knowledge14

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Lab Guide

Technical Best Practices 101:

Plan for Success

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Work as a team to get requirements to build an access request system. The lab leader(s) simulate your process owner to let you know what they think they need. Your job is to turn their needs in to functional and technical requirements.

Lab 1.1
Requirements

Discussion

Your process owner has provided you with the following requirements for an access request system. What questions do you have?

1. Create an access request system
2. Concept: Recipient is “modeled” after another user
3. The request has a list of add/remove actions for the fulfiller
4. Each entitlement with an owner requires an approver
5. No owner means it’s a “freebie” (can be fulfilled immediately)
6. If the owner is the recipient, it becomes a “freebie”
7. Justification for the request is required
8. Access request admins != itil users (new role)

Notes

Verification

There is no verification for this lab.

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Lab Goal

Create the table(s) needed to support the requirements gathered from the previous lab.

NOTE: Fields will be created in the next lab.

Lab 2.1 Create Tables

Before You Begin

What would be good names for these tables?

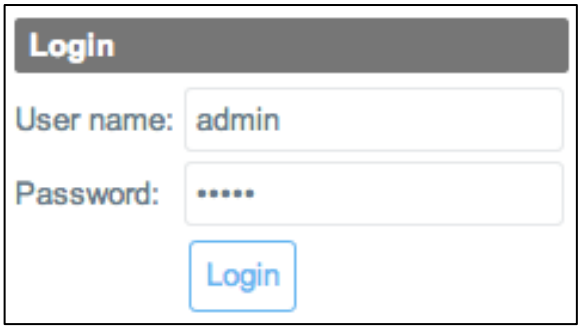
Should either or both of these be extended?

- If so, what base table would be a good place to start?
- If we extend the table, what should we be aware of?

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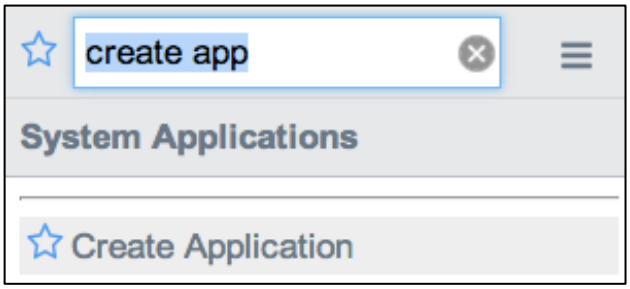
Login to your Instance

1. Login to the instance URL on the cover page using the provided **admin** credentials.



Create the Application

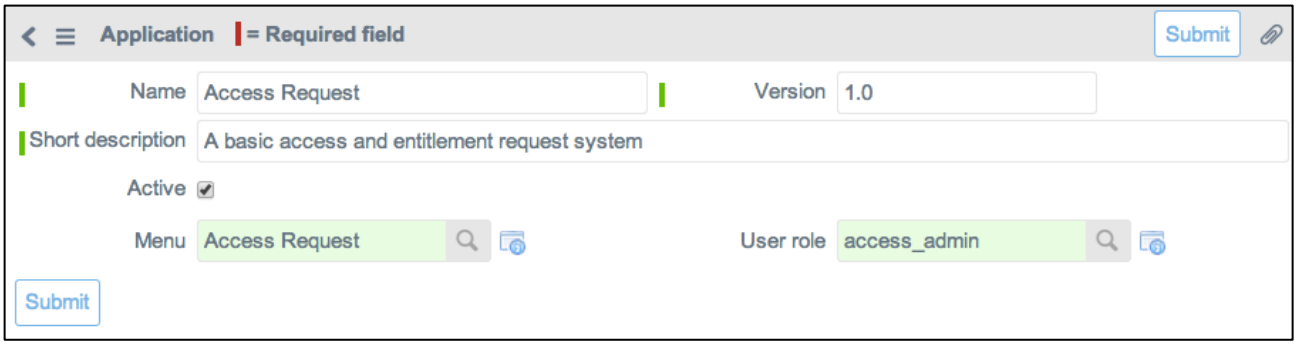
2. Navigate to **System Applications> Create Application.**



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3. Enter the following information in the Application form:

   - Name: **Access Request**
   - Version: **1.0**
   - Short description: **A basic access and entitlement request system**
   - Active: **true** (checked)
   - Menu: **Access Request**
   - User role: **access_admin**
     - **IMPORTANT**: Do not use the default u_access_request_user role!



4. Right-click> **Save**

Create the Tables

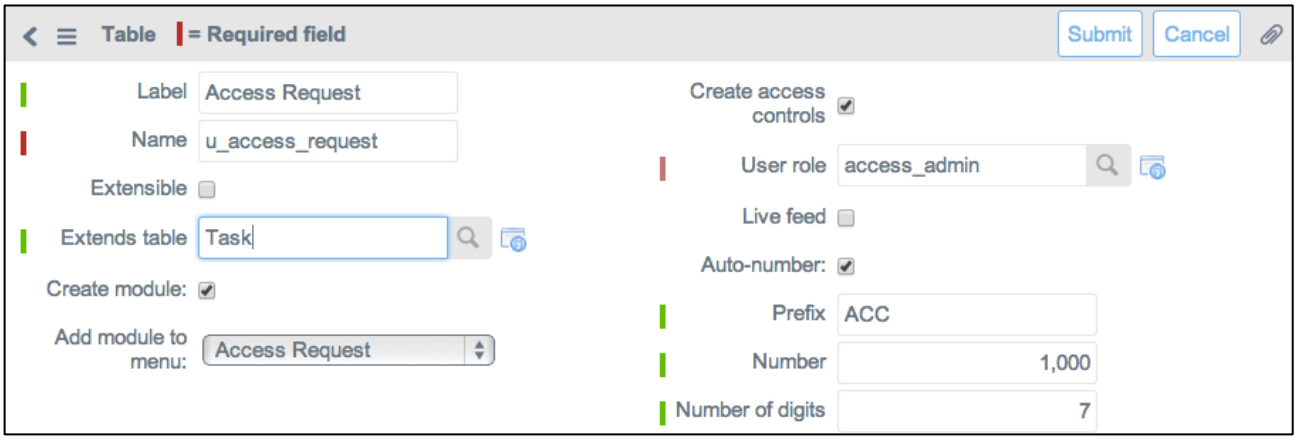
5. Locate the related list **Tables** and click **New.**



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6. Enter the following information in the Table form:

- Label: **Access Request**
- Name: **u_access_request**
- Extensible: **false** (unchecked)
- Extends table: **Task**
- Create module: **true** (checked)
- Add module to menu: **Access Request**
- Create access controls: **true** (checked)
- User role: **access_admin**
- Live feed: **false** (unchecked)
- Auto-number: **true** (checked)
- Prefix: **ACC**
- Number: **1,000**
- Number of digits: **7**

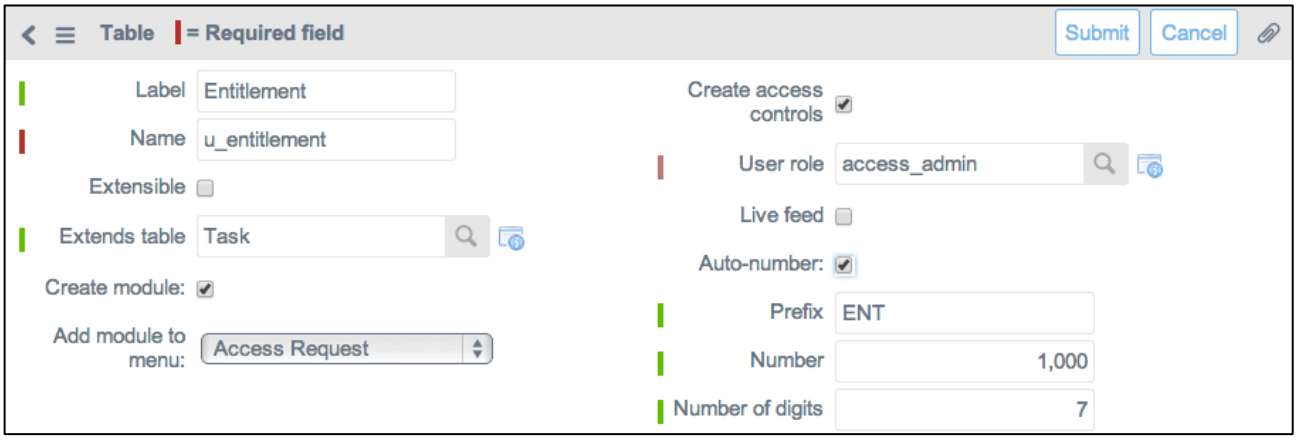


7. Click **Submit**.

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8. Create a second table by clicking **New** on the Tables related list again.

- Label: **Entitlement**
- Name: **u_entitlement**
- Extensible: **false** (unchecked)
- Extends table: **Task**
- Create module: **true** (checked)
- Add module to menu: **Access Request**
- Create access controls: **true** (checked)
- User role: **access_admin**
- Live feed: **false** (unchecked)
- Auto-number: **true** (checked)
- Prefix: **ENT**
- Number: **1,000**
- Number of digits: **7**



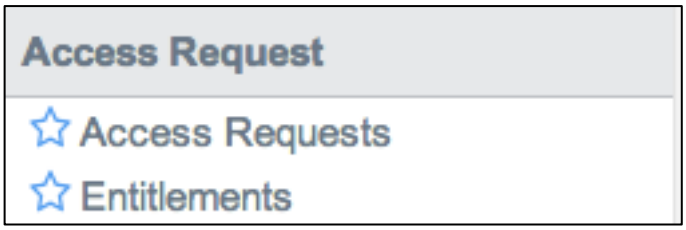
9. Click **Submit**.

10. Explain why you extended both tables from task instead of creating new tables?

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Verification

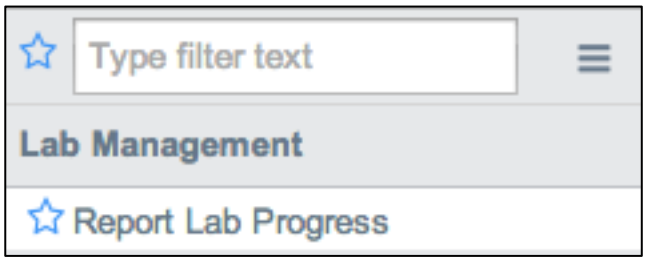
Verify the Access Request application menu appears with Access Requests and Entitlements modules similar to the image below:



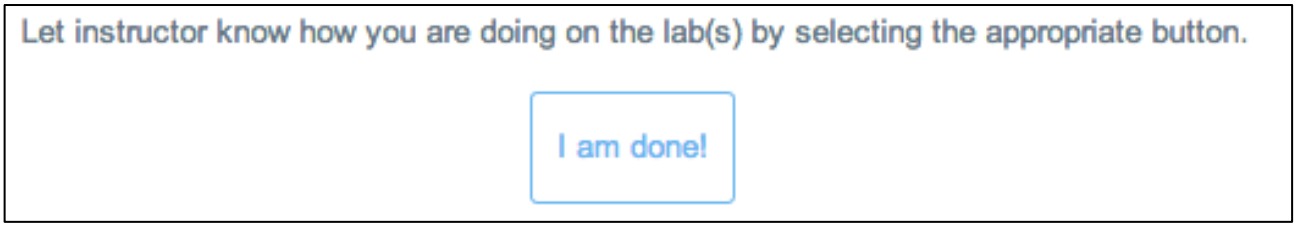
Notes

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am Done!**



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Lab Goal

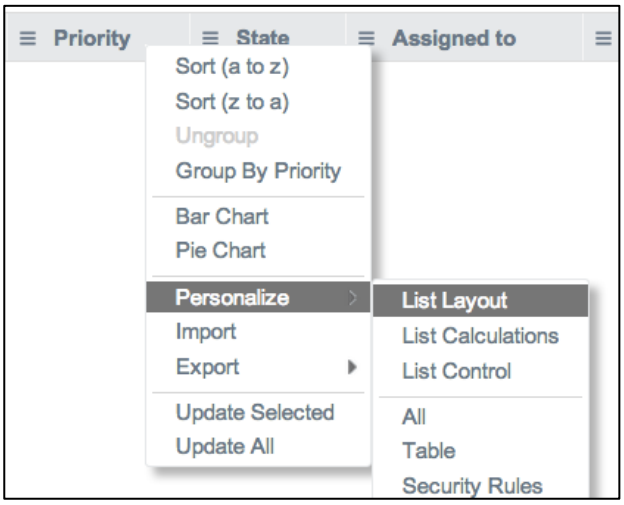
Create fields on the Access Request table to support the requirements provided earlier.

Lab 3.1
Create Access Request Fields

Before You Begin

Based on the requirements, which fields can you repurpose from the task table?

Hint: Navigate to **Access Request> Access Requests**, right click on the list header and select **Personalize> List Layout**.

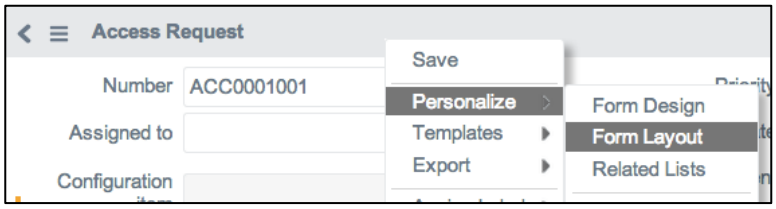


Which fields do you need to create? Hint: Be sure to look closely at the data types in parentheses.

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Create Fields

1. Navigate to **Access Request> Access Requests**
2. Click **New**
3. Right click **Personalize> Form Layout**



4. Remove the following fields from the Selected column of the list collector:
   - Assigned to
   - Configuration item
   - Active
   - Priority
   - Parent
   - Short description
   - Description
   - Work notes
5. Move the following fields from the Available column of the list collector to the Selected column:
   - Additional comments
   - Activities (filtered)
   - Opened by
6. In the Create new field section, create the following fields:

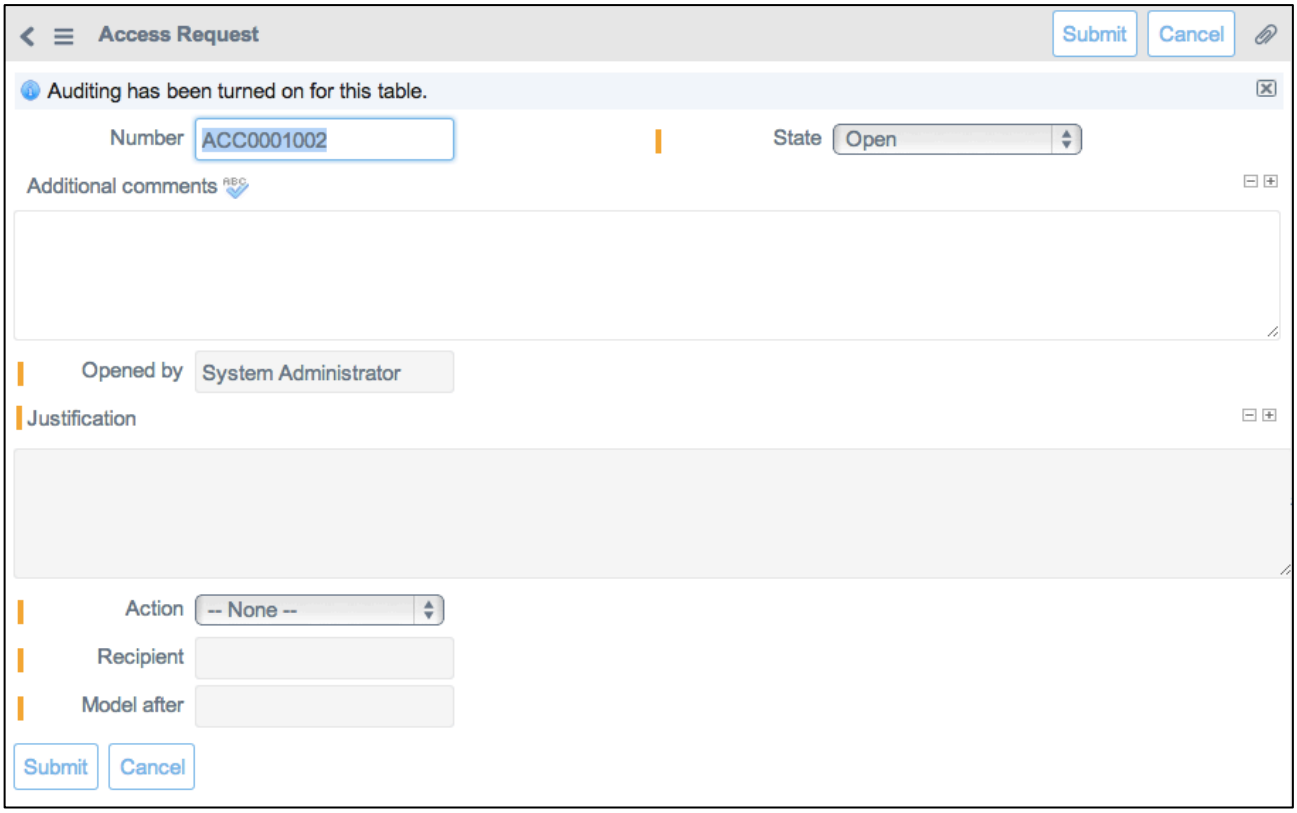
Name	Type	Length/Reference
Due date	Date	
Justification	String	Length: 1000
Action	Choice	
Recipient	Reference	Reference: User [sys_user]
Model after	Reference	Reference: User [sys_user]

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7. Click **Save.**

Verification

Verify your screen appears similar to the image below.



Notes

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Lab Goal

Create fields on the Entitlement table to support the requirements provided earlier.

Lab 3.2 Create Entitlement Fields

Before You Begin

Based on the requirements, which fields can you repurpose from the task table?

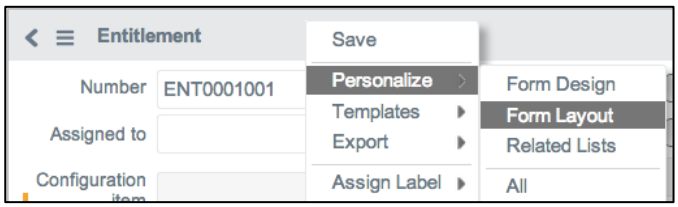
Hint: Navigate to **Access Request> Entitlements**, right click on the list header and select **Personalize> List Layout**.

Which fields do you need to create?

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Create Fields

1. Navigate to **Access Request> Entitlements**.
2. Click **New**.
3. Right click **Personalize> Form Layout**



4. Remove the following fields from the Selected column of the list collector:
   - Configuration item
   - Active
   - Priority
   - Parent
   - Short description
   - Work notes
5. Move the following fields from the Available column of the list collector to the Selected column:
   - Approval
   - Additional comments
   - Assignment group
   - Activities (filtered)

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6. In the Create new field section, create the following fields:

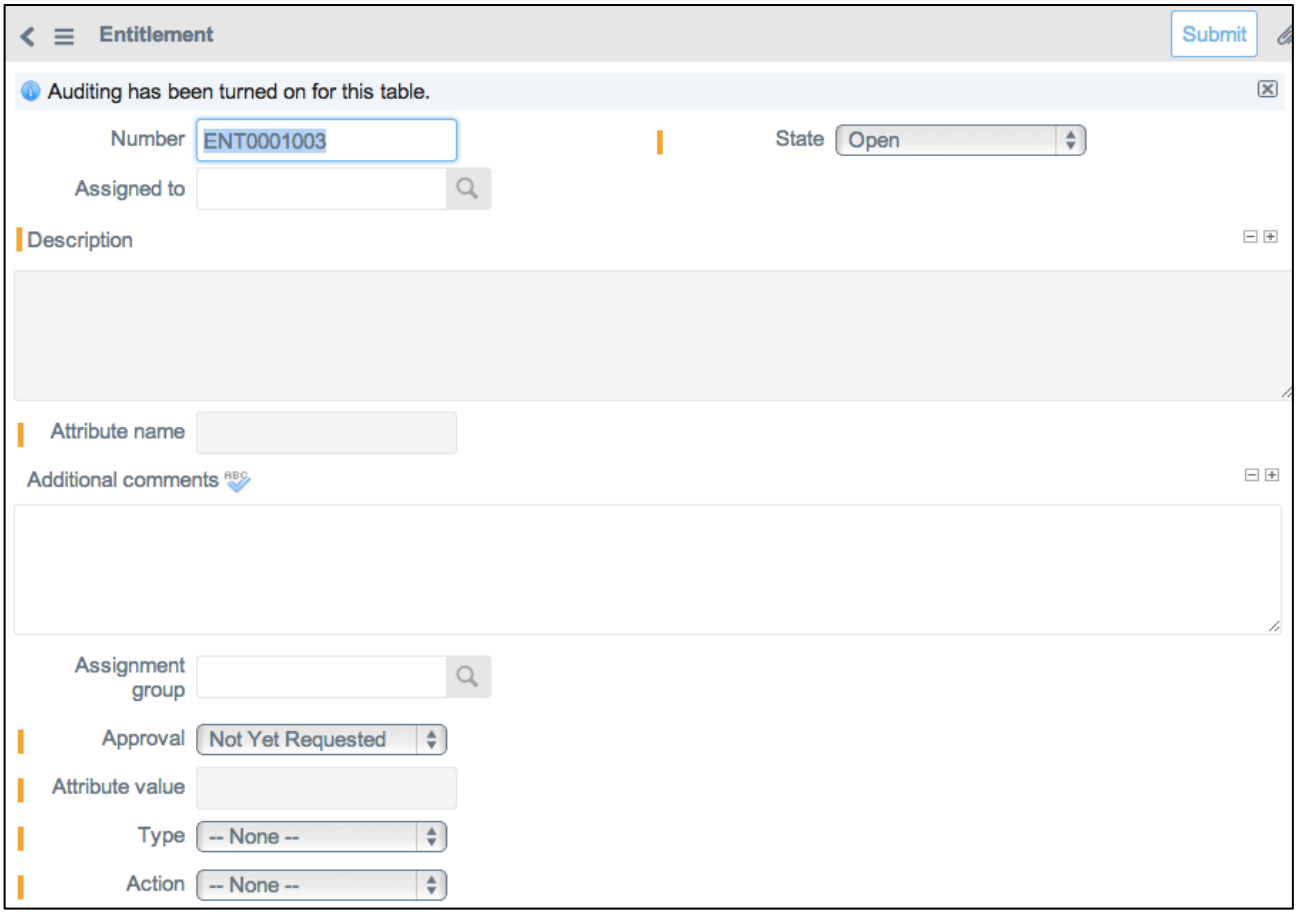
Name	Type	Length/Reference
Attribute value	String	40
Type	Choice	
Action	Choice	
User ID	Reference	Reference: User [sys_user]
Target	String	40
Justification	String	1000
Owner	Reference	Reference: User [sys_user]
Request	Reference	Reference: Access request [u_access_request]
Attribute name	String	40

7. Click **Save**.

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Verification

Verify your screen appears similar to the image below:



Notes

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Lab Goal

The process owner has asked for some changes to the Access Request and Entitlement tables. Apply the best practices you just learned to address the new requirements.

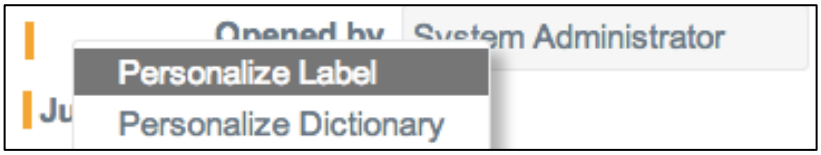
Lab 3.3 Requirements Change

The process owner has asked to change the following items:

- On the Access Request form, change “Opened by” to “Requester”
- Set the default state of a new Access Request form to be “Work in Progress”
- Set the default state of a new Entitlement to be (empty)

Create a New Label

1. Navigate to **Access Request> Access Requests**.
2. Click **New** from the list of Access Requests.
3. Locate the **Opened by** field on your form.
4. **Right-click** the field and select **Personalize Label.**

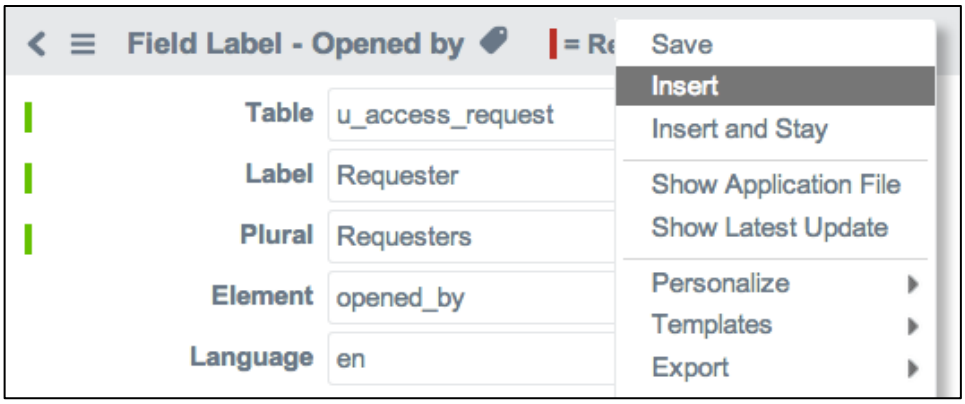


5. Change the **Table** field from task to **u_access_request**
6. Change the **Label** field from Opened by to **Requester**.

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7. Change the **Plural** field from Opened by to **Requesters.**

8. **Right-click** the record header and select **Insert.**



Create Dictionary Overrides

9. **Right-click** the **State** field and select **Personalize Dictionary**.



10. Scroll down to the related lists and click on **Dictionary Overrides**

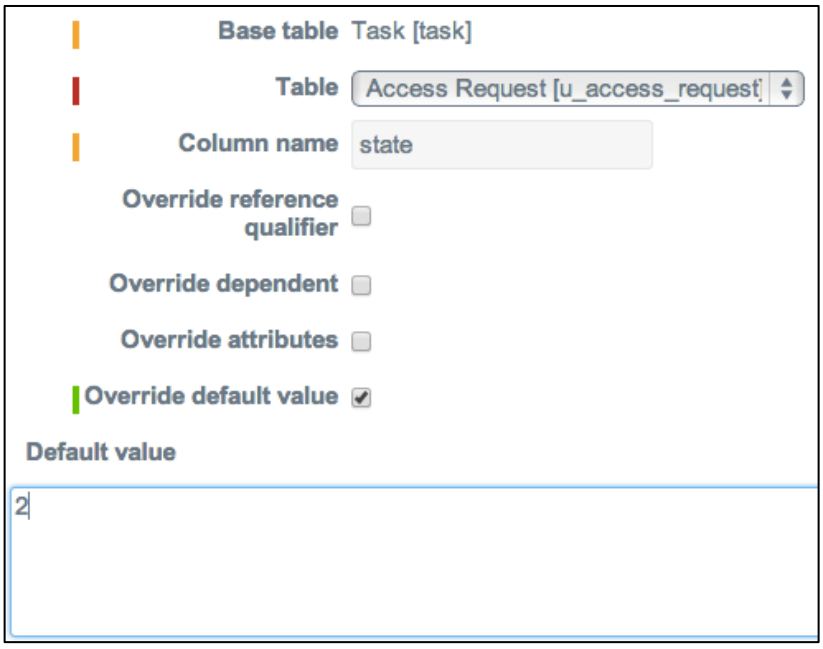
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11. Click **New**.



12. Enter the following values in the Dictionary Entry Override form:

    Table: **Access Request [u_access_request]**
    Override default value: **true** (checked)
    Default value: **2**



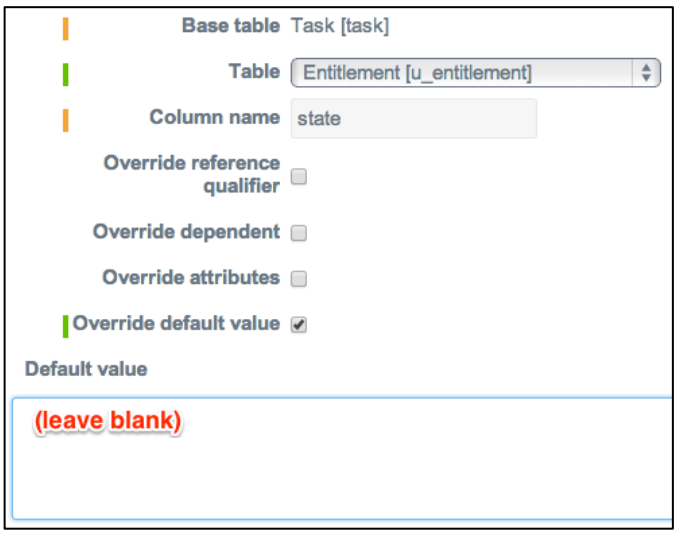
13. Click **Submit**

14. Click **New** again on the Dictionary Overrides form

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15. Enter the following values in the Dictionary Entry Override form:

    Table: **Entitlement [u_entitlement]**
    Override default value: **true** (checked)
    Default value: **(empty)**



16. Click **Submit**.

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Verification

17. Navigate to Access Request> Access Request.

18. Click **New** (or open an existing record).

19. Is the Opened by field is now labeled Requester?

20. Navigate to **Incident> Open**.

21. Click **New**.

22. Verify the **Opened by** field still labeled **Opened by**.

    What would have happened if you had clicked **Update** or **Save** instead of **Insert** on the Personalize Label form in step 8?

    What is the default state of the new incident?

23. Navigate to **Access Request> Access Requests**.

24. Click **New**.

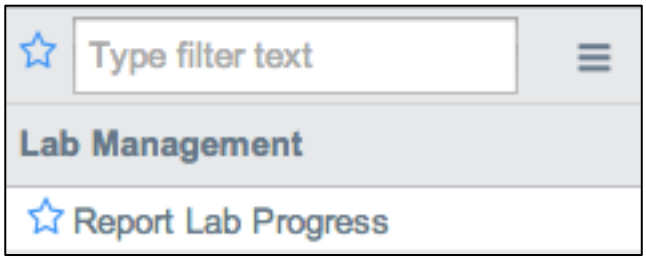
    What is the default state of the new access request?

Notes

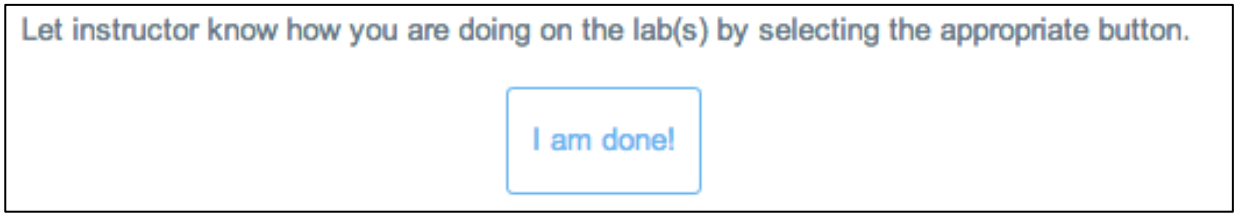
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Progress Report

1. Navigate to Lab Management> Report Lab Progress.



2. Click **I am Done!**



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Lab Goal

Organize the fields on the Access Request form in to a more effective and user-friendly layout.

Lab 4.1 Access Request Form Layout

Before You Begin

1. Navigate to **Access Request> Access Requests**.
2. Click **New**.
3. What best practices can be applied to the current form layout?

Modify the Form Layout

4. Right click the header and choose **Personalize> Form Layout**.

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5. In the Selected column, re-order the fields/formatters to match the list below:

    - Number
    - Requester
    - Recipient
    - Model after
    - |- split -|
    - State
    - Action
    - Due date (u_due_date)
    - |- end_split -|
    - Justification
    - Additional comments
    - Activities (filtered)

6. Click **Save.**

7. Right click the header and choose **Personalize> Related Lists.**

8. Move the following items from the Available column to the Selected column in the list collector:

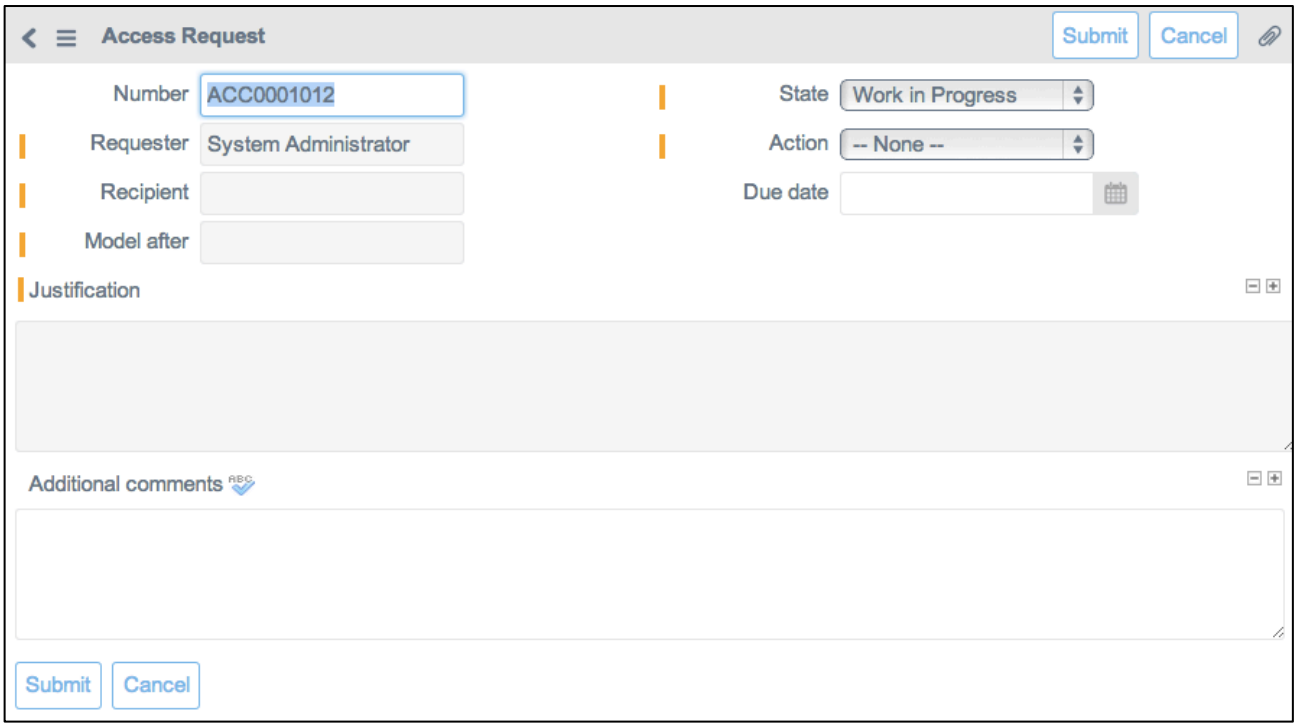
    - Changes
    - Current Access

9. Click **Save**.

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Verification

Ensure your form layout looks similar the following image.



Notes

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Lab Goal

Organize the fields on the Access Request form in to a more effective and user-friendly layout.

Lab 4.2
Entitlement Form Layout

Before you Begin

1. Navigate to **Access Request> Entitlements**.
2. Click **New**.
3. What best practices can be applied to the current form layout?

Modify the Form Layout

4. Right click the header and choose **Personalize> Form Layout**.

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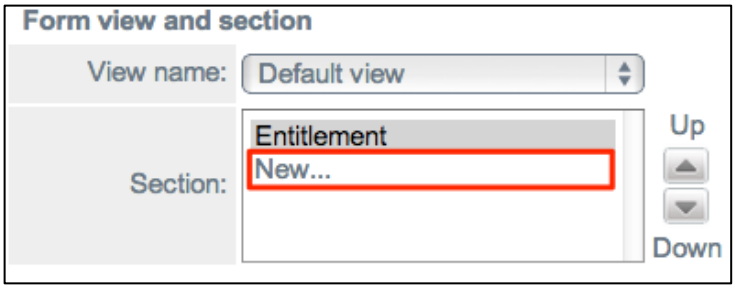
5. In the Selected column, reorder the fields/formatters to match the list below:

   - Number
   - User ID
   - Assignment group
   - Assigned to
   - |- split -|
   - Request
   - State
   - Approval
   - Action
   - Type
   - |- end_split -|

6. Move the following columns from the Selected column to Available.

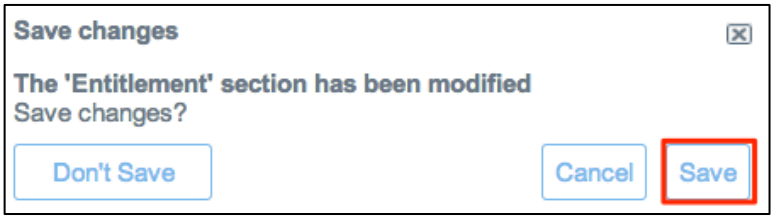
   - Attribute value
   - Attribute name
   - Target
   - Owner
   - Description
   - Justification
   - Additional comments
   - Activities (filtered)

7. In the **Section** field, click **New…**



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8. When the prompt **Save changes** appears, click **Save**.



9. When the **Create new section** prompt appears, enter **Details** and click **OK**.



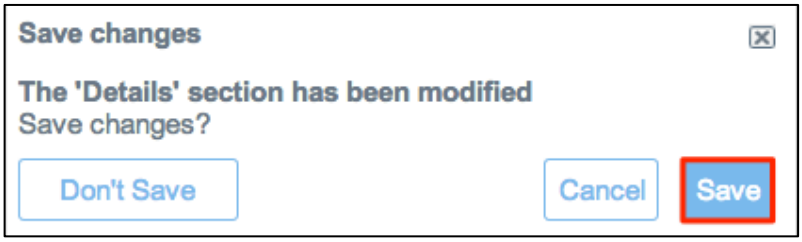
10. Move the following columns from the Available column to Selected.

- Attribute value
- Attribute name
- |- split -|
- Owner
- Target
- |- end_split -|
- Description
- Justification

11. In the **Section** field, click **New…**

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12. When the prompt **Save changes** appears, click **Save**.



13. When the **Create new section** prompt appears, enter **Log** and click **OK**.
14. Move the following columns from the Available column to Selected.

    - Additional comments
    - Activities (filtered)

15. Click **Save**.
16. Right-click the header and choose **Personalize> Related Lists**.
17. Move the following items from the Available column to the Selected column in the list collector:

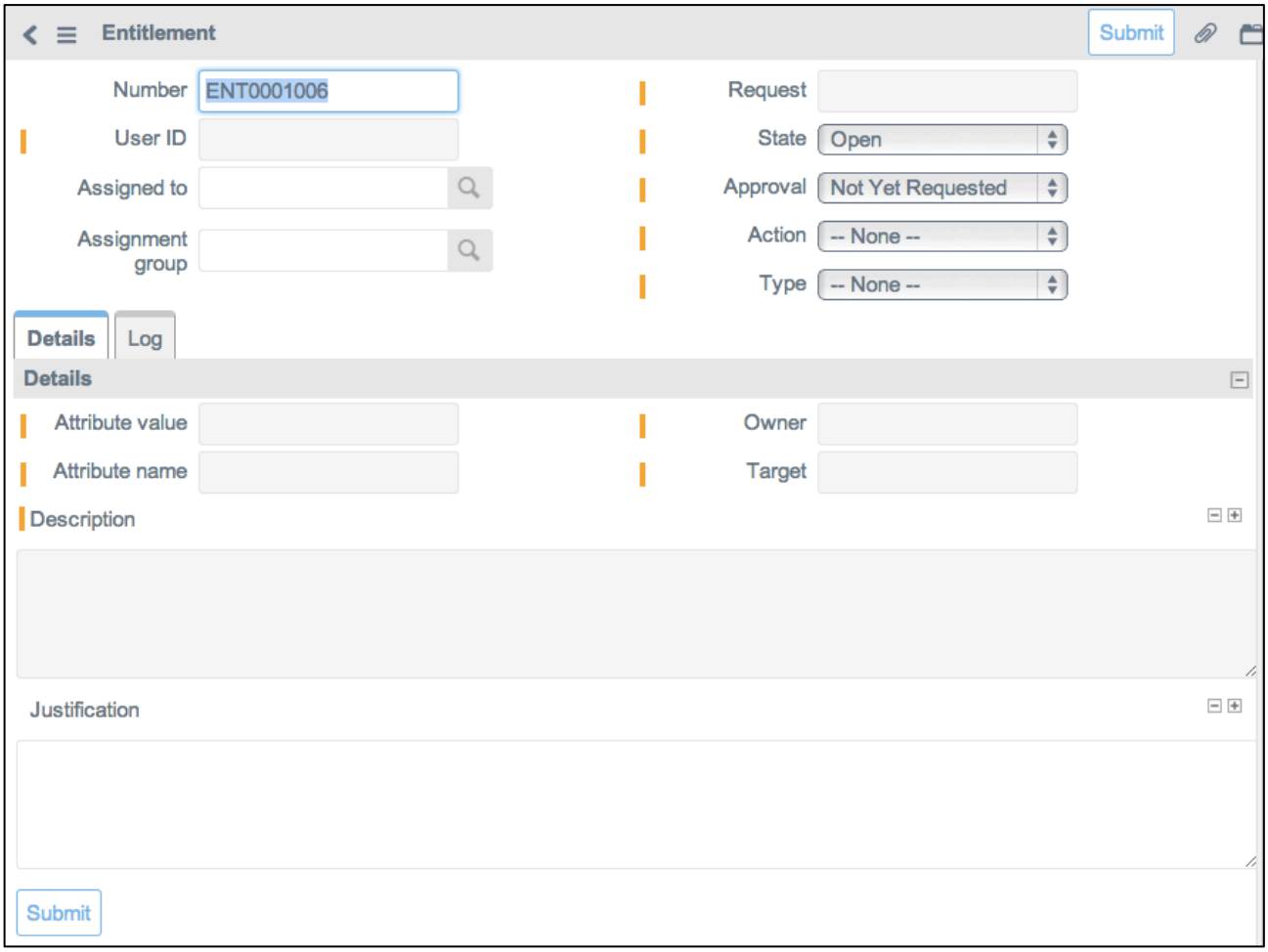
    Approvers

18. Click **Save**.

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Verification

Ensure your form layout looks similar the following image.



Notes:

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Lab Goal

Define effective list layouts for the Access Request and Entitlement layouts.

Lab 4.3
List Layout

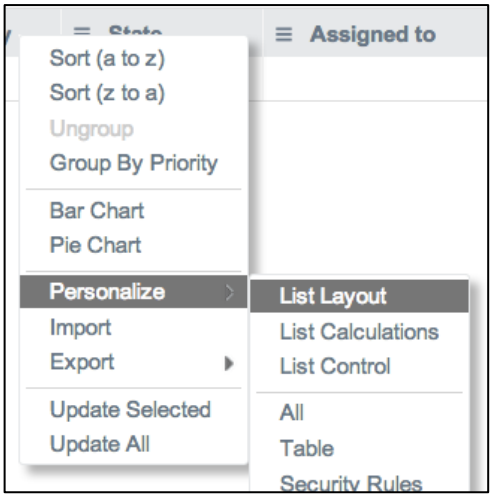
Before You Begin

1. Navigate to **Access Request> Access Requests**.
2. What best practices can be applied to the current form layout?

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Personalize the Access Request List Layout

3. Right click the list header and choose **Personalize> List Layout**



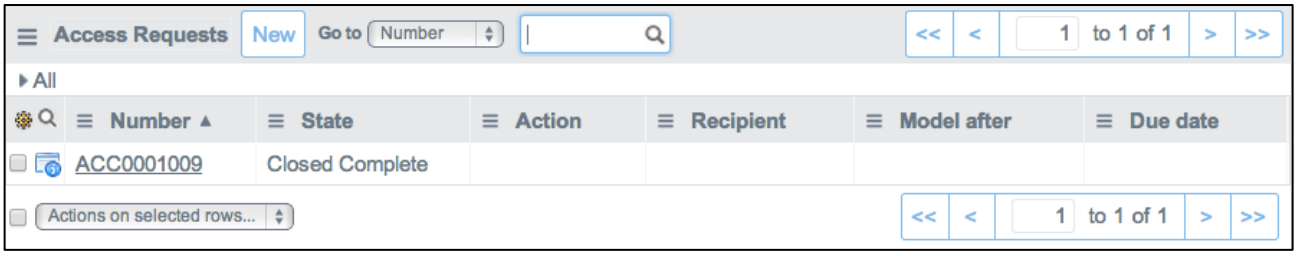
4. Place the following fields in the Selected column of the list collector:

   - Number
   - State
   - Action
   - Recipient
   - Model after
   - Due date (u_due_date)

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Verification

5. Ensure your list layout looks similar to the following image:



Personalize the Entitlement List Layout

6. Navigate to **Access Request> Entitlements**.

7. What best practices can be applied to the current form layout?

8. Right click the list header and choose **Personalize> List Layout**.

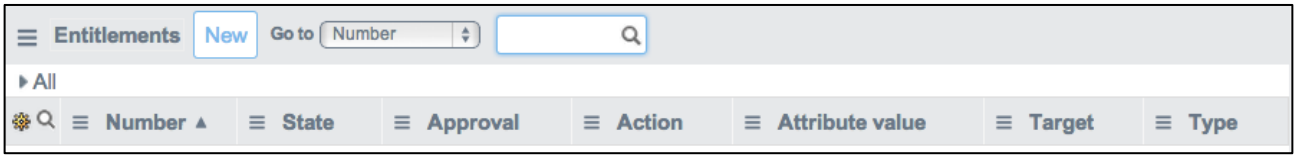
9. Place the following fields in the Selected column of the list collector:

   - Number
   - State
   - Approval
   - Action
   - Attribute value
   - Target
   - Type

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Verification

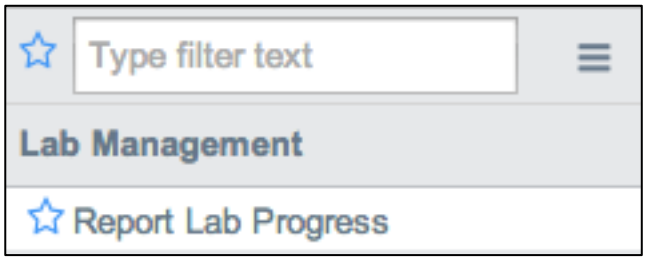
Ensure your list layout looks similar to the following image:



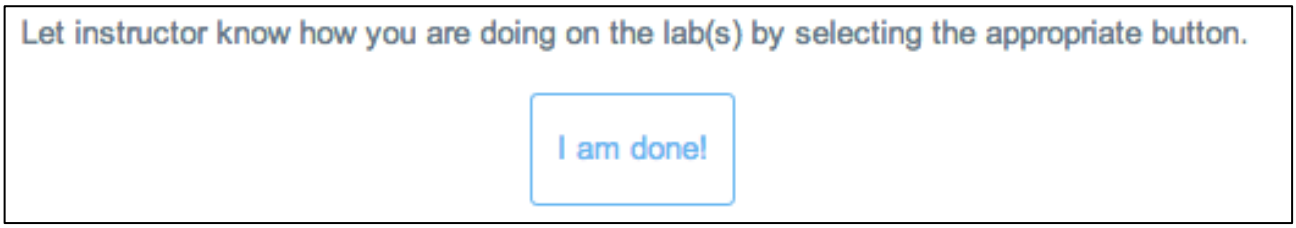
Notes:

Progress Report

1. Navigate to **Lab Management> Report Lab Progress**.



2. Click **I am Done!**



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Additional Information

http://wiki.servicenow.com/index.php?title=Understand_the_Requirements

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Tables

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Fields

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Forms

http://wiki.servicenow.com/index.php?title=Modifying_the_Application_Design#Lists

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