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

Lab Guide

DevOps 101

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& Tom Mehrkam

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

Explore using ServiceNow to capture development requests from users as Ideas, allowing DevOps to triage requests before committing to a full analysis. The idea form is designed to capture as little data as possible while allowing the request triage team to be able to assess the quality of an idea.

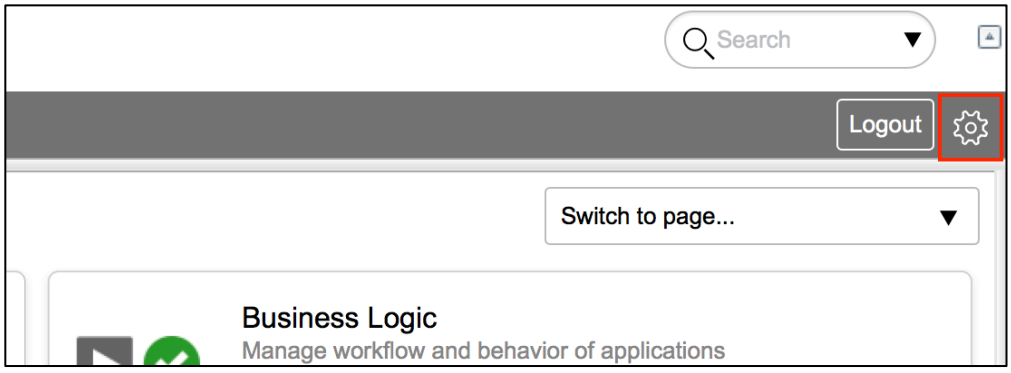
Lab 1.1 Create Idea

Log on to Your Training Instance

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

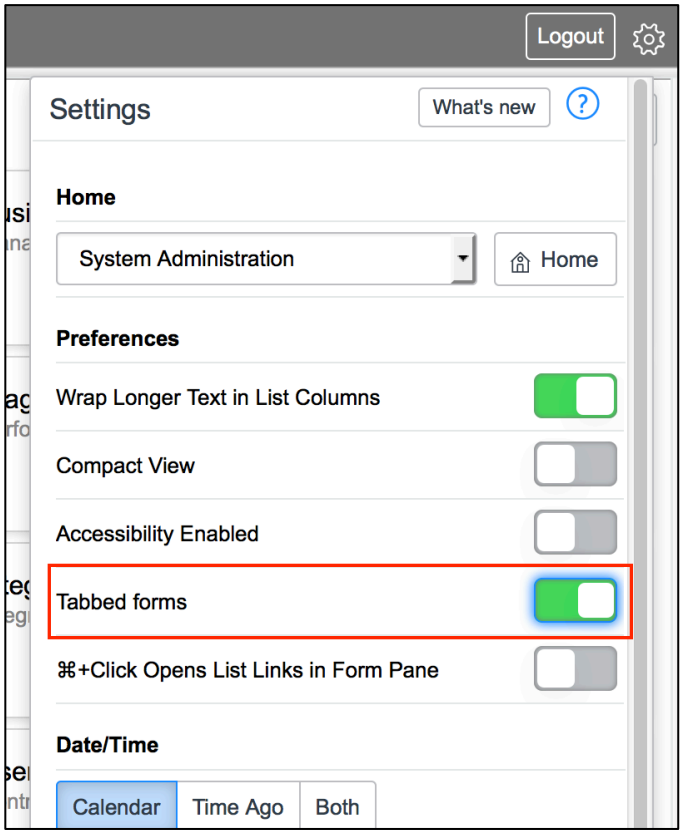
Configure Tabbed Forms

1. Press the gear icon in the upper right hand corner



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2. This will bring up the settings fly out. Click the switch to enable **Tabbed Forms**.

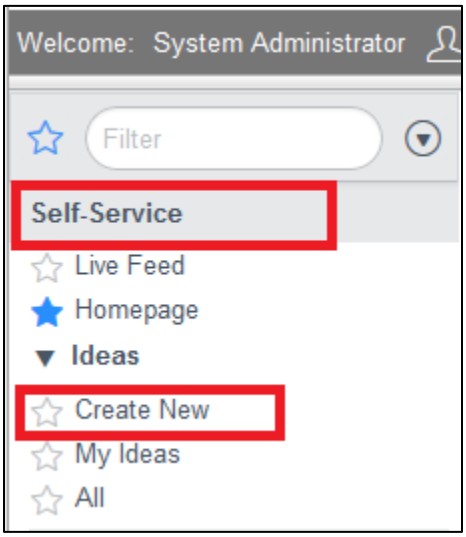


3. Click anywhere off the settings fly out to close the window.

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Create a New Idea

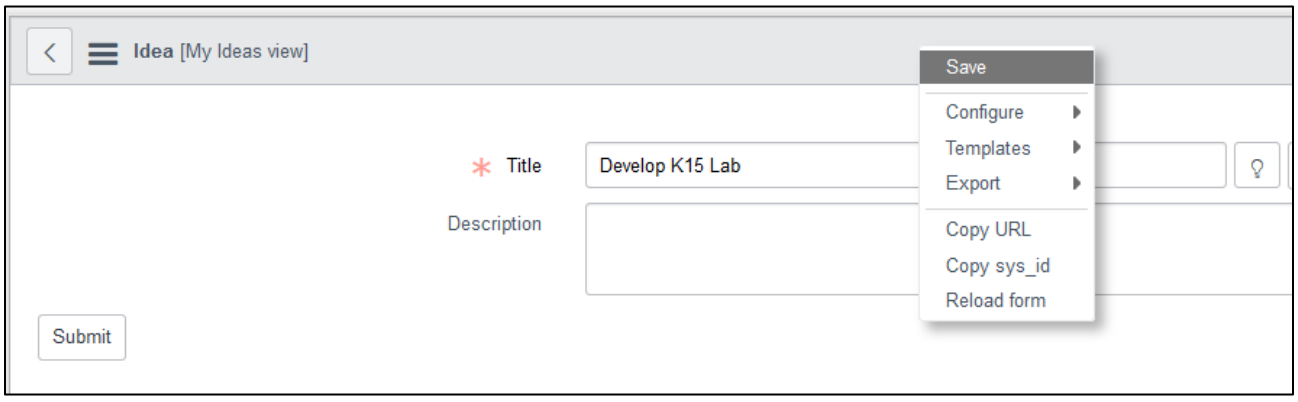
1. Navigate to **Self-Service > Ideas > Create New**.



Note: In subsequent labs, these steps are abbreviated to **Application Name** > **Module Name.**

2. Create a new idea with the following:
   - Title: **Develop K15 Lab**
   - Description: **DevOps 101 – Why and How you should start**

3. Right-click the title bar and select **Save.**

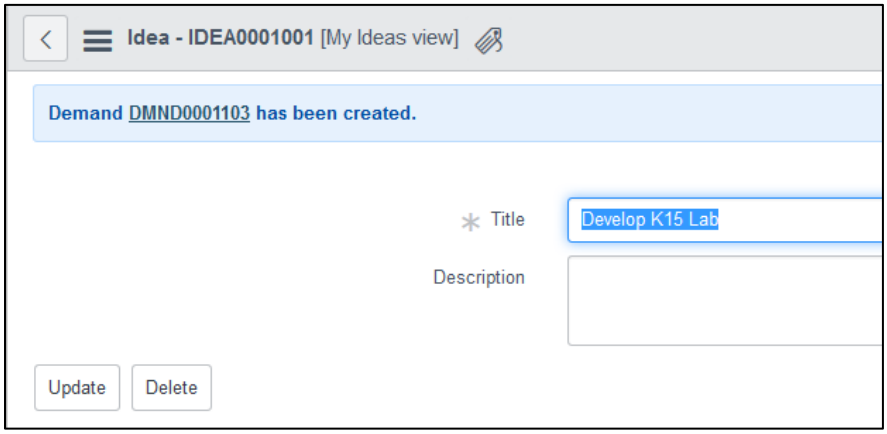


4. Once you have saved the form, you should see the **Accept** and **Defer** buttons. Press the **Accept** button to create a demand.

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Lab Success Verification

1. Your screen should look like this:

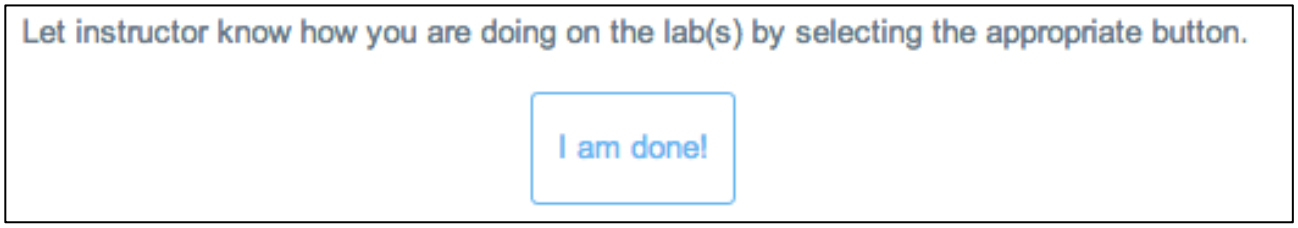


Progress Report

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



2. Click **I am done!**



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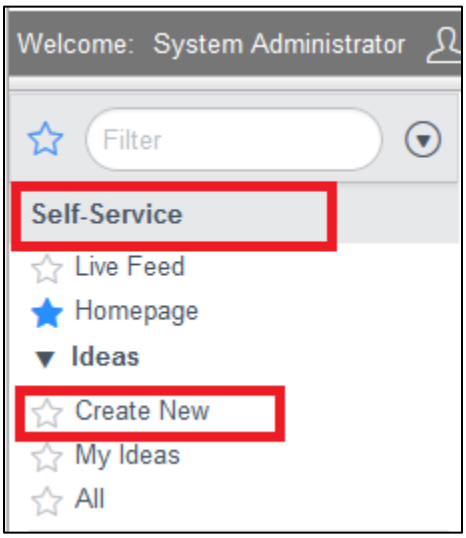
Lab Goal

Learn how to modify a basic form to adapt to organizational process requirements.

Lab 1.2
Modify
Idea form

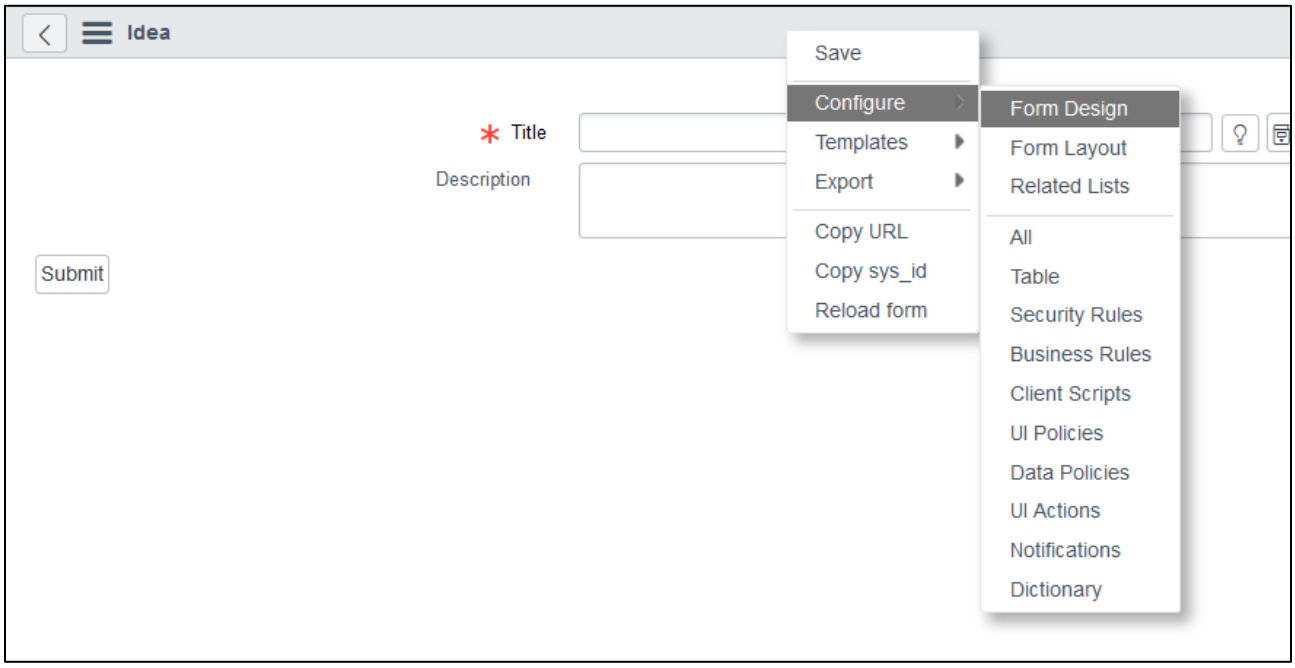
Create a New Idea

1. Navigate to **Self-Service > Ideas > Create New**.



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2. Right-click the title bar, and select **Configure > Form Design.**

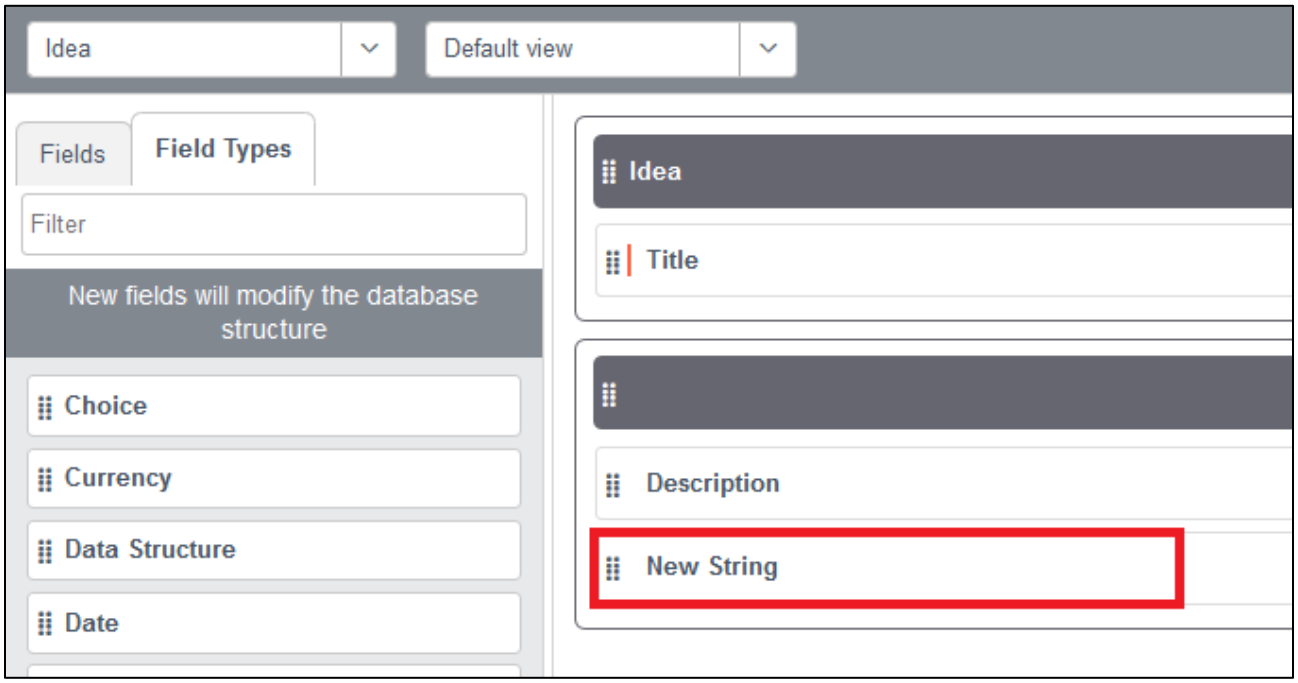


3. Select the **field types** tab on the left navigation menu.

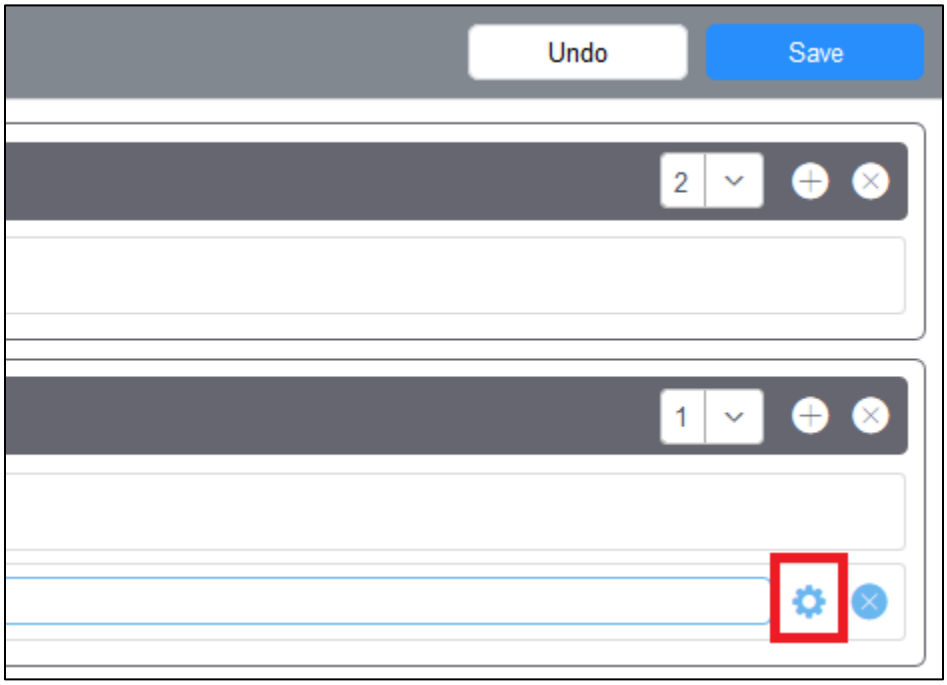


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4. Take the **String** field type and drag it onto the form under the **Description** field.

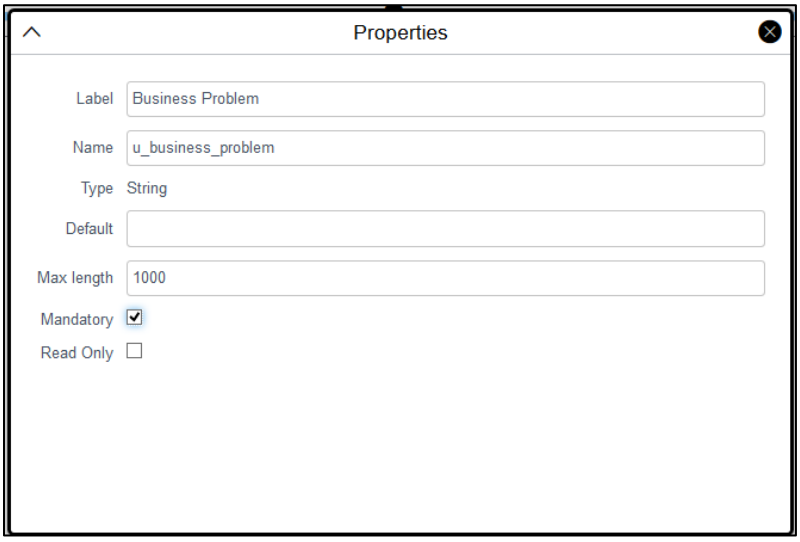


5. Click the **gear** icon to the right of the new field.



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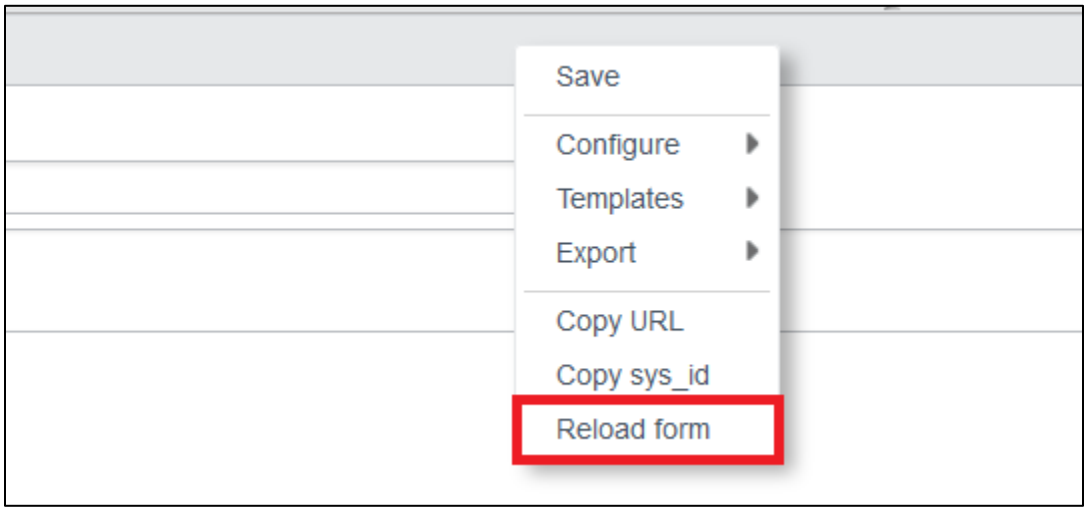
6. Define the properties of the new field:
   - Label: **Business Problem**
   - Name: **u_business_problem**
   - Max Length: **1000**
   - Mandatory: **True (checked)**



7. Close the Properties box by clicking the **X**.
8. **Save** the design by pressing the save button in the upper-right corner.
9. Close the form **Design** tab to return to the form.

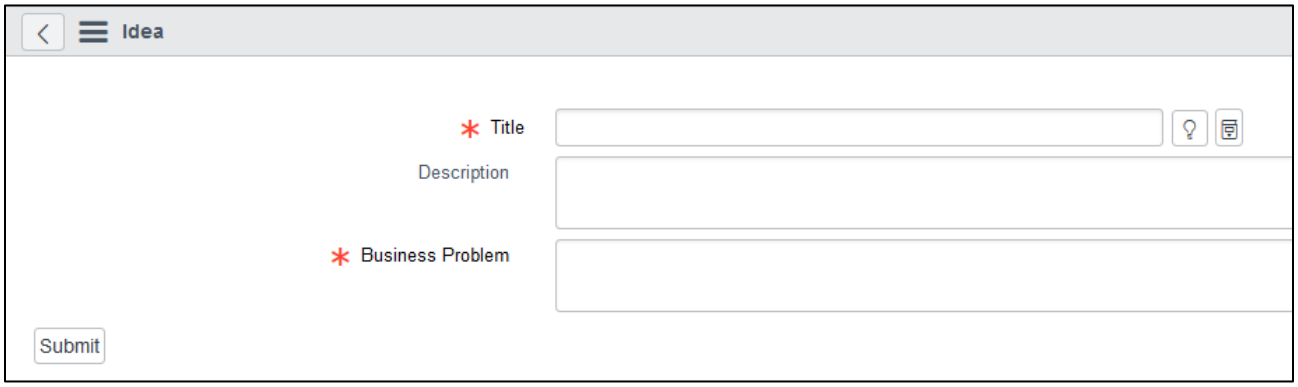
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10. Reload the form by right-clicking in the title bar and selecting the **Reload form** option.



Lab Success Verification

1. Your screen should look like this:



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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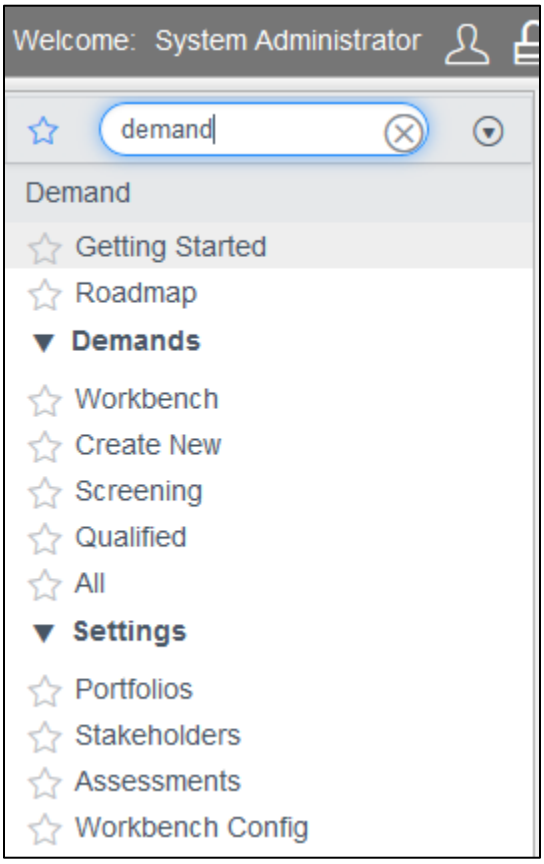
Lab Goal

View current demands in ServiceNow and work with workbench and roadmap views to assess Demands.

Lab 2.1
Demand Visualization

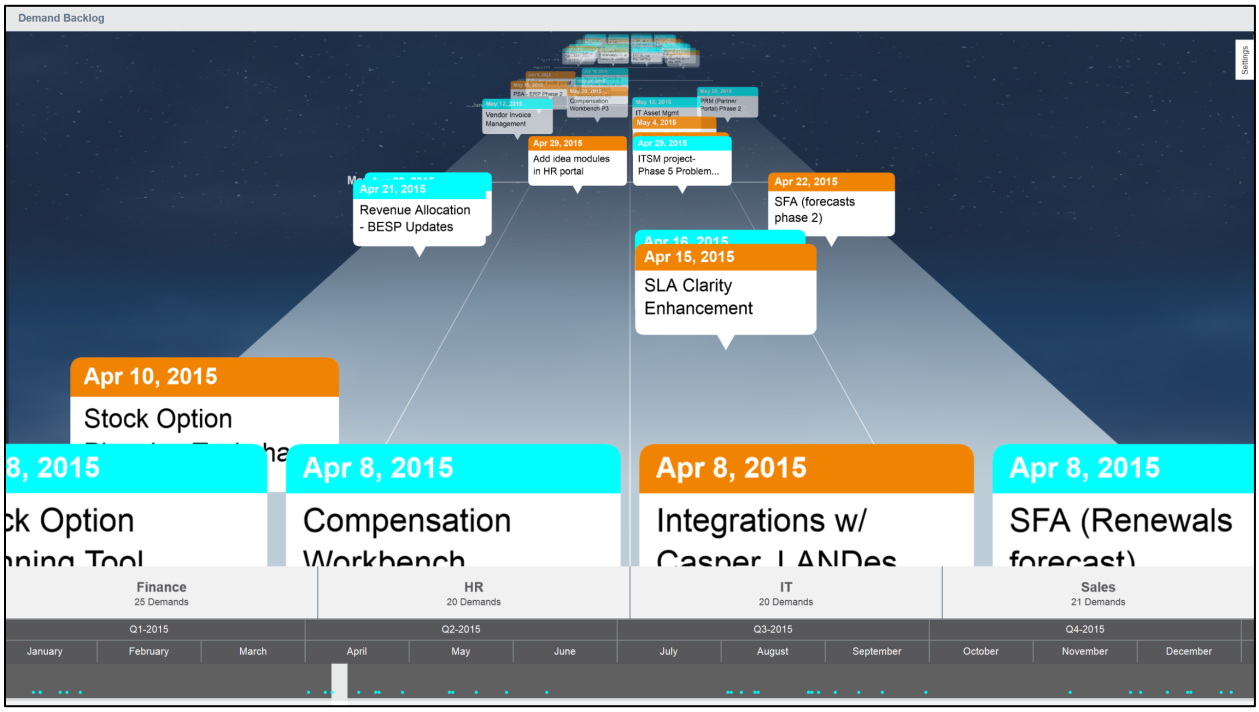
Navigate to the Demand Module

1. In the upper-left corner, enter **Demand** into the filter text box.

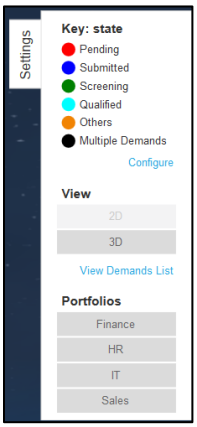


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2. Select **Demand > Roadmap**. This brings up the "Guitar Hero" view of demands by portfolio.



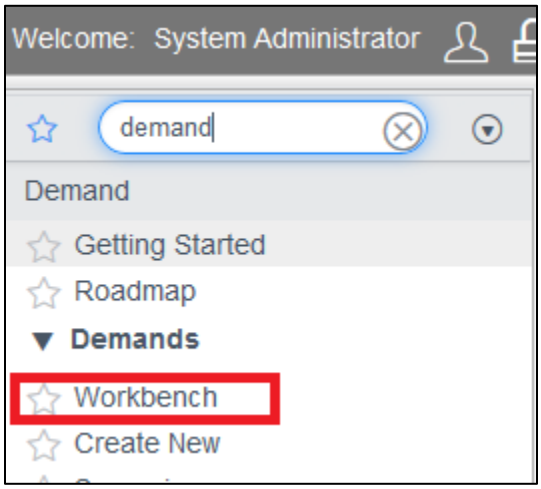
3. Click the **Settings** button on the right side of the roadmap. This brings up the settings fly-out, allowing you select and deselect various portfolios and settings. Explore the changes between 2D/3D.



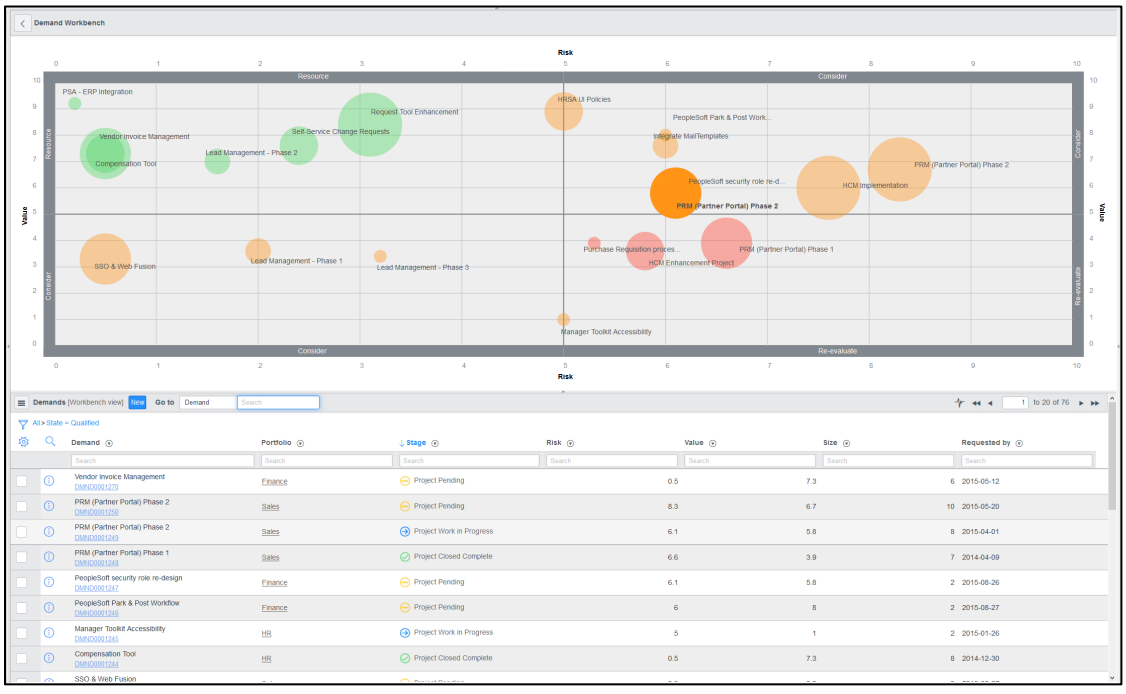
4. Close the **Roadmap** tab.

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5. Select the **Demands > Workbench** module on the left navigator.

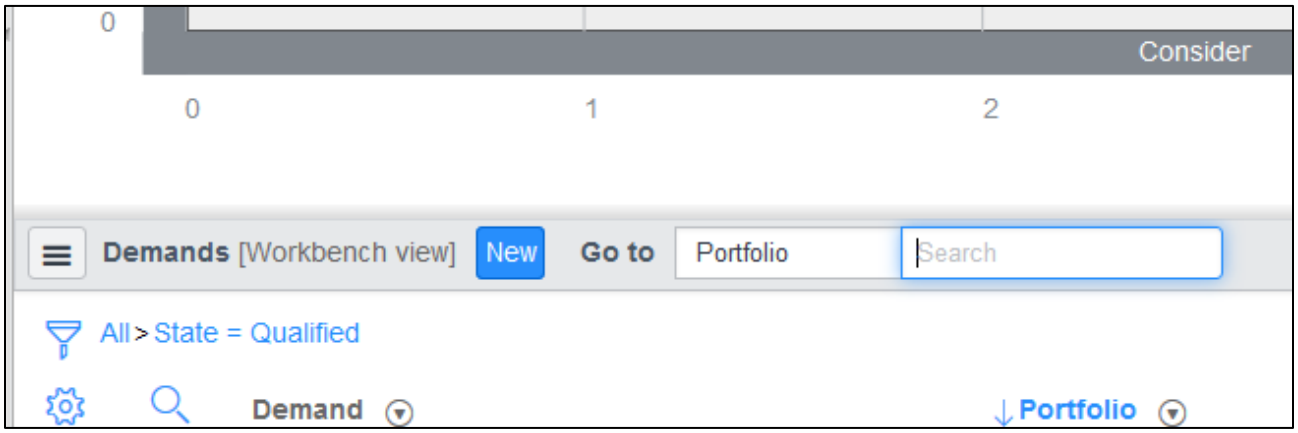


6. You should be looking at the workbench view of demands. The top grid represents all of the demands in the various states as filtered by the list in the bottom half. Demands are plotted on the grid by Risk / Value, with the circles driven by the size of a demand.



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7. Filter the workbench list to only show demands against the IT portfolio by selecting **Portfolio** in the Go to input, and entering ***IT** in the input box. The * represents a filter to any portfolio that contains the string IT.



8. Click the bubble labeled **ITSM project- Phase 3c Change Management.** This brings up a slider that allows you to adjust the size of a project. Change it to various levels and observe the bubble change sizes.

9. Right-click the bubble labeled **ITSM project- Phase 3c Change Management.** This brings up an option to view the underlying Project or Demand records. If this was a Change or Enhancement demand, it would list those as possible destinations instead of Project.

Lab Success Verification

1. This lab is meant to give a feel for how demands can be visualized across the enterprise, across multiple portfolios. This can be a valuable way of communicating with multiple stakeholders and project managers, while maintaining a consistent set of data being shared.

Progress Report

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

2. Click **I am done!**

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Lab Goal

Promote the idea generated in Lab 1.1 to a demand.

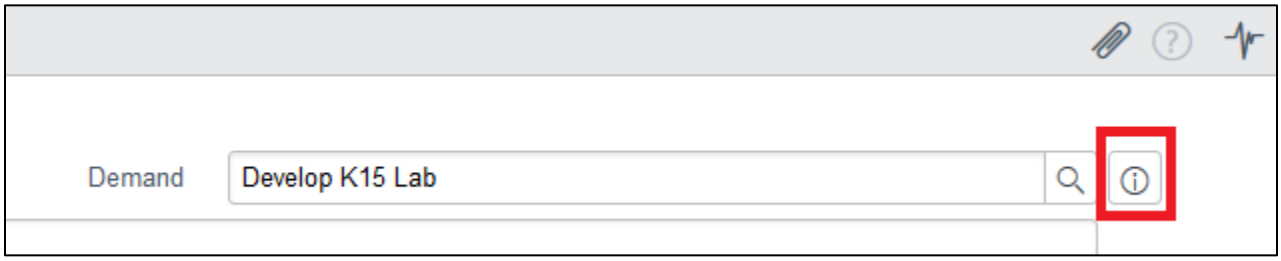
Lab 2.2
Ideation to Demand

Navigate to the Idea Proposed in Lab 1.1

1. Navigate to **Self-Service > Ideas > My Ideas**.
2. Select the idea that you submitted in Lab 1.1 by clicking the **Idea Number**.

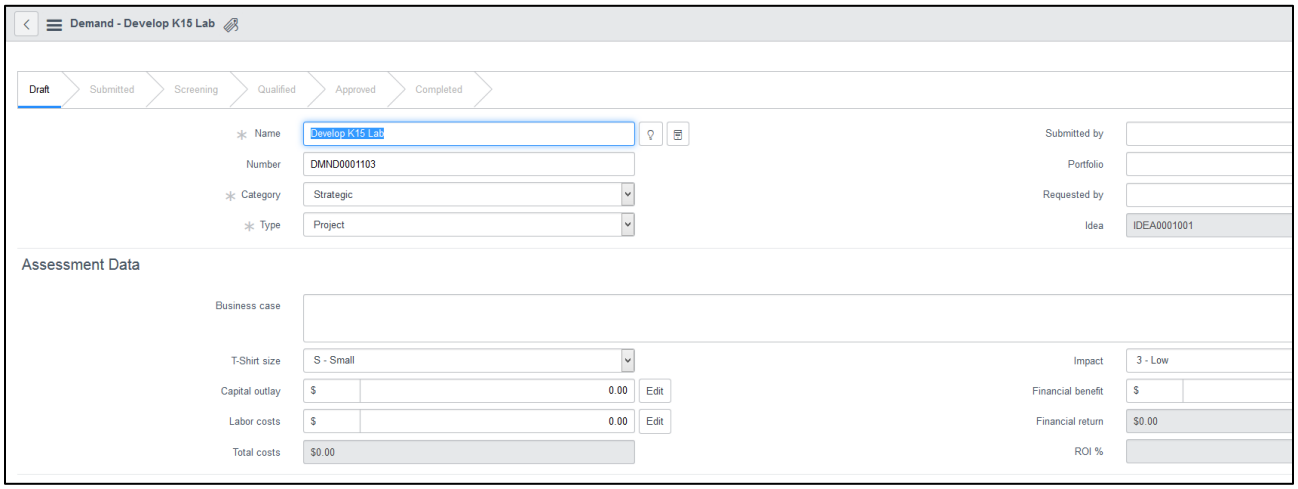


3. On the idea form, you can see that there has been a demand created since we accepted the idea in Lab 1.1. Click the information button on the right of the Demand field to access the draft demand.



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4. You should now be looking at the demand form that was created from the accepted idea.



5. Set the Category to **Strategic** and set Type to **Enhancement**. Review the form and fields.

6. Set the Category to **Strategic** and set Type to **Project**. Review the form and fields. Notice that the assessment data changes based on the Type of demand.

7. Set the Following fields / values:

   - Category: **Operational**
   - Type: **Change**
   - Portfolio: **DevOps**

   You will see the field turn RED because this portfolio does not exist.

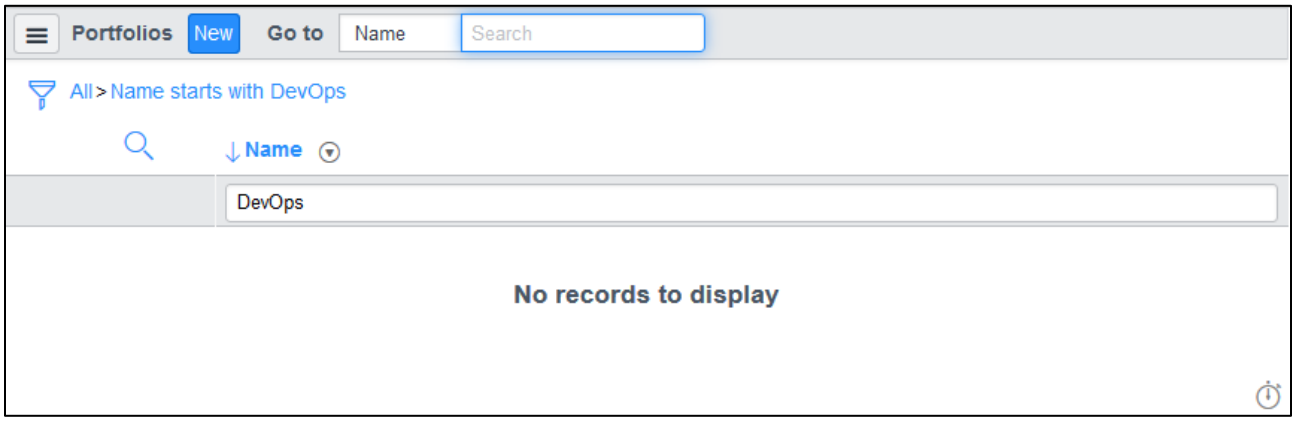


8. Add the Portfolio for DevOps by first selecting the Magnifying Glass in the field



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9. This brings up the lookup list for portfolios.



10. Select the **New** button.

11. Fill out the form with the following values

- Name: **DevOps**
- Description: **Portfolio to track labs at K15**

12. Press the **Create Portfolio** button.



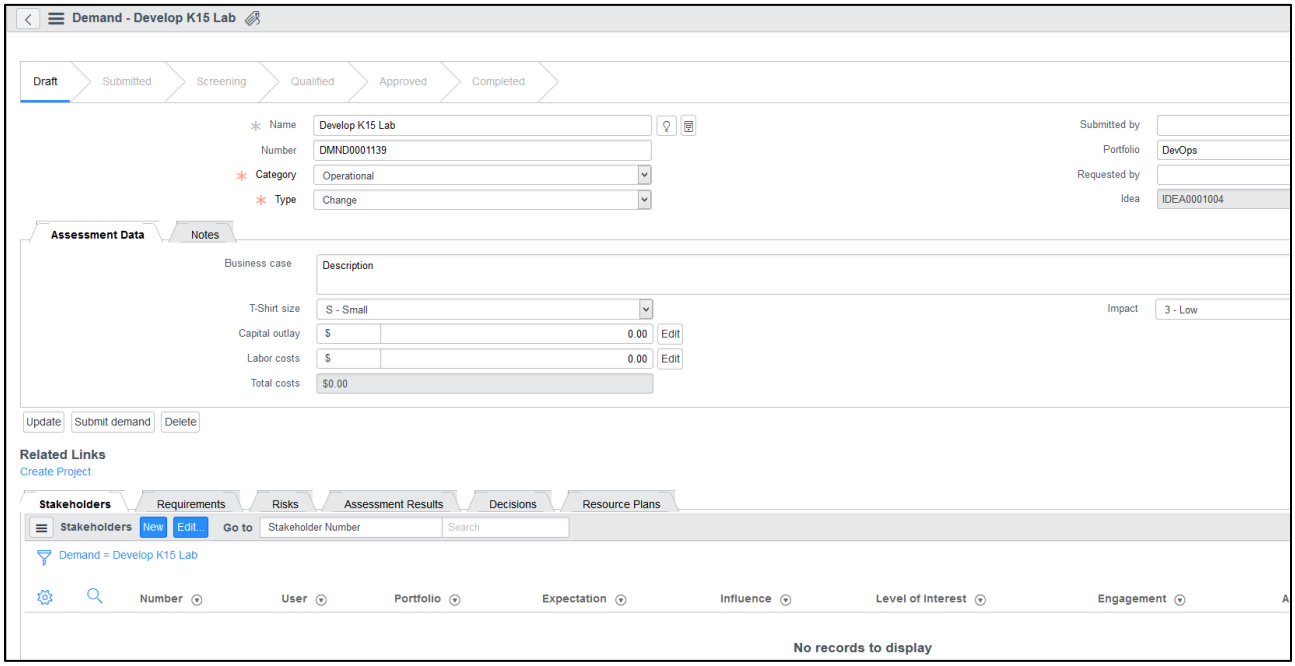
13. You should be returned to the original Demand Form, with a valid Portfolio set to DevOps.

14. Save the record by right-clicking the title bar, and selecting **Save**.

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Lab Success Verification

1. You should now be looking at the draft demand with the portfolio set to DevOps.



Progress Report

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

2. Click **I am done!**

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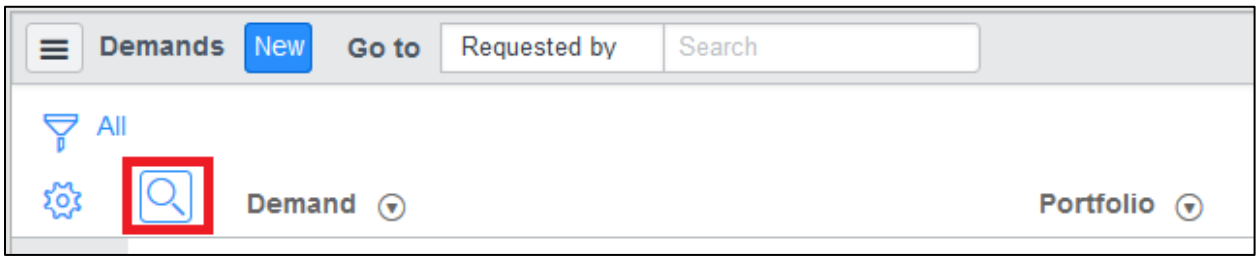
Lab Goal

Add stakeholders to demands and Progress through various lifecycle stages.

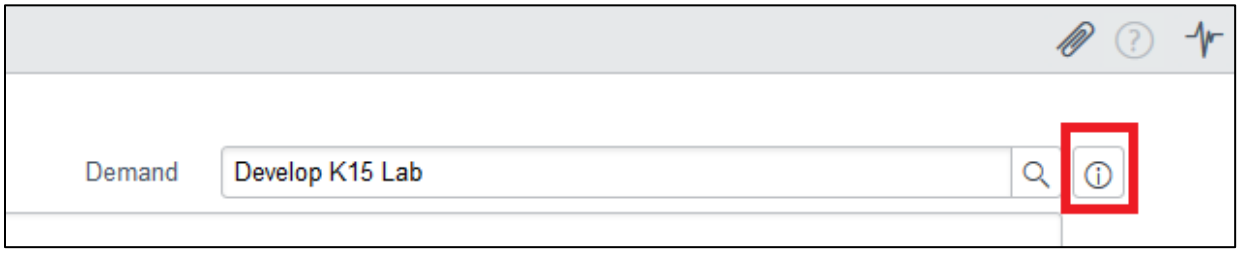
Lab 2.3 Demand Details and Staging

Navigate to the Draft Demand

1. Navigate to **Demand > Demands > All**.
2. Select demand you created for the lab by filtering the list. Do this by first selecting the magnifying glass in the upper-left corner of the list.



3. On the demand column, enter the text to filter on as ***develop.** In ServiceNow filters, the * represents contains.

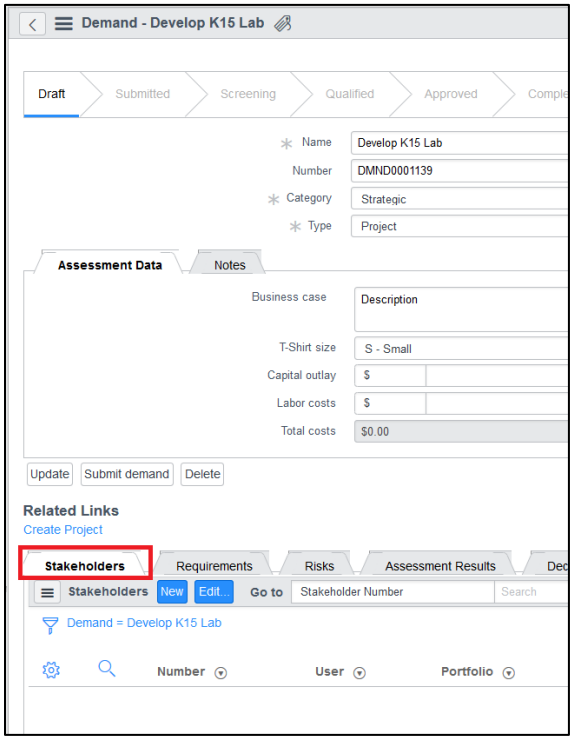


4. Select the demand for **Develop K15 Lab**.

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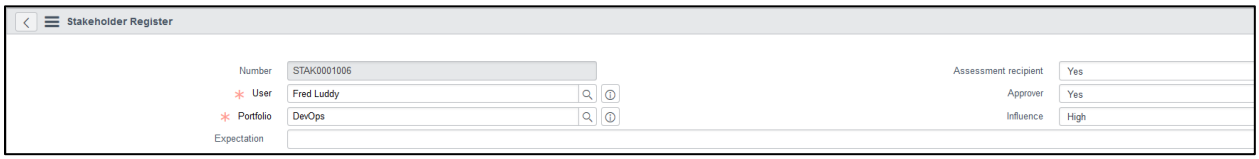
Adding Stakeholders to the Demand

1. On the Demand form, select the **Stakeholders** tab.



2. Select **New** add a new stakeholder. Fill in the form as follows:

   - User: **Fred Luddy**
   - Portfolio: **DevOps**
   - Assessment Recipient: **Yes**
   - Approver: **Yes**
   - Influence: **High**

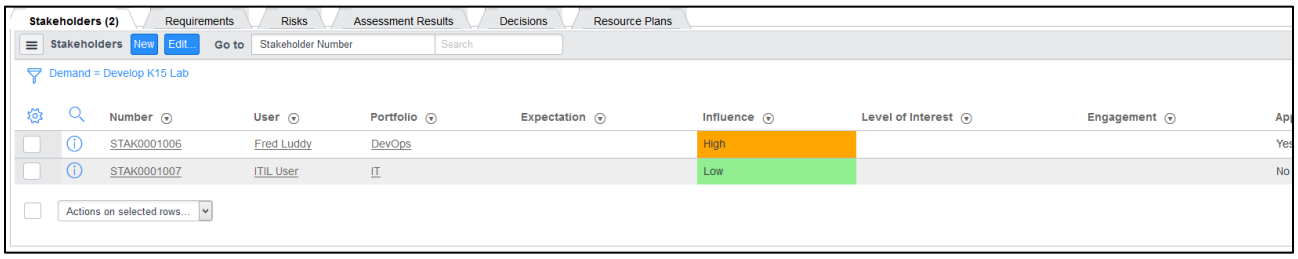


3. Press the **Submit** button.

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4. Add an additional user for the ITIL user:
   - User: **ITIL User**
   - Portfolio: **DevOps**
   - Assessment Recipient: **Yes**
   - Approver: **No**
   - Influence: **Low**

5. Once finished, you should see a list of two stake holders:



6. [OPTIONAL] Double-click the fields for **Level of Interest** and **Engagement**. Think about any additional information you would like to capture as part of the process.

7. Select the **Requirements** tab.

8. Press the new button to view the Requirements form. This brings up the requirements form. Add a requirement with the following fields:
   - Estimated Effort: **Hours | 20 | 00 | 00**
   - Title: **Develop K15 Lab Guide**
   - Description: **Use MSFT Word template to document steps**

9. Submit record.

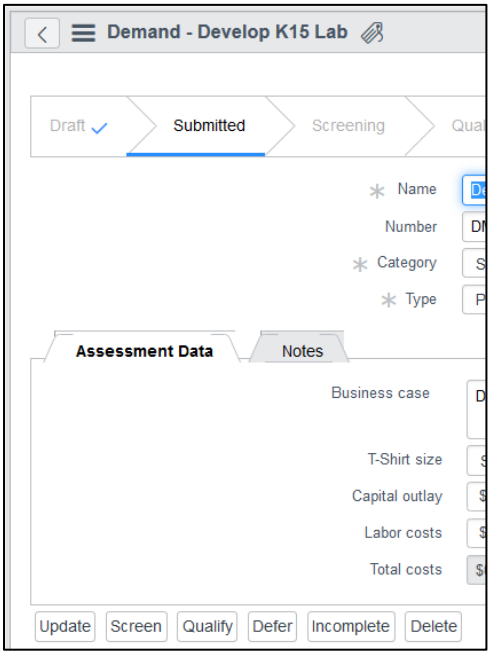
10. Select the **Risks** tab.

11. Add a new Risk.
    - Short Description: **Missed Deadline**

12. At this point, your demand has enough information to proceed to the next stage. Do this by selecting the button to **Submit Demand**. This is where an organization can place an initial layer of triage in process to validate the Demand, and ensure that there are enough details to move forward.

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13. At this point, you should see the stage tracker has progressed to the submitted stage, and that there are new actions that can be taken on the record.

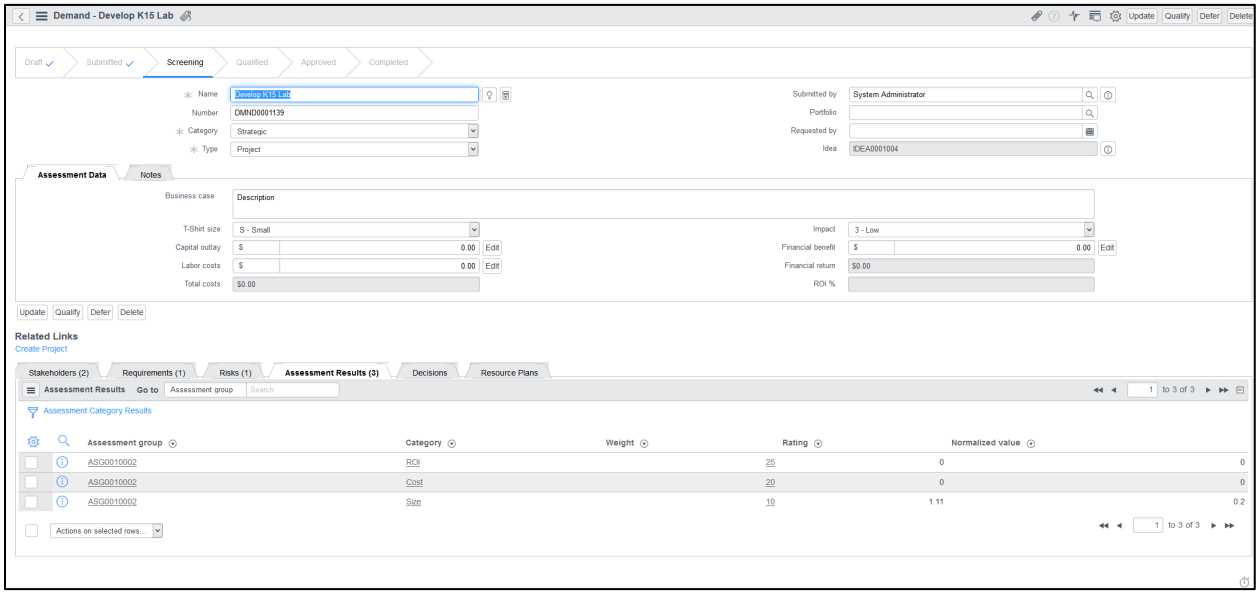


14. Press the **Screen** button to initiate the assessment process. This will move the record to the Screening phase, and send assessments to the stakeholders.

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Lab Success Verification

1. You should now be looking at the Demand with the stage set to **Screening**.



Progress Report

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

2. Click **I am done!**

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Lab Goal

Impersonate a stakeholder, and submit results.

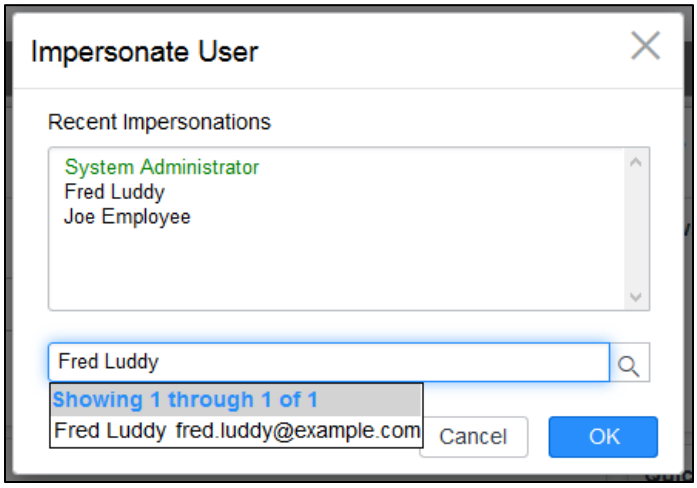
Lab 2.4
Demand Assessment

Impersonate Fred Luddy and Take an Assessment

1. Locate and press the impersonate icon on the upper-left area, next to your user name.



2. Enter **Fred Luddy** for the user to impersonate and press **OK**.



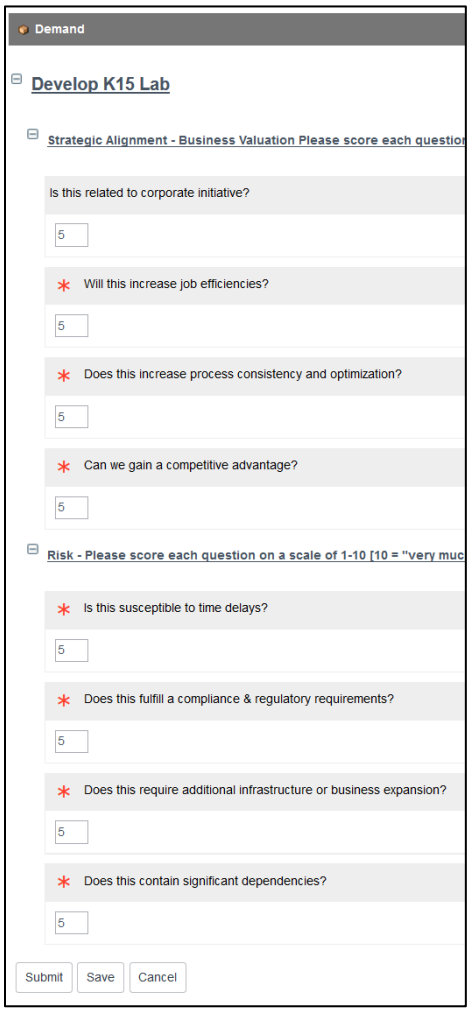
3. Navigate to the assessment module: **Self-Service > My Assessments & Surveys**.

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4. You should see the assessment generated by the Demand that we promoted to the Screening stage. Press the button to take the assigned assessment.



5. Enter in **5** for all fields and **Submit**.



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Impersonate the ITIL User and Take the Assessment

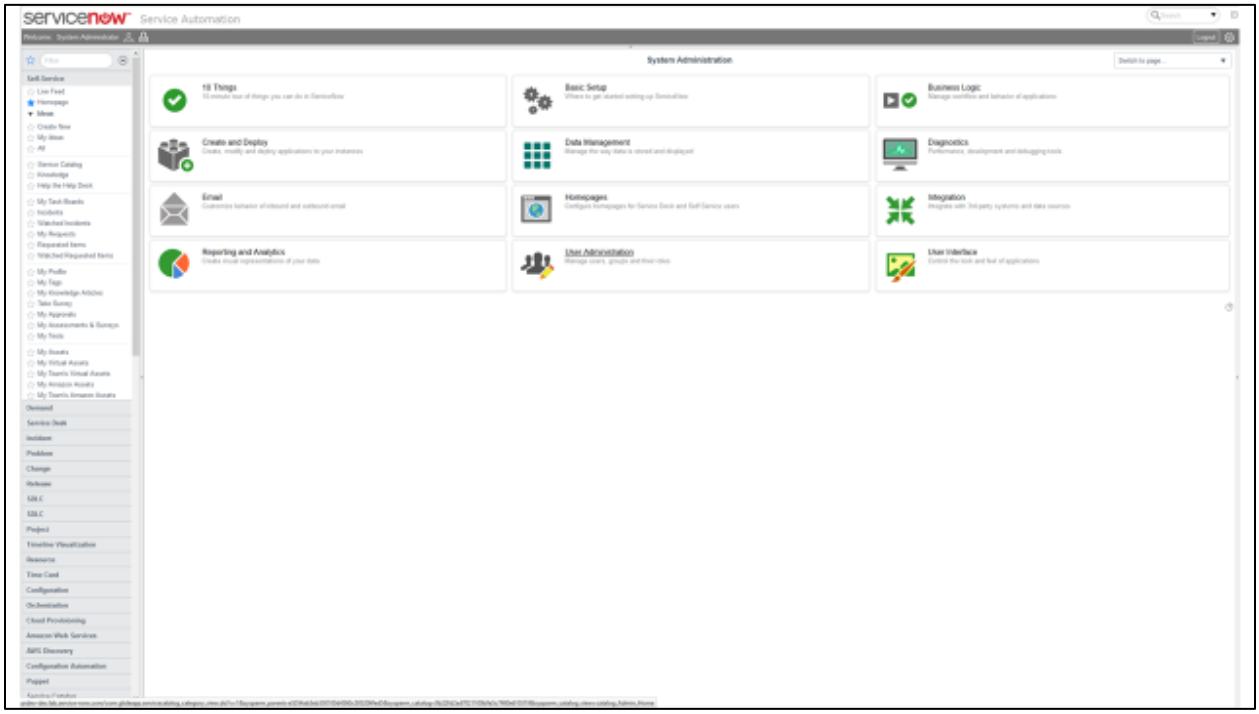
1. Locate and press the impersonate icon on the upper-left area, next to your user name.



2. Enter **ITIL User** for the user to impersonate and press **OK**.
3. Navigate to the assessment module: **Self-Service > My Assessments & Surveys.**
4. You should see the assessment generated by the Demand that we promoted to the Screening stage. Press the button to take the assigned assessment.
5. Enter in **5** for all fields and **Submit**.
6. Locate and press the **Impersonate** icon in the upper-left area, next to your user name.

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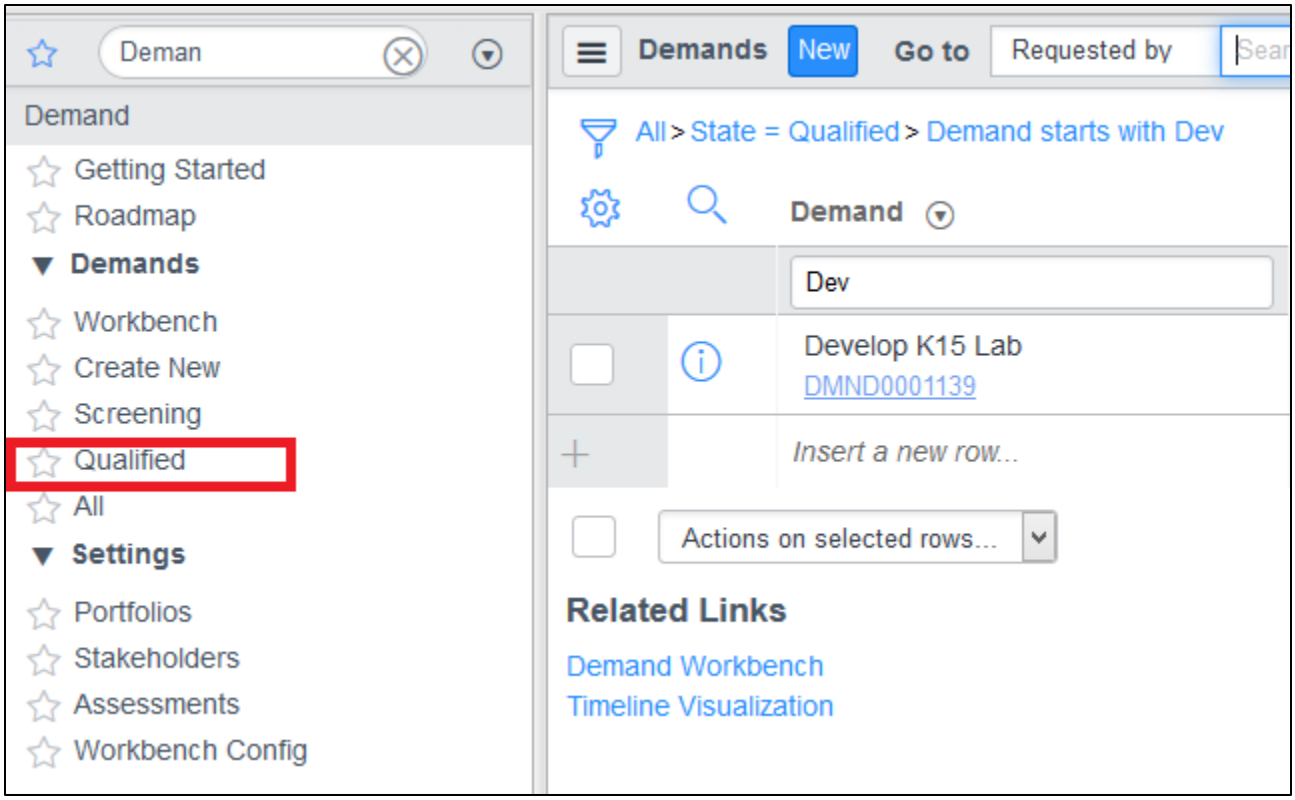
7. Select your student login from the list and press **OK**. This should return you to the homepage for your student account.



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8. Navigate to **Demand > Demands > Qualified** module. The Demand automatically progresses from the screening phase to the qualified phase once all assessments are received. This gives the project manager another opportunity to assess the demand.

9. Filter the list of Demands by entering **Dev** on the Demand column.



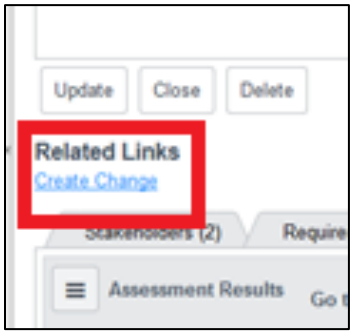
10. Select the **Demand** link to view the form.

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Review the Assessments and Approve

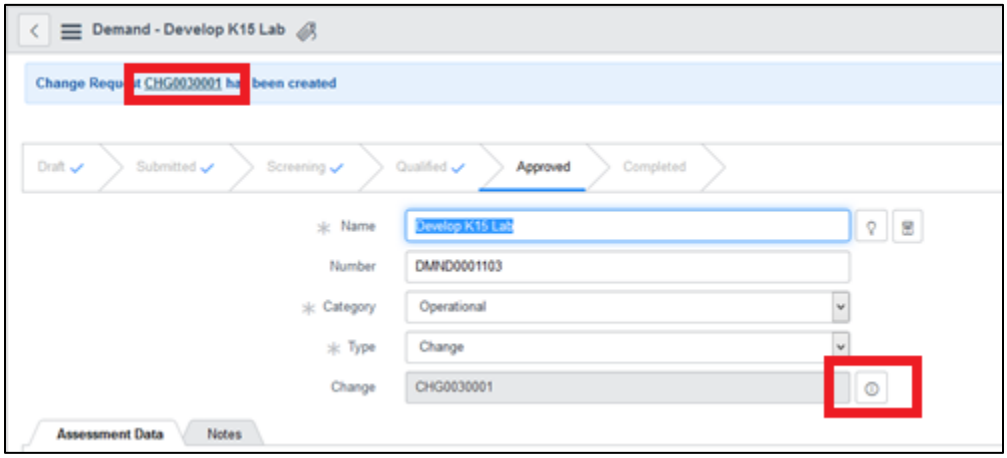
1. On the Demand form, select the **Assessment Results** tab. Notice that the Normalized Values are different from the assessment values we gave. Based on the stakeholder configuration, and the metric definitions, different weightings can be given based on the process of an organization.

2. In the **Related Links** on the form, you can select **Create Change**.



3. This opens a Change Request, which can then be worked to finish the demand. Alternately, depending on the options selected in the Category and Type fields, this demand could lead to a Project, Defect, Enhancement, or Change.

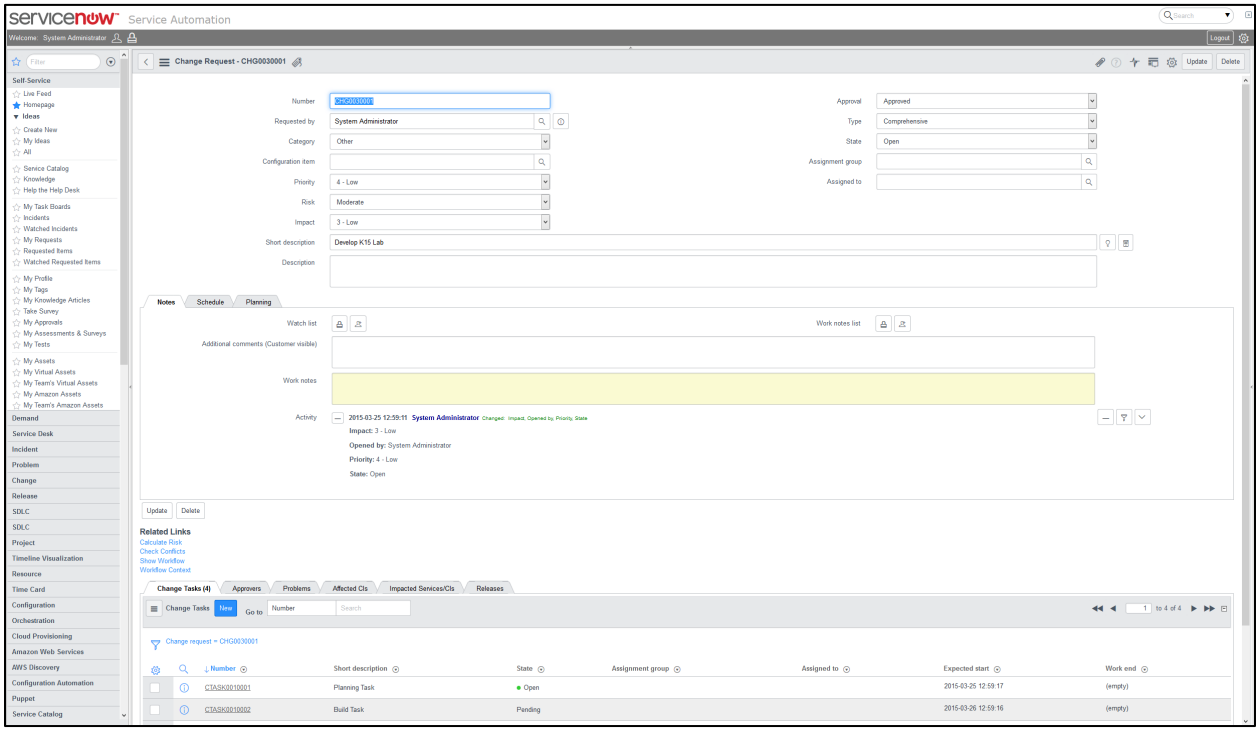
4. Click the **Change** link to view the generated change record.



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Lab Success Verification

1. You should now be looking at **Change** created by the Demand.



Progress Report

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

2. Click **I am done!**

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Lab Goal

Lab 3.1 Change Process

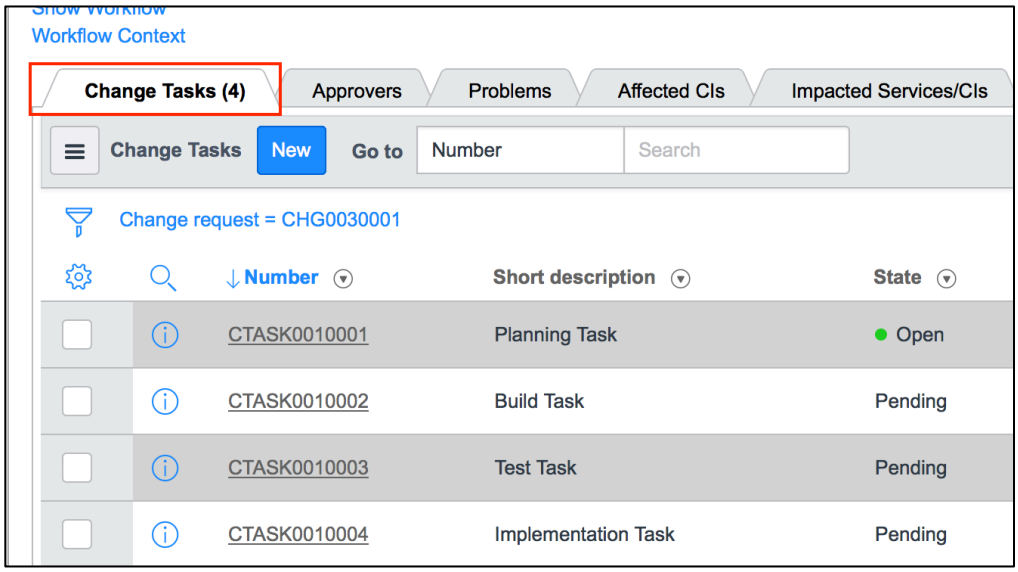
In this lab, we have decided to process the development request as a change record within ServiceNow. This is one of the many routes that a demand can take on the way to fulfillment. We could have as easily selected a project, enhancement, or defect. It really comes down to the process that your organization feels best fits your needs.

In this phase of the lab, we will navigate the form and ensure that the proper set of taskings and information are included.

Navigate Change form

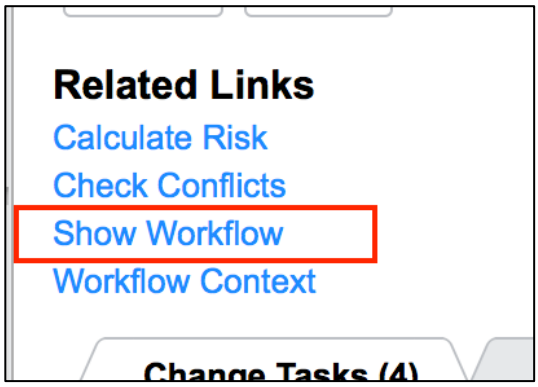
1. On the form, find the tabs at the bottom of the form.

2. Select the **Change Tasks** tab. Notice that there are tasks already configured for this change. These came from a workflow that was assigned to this task.

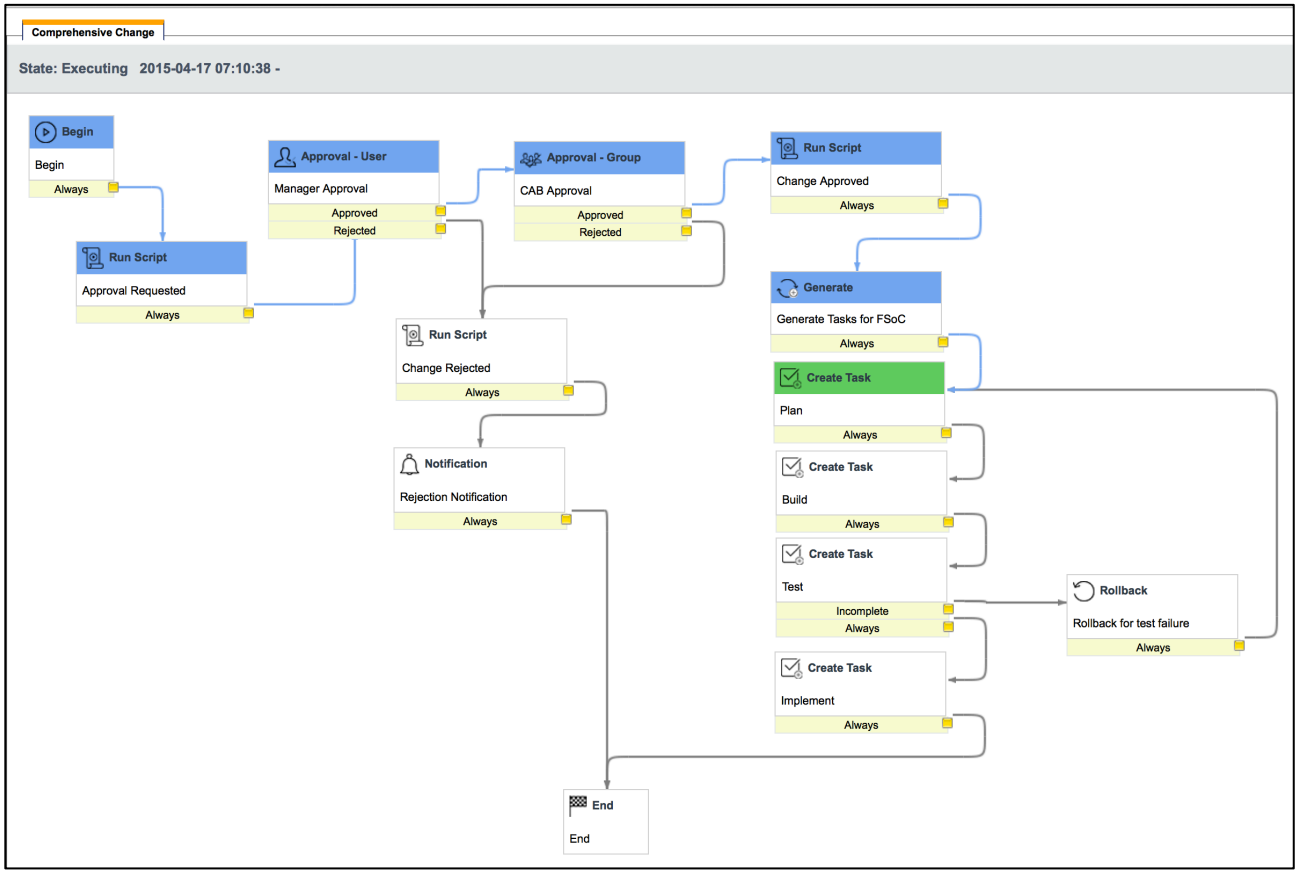


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3. To view the workflow, select the **Show Workflow** related link to view the current running workflow.



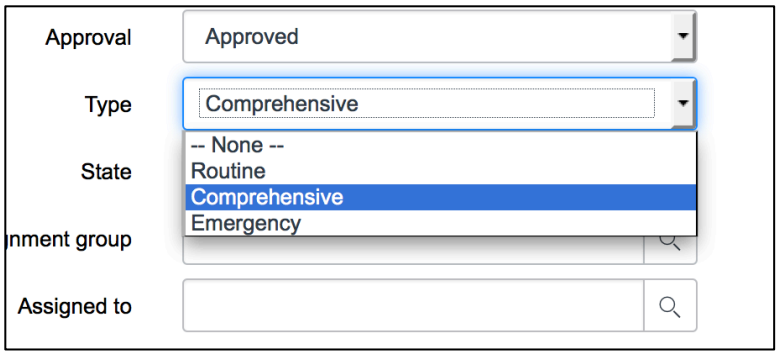
4. This will open a new tab, and show the currently running workflow. The steps in blue indicate finished steps, and the step in green indicates the currently running step.



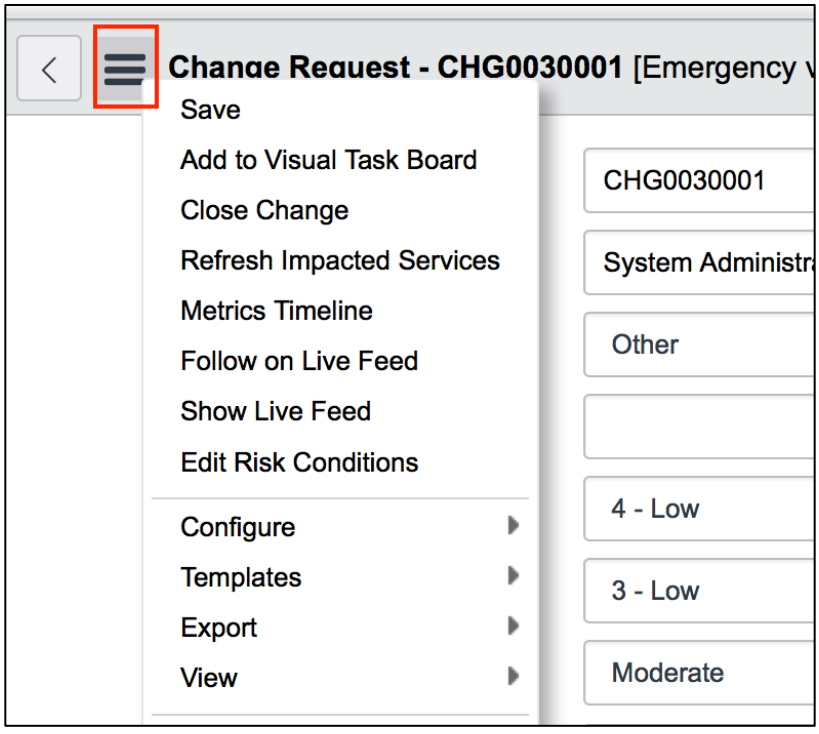
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5. In this case, we can see that the workflow is a Comprehensive Change workflow, and it is currently waiting for the Plan change task to complete. At this point, close the workflow browser tab. This will bring you back to the change form.

6. Locate the Type field on the right hand column, and pull down the select choices.



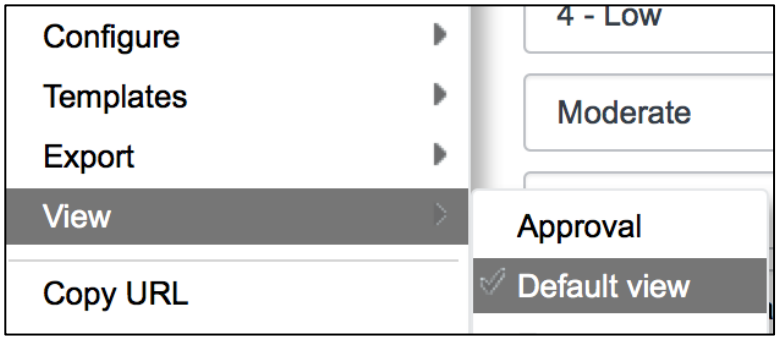
7. Ensure that the **Type** is maintained as **Comprehensive**. In the upper right hand corner, locate the **hamburger icon** to access the **Additional Actions** menu.



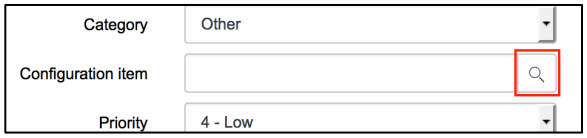
8. Select the **View > Emergency View**.

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9. Notice that the form fields have changed. ServiceNow has the ability to drive different workflows and different views from the same underlying Form using basic criteria, such as the value of a field. This can help in alignment when working across multiple disciplines across the enterprise. Once you are finished exploring the different views, return the form to the default view.

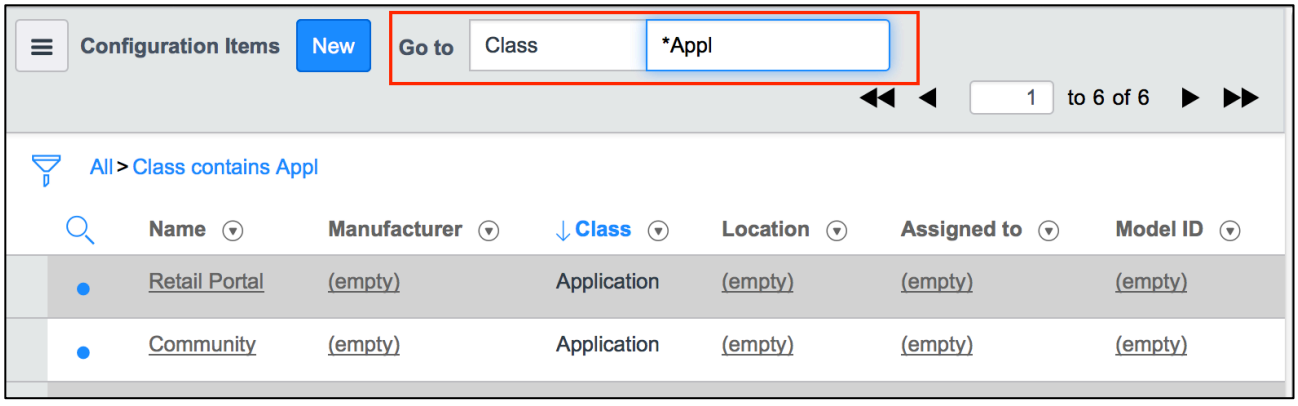


10. Click the lookup icon next to the Configuration Item field.



11. This will bring up the field lookup dialogue.

12. In the Go to field select **Class** and enter ***Appl**.

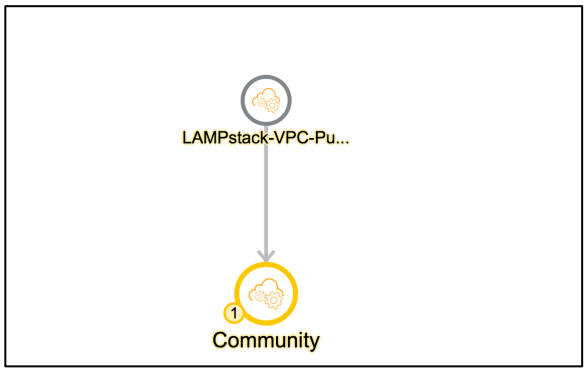


13. This allows you to associate activities with a particular application, and will notify any stakeholders as you move through the lifecycle of the process.

14. Select the **Community** application from the list.

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15. You should now see the **CI Map** icon next to the Configuration Item field. Press the icon to bring up the CI Map in a new browser tab.



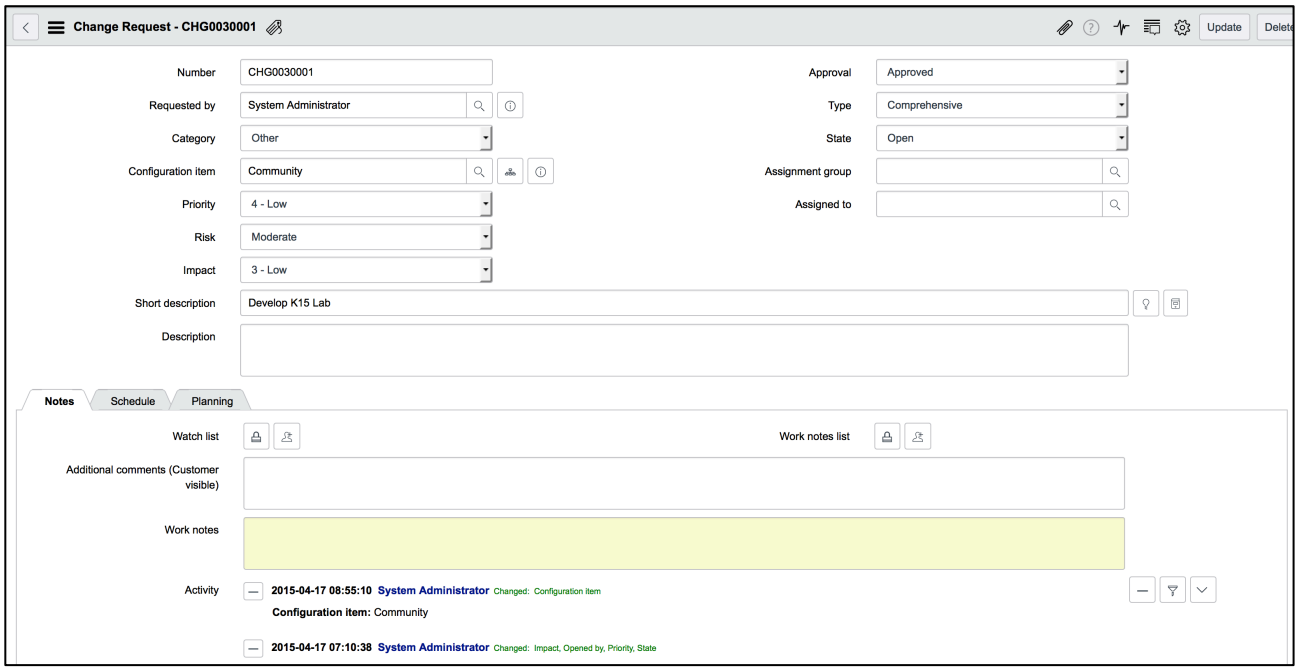
16. This is where you can quickly identify any related services that might be affected by a change against the current application. If you hover the mouse over the number on the lower left hand side of the application, you can see any “task” records that are open against a particular item. Once you are done exploring the CI map, close the browser tab to return to the form.

17. **Right Click** on the grey title bar and **Save** the record.

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Lab Success Verification

1. You should now be looking at a **Change Request** created by the Demand.



Progress Report

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

2. Click **I am done!**

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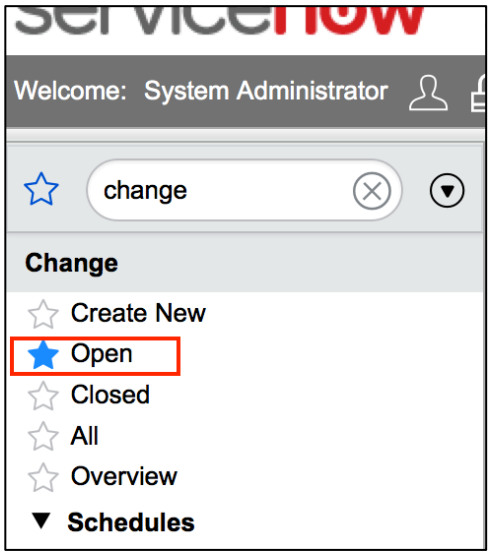
Lab Goal

In this phase, we will review the current change tasks, and add additional tasks to review.

Lab 3.2 Assign Change Tasks

Navigate To the Change form

1. Navigate to **Change > Open**.

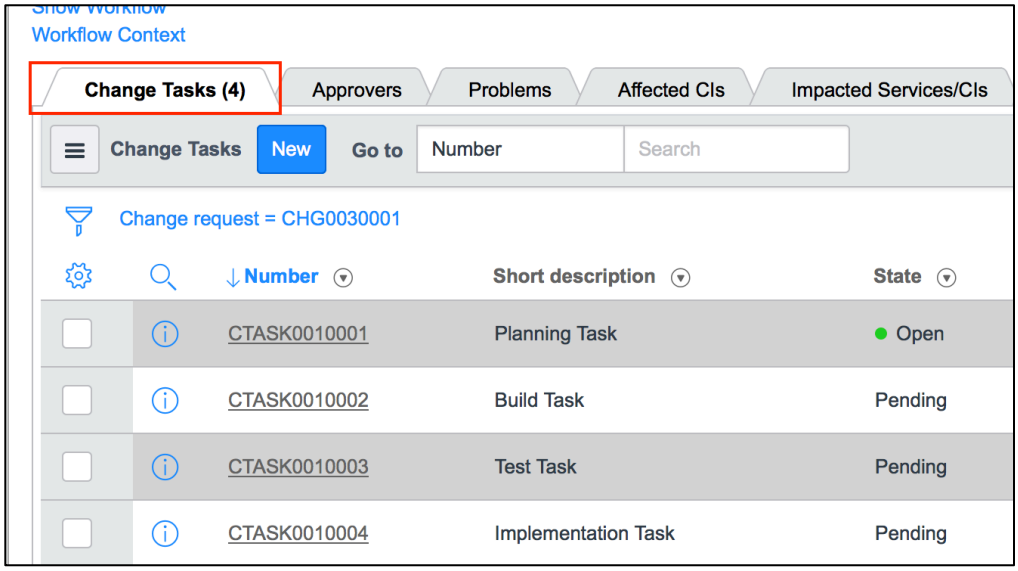


2. Select the change record created in the previous labs from the list.

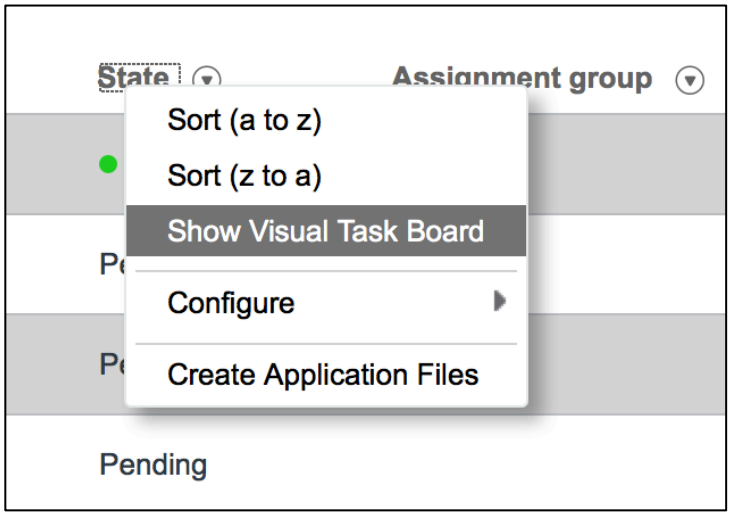
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Manage Change Tasks

1. Select the **Change Tasks** tab. Notice that there are tasks already configured for this change. These came from a workflow that was assigned to this task.

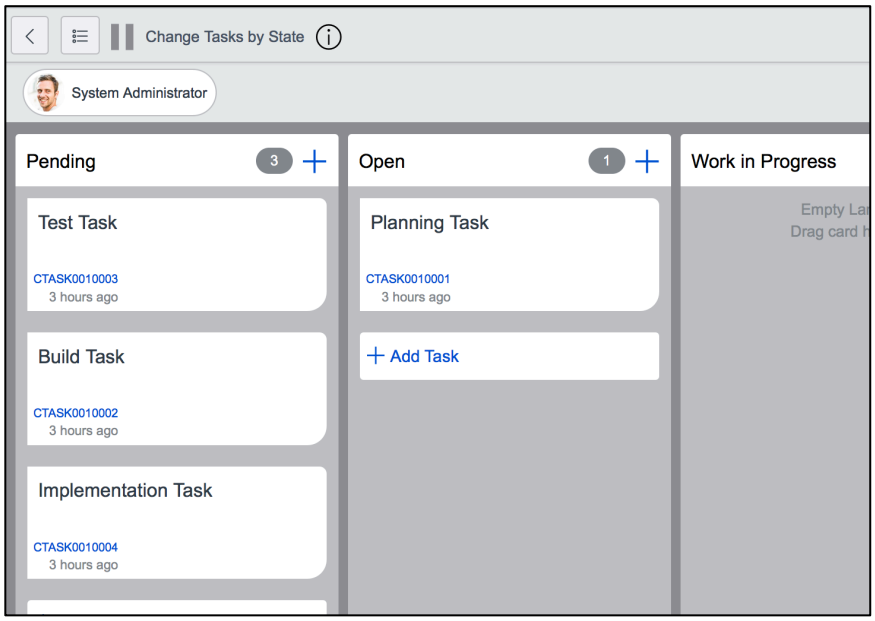


2. **Right Click** on the State column header, and select **Show Visual Task Board**.

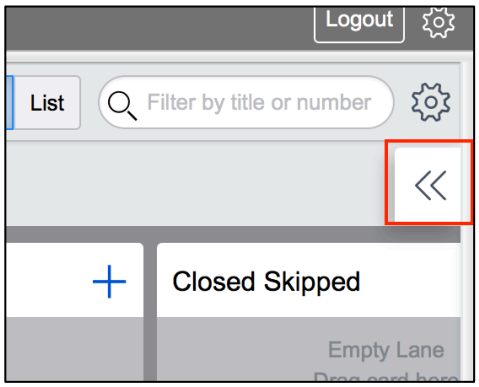


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3. **Close** the welcome dialogue. You should now be looking at a list of tasks displayed in a Kanban style with lanes representing the various states of the tasks.

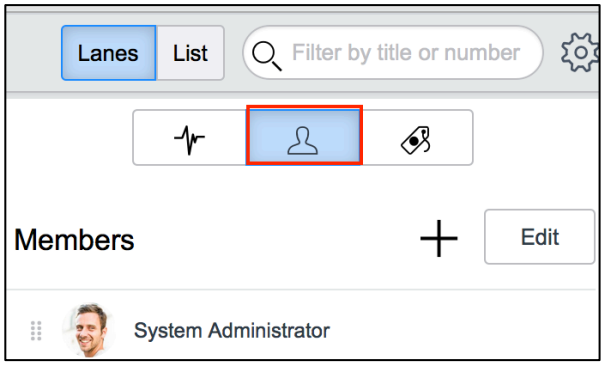


4. First we need to add users to work on our tasks. To do this, you need to access the fly-out on the right side



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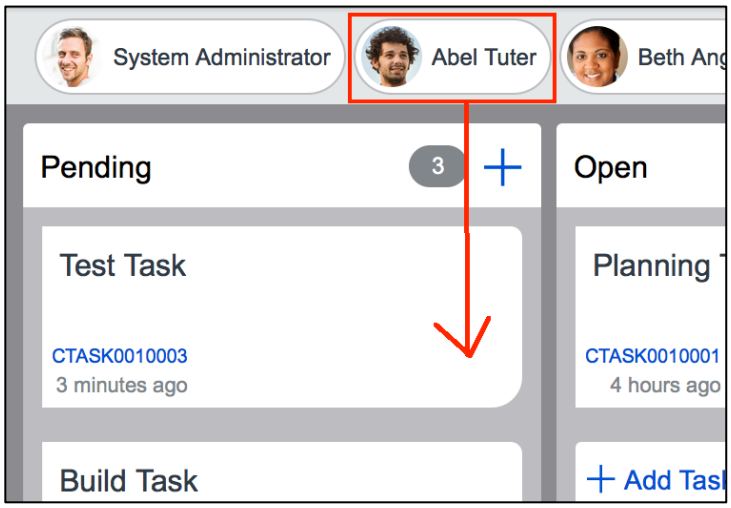
5. On the fly-out, select the Members tab.



6. Hit the **+** to add two users **Beth Anglin** and **Abel Tuter**.

7. Close the flyout by clicking the **>>** tab.

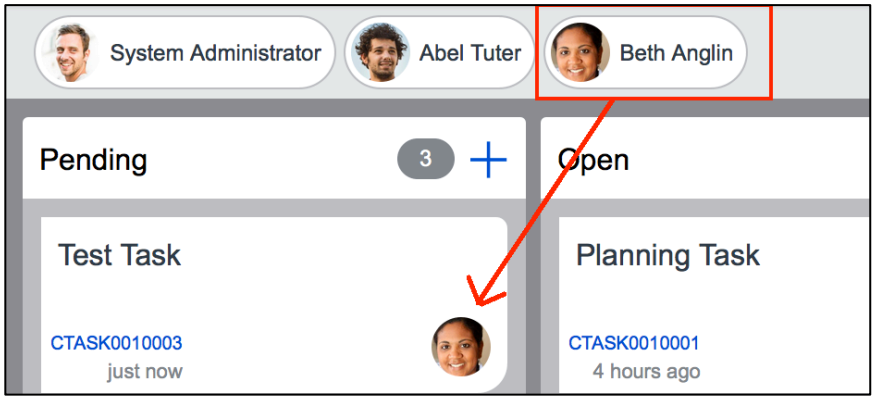
8. You should now have multiple users to add to the task board. Attempt to drag **Abel Tuter** onto the Test Task.



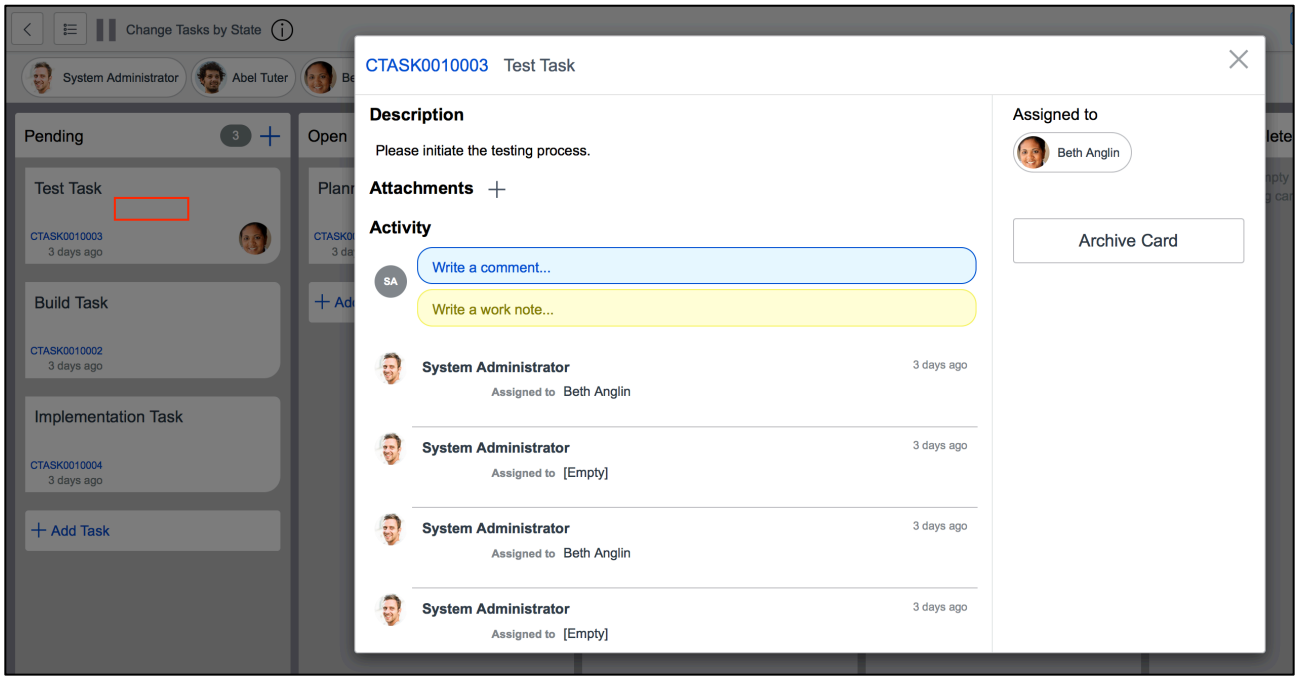
9. You should get an error saying that Abel cannot be added to the record due to a Record Qualifier Rule. This is expected, and demonstrates that data integrity can be defined in a single location, and be enforced in multiple areas of the product. Dismiss the error alert by clicking the red X.

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10. Now drag **Beth Anglin** on the task.



11. Click on the white space in the card to access the live feed for this task.

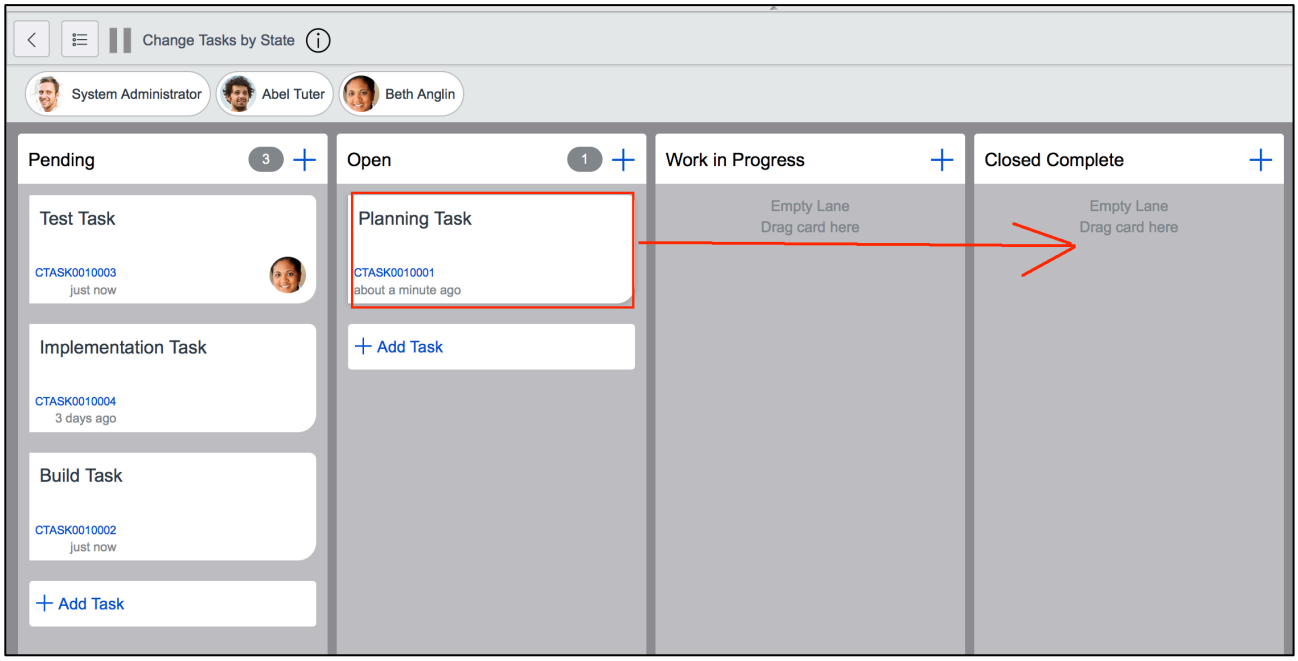


12. In the yellow box, **write a work note**. Live feed gives your users an alternative way to manage tasks while using a social media experience.

13. Click the **X** in the upper right hand corner to return to the task board.

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14. Drag the Planning Task to the Closed Complete column.

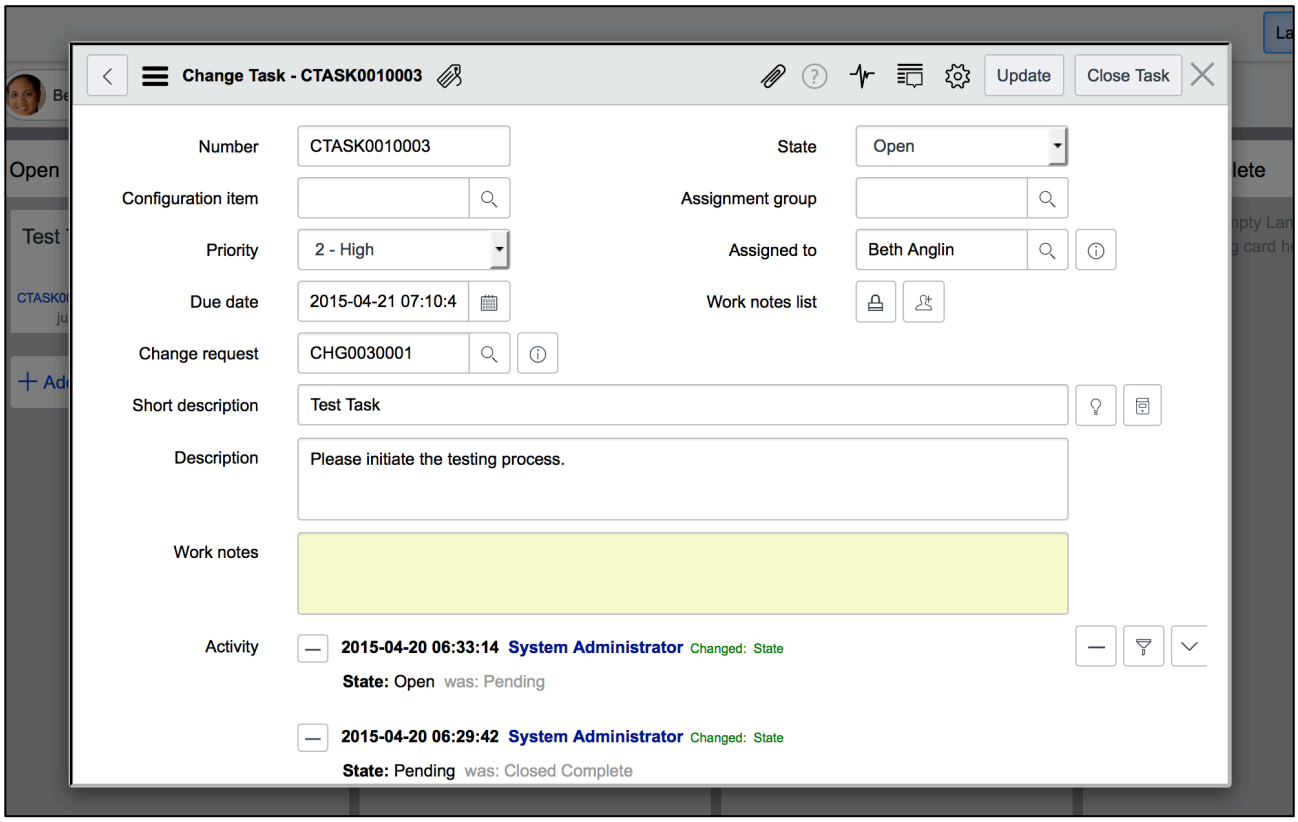


15. Notice that when you drag the task between columns, it is updating the state of the record. This then updates the workflow, moving to the next phase and bringing the Test Task into an open state.

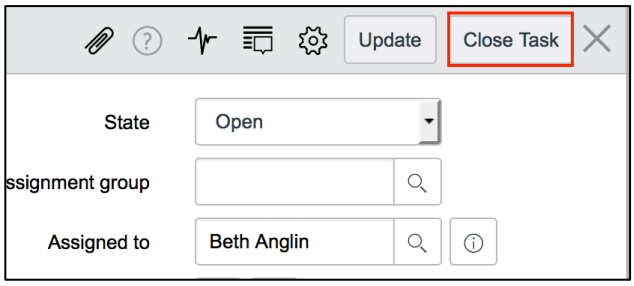
16. Now drag the build task to Closed Complete. Again, notice the workflow engine changing the state of the next change.

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17. Click the blue **hyperlink** on the Test Task to access the Change Task. This will bring up the details for the record.



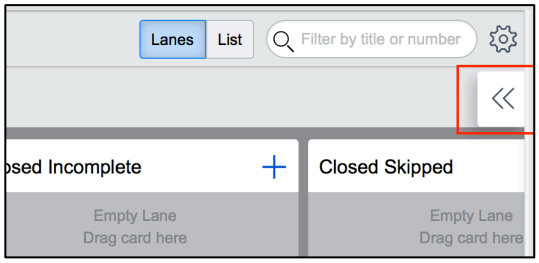
18. Close this task by pressing the **Close Task** button in the upper right hand corner.



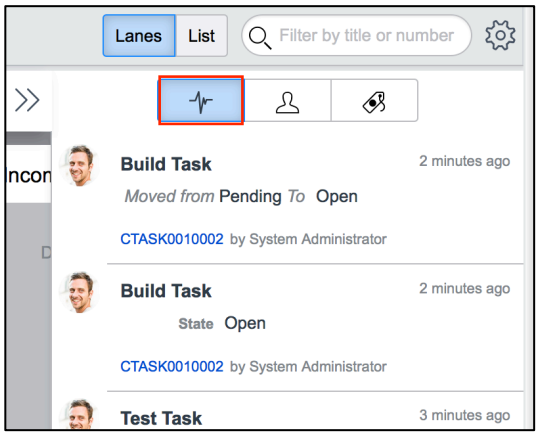
19. Notice that regardless of how the record is updated, the cards will reflect that change on the visual task board.

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20. Access the Visual Task Board fly out again by pressing the << in the upper right hand corner

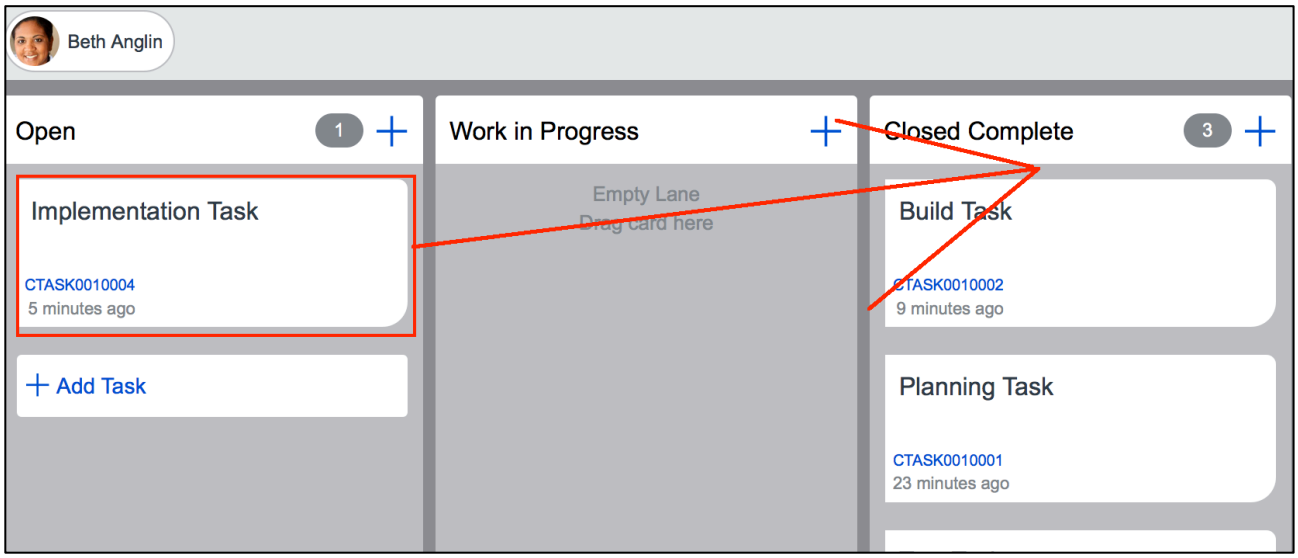


21. Make sure that you looking at the list of activities by clicking on the **Activities** icon. This view gives you a listing of all the activities occurring on the board. This view provides teams a quick way to assess what people are working on, and what status the various projects are in.

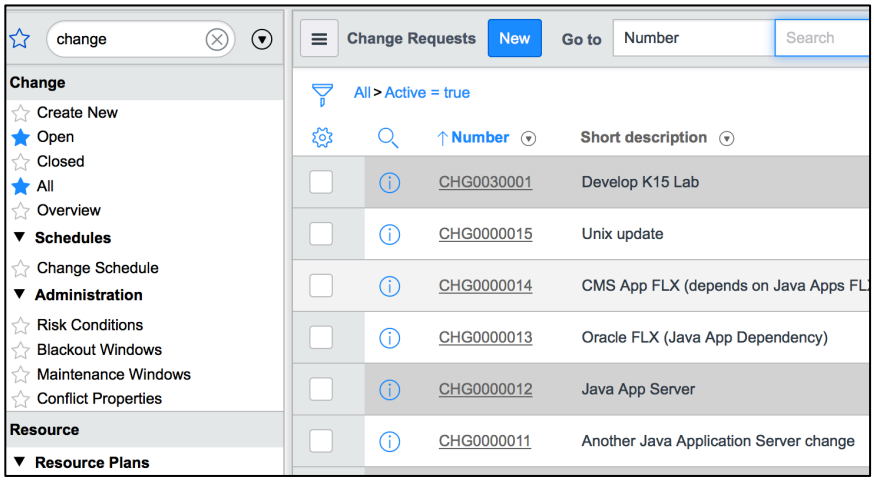


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22. Drag the remaining Implementation Task to the Closed Complete lane. This will mark all of the tasks closed.



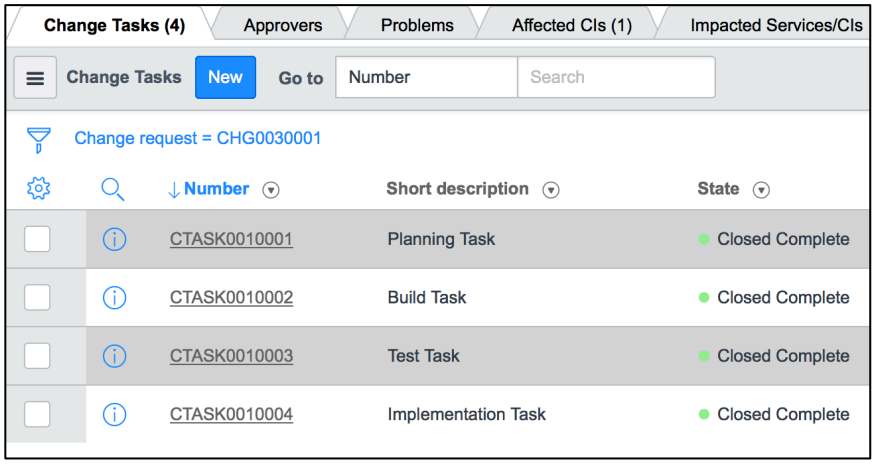
23. Navigate to the change request by going to **Change > Open** in the navigation pane.



24. Select the change for **Develop K15 Lab**.

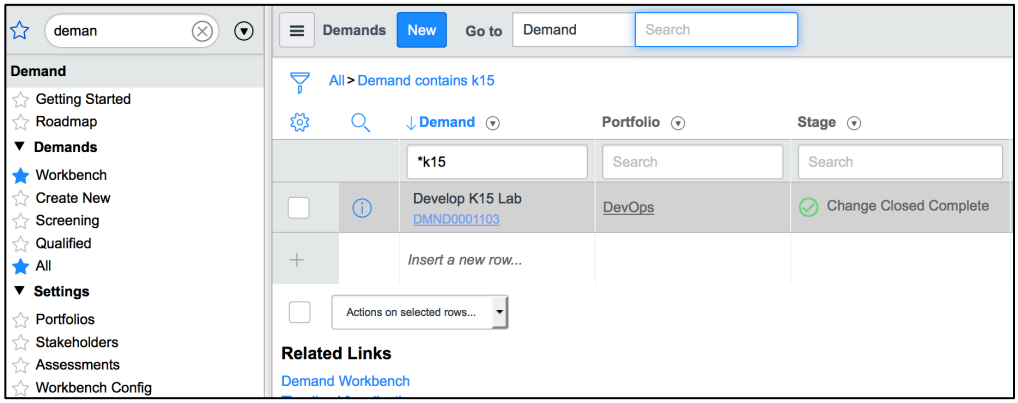
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25. Navigate to the **Change Tasks** tab, and notice all task are now closed complete.

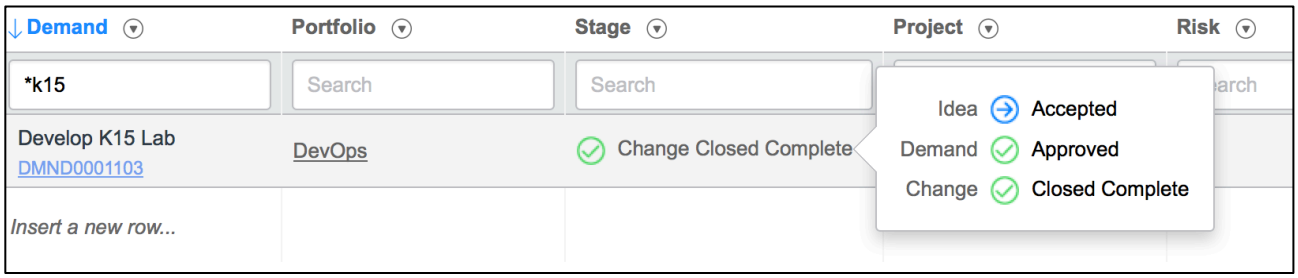


26. Change the State to **Closed Complete** and update the change.

27. Navigate to the list of Demands in the navigation pane by going to **Demand > Demands > All**. You may need to filter the list by Demand and enter the filter text ***K15**.



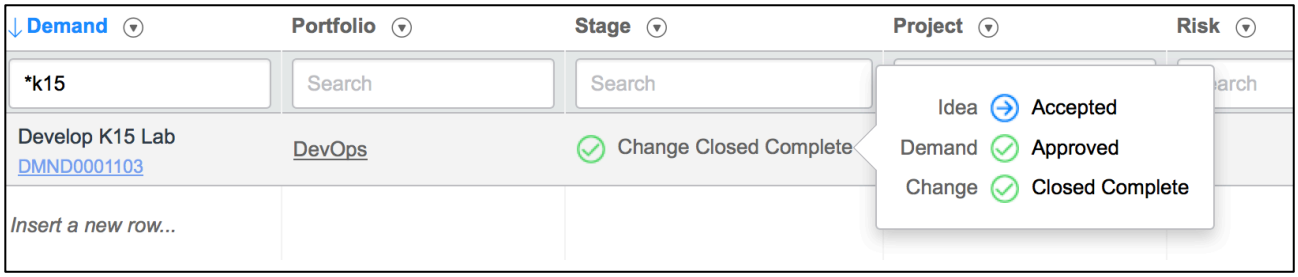
28. If you hover the mouse over the Stage column, you can see that the system has updated the Demand based on the state of the Change.



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Lab Success Verification

1. In this lab, you have taken a concept from an Idea, reported a Demand, and driven the process to completion.



Progress Report

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

2. Click **I am done!**

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