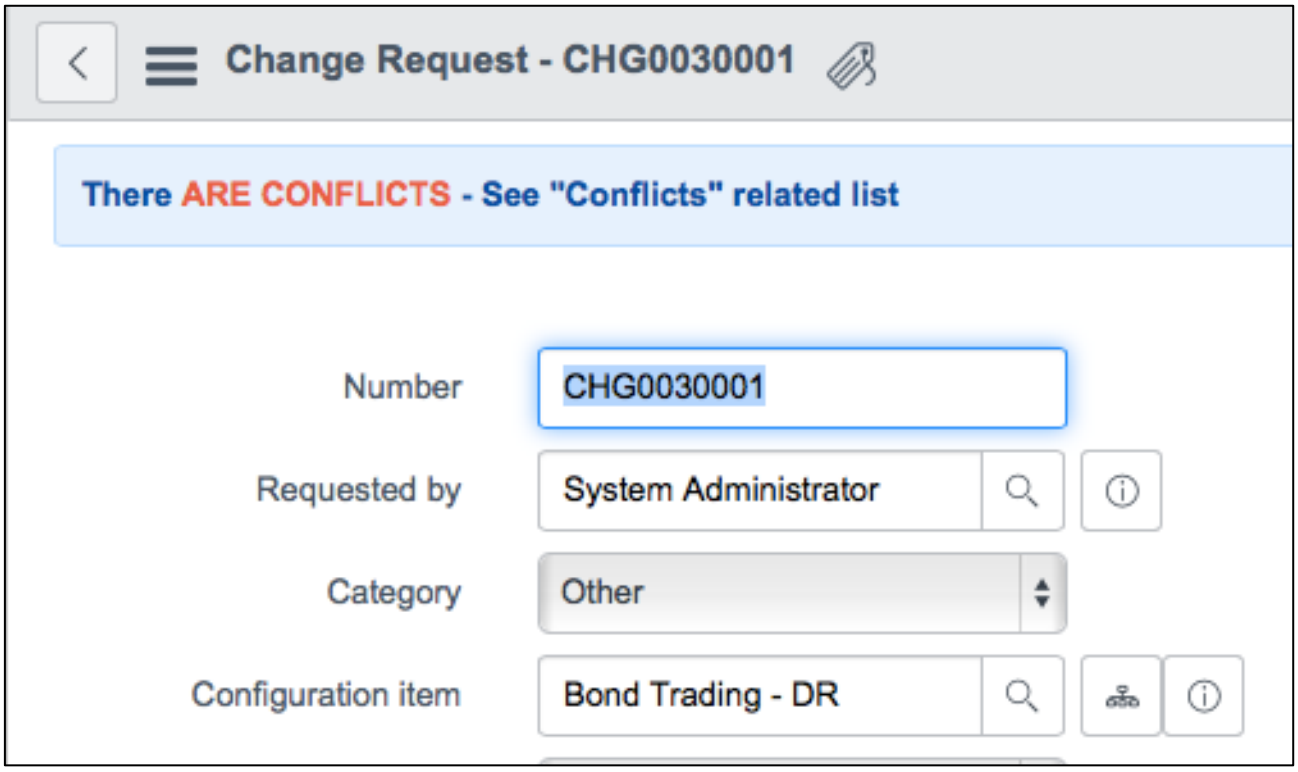
2. Navigate back to the open Change Record (*noted in an earlier step - probably **CHG003001***). Click **Check Conflicts**.



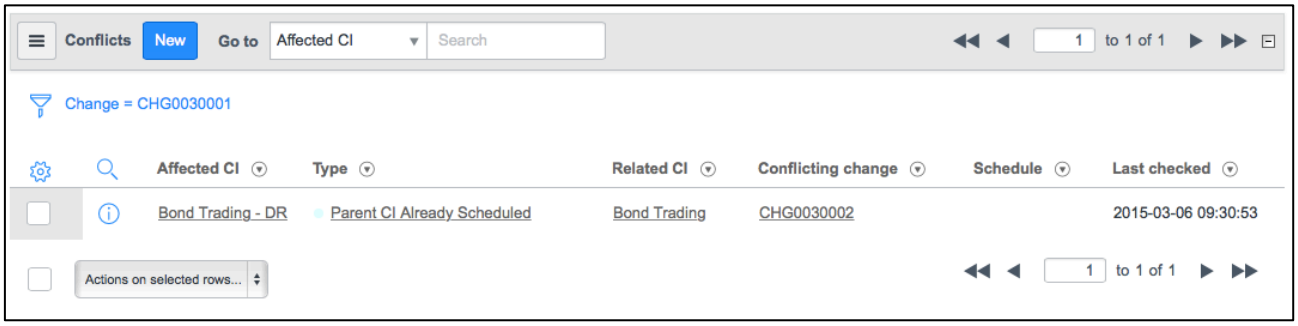
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Lab Success Verification

1. The screen should display the following message:



2. Scroll down the Change Request form to the **Conflicts** tab which should look like the example.



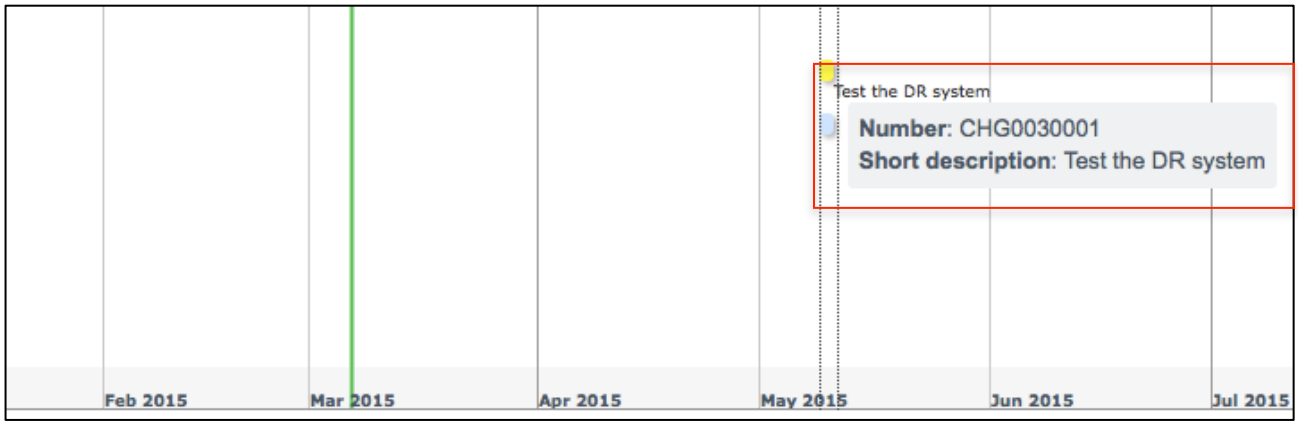
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Change Schedule

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

1. View the out of the box Change Schedule by navigating to **Change > Change Schedule**.

2. The screen should display the Change Schedule with your planned change in May.
   HINT: Hover over the change to see the Change Request number and Short description.



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

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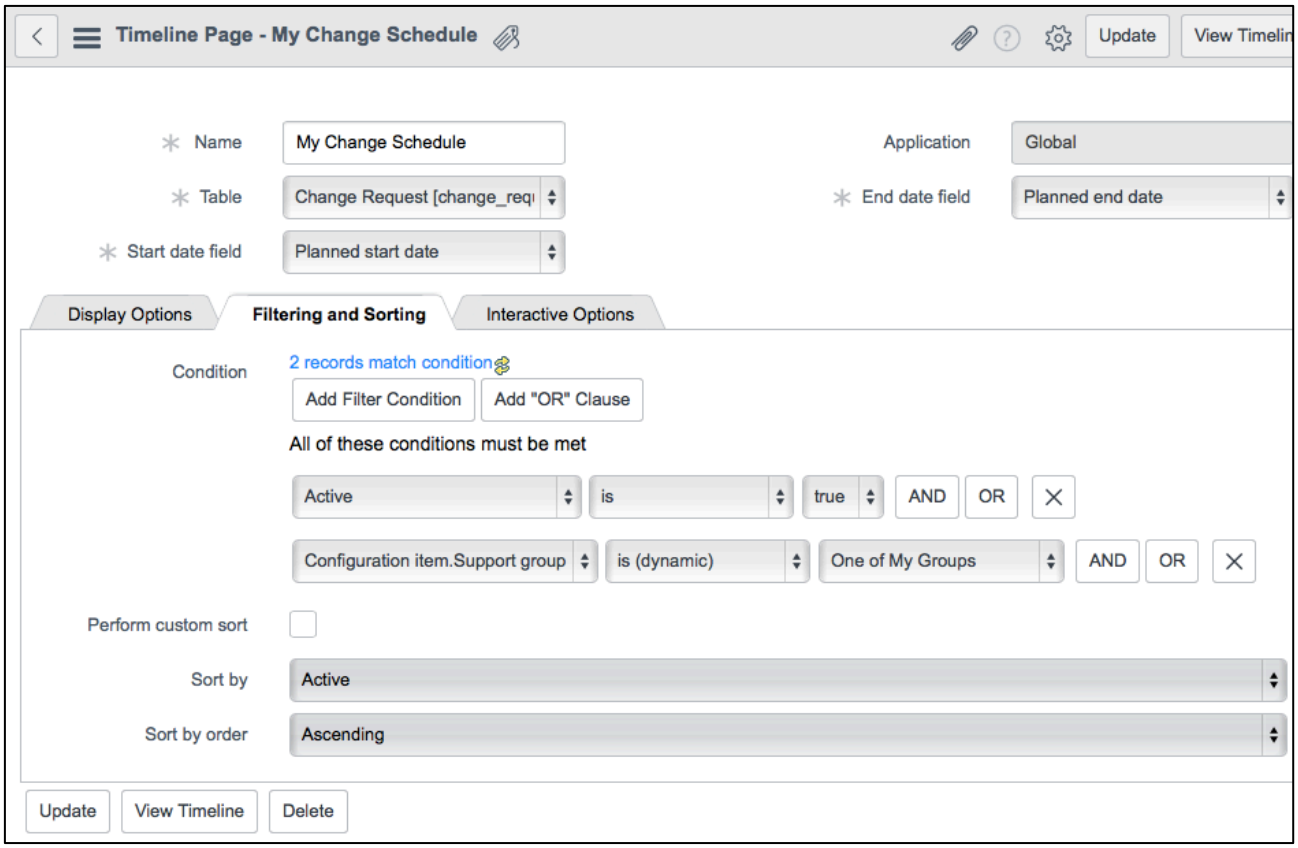
4. Make the following changes to the form.

   Name: **My Change Schedule**

   Conditions:

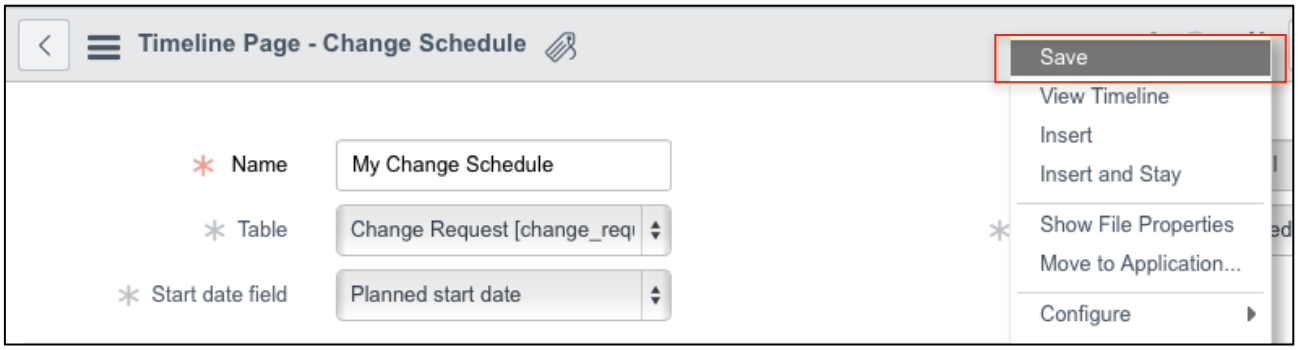
   Active - **is** - **True AND**
   Configuration Item.Support group - **is** (**dynamic**) - **One of My Groups**

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



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

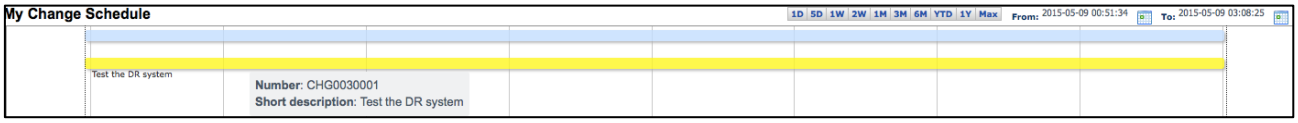


6. After saving, click **View Timeline**



Lab Success Verification

1. The screen should display the Change Schedule in this manner:



HINT: Hover over either Change to see the associated Change Request number and Short description.

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Lab Goal

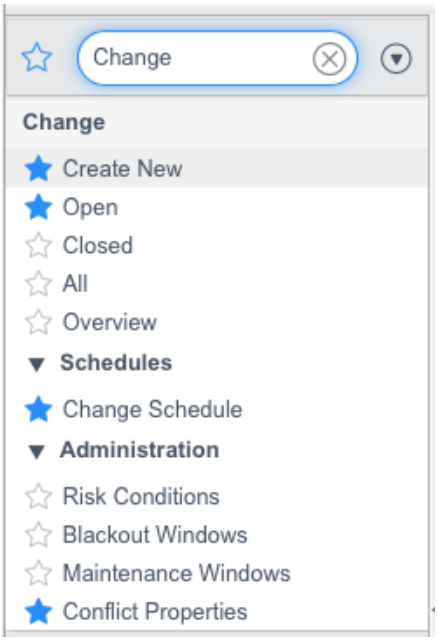
Change requesters must provide accurate information. But sometimes they need help to provide consistent answers to standard situations. Let's help them by automating.

Lab 2
Risk Conditions and Assessment

Set a Risk Condition, and See the Default Risk

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

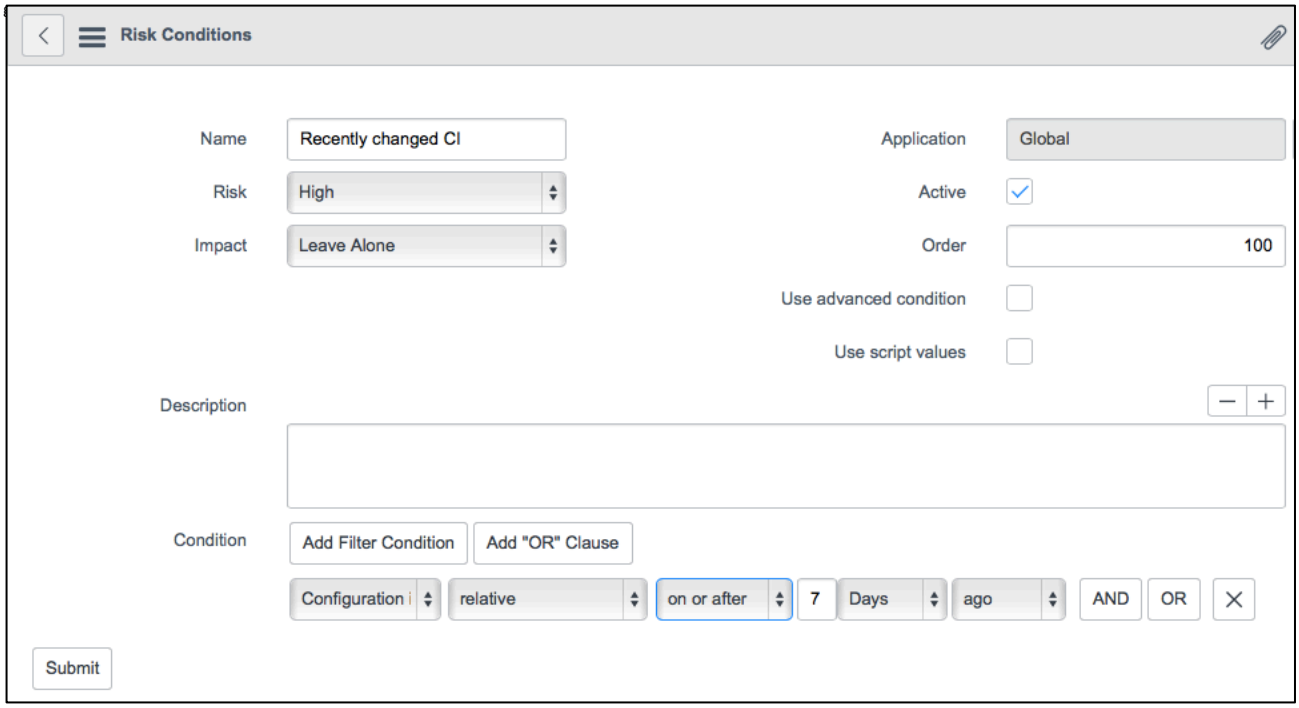
1. Navigate to **Change > Administration > Risk Conditions**. Click **New**.



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2. Complete the Risk Conditions form as follows:

   Name: **Recently changed CI**
   Risk: **High**
   Condition: **Configuration item.Updated - relative - on or after - 7 - Days – ago**

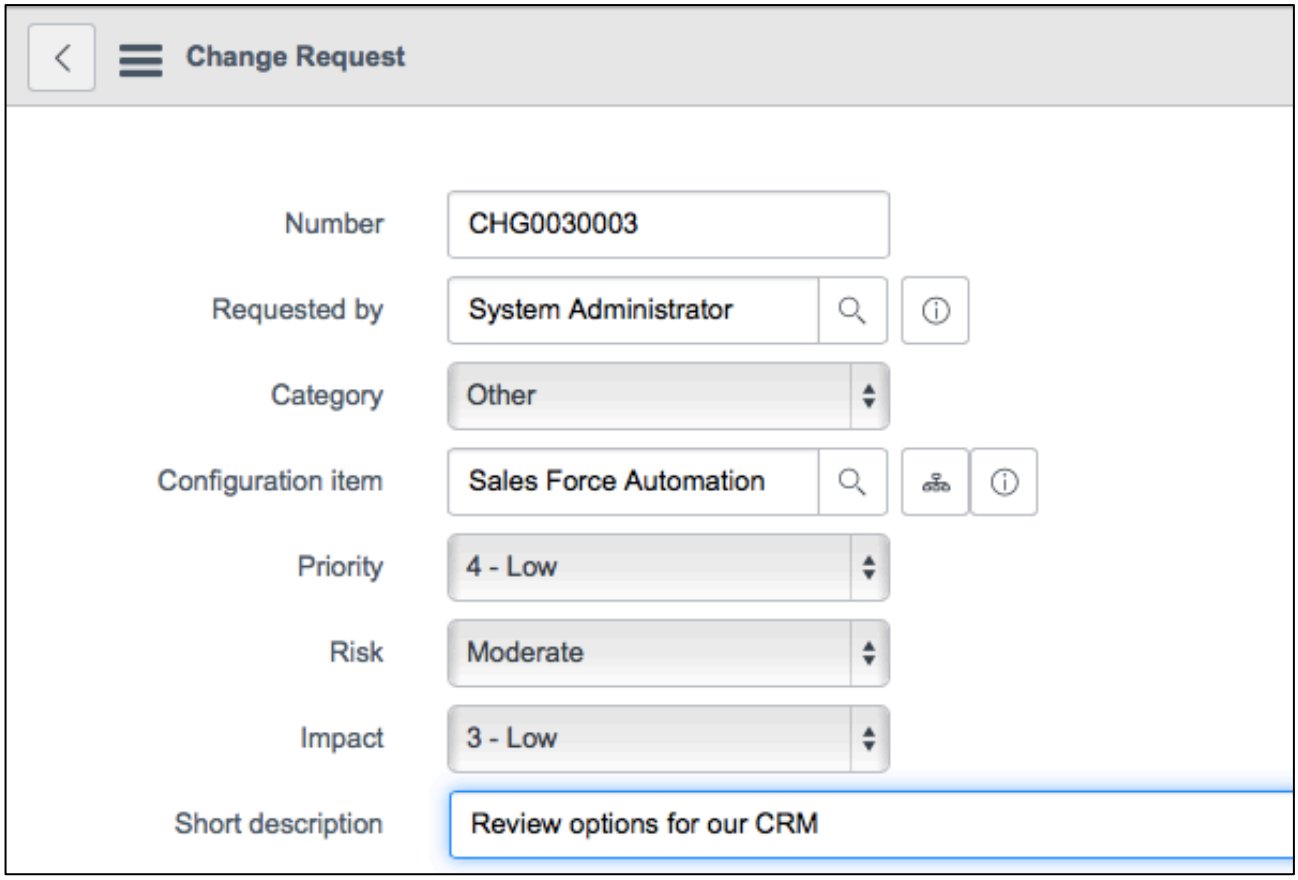


3. Click **Submit**.

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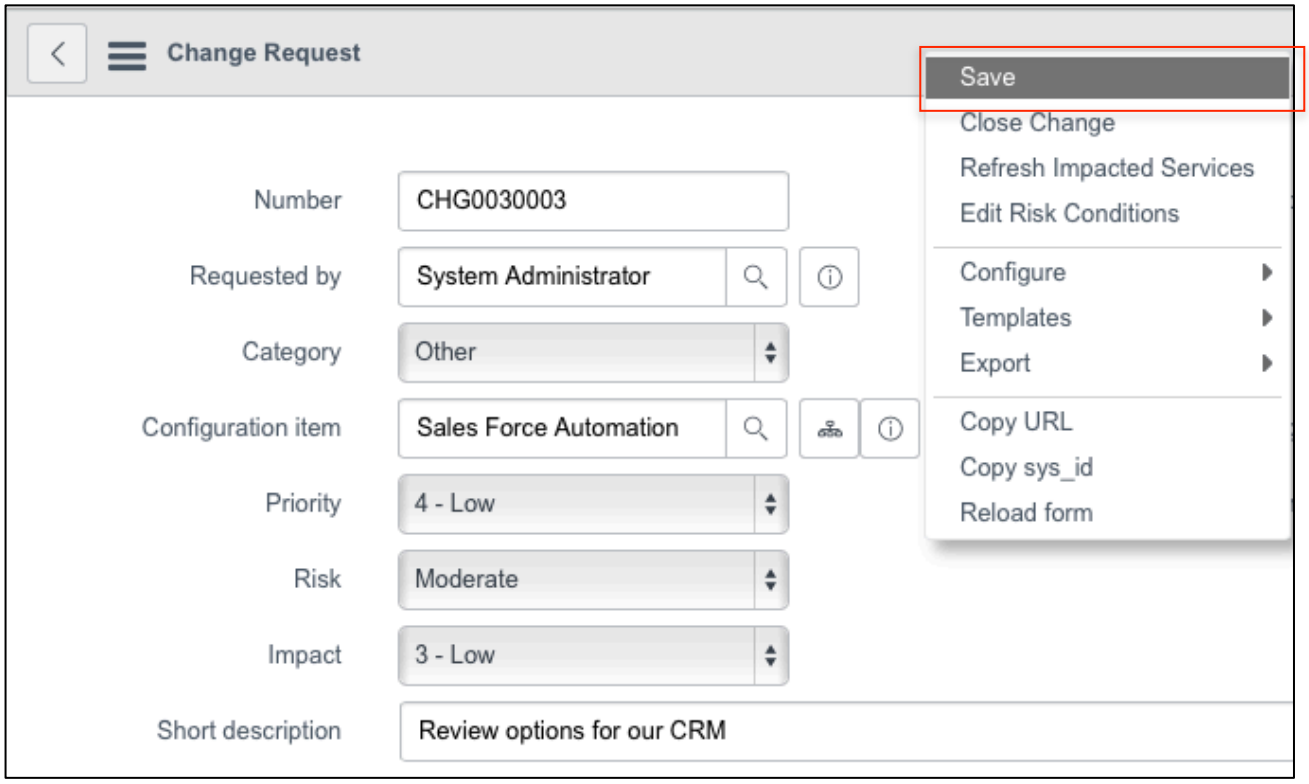
4. Navigate to **Change > Create New**.
   Complete the Change Request form as follows:

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



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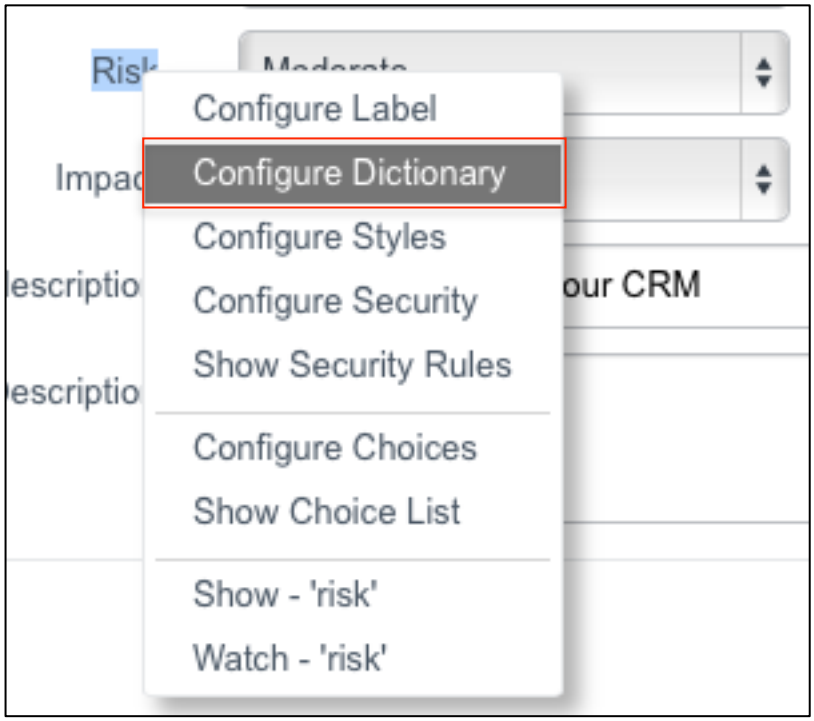
5. Right-click the **Change Request** form header and click **Save**.



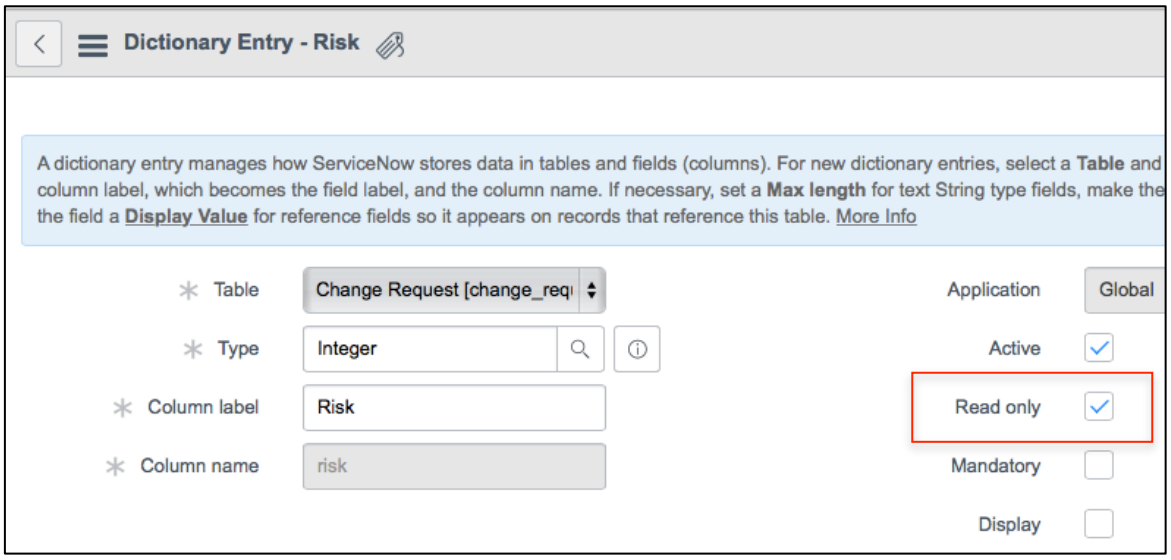
6. Make the risk field **read only,** so **only the risk calculation system can update the value.**

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7. Right-click the **Risk** label, and choose **Configure Dictionary**.

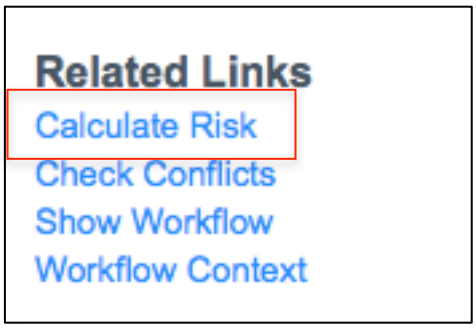


8. Check the **Read only** option. Click **Update**.



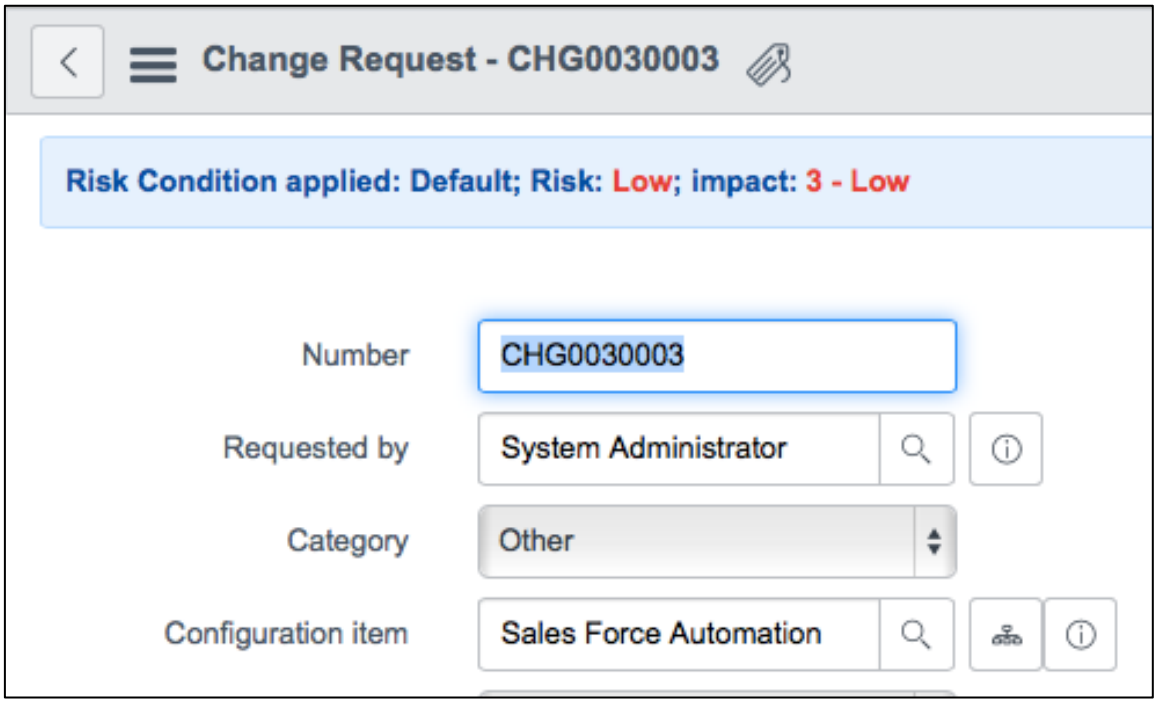
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9. Scroll down the Change Request form. Click the **Calculate Risk** link.



Lab Success Verification

1. The screen should display the following message:
   Risk Condition applied: Default; Risk: Low; impact: 3 – Low.

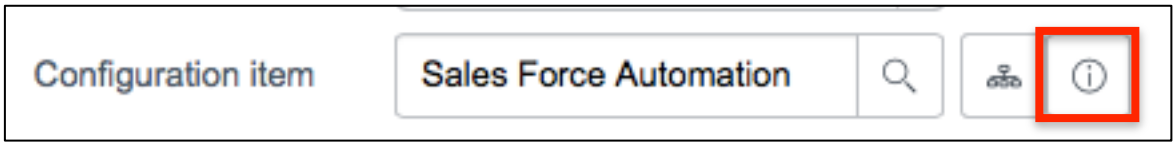


2. You should not be able to change the **Risk** field; it should be set to **Low**.

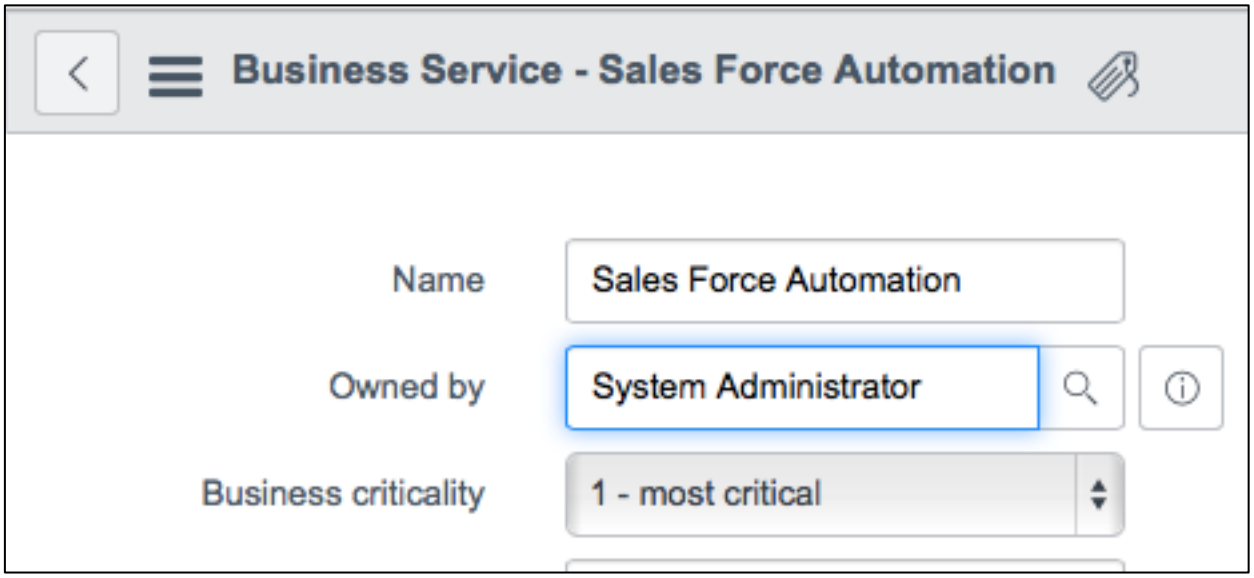
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Change a CI to Apply the Risk Condition

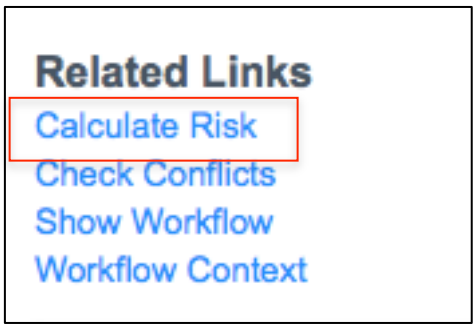
1. Click the reference icon next to **Sales Force Automation**.



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



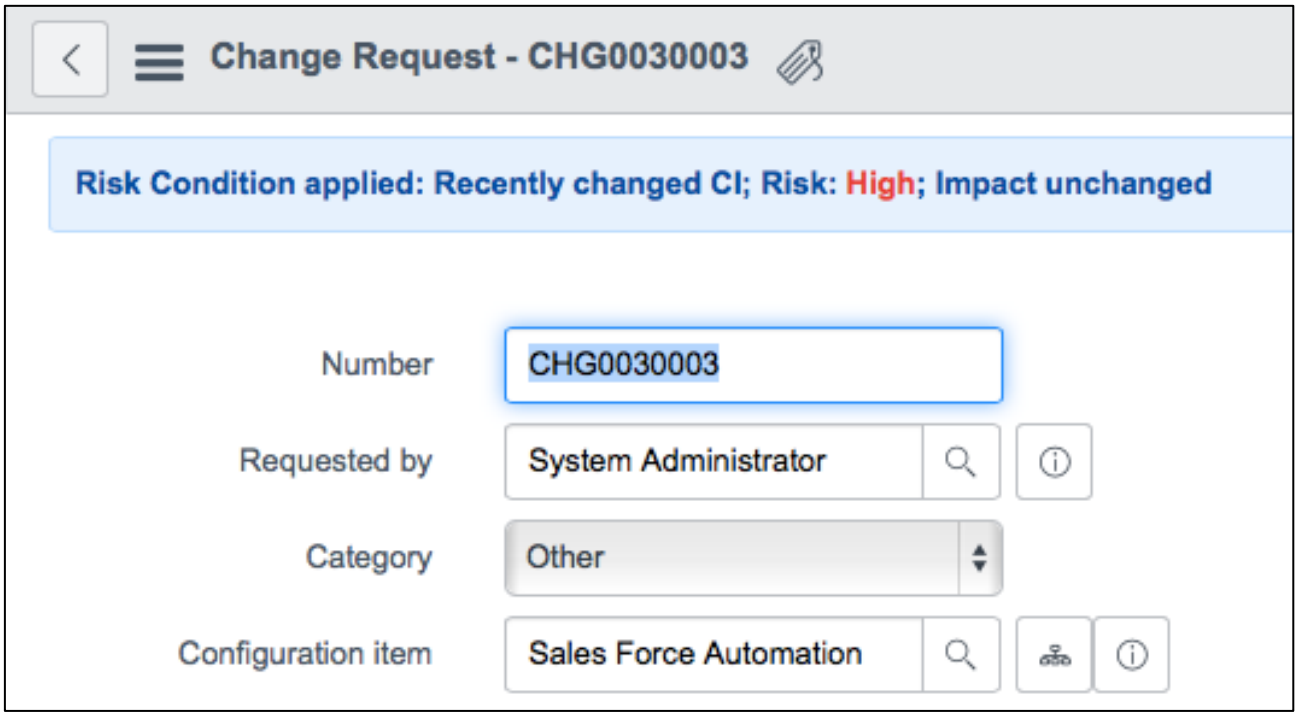
3. Scroll down the Change Request form. Click the **Calculate Risk** link.



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Lab Success Verification

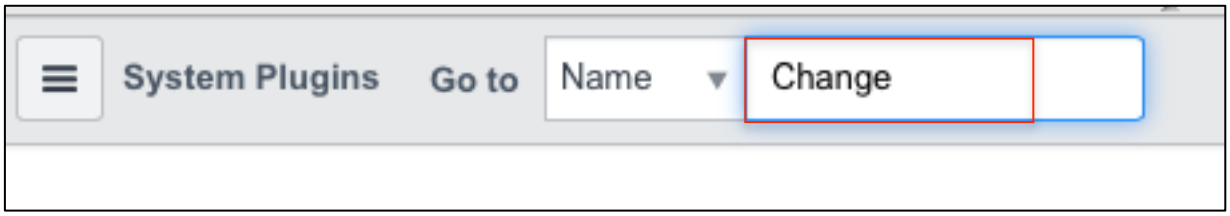
1. The screen should display the following message:
   Risk Condition applied: Recently changed CI; Risk: High; Impact unchanged



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Risk Assessment

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



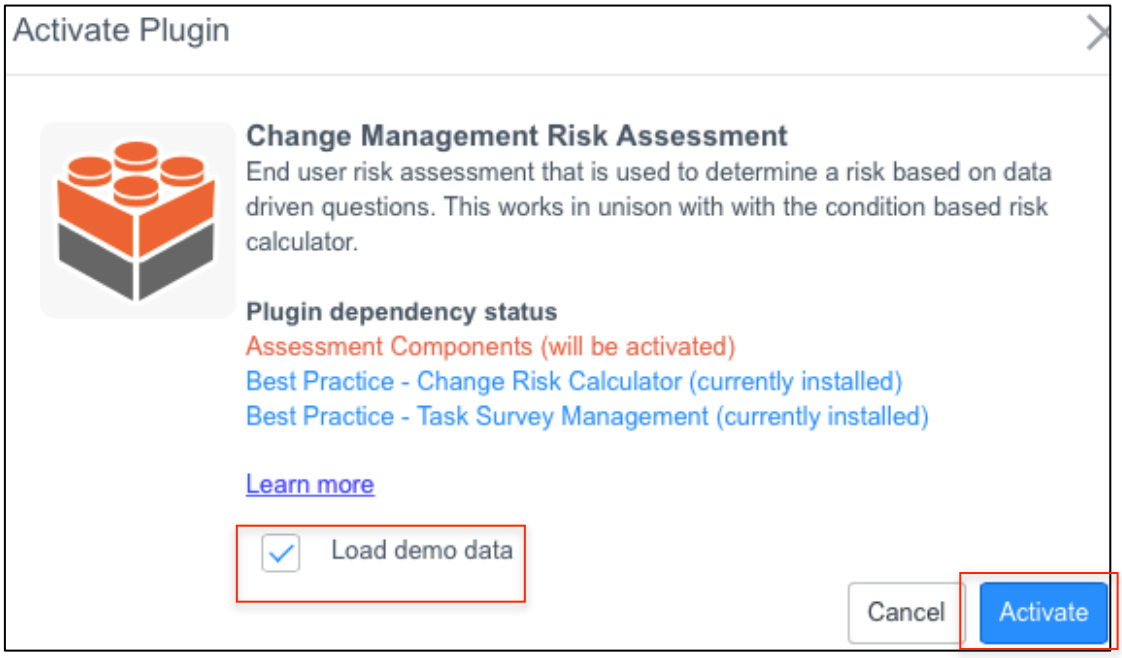
2. Click **Change Management Risk Assessment**.



3. Click **Activate/Upgrade**.

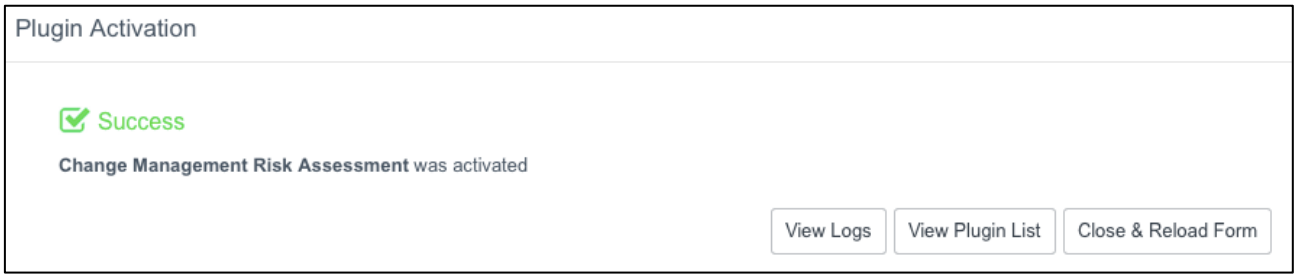


4. Choose **Load demo data**. Click **Activate**.

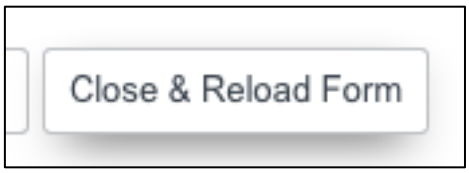


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5. Wait while the plugin loads. Upon completion, the success message **Change Management Risk Assessment was activated** appears.



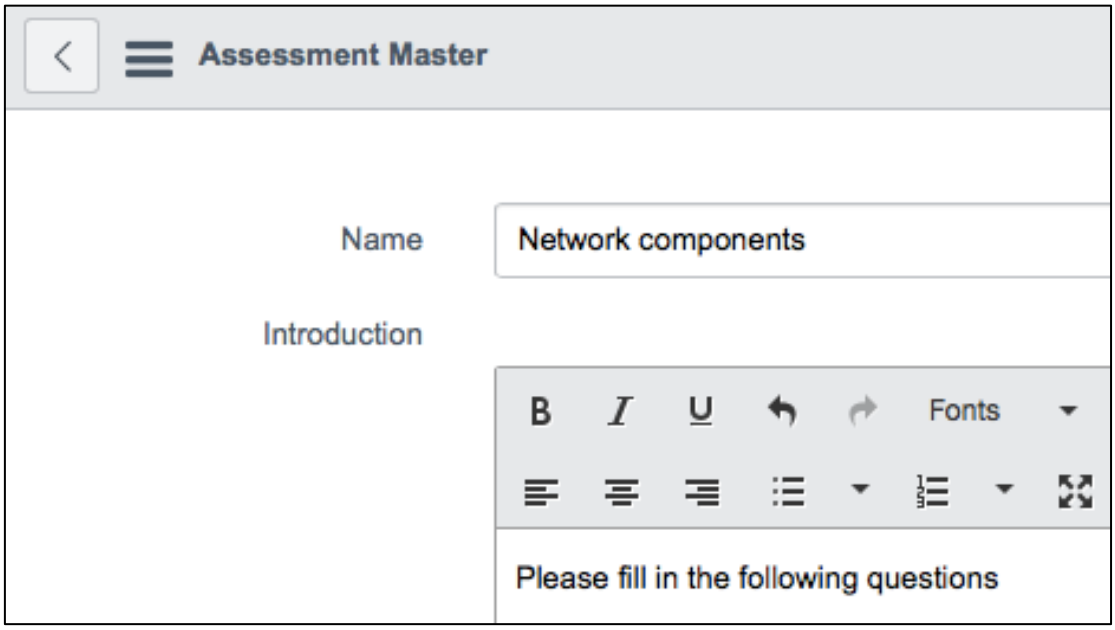
6. Click **Close & Reload Form**.



7. Navigate to **Change > Administration > Risk Assessments**. Click **New**.

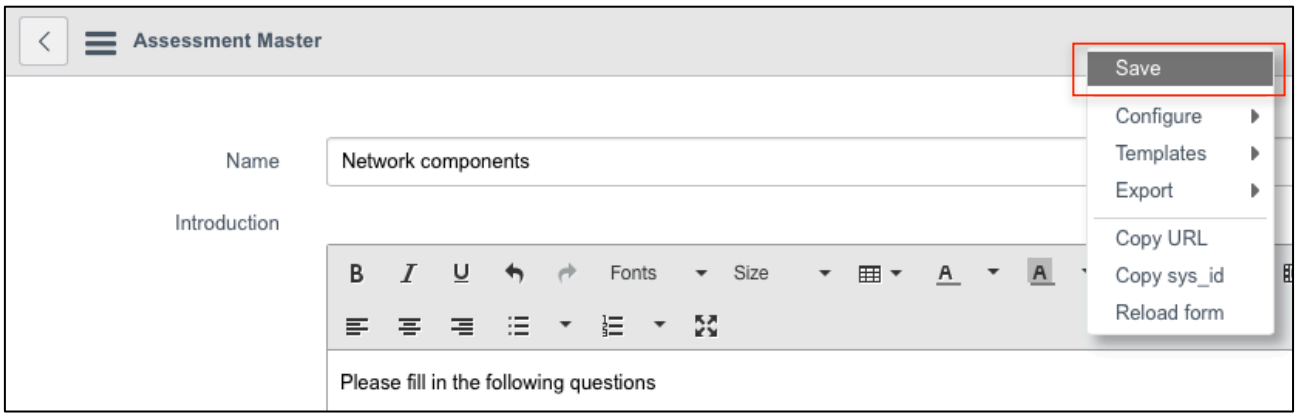
8. Complete the **Assessment Master** form as follows:

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

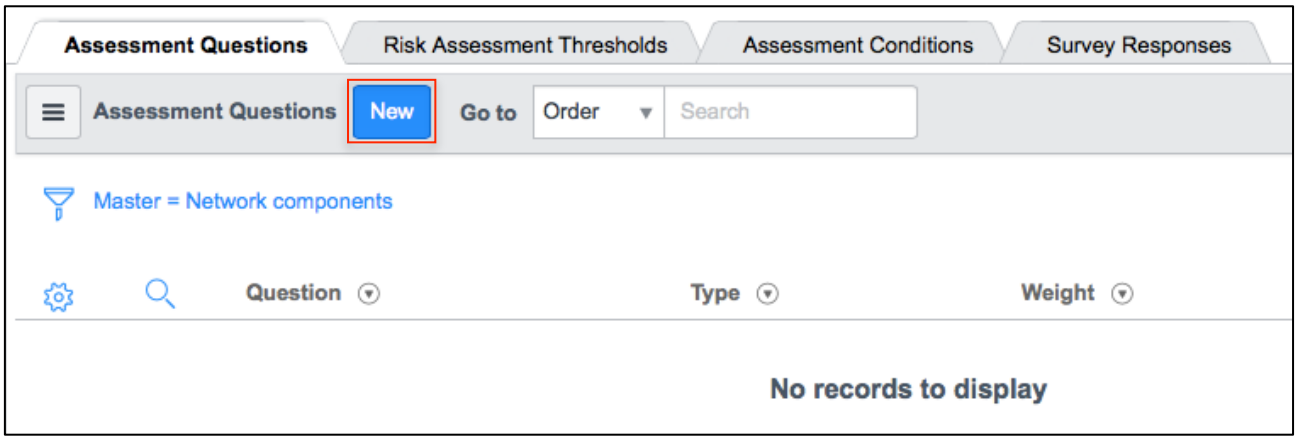


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9. Right click the **Assessment Master** form header and click **Save**.

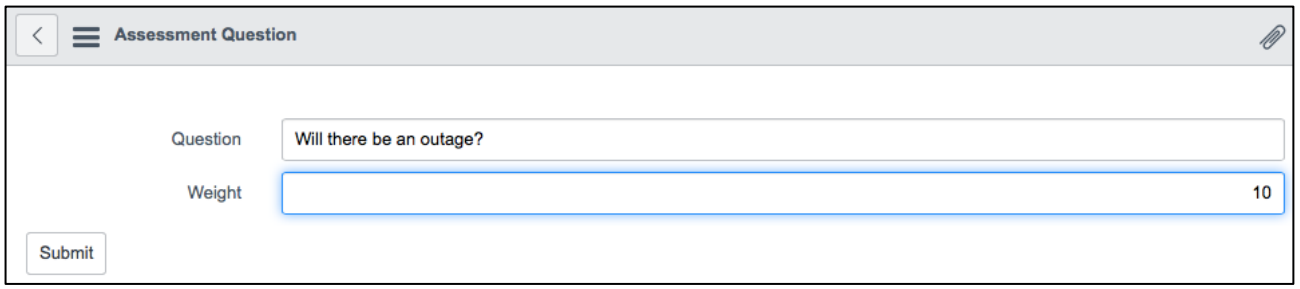


10. Scroll to the **Assessment Questions** tab. click **New**.



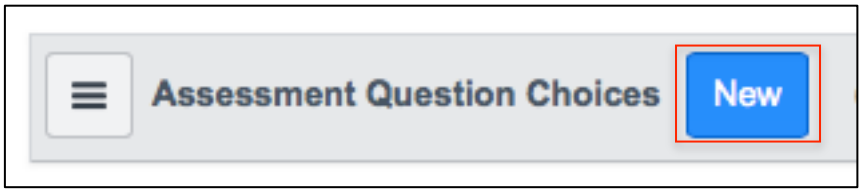
11. Complete the **Assessment Question** form as follows, then right click the form header and click **Save**:

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



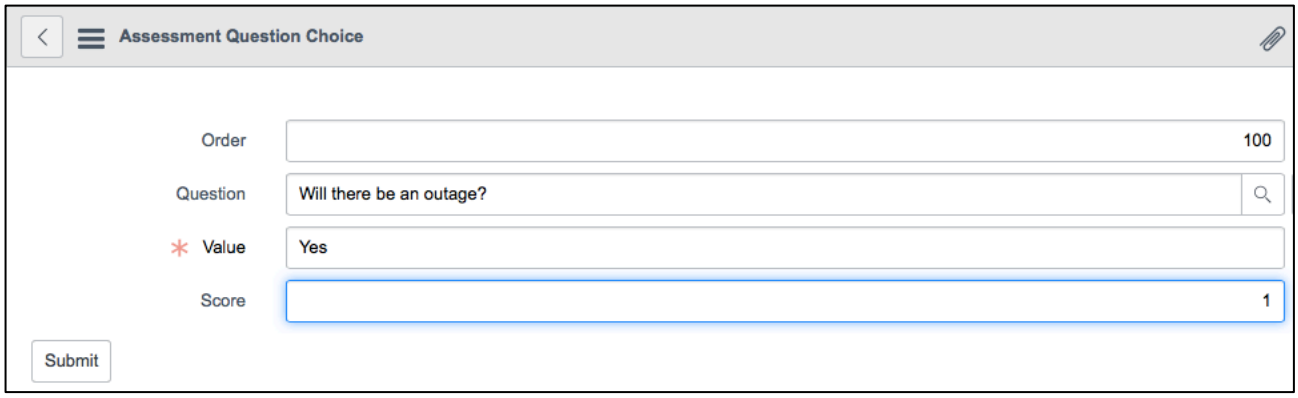
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12. In the **Assessment Questions Choices** section, click **New**.

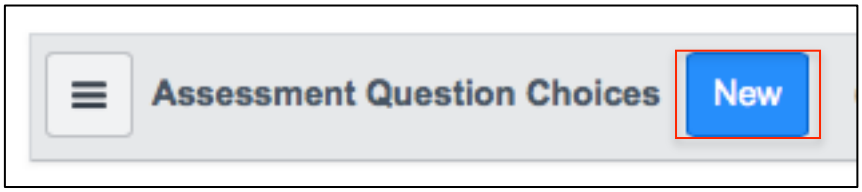


13. Complete the **Assessment Question Choice** form as follows, then click **Submit**:

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



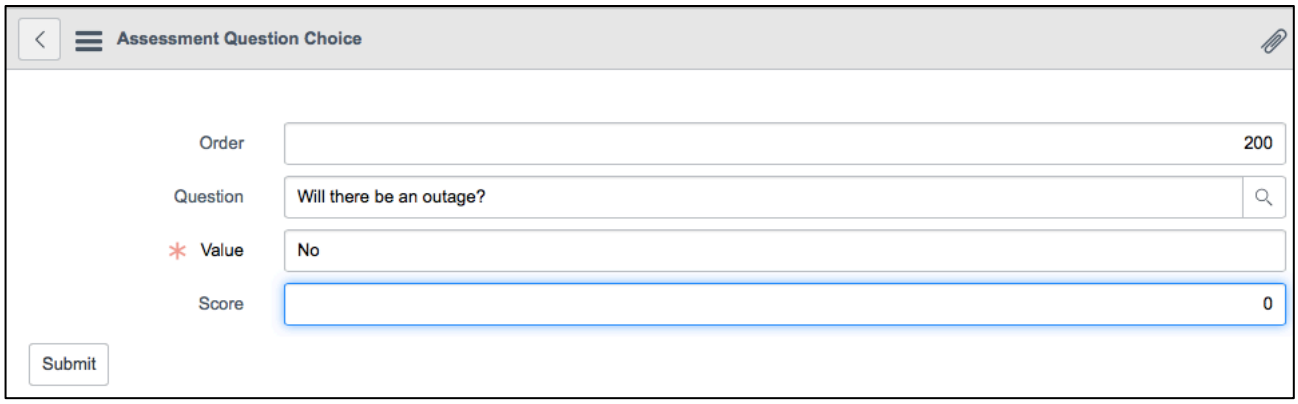
14. In the **Assessment Questions Choices** tab, click **New**.



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15. Complete the **Assessment Question Choice** form as follows, then click **Submit**:

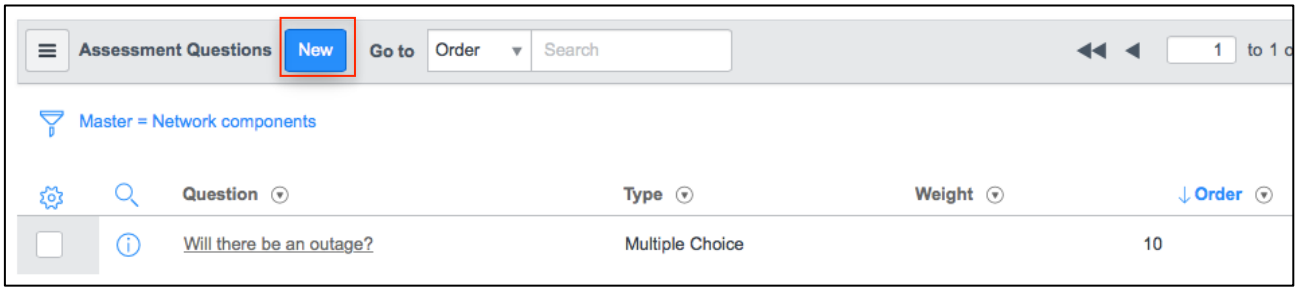
    Value: **No**
    Score: **0**



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



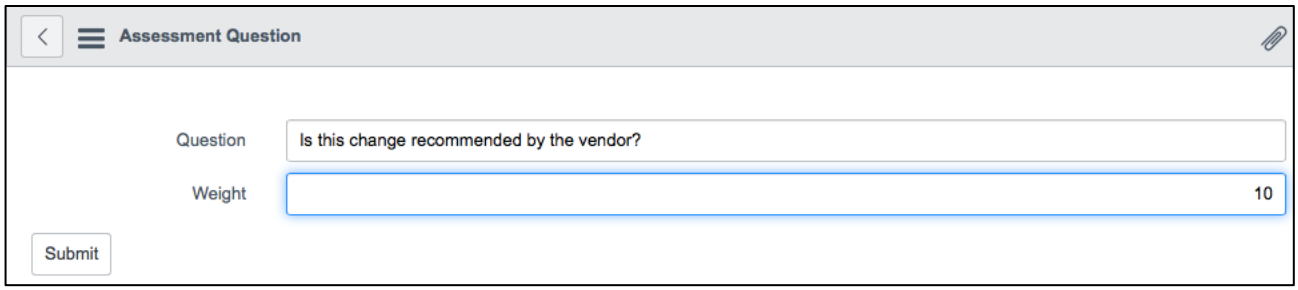
17. In the **Assessment Questions** tab, click **New**.



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18. Complete the **Assessment Question** form as follows:

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



19. Right click the form header and click **Save**.

20. In the **Assessment Questions Choices** tab, click New.

21. Complete the **Assessment Question Choice** form as follows, then click **Submit**:

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

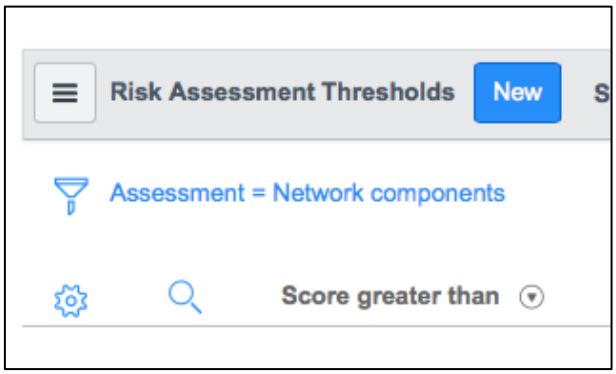
22. In the **Assessment Questions Choices** section, click **New**.

23. Complete the **Assessment Question Choice** form as follows, then click **Submit**:

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

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

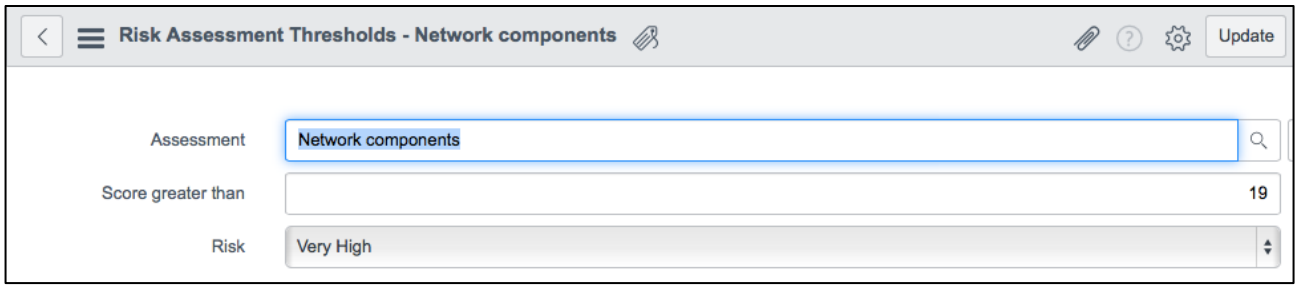
25. In the **Risk Assessment Thresholds** tab, click **New**.



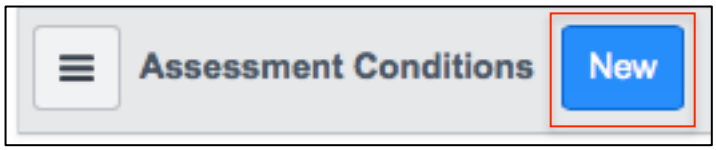
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26. Complete the **Risk Assessment Thresholds** form as follows and click **Submit:**

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

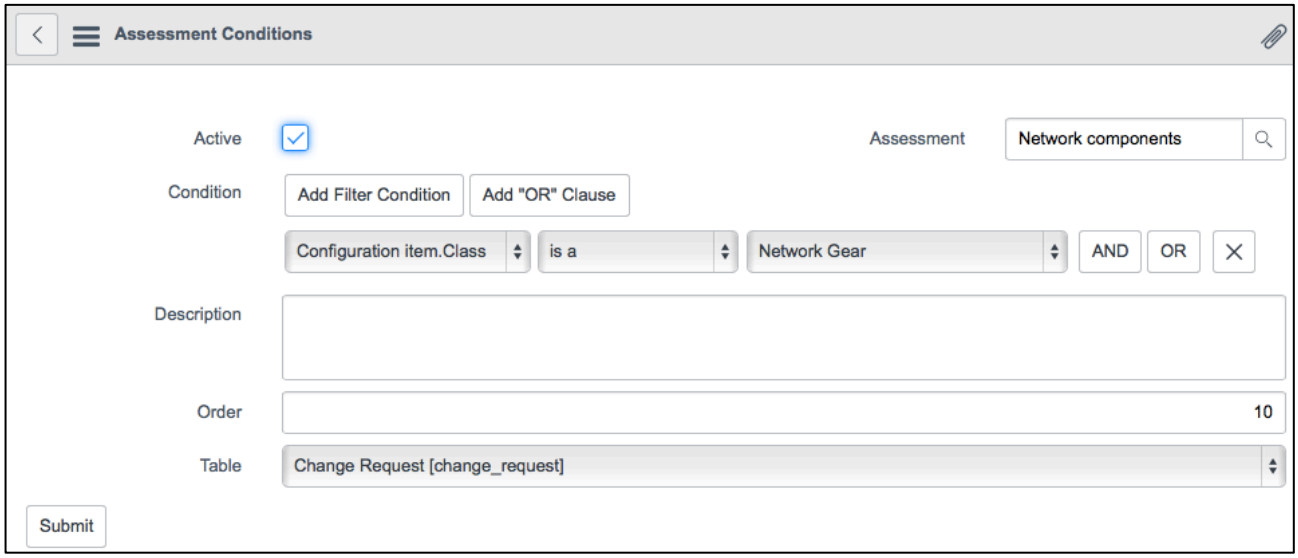


27. In the **Assessment Conditions** tab, click **New**.



28. Complete the **Assessment Conditions** form as follows and click **Submit**:

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

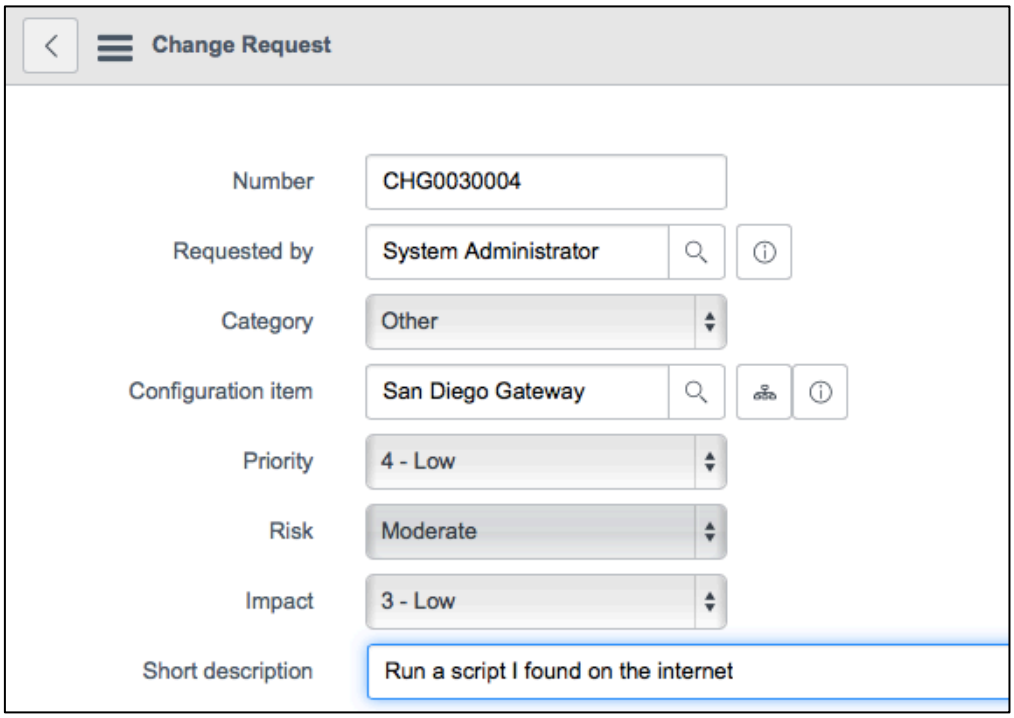


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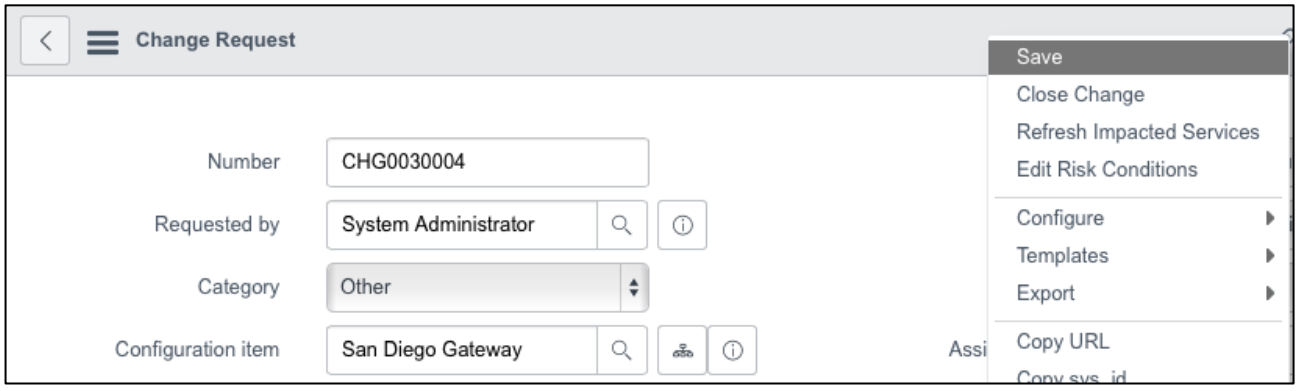
29. Navigate to **Change > Create New**.

30. Complete the **Change Request** form as follows:

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

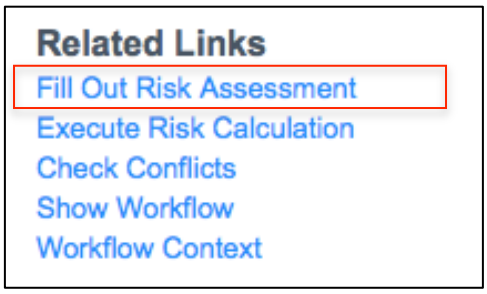


31. Right click on the **Change Request** form header and click **Save**.



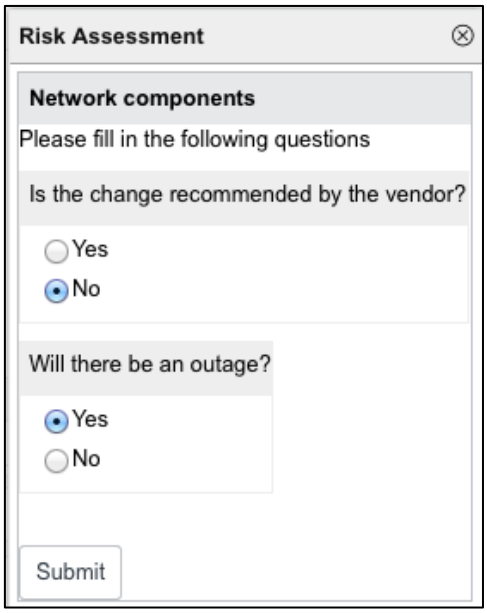
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32. Scroll down to Related Links and select **Fill Out Risk Assessment**.

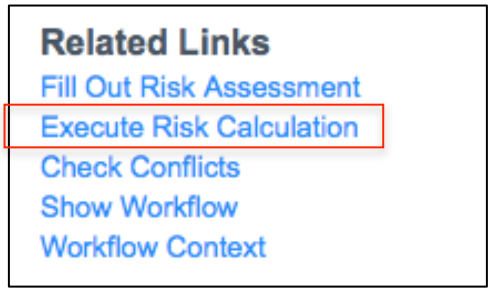


33. Complete the **Risk Assessment** form as follows. Click **Submit**.

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



34. Scroll down to **Related Links** and select **Execute Risk Calculation**.

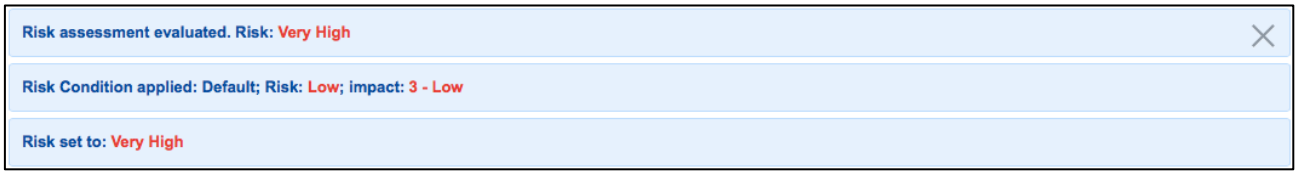


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Lab Success Verification

1. You should receive a message saying:

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



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Lab Goal

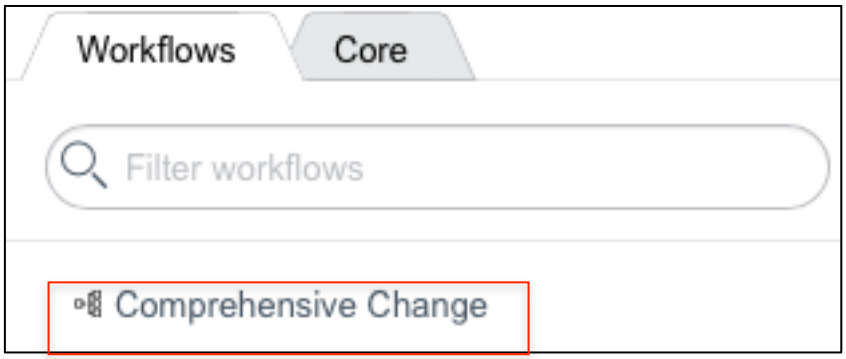
A typical change process will ask for approval from whoever manages the CI specified in the Change Request. Lets extend that to include the Change Advisory Board who looks after the Business Service.

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

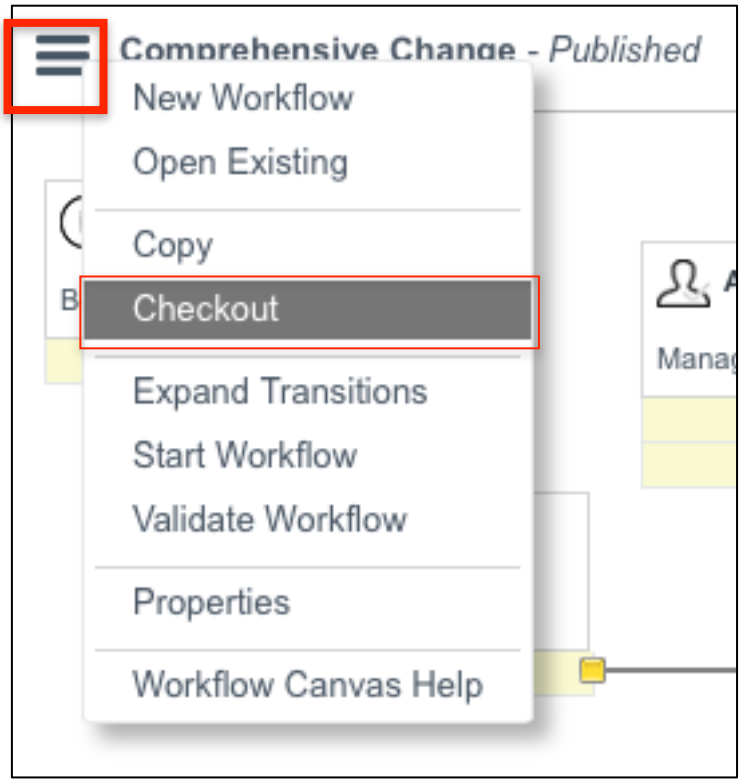
Perform Risk-Based Approval

1. Navigate to **Workflow > Workflow Editor**.
2. Under the **Workflows** tab on the right hand side of the screen, click **Comprehensive Change**.



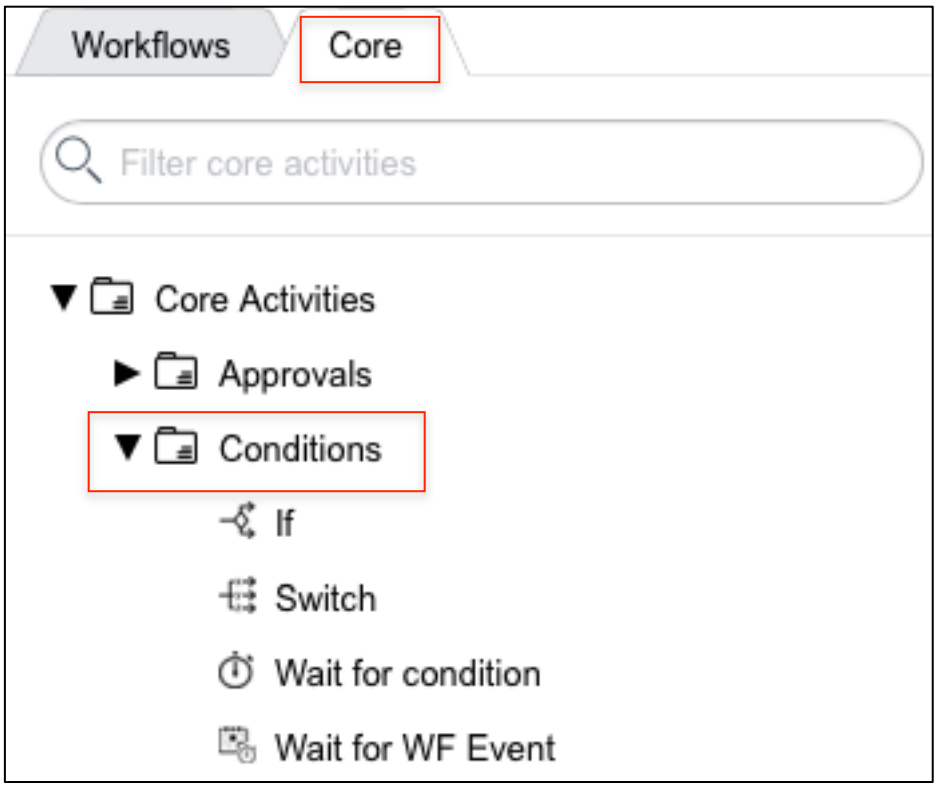
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3. Click on the **Workflow Actions** menu icon, and select **Checkout**.

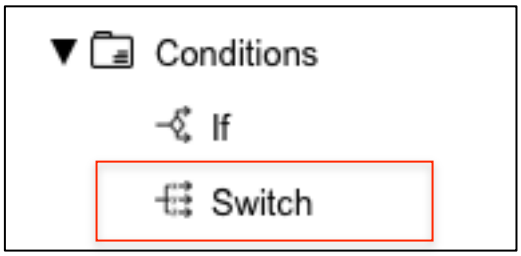


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4. Select the **Core** tab on the right side of the screen. Click on **Conditions** under Core Activities.



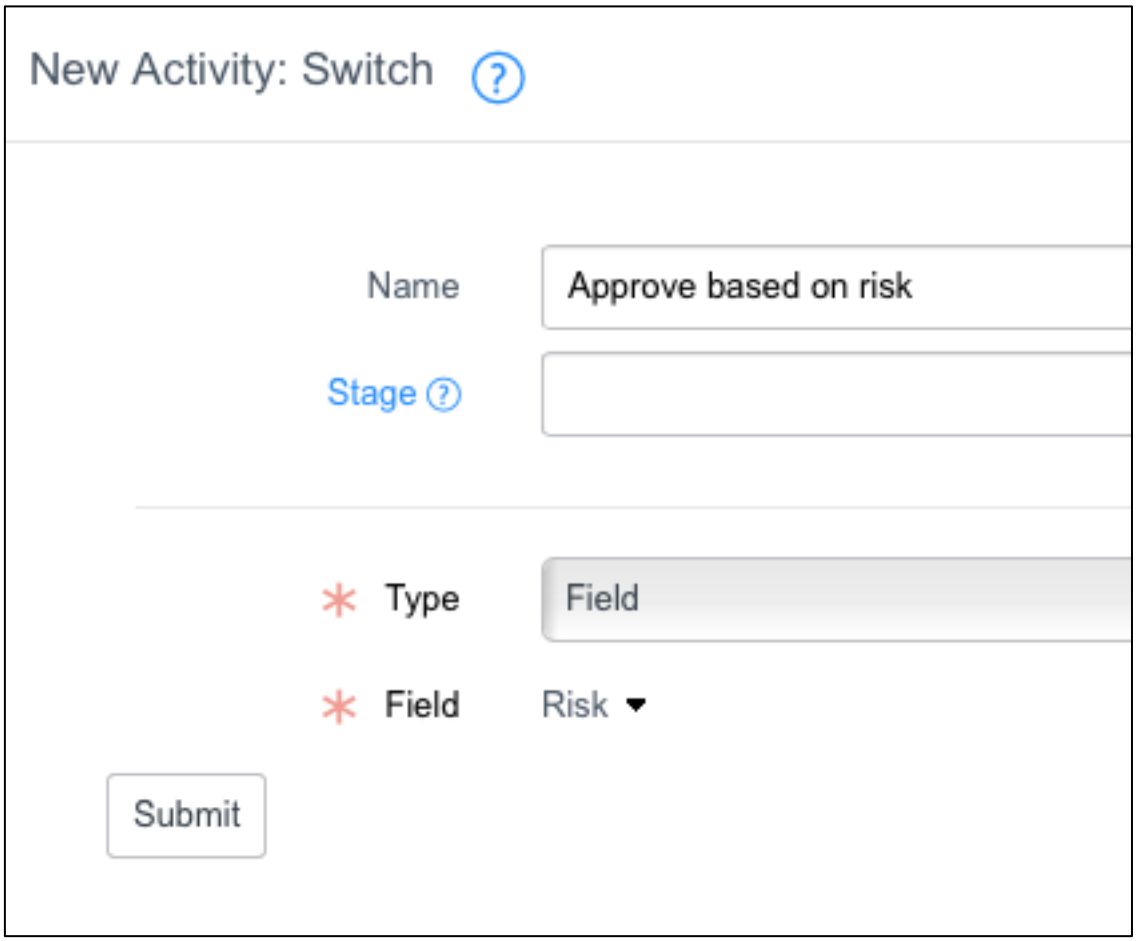
5. Select the **Switch** activity and drag it onto the left side of the Workflow. Place it underneath the **Run Script/Approval Requested** activity.



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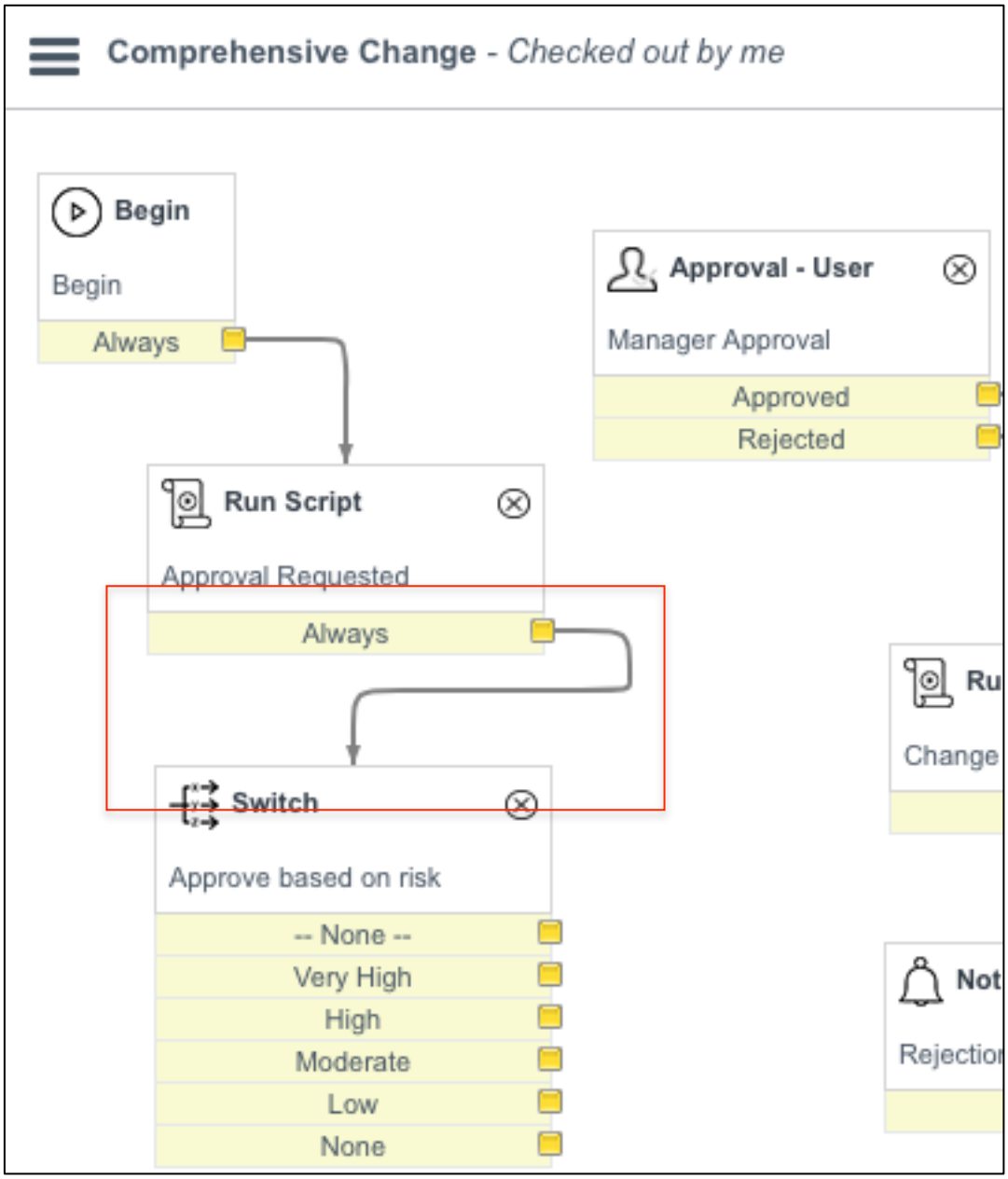
6. Complete the fields as follows. Click **Submit**:

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



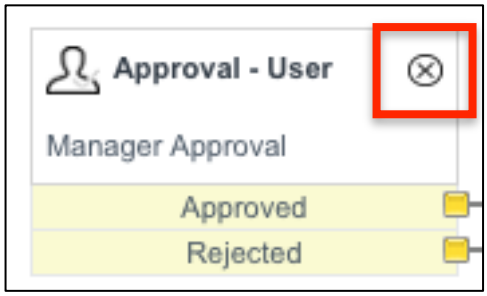
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7. Move the connection between the **Run Script** Activity and the **Approval - User** Activity so that the **Run Script** Activity connects to the **Switch** Activity as shown below.



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8. Click the [**X**] on the **Approval – User** / **Manager Approval** Activity to remove it.



9. Under the **Core** tab on the right side of the screen, click **Approvals** under **Core Activities**.



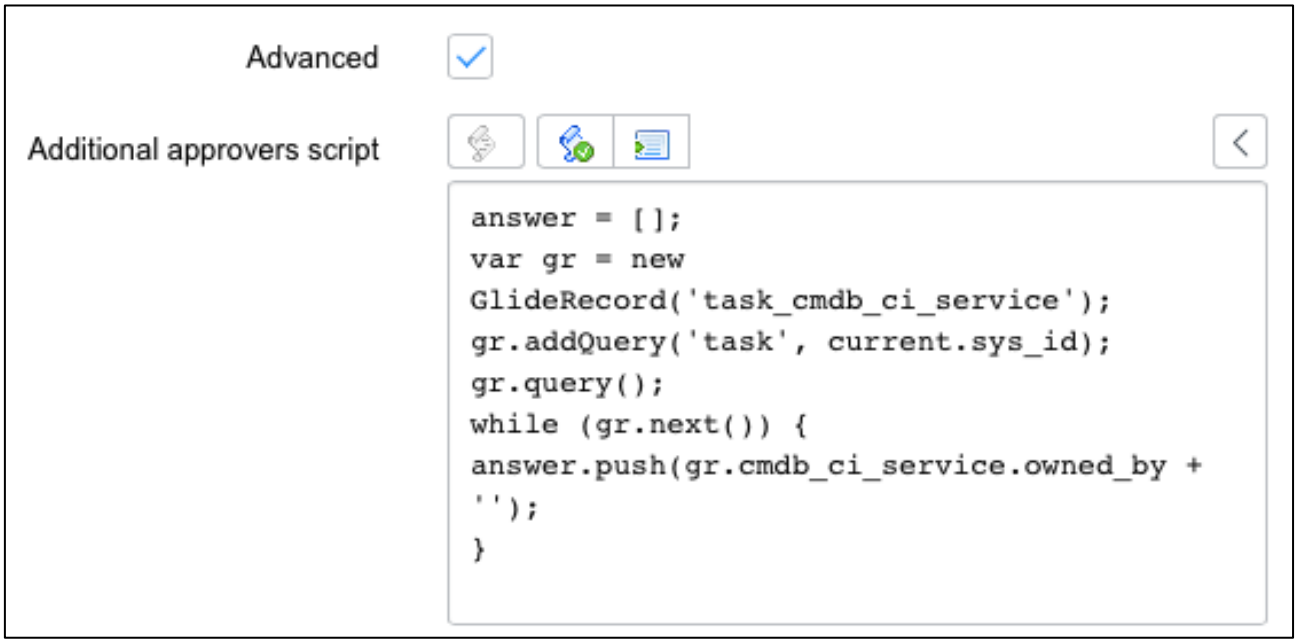
10. Select the **Approval - User** activity and drag it onto the left side of the Workflow. Place it under the **Switch** activity.

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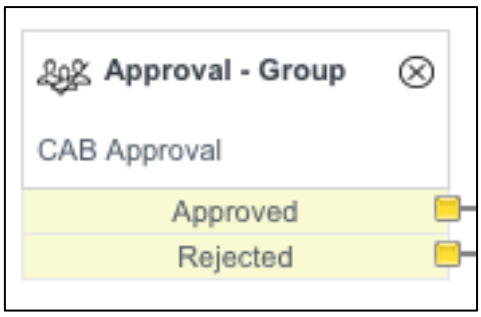
11. Complete the fields as follows. Click **Submit**:

    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.



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

    Name: **CAB 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 connections from the **Switch / Approve based on risk** Activity as follows:

    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

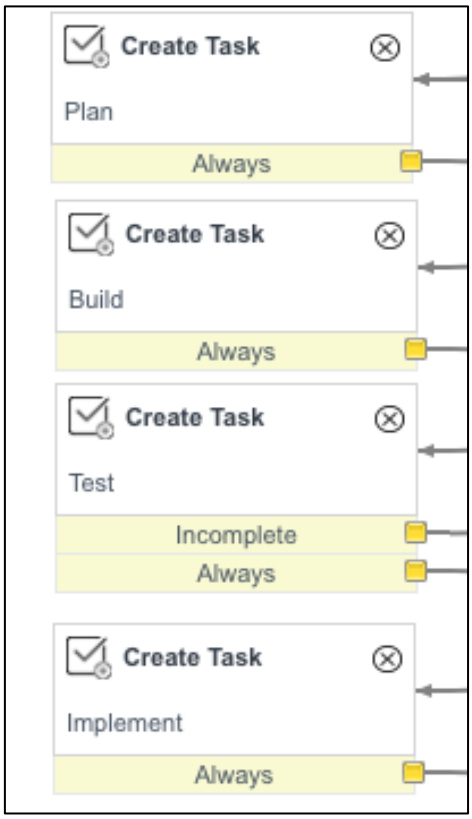
15. Create connections from **the Approval - User / Owner** approval activity as follows:

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

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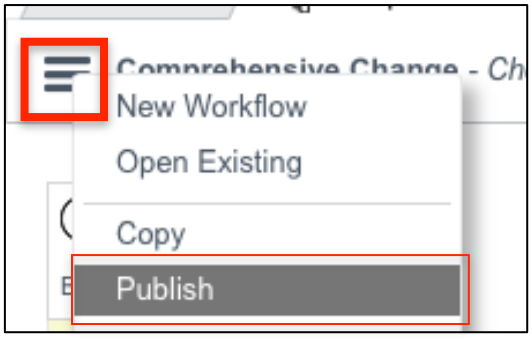
16. For each of the four **Create Task** activities, perform these actions. Double click each one to edit the Activity, set the following fields. Click **Update** when complete.

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



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

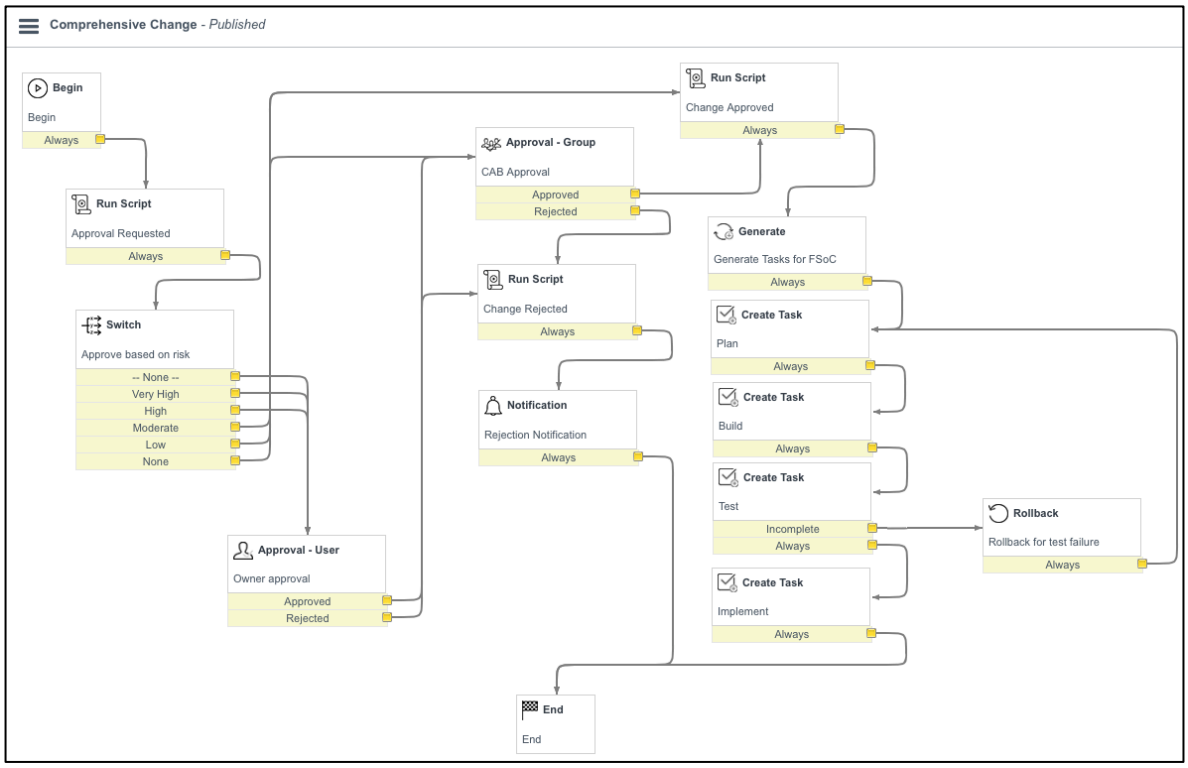
18. Click the **Workflow Actions** menu icon, and select **Publish**.



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Lab Success Verification

1. The Workflow screen should look similar to the example.



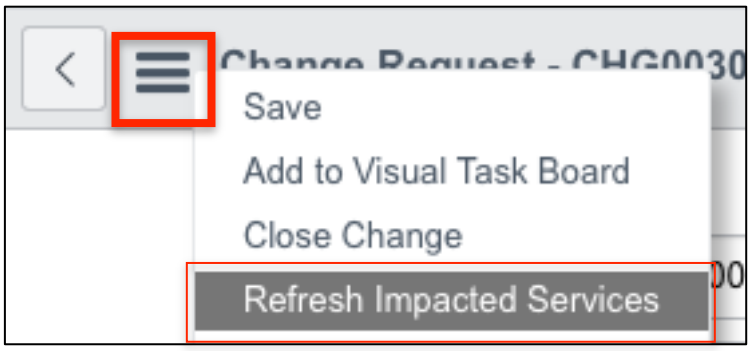
2. Close the Workflow window to return the main interface.

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: **2015-05-16 01:00:00**
   Planned end date: **2015-05-16 02:00:00**

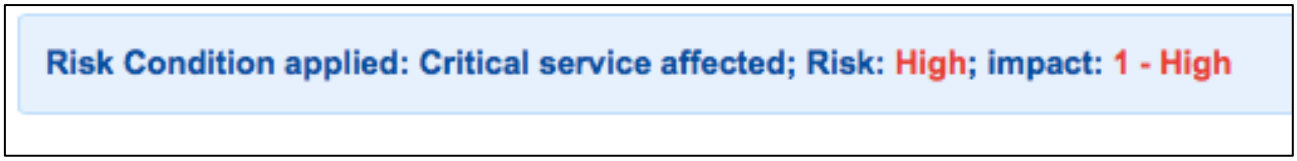
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4. Right-click the menu icon and select **Refresh Impacted Services**.



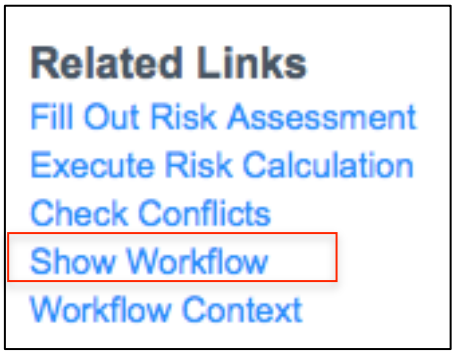
5. Scroll down and review the Impacted Services/CIs.
   HINT: There should be a number of impacted services.

6. Click **Execute Risk Calculation**. The Risk should be **High**.



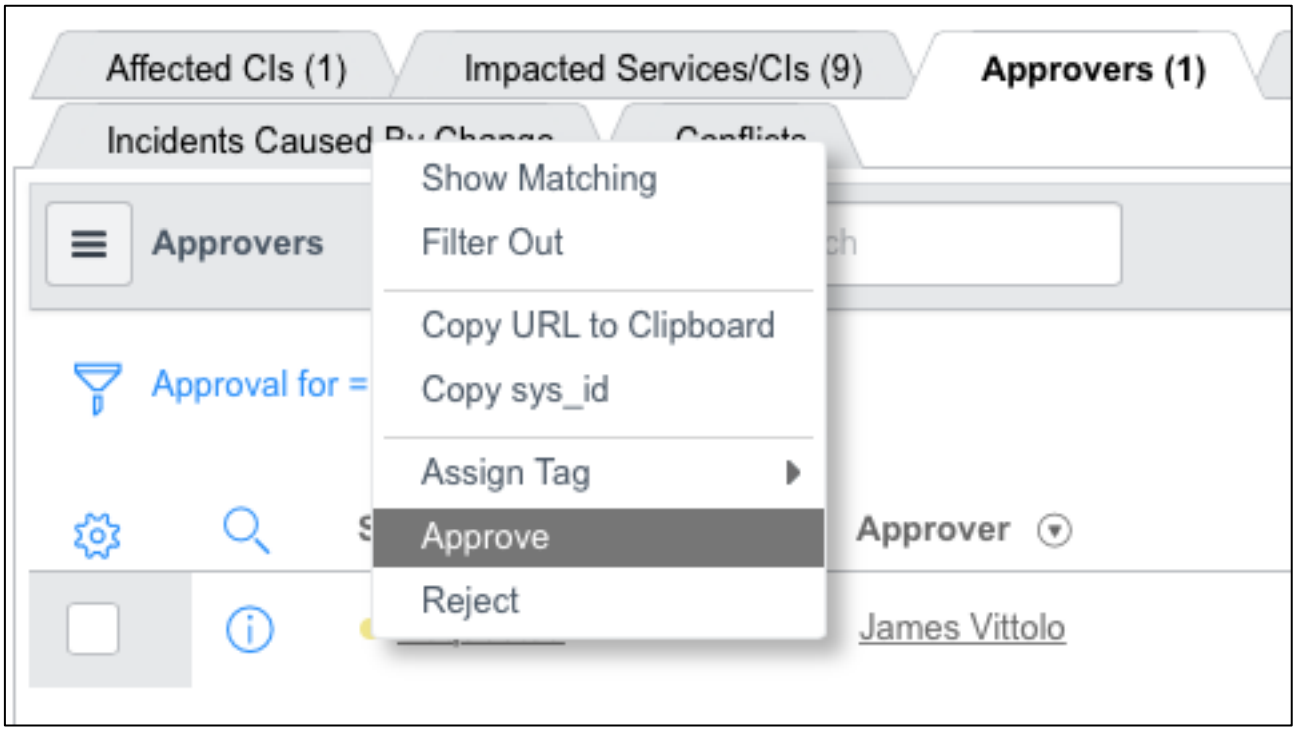
7. Click **Request Approval**.

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



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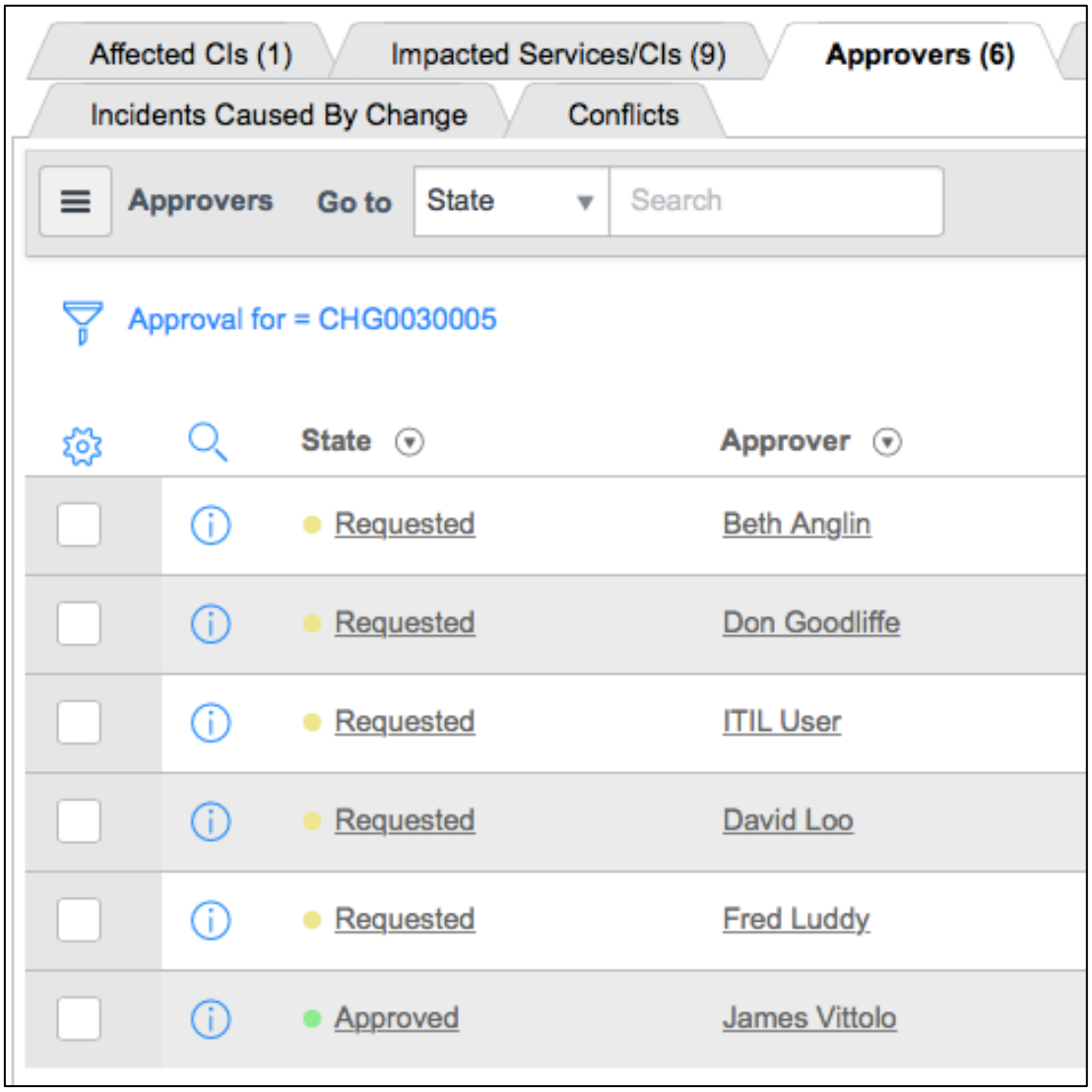
9. Select the **Approvers** tab. Note **James Vittolo** has an **Approval Request**. Right-click on **Requested** and select **Approve**.



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

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11. Note the Software group has been used as the **CAB** for this change and all members have been assigned an Approval Request.



12. Right-click on **David Loo** and choose **Approve**.

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

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

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

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