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

Lab Guide

Facilities:

Planned & Unplanned Work for Facilities Managers

Drew Whittington & Sean Barrett

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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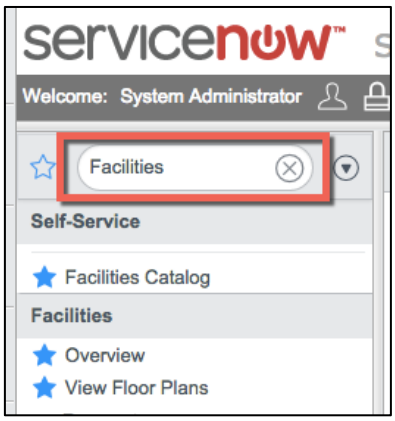
Lab Goal

This lab explains how to create a facilities request from the Facilities Catalog.

Lab 1.1 Create from Facilities Catalog

Create a Request from the Facilities Catalog

1. Navigate to your training instance: **https://<<name>>.lab.service-now.com**.
2. Log on with admin/Knowledge15 credentials.
3. On the left navigation bar, in the **navigator filter text** enter **Facilities.** The Application menu filters down to only Facilities related items.

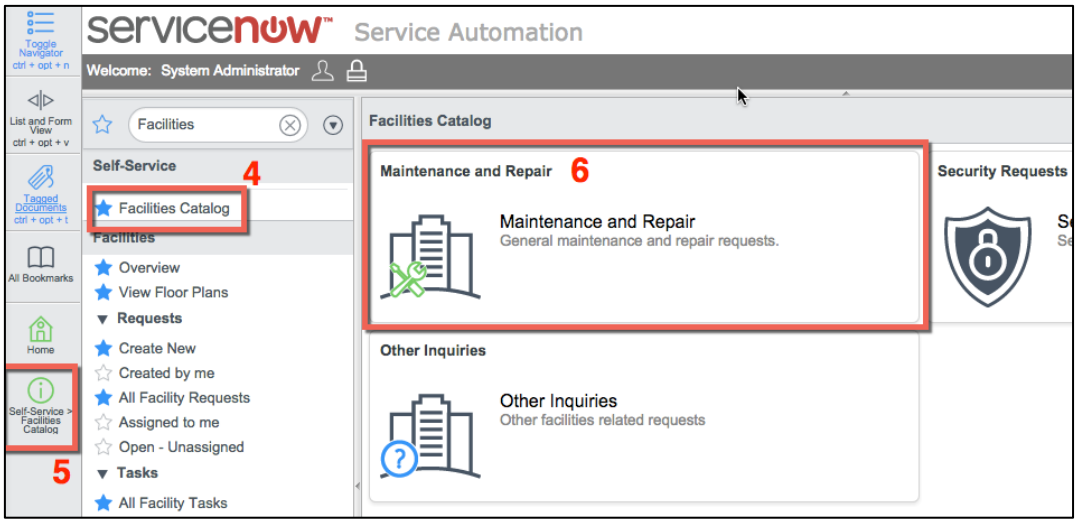


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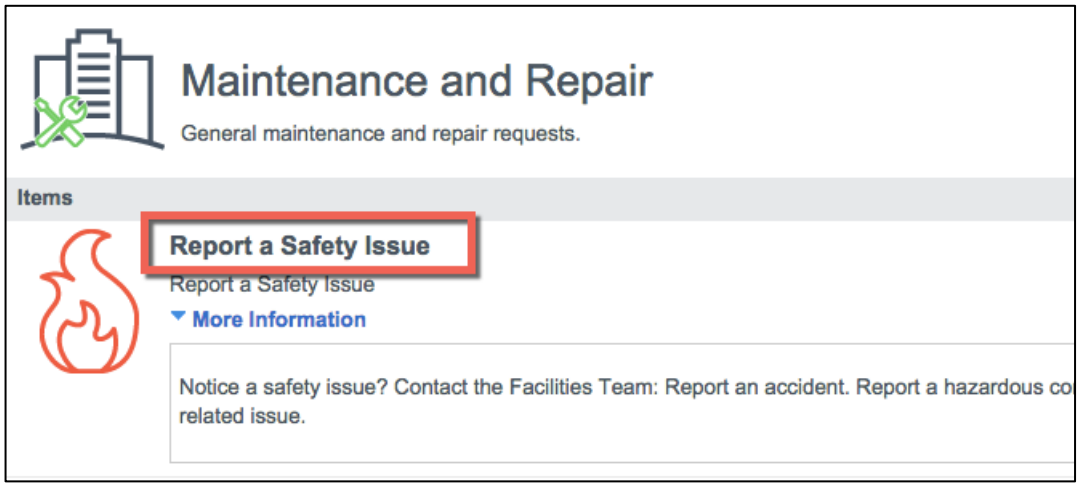
4. Under the **Self-Service** heading, click on **Facilities Catalog** to view catalog categories.

5. Click and hold on **Facilities Catalog** then drag it to the **PowerEdge**. A shortcut to the catalog is created for future use.

6. Click **Maintenance and Repair** in the Facilities Catalog window.



7. Click on **Report a Safety Issue**.

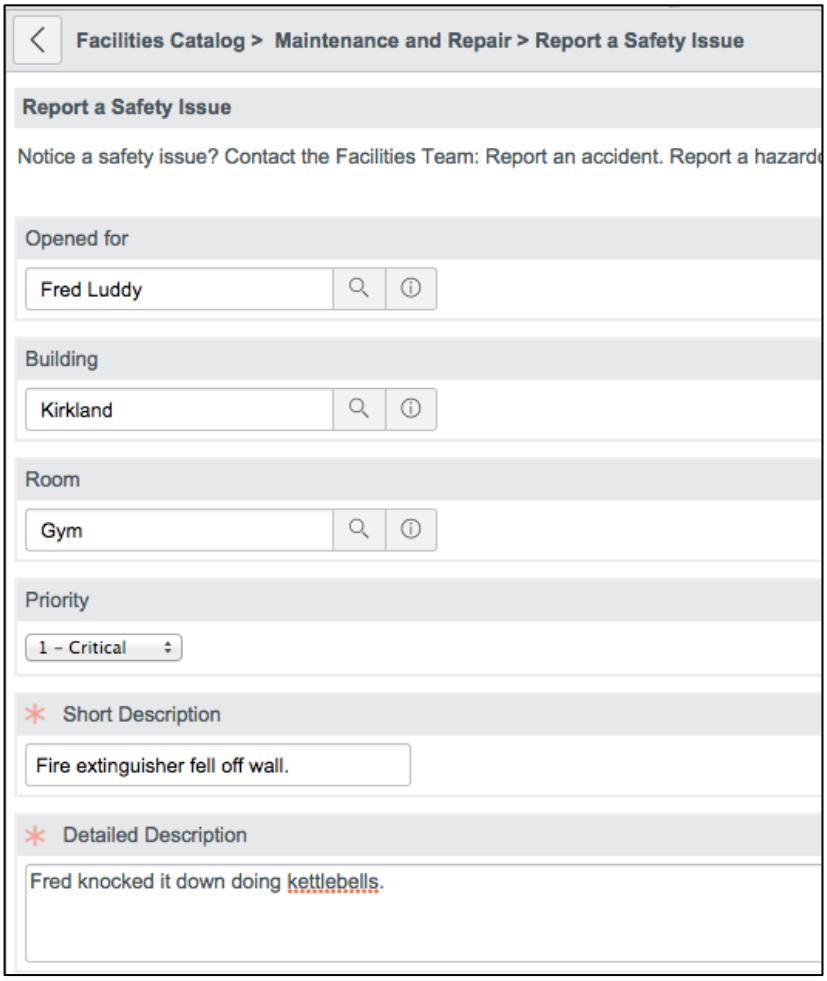


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8. Enter the following information into the **Request form**:

   Opened for: **Fred Luddy**
   Building: **Kirkland**
   Room: **Gym**
   Priority: **1-Critical**
   Short Description: **Fire extinguisher fell off wall.**
   Detailed Description: **Fred knocked it down doing kettlebells.**

9. The screen should look like the example.



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10. Click the blue **Submit** button at the bottom right of the form. The request is verified by a blue notification at the top of the screen.



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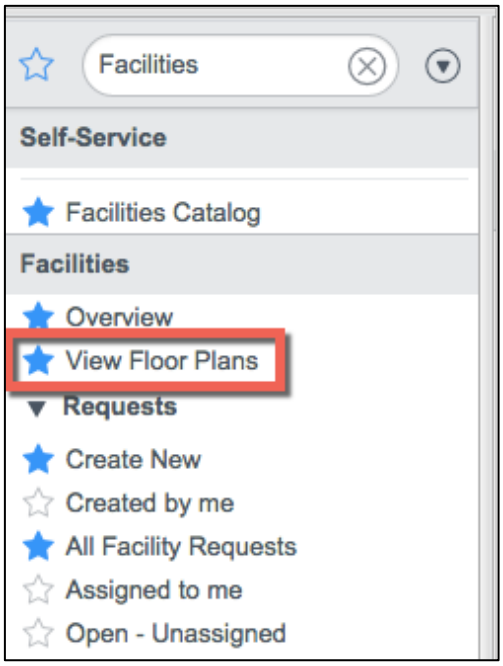
Lab Goal

This lab explains how to create a facilities request from the Floor Plan Viewer.

Lab 1.2 Create from Floor Plan Viewer

Create a Request from the Floor Plan Viewer

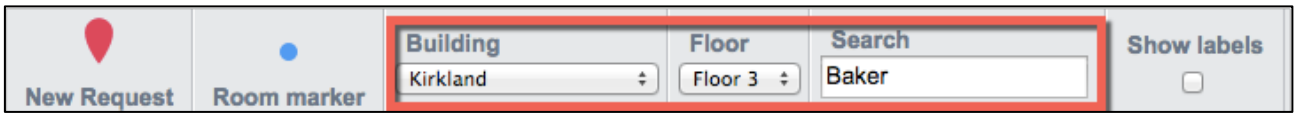
1. Under Facilities click View Floor Plans.



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2. At the top of the form complete the selections as follows:

   Building: **Kirkland**
   Floor: **Floor 3**
   Search: **Baker**

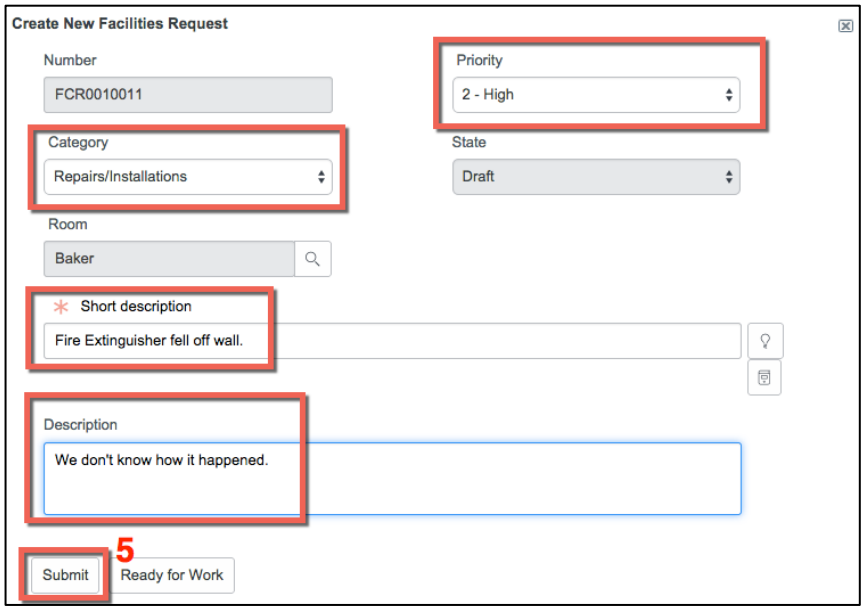


3. Click and **hold** the **New Request Marker**; then drag it to **Baker**, which is now highlighted blue after searching. Let go of the **New Request Marker** when it is over **Baker**. The **Create New Facilities Request Form** opens.

4. Enter the following information in the **Request form**:

   Category: **Repairs/Installations**
   Priority: **2 – High**
   Short Description: **Fire extinguisher fell off wall.**
   Description: **We don't know how it happened**.

5. Click **Submit**. The floor plan is still viewable.



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Lab Success Verification

1. Locate the room Baker on the Floor Plan Viewer. A red marker appears on the room indicating a request has been created.



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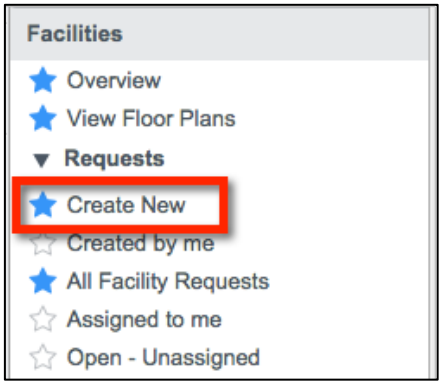
Lab Goal

This lab explains how to create a facilities request from scratch in the Facilities Request Form.

Lab 1.3 Create from Facilities Form

Create a Request from the Facilities Request Form

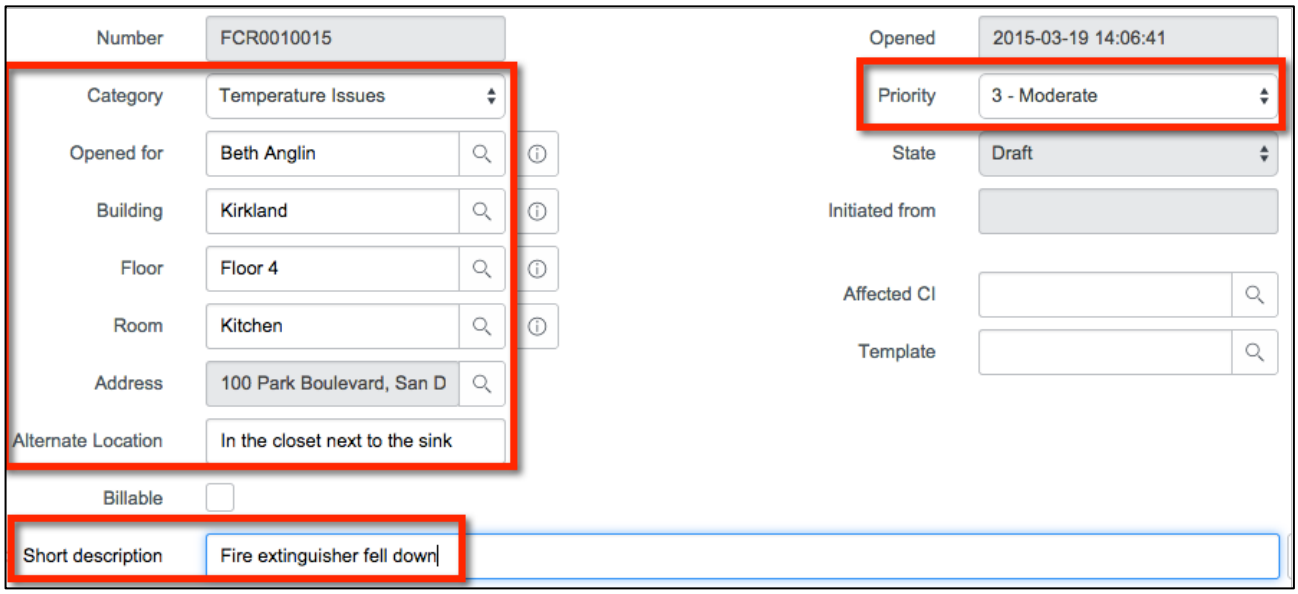
1. Under **Facilities > Requests** click **Create New**.



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2. Enter the following information in the **Facilities Request form**:

   Category: **Temperature Issues** (intentionally misclassified)
   Opened for: **Beth Anglin**
   Priority: **3 – Moderate**
   Building: **Kirkland**
   Floor: **Floor 4**
   Room: **Kitchen**
   Alternate Location: **In the closet next to the sink**
   Short Description: **Fire extinguisher fell down**

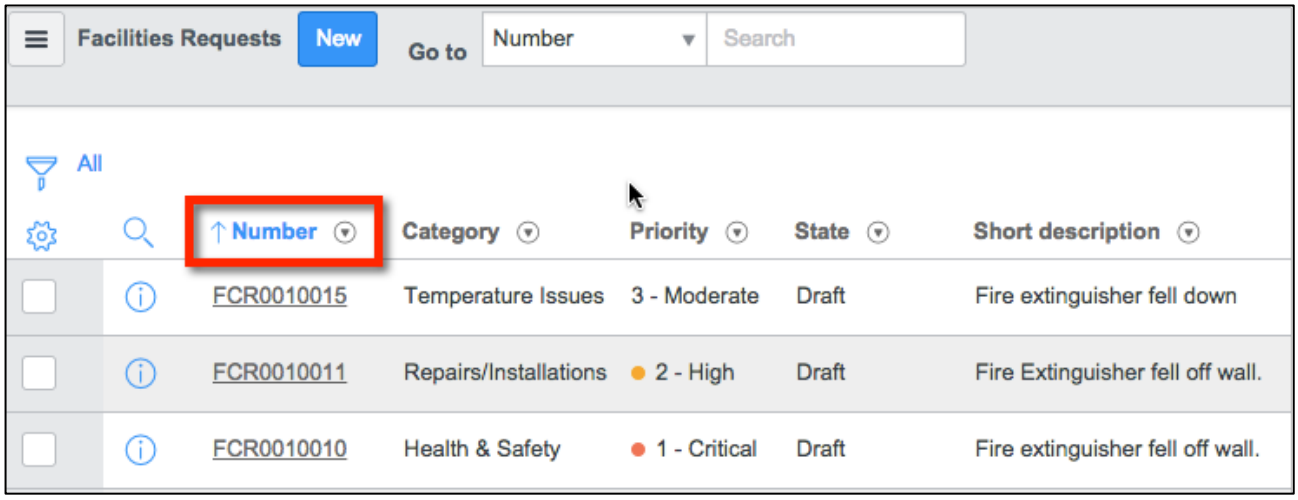


3. Click the **Submit** button at bottom left of the form.

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Lab Success Verification

1. Click the **Number** column header until the **blue** arrow points **up**. The screen should look like the example with the three requests created in the lab at top of the list.



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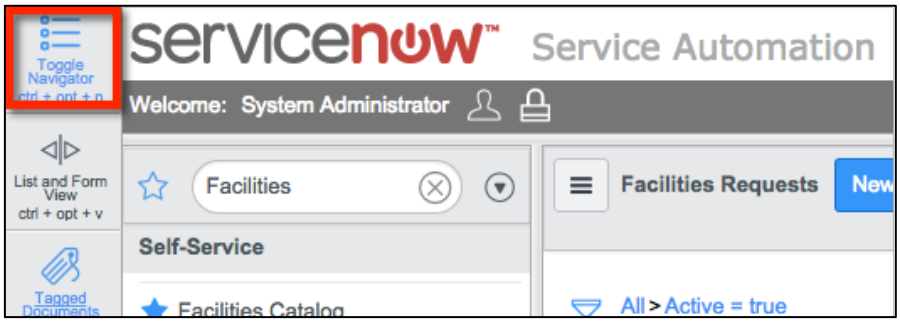
Lab Goal

This lab explains how to use the List View to assign requests to Groups and Users.

Lab 2.1 Assign Requests with List View

Use the List View to Assign Facilities Requests to Groups and Users

1. At top right of the screen click **Toggle Navigator.** The left navigation pane collapses.

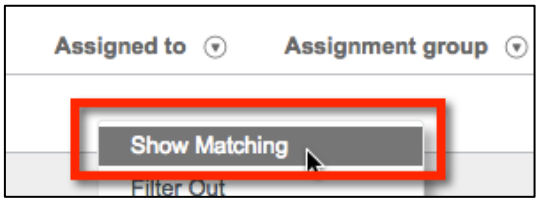


2. Right-click on the value **Closed Complete** in the **State** column and select **Filter Out** from the resulting menu. Closed requests are removed from the list.

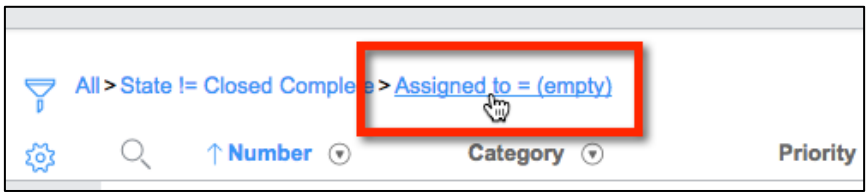


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3. Right-click on the **blank space** in the **Assigned to** column on the top request and select **Show Matching** from the resulting menu. Assigned requests are removed from the list.



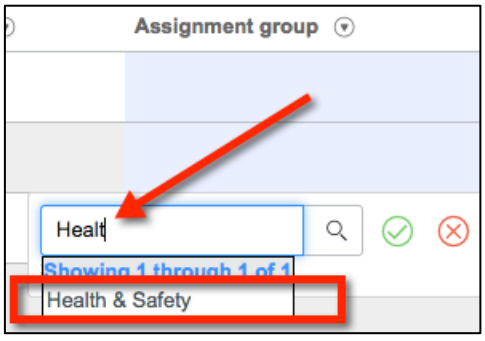
4. Above, the column header shows the query for the data you are working with, **unassigned** requests. **Click and hold** on the end of it at **Assigned to = (empty)**. **Drag** it to the **PowerEdge**. A shortcut to this query is saved for future use.



5. **Command+click** on the **blank space** in the **Assignment group** column for the three requests created in the previous labs. The fields **turn** blue as they are selected.

6. Double click on one of the **blue selected fields**. A dialog appears with a select box and a message confirms that 3 rows were updated.

7. Start typing **Health & Safety** in the select box then select it from the prompt. Click the **green** check mark to assign these requests to the Health & Safety group.



8. **Command+click** on the **blank space** in the **Assigned to** column for the three requests created in the previous labs. The fields turn **blue** as you select them.

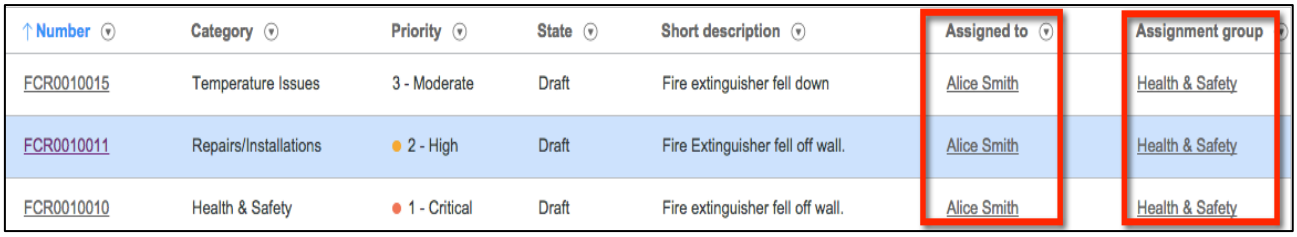
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9. Double click on one of the **blue selected** fields. A dialog appears with a select box and a message that confirms 3 rows updated.

10. Start typing **Alice Smith** in the select box then select her from the prompt. Click the **green** check mark to assign these requests to Alice Smith.

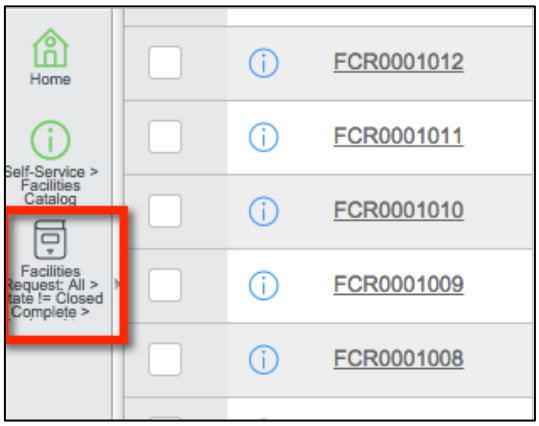
Lab Success Verification

1. The screen should look like the example with all three requests assigned to Alice Smith in the Health & Safety group.



Number	Category	Priority	State	Short description	Assigned to	Assignment group
FCR0010015	Temperature Issues	3 - Moderate	Draft	Fire extinguisher fell down	Alice Smith	Health & Safety
FCR0010011	Repairs/Installations	2 - High	Draft	Fire Extinguisher fell off wall.	Alice Smith	Health & Safety
FCR0010010	Health & Safety	1 - Critical	Draft	Fire extinguisher fell off wall.	Alice Smith	Health & Safety

2. Click on the **bookmarked query** for unassigned requests. The records are no longer included in the unassigned list because they have been **assigned**.



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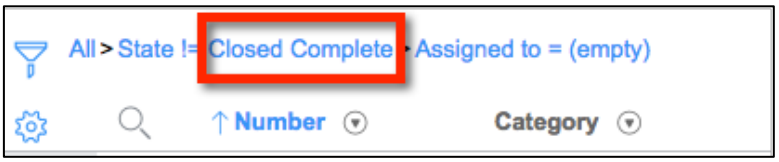
Lab Goal

This lab explains how to use the Visual Task Board to categorize requests.

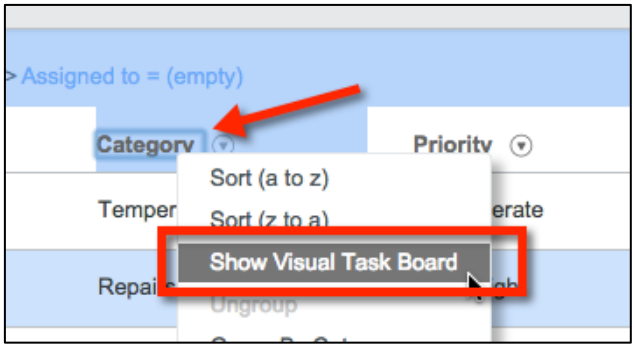
Lab 2.2 Categorize Requests with Visual Task Board

Use the Visual Task Board to Categorize Facilities Requests

1. Above the column headers in the **breadcrumb trail** click on **Closed Complete**. The **Assigned To** condition is removed from the query to include all non-closed requests in the list.



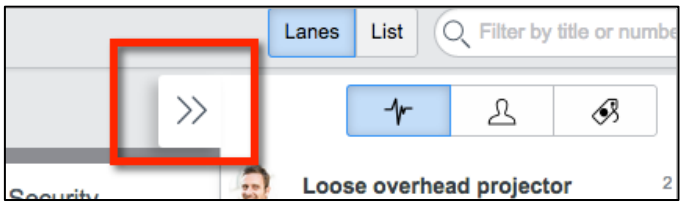
2. Right click on the **Category** column header and select **Show Visual Task Board** from the menu.



3. Close the welcome to task boards message if it appears.

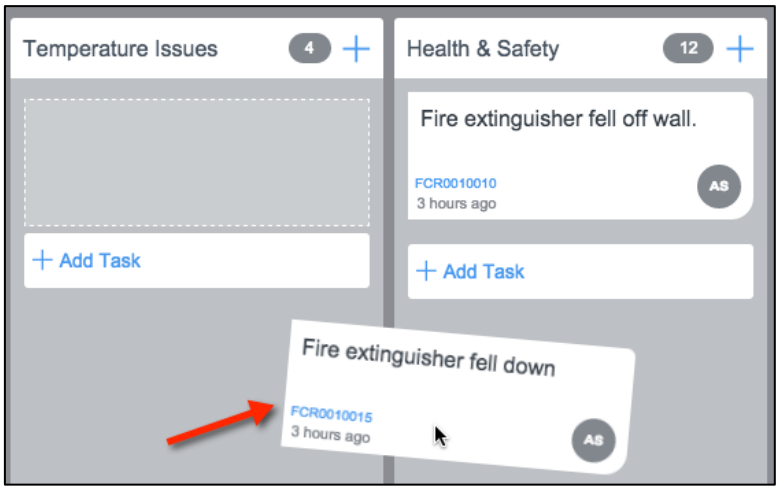
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4. Click the **chevrons** in the **Activity Stream** to close it if it opens automatically.

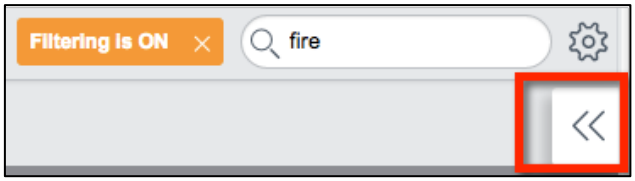


5. At top right in the **Filter by title or number** field type **fire**. The board filters to only requests with fire in the title.

6. **Click and hold** the request in the **Temperature Issues** lane. Drag it to the **Health & Safety** lane. Repeat for the remaining requests in the **Repairs/Installations** lane.



7. Beneath the **Filter by title or number** field click the **chevrons** to open the **Activity Stream**. The changes just made are reflected in the stream for each request.

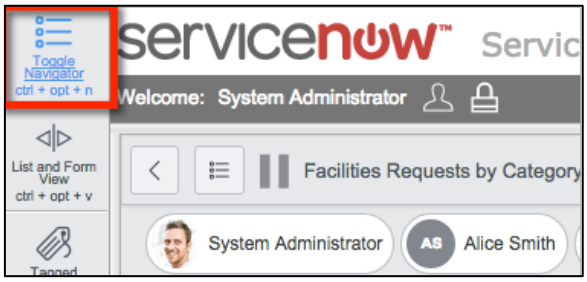


8. Scroll down the Activity Stream to view activities from the lab so far.

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Lab Success Verification

1. In the top left of the form click **Toggle Navigator** to open the application navigator.



2. Under **Facilities > Requests** click **All Facility Requests**. The screen should look like the example with all requests created in the lab properly categorized and assigned.

Number	Category	Priority	State	Short description	Assigned to	Assignment group
FCR0010015	Health & Safety	3 - Moderate	Ready	Fire extinguisher fell down	Alice Smith	Health & Safety
FCR0010011	Health & Safety	2 - High	Ready	Fire Extinguisher fell off wall.	Alice Smith	Health & Safety
FCR0010010	Health & Safety	1 - Critical	Ready	Fire extinguisher fell off wall.	Alice Smith	Health & Safety

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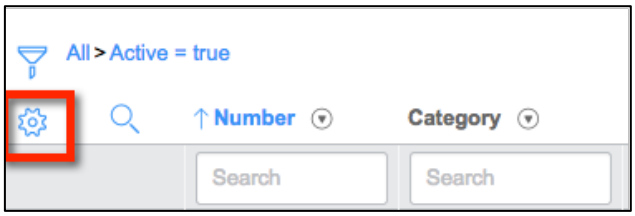
Lab Goal

This lab explains how to add a field to the list view.

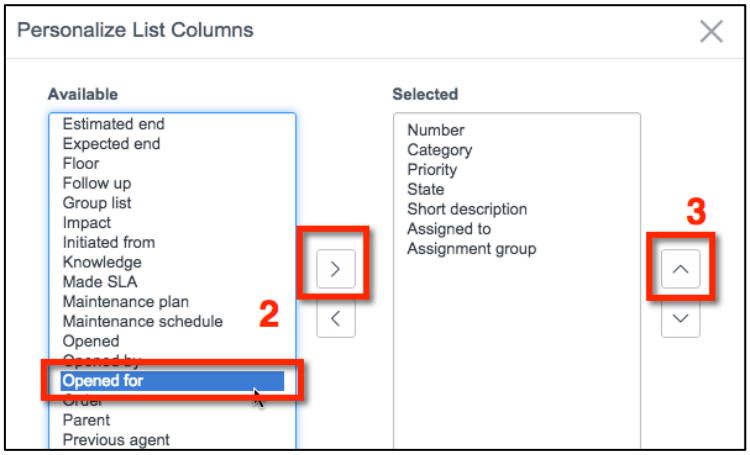
Lab 2.3
Add a field to the List View

Add a Field to the List View

1. At left in the column header click the **blue gear**. The Personalize List Columns window appears.



2. Scroll down and click on **Opened for**. Click the **right-facing arrow** to move Opened for into the List View.



3. Click the **up** button until **Opened for** is between **Number** and **Category**.

4. Click **OK**.

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Lab Goal

This lab explains how to build out the tasks for executing requests manually.

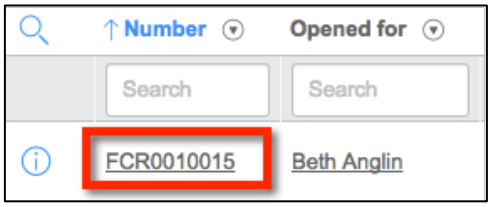
Lab 2.4 Manually Build out Tasks for Requests

Build out Tasks for Executing Requests Manually

1. At top right of the form next to the Logout button click the **gear**. The personal settings screen opens. Click the slider for **Tabbed forms**. The slider turns green.



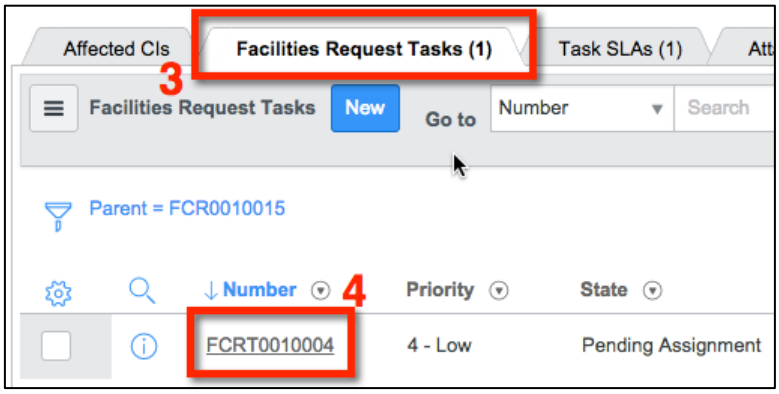
2. Click on the Facilities **request number** opened for Beth Anglin. The facilities request form opens.



3. Scroll to the bottom of the form and click the **Facilities Request Task** related list.

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4. Click the **first Task**, which was auto generated when the Request was assigned.

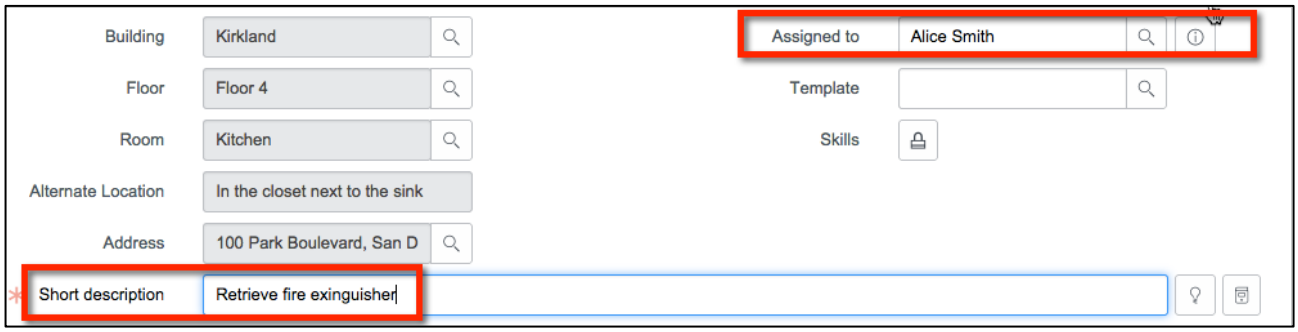


5. In the Facilities Request Task form notice the following fields are inherited from the Request:

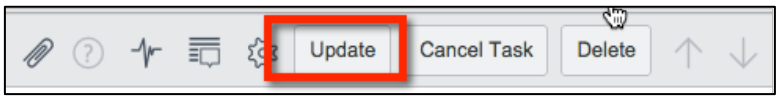
   Building
   Floor
   Room
   Alternate Location
   Address
   Short description

6. Enter the following information in the Facilities Request Task form:

   Assigned to: **Alice Smith**
   Short descrip**tion: Retrieve fire extinguisher**

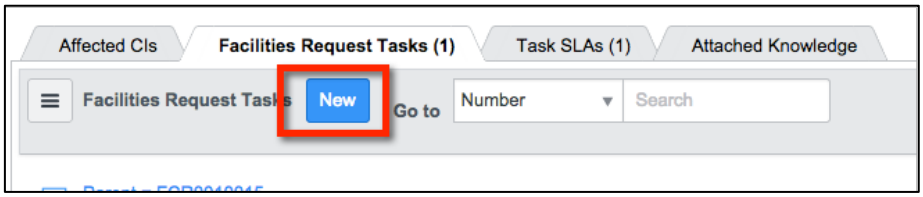


7. At top right of the form click **Update**. The task is created. The screen returns to the Facilities Request form for the parent Request.



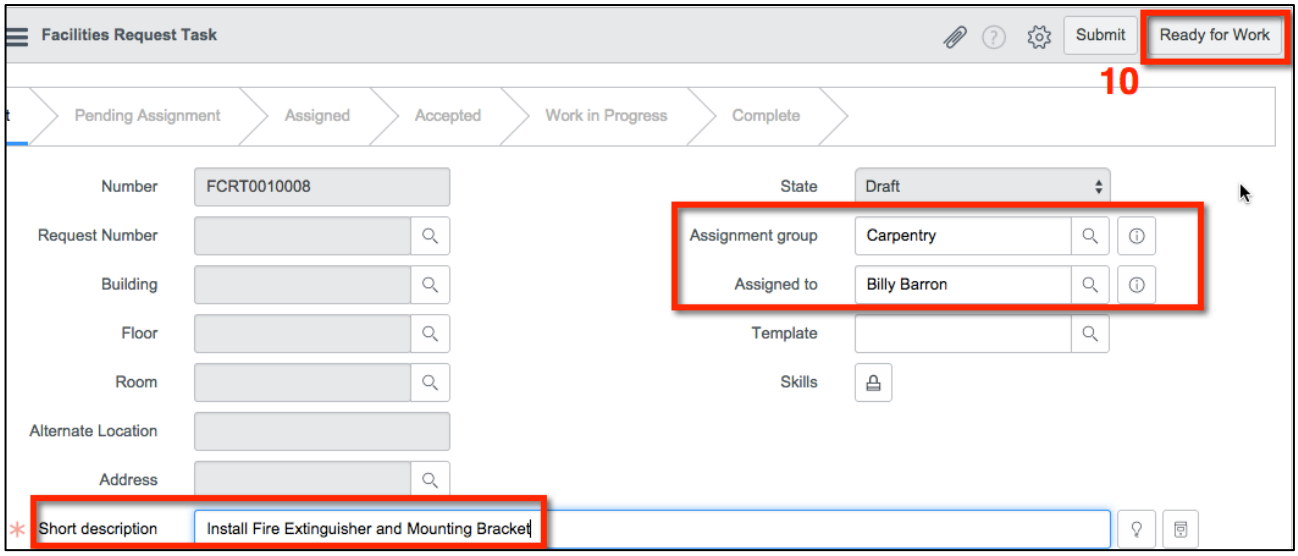
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8. Scroll down to the **Facilities Request Task related list** and **click** the **New** button to create a second task for this request.



9. Enter the following information in the **Facilities Request Task form**:

   Assignment group: **Carpentry**
   Assigned to: **Billy Barron**
   Short description: **Install fire extinguisher and mounting bracket**



10. At top right click **Ready for Work**.

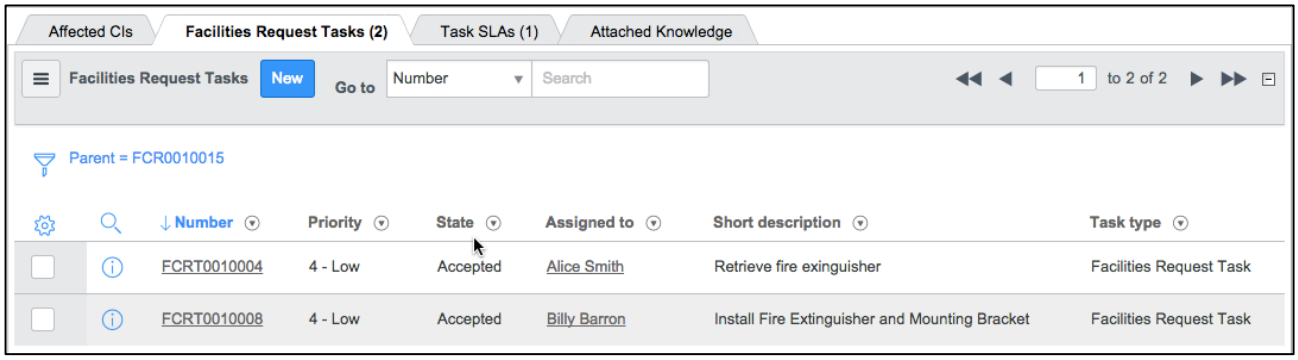
11. At top left click the **left facing arrow** next to the Facilities Request Task form header. The parent request form appears.



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Lab Success Verification

1. On the Facilities Request from scroll down to the related lists. The screen should look like the example with two tasks.



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Lab Goal

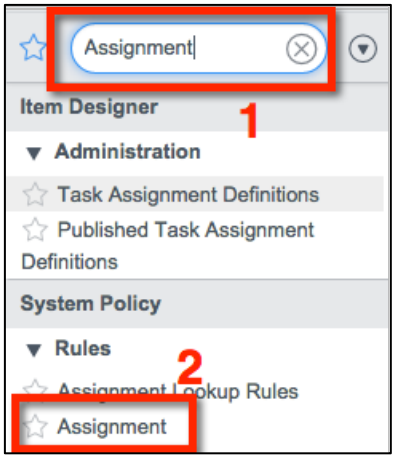
This lab explains how to use Assignment Rules to automatically assign Facilities Requests to Groups and User.

Lab 3.1 Auto Assign Requests

Create an Auto Assignment Rule

1. On the left navigation bar, in the **navigator filter text** enter Assignment and press Enter. The list filters down to Assignment related items.

2. Under **System Policy > Rules** click **Assignment**.



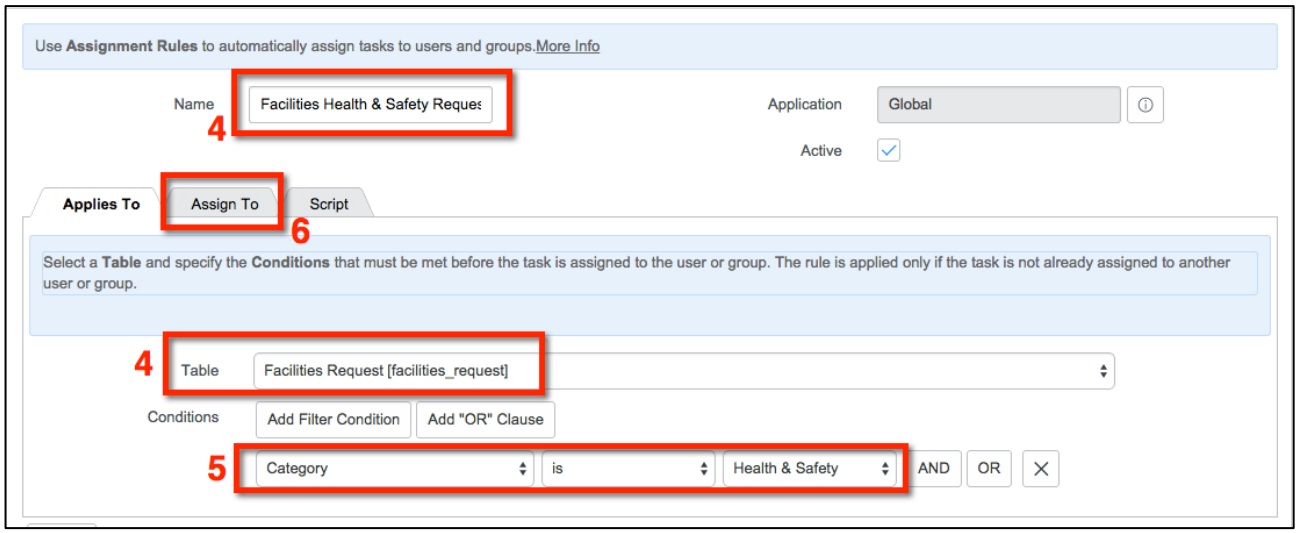
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3. At top of the form click **New**.

4. Enter the following information in the **Applies To** section:

   Name: **Facilities Health & Safety Requests**
   Table: **Facilities Request [facilities_request]**

5. **In the Conditions** section choose **Category is Health & Safety**.

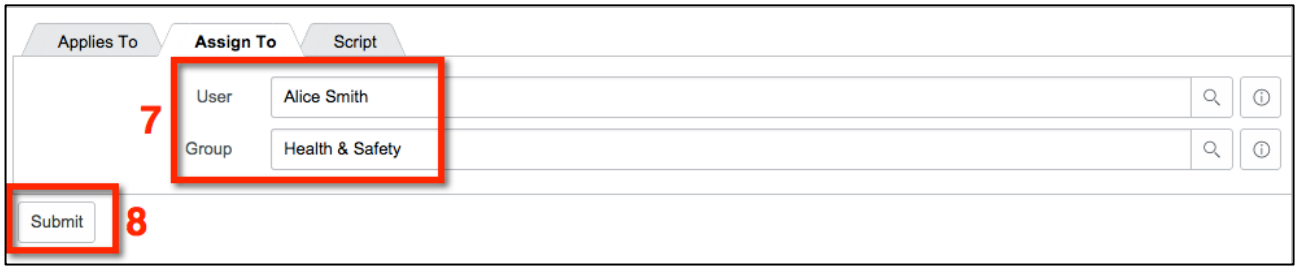


6. Click the **Assign To** tab.

7. Enter the following information in the **Assign To** section:

   User: **Alice Smith**
   Group: **Health & Safety**

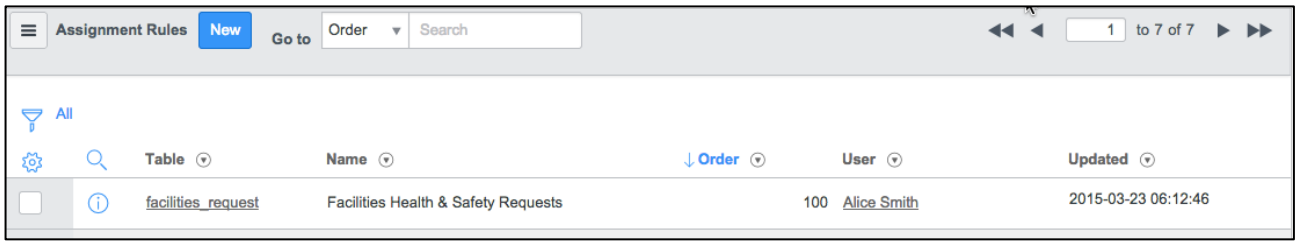
8. Click **Submit**. The form closes and the screen returns to the Assignment Rule List View.



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Lab Success Verification

1. The screen should look like the example with the new **Assignment Rule** for **Alice Smith**.



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Lab Goal

This lab explains how to use Templates to auto generate assigned tasks and accomplish work in a planned manner.

Lab 3.2 Create a Facilities Request Template

Create a Facilities Request Template

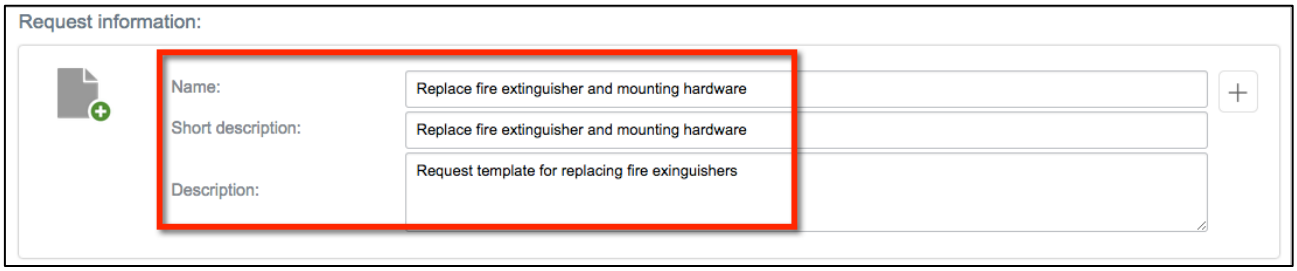
1. On the left navigation bar, in the **navigator filter text** enter **Facilities**. The application list filters to only Facilities related items.

2. Under **Facilities > Catalog & Knowledge** click **Facilities Request Templates**.

3. At the top of the form click **New**.

4. Enter the following information in the **Request information** section:

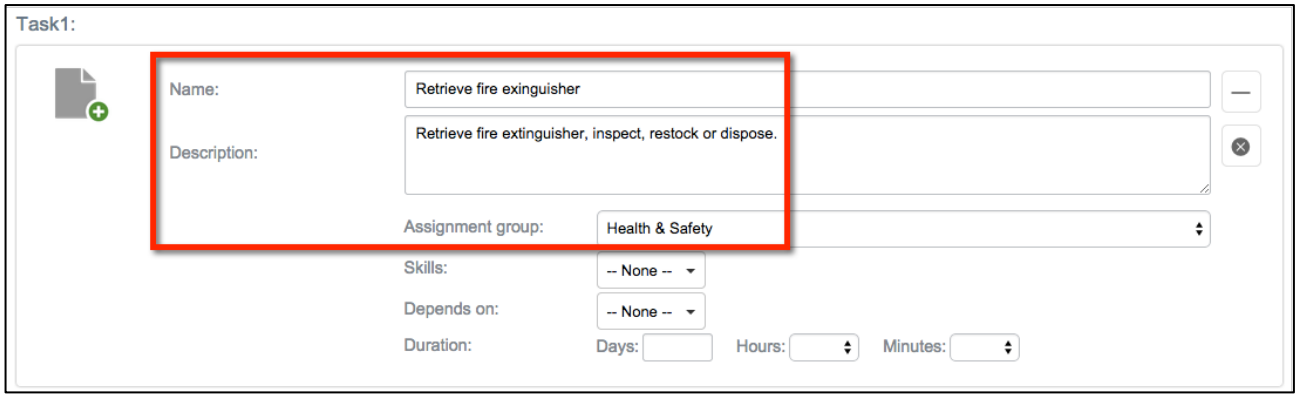
   Name: **Replace fire extinguisher and mounting hardware**
   Short Description: **Replace fire extinguisher and mounting hardware**
   Description: **Request template for replacing fire extinguishers**



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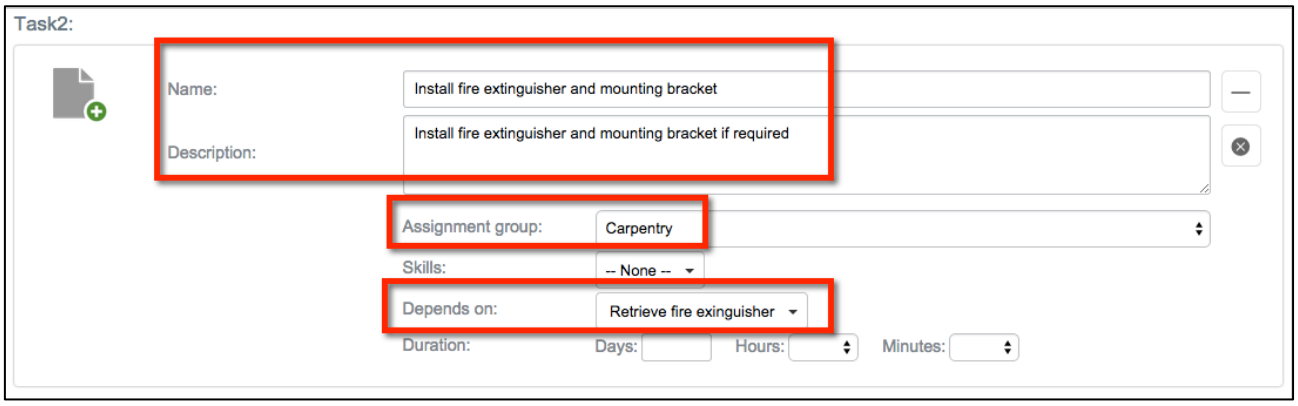
5. Enter the following information in the **Task 1** section**:**

   Name: **Retrieve fire extinguisher**
   Description: **Retrieve fire extinguisher, inspect, restock or dispose.**
   Assignment Group: **Health & Safety**



6. Enter the following information in the **Task 2** section:

   Name: **Install fire extinguisher and mounting bracket**
   Description: **Install fire extinguisher and mounting bracket if required**
   Assignment Group: **Carpentry**
   Depends on: **Retrieve fire extinguisher**



7. **DO NOT PRESS Submit or Publish** at this point. Work continues in the next lab.

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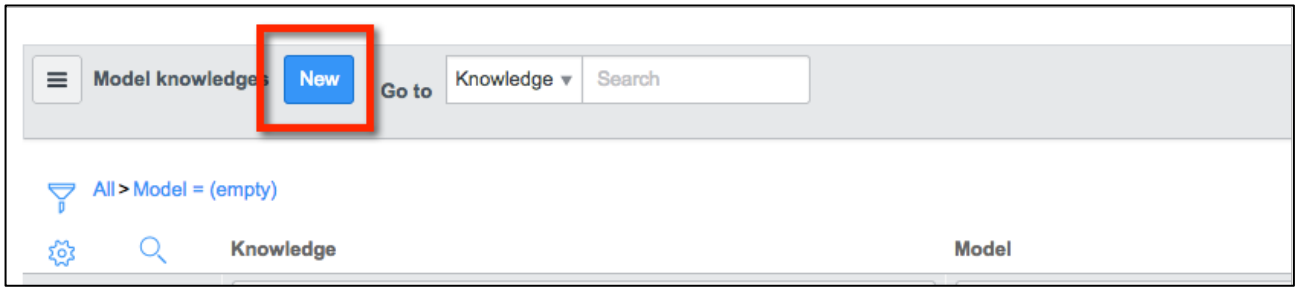
Lab Goal

This lab explains how to attach Knowledge articles to Facilities Template.

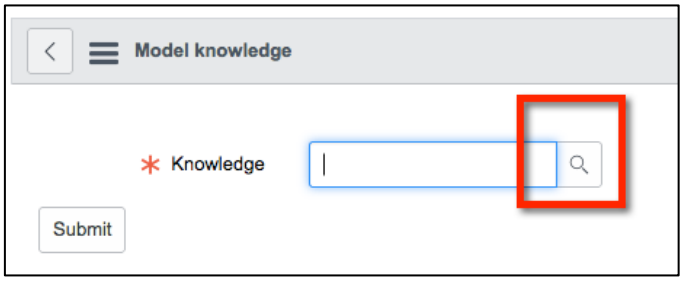
Lab 3.3 Attach Knowledge to a Template

Attach Knowledge Articles to a Facilities Request Template

1. Scroll to the **Model knowledges** section of the Facilities Request Template form.
2. Click **New**.



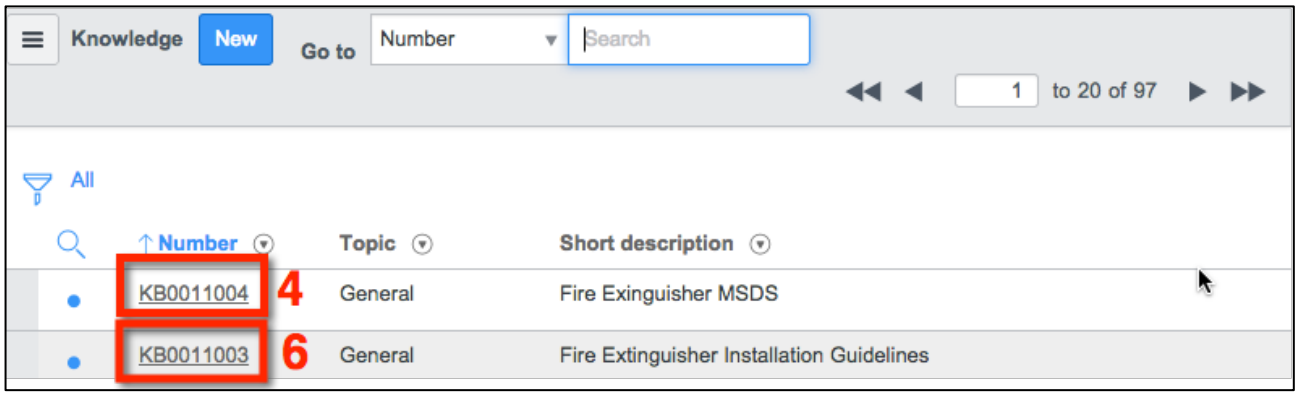
3. Click the **magnifying glass** next to the **Knowledge** field. The KB article selection dialog appears.



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4. Click the **KB Number** associated with **Fire Extinguisher MSDS**.

5. Click **Submit**.



6. **Repeat from step 2**, this time select the **KB Number** for **Fire Extinguisher Installation Guidelines**.

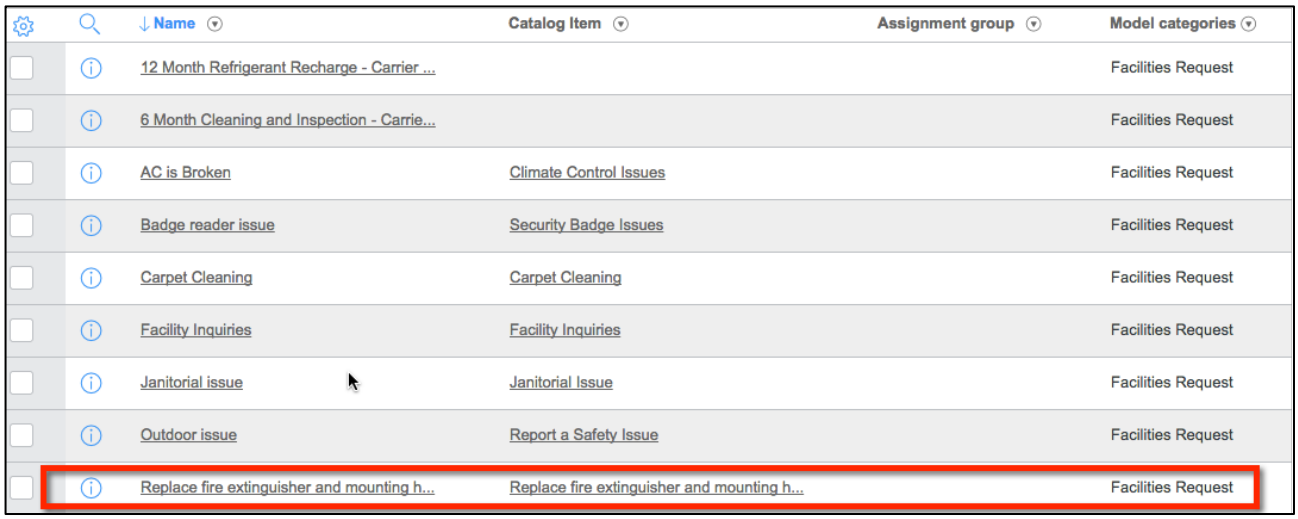
7. Above the **Model knowledges** section click the **blue Submit** button. The entire Facilities Request Template is submitted and the List View is brought up.



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Lab Success Verification

1. In the list view there is a record for **Replace fire extinguisher**.



Name	Catalog Item	Assignment group	Model categories
12 Month Refrigerant Recharge - Carrier ...			Facilities Request
6 Month Cleaning and Inspection - Carrie...			Facilities Request
AC is Broken	Climate Control Issues		Facilities Request
Badge reader issue	Security Badge Issues		Facilities Request
Carpet Cleaning	Carpet Cleaning		Facilities Request
Facility Inquiries	Facility Inquiries		Facilities Request
Janitorial issue	Janitorial Issue		Facilities Request
Outdoor issue	Report a Safety Issue		Facilities Request
Replace fire extinguisher and mounting h...	Replace fire extinguisher and mounting h...		Facilities Request

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Lab Goal

This next series of labs walks a Facilities Request through its end-to-end lifecycle using the automation from the previous labs.

Lab 3.4 Create Requests with Plans

Create a new Facilities Request using Plans and Automation

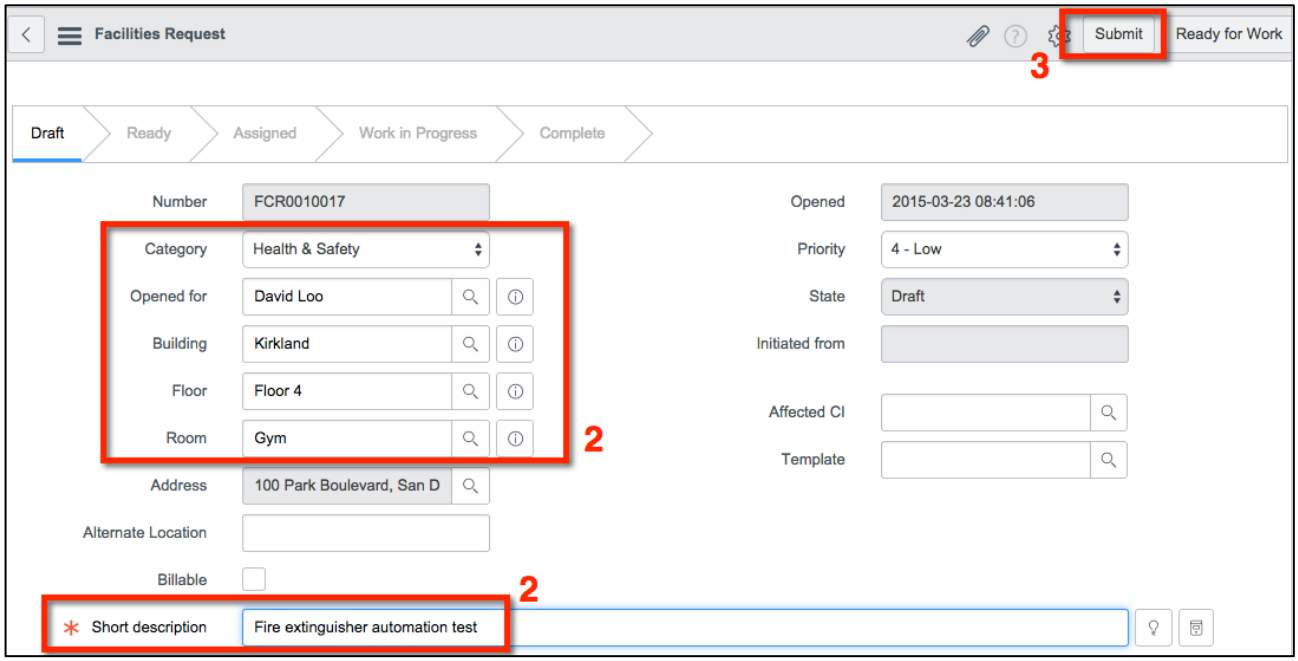
1. Under **Facilities > Requests** click **Create New**.

2. Enter the following information in the **Facilities Request form**:

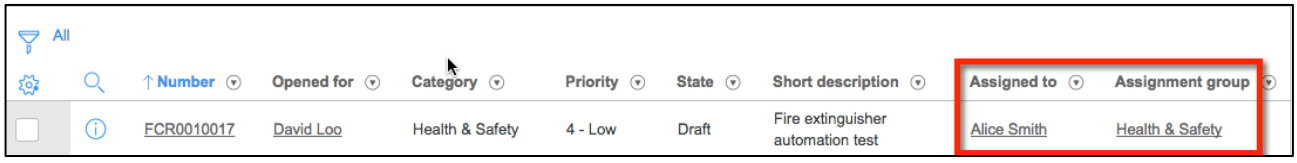
   Category: **Health & Safety**
   Opened for**: David Loo**
   Building: **Kirkland**
   Floor: **Floor 4**
   Room: **Gym**
   Short Description: **Fire extinguisher automation test**

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3. The form should look like the example. In the upper right of the form click **Submit.**



4. Locate the Fire extinguisher automation test record in the list view. Notice it is assigned to **Alice Smith** and the **Health & Safety** group.



5. Click the **Facilities Request number** for the test record. The form opens.

6. On the **Template** field click the **magnifying glass**. Select the template from Lab 3.2 titled **Replace fire extinguisher and mounting hardware**.



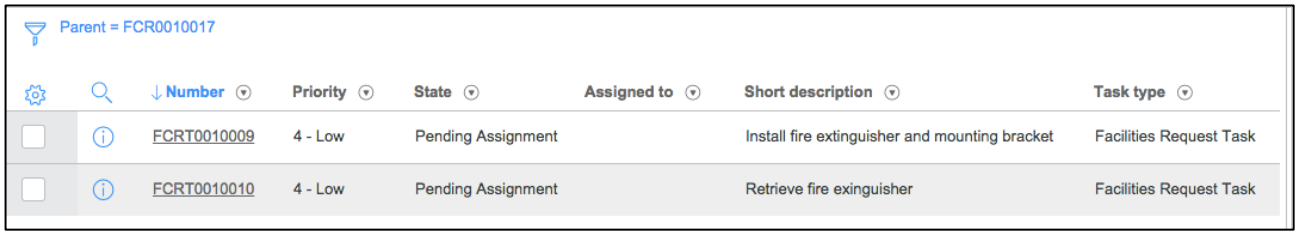
7. At the top of the form, click the **Ready for Work** button. The request is saved and the template is applied.



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Lab Success Verification

1. Scroll to the related lists section and click the **Facilities Request Tasks** tab. The screen should look like the example with two planned tasked awaiting assignment.


Parent = FCR0010017

	Number	Priority	State	Assigned to	Short description	Task type
	FCRT0010009	4 - Low	Pending Assignment		Install fire extinguisher and mounting bracket	Facilities Request Task
	FCRT0010010	4 - Low	Pending Assignment		Retrieve fire exinguisher	Facilities Request Task

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Lab Goal

This lab explains how the end user or assignee interacts with Requests and Tasks. It follows the complete lifecycle of a Facilities Request.

Lab 3.5 Assign and Complete Tasks

Assign and Complete Facilities Tasks as an End User

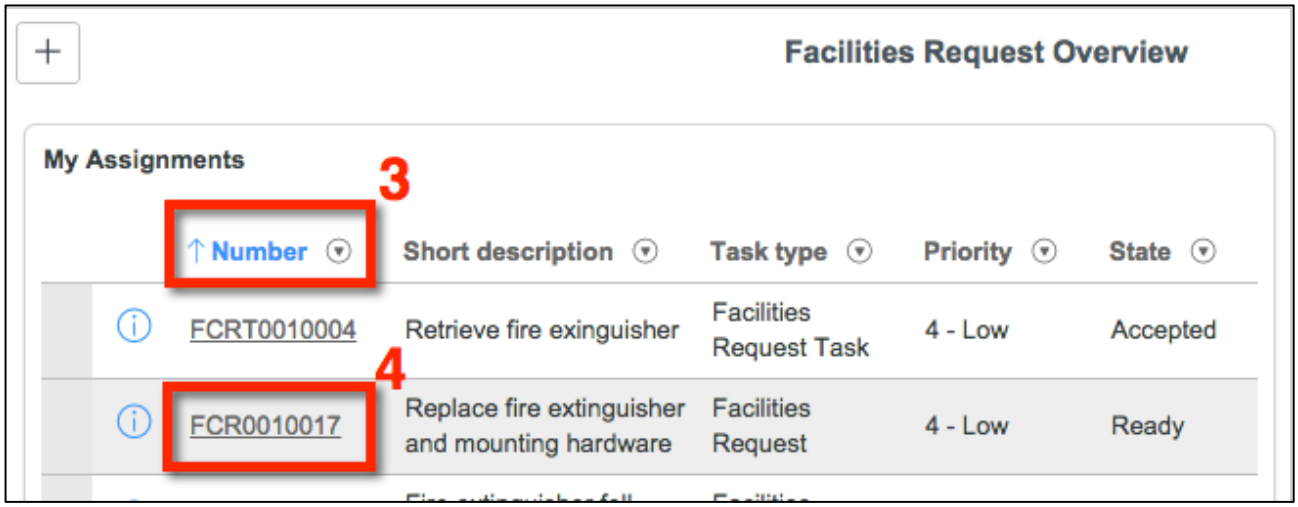
1. At the top left of the screen next to Welcome: System Administrator, click the **person silhouette** to impersonate an user. This function is available only to administrators and is used for lab purposes only.



2. In the **Impersonate User** dialog box, start typing **Alice Smith** and select her from the type ahead prompts. Click OK. Alice's home page is loaded. You are now logged in as Alice, the Health & Safety shop supervisor.

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3. In the **My Assignments** dashboard widget, click the **Number** column. The list sorts in descending order. Notice in Task type there are Requests for Alice to manage and Tasks for her to perform.

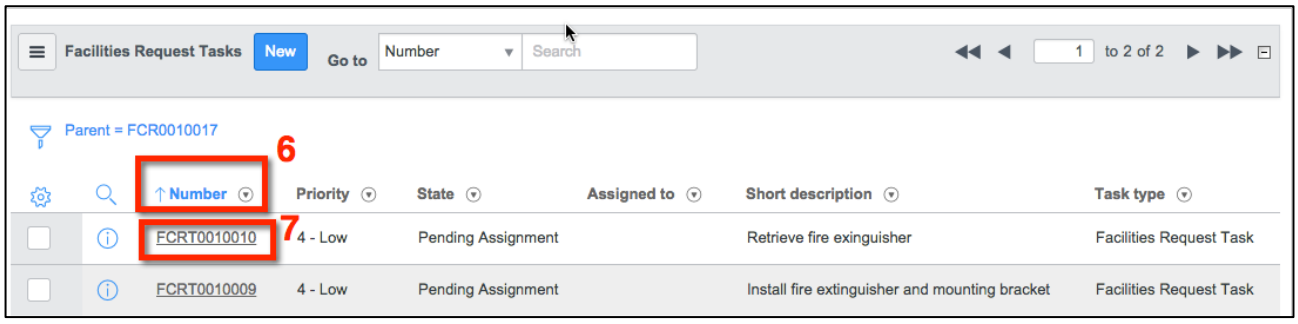


4. Click the **Facilities request number** for the request titled **Replace fire extinguisher and mounting hardware**. The template in the previous lab applied this title for us.

5. Scroll to the **Facilities Request Tasks related list**. This is how related lists look when the Tabbed forms setting from Lab 2.4 is not selected.

6. Click the **Number** column header to sort the tasks.

7. Click the task for **Retrieve fire extinguisher**.



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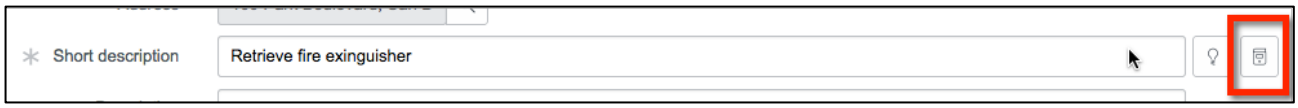
8. At the top of the form, click the **Assign to Me** button to self-assign this task to Alice Smith. The task is assigned to Alice and the form refreshes.



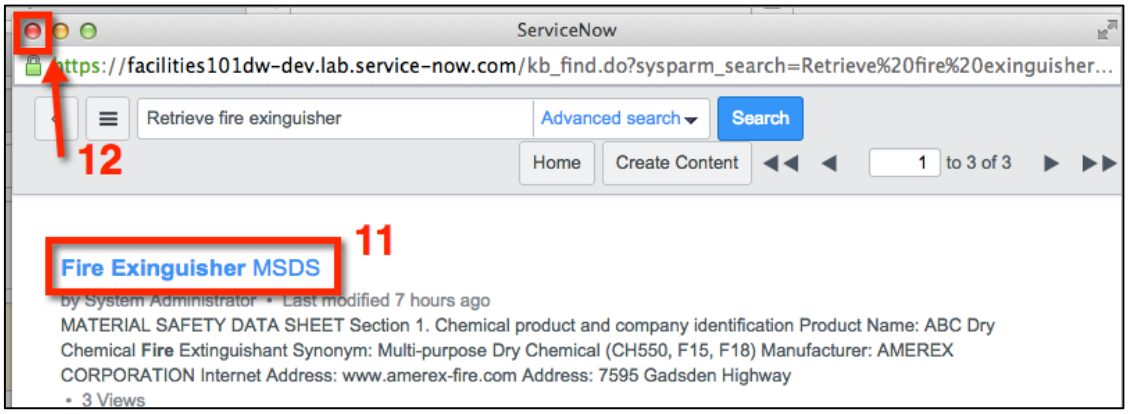
9. At the top of the form click the **Start Work** button, since Alice will begin this work right away.



10. Alice wants to check the Knowledge Base for relevant documentation. Next to the Short description field click the **Knowledge Search** button. Relevant Knowledge Articles are returned based on the contents of the **Short description**.



11. In the resulting dialog box, click Fire **Extinguisher MSDS**. The MSDS sheet for the fire extinguisher appears. Your browser may open a tab instead of a window.



12. Click the **red dot** to close the Knowledge base.

13. Enter the following in the **Work Notes** field: **I picked up the old extinguisher and mount. They both need disposal. It left a big hole in the wall, better bring some wall repair materials.**

14. At the top of the form click the **Close Complete** button. The form closes and the Parent Facilities Request form comes up.

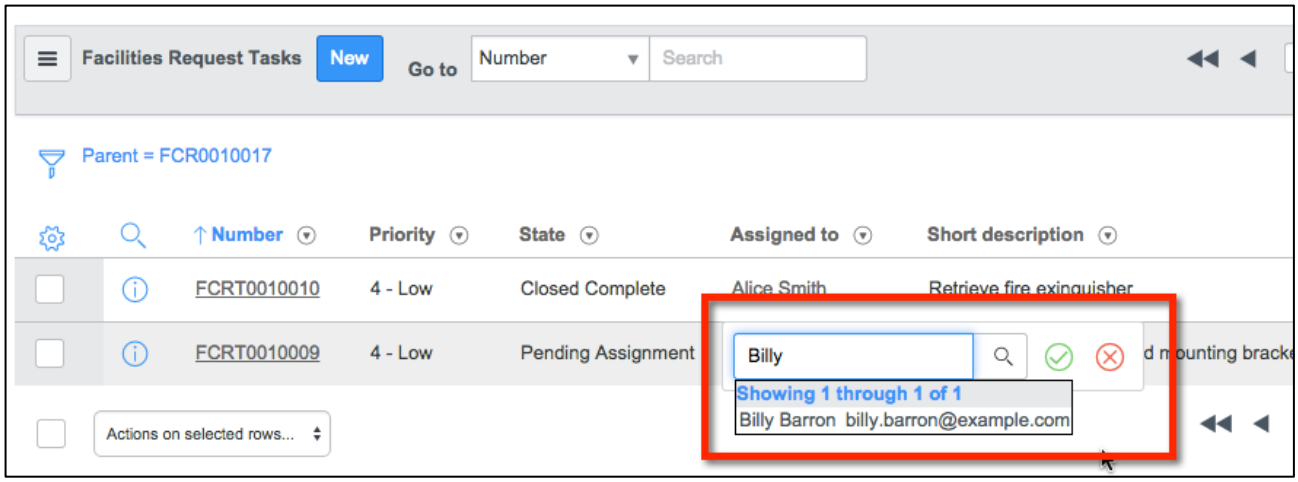
15. Alice knows Billy Barron from the Carpentry Shop. She executes the next task and assigns it to him as a courtesy.

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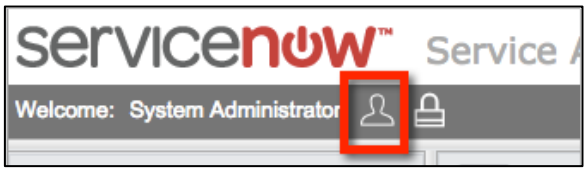
16. Scroll to the **Facilities Request Tasks related list**.

17. Double click in the blank space for the **Assigned to column** of the installation task.
    Note: If the Assigned to column is not present add it by following the steps in Lab 2.3.

18. Start typing **Billy Barron** then select him from the prompts. Click the **green** check mark. The task is assigned to Billy.



19. At the top left of the screen next to **Welcome: Alice Smith** click the **person silhouette** to impersonate an user.

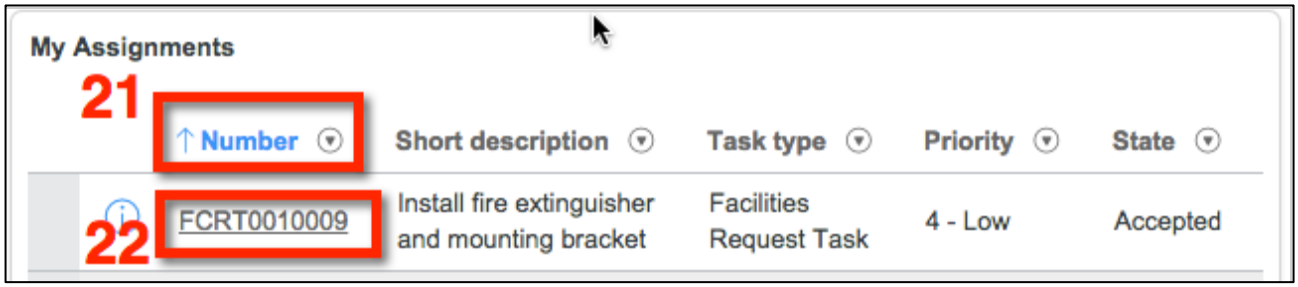


20. In the **Impersonate User** dialog box, start typing **Billy Barron** and select him from the type ahead prompts. Click OK. Billy's home page is loaded. You are now logged in as Billy, the Carpentry shop supervisor.

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21. In the **My Assignments** dashboard widget click the **Number column**. The list sorts in descending order.

22. Select the task titled **Install fire extinguisher and mounting bracket**.



23. Billy wants to check the Knowledge base for the installation guidelines before starting work. Click the **Knowledge Base search** button next to the **Short description** field.



24. In the resulting window, click the **Fire Extinguisher Installation Guidelines**. Read the contents. Click the **red button** at top left to close.

25. At the top of the form, click **Start Work**.



26. Enter the following in the **Work Notes** field: **The new one is installed and the wall is repaired.**

27. At the top of the form click the **Close Complete** button. Billy's homepage loads. The task is no longer in his My Assignments Widget.

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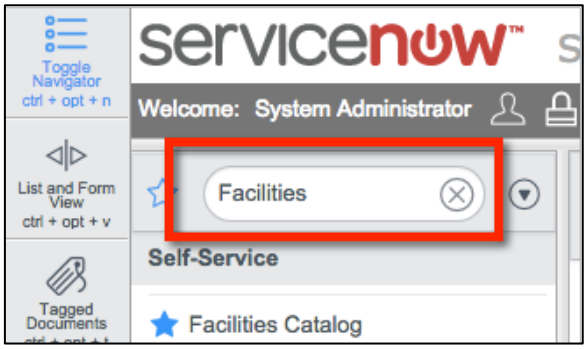
Lab Success Verification

1. At the top left of the screen next to **Welcome: Billy Barron** click the **person silhouette** to impersonate a user.



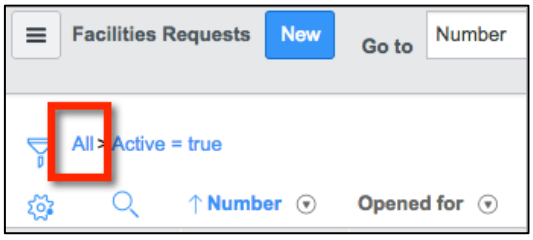
2. In the **Impersonate User** dialog box, choose **System Administrator**. The administrator's home page loads. You are once again logged in as System Administrator.

3. On the **left navigation bar**, in the navigator filter text enter **Facilities**. The Application Menu filters down to only Facilities related items.



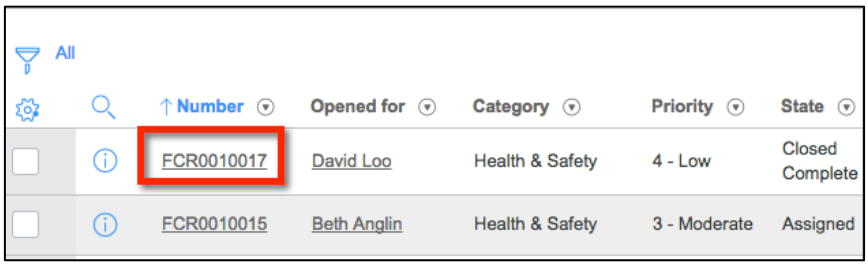
4. Under **Facilities > Requests**, click **All Facility Requests**

5. In the breadcrumb trail, click **All** to remove the **Active = true** condition from the filter for the list view.



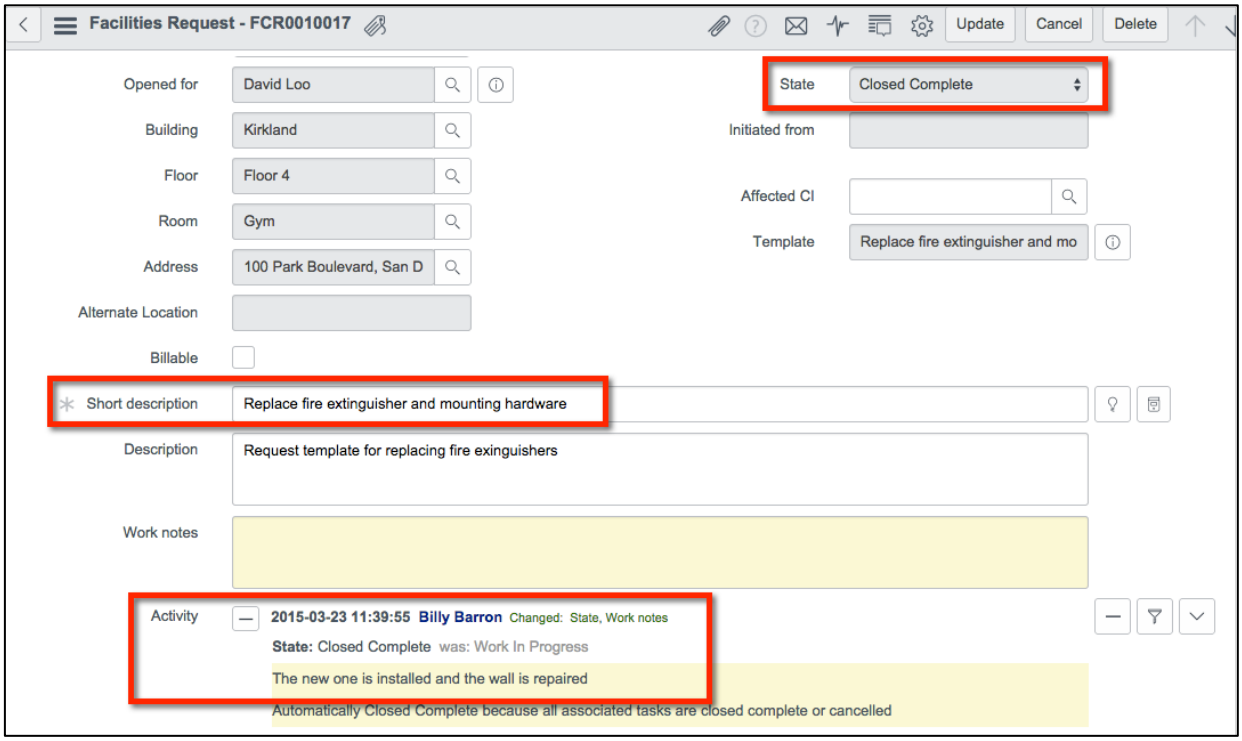
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6. Select the request opened for David Loo in the previous lab.



7. Note the following values on the form:

   State: **Closed by way of all associated tasks being closed**
   Short Description: **The title of the last task completed for the request**
   Activity: **The work notes from the associated tasks**



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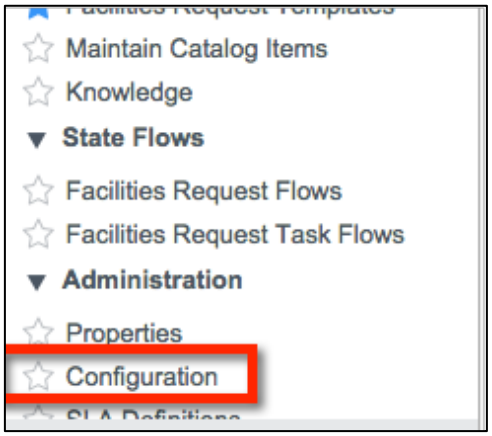
Lab Goal

This lab explains how to add parts requirements to a Facilities Request Template.

Lab 3.6
Add Parts Required to a Template

Add Parts Requirements to a Facilities Request Template

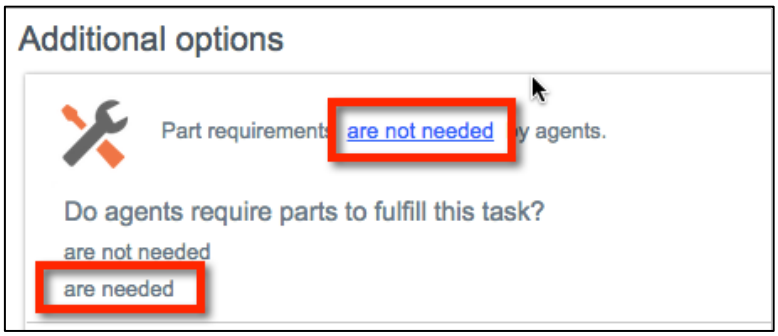
1. Under **Facilities > Administration** click **Configuration**.



2. Take a minute to review the options for configuring the Facilities Application.
3. Under **Additional Options** find the setting for **Parts requirements**.
4. Click the **are not needed** hyperlink to expose the configurations for **part requirements**.

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5. Click **are needed** to allow parts requirements for tasks. The hyperlink changes to **are needed**.



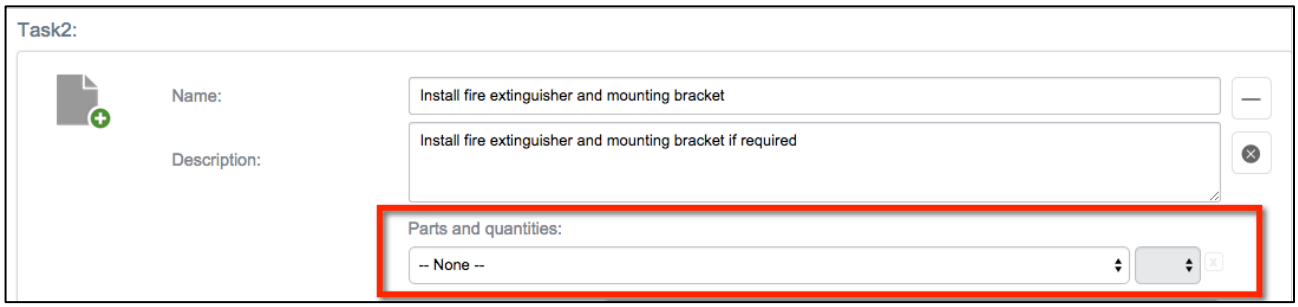
6. Scroll to the top of the form and at top right press **Save**.



7. Under **Facilities > Catalog & Knowledge** select **Facilities Request Templates**.

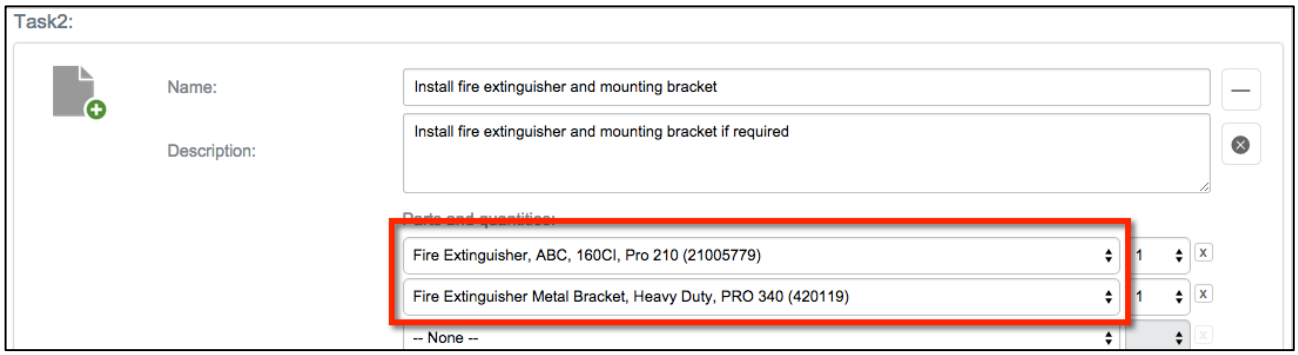
8. Select **Replace fire extinguisher and mounting hardware** from the List View. The template form loads.

9. For **Task 2** find the **Parts and quantities** section that was enabled in Step 5.



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10. Click in the **Parts** field that says **None.** Start typing **Fire Extinguisher**. Select **Fire Extinguisher, ABC, 160CI, Pro 210 (21005779)** from the list.



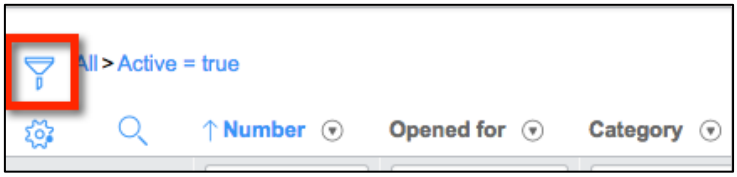
11. Scroll to the top of the form and at top right, click the **blue Save** button.

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Lab Success Verification

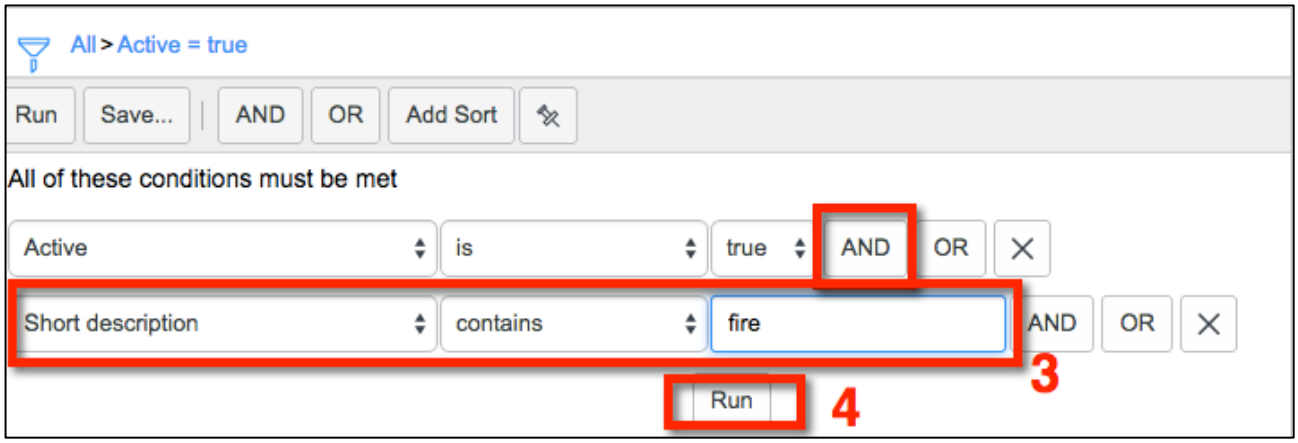
1. Under **Facilities > Requests** click **All Facility Requests.**

2. In the header click the **Filter** icon to modify the query for the current list view.



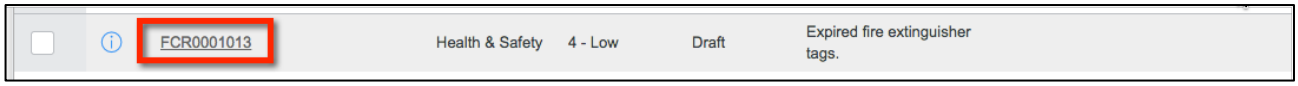
3. Press the **AND** button on the row for the **Active** field, then select **Short description** from the **choose field** dialog. Complete the form as in the example below.

Note: Start typing **Short Description** in the select box then select it from the prompts.



4. Press **Run**.

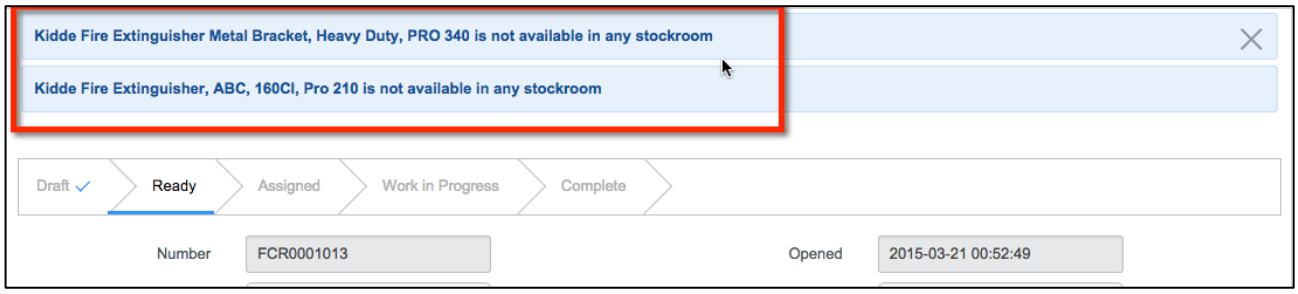
5. Select the request for **Expired fire extinguisher tags**.



6. In the **Template** field, select **Replace fire extinguisher and mounting hardware**.

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7. At top right press the **Ready for Work** button. Receive a warning about the parts not being available in any stock room.
   Note: Asset and Inventory Management are not in scope for this lab.



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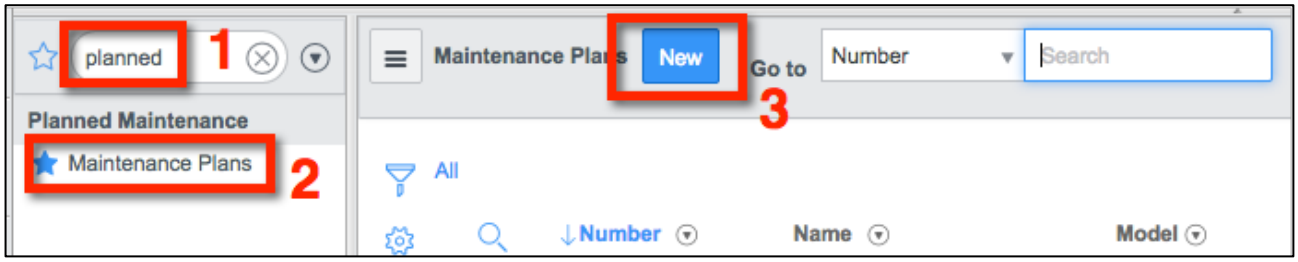
Lab Goal

This lab explains how to create a preventative maintenance plan, relate it to an asset model, and apply a schedule for routine work to be done on it.

Lab 4.1
Create a Maintenance Plan

Create a Maintenance Plan

1. On the left navigation bar, in the **navigator filter text** type **Planned.** The Application Menu filters down as you type
2. Click on **Planned Maintenance > Maintenance Plans**.
3. In the **Maintenance Plan** window, click **New**.



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4. In the **Name** field, type **50KC Maintenance Plan**.

5. Change the **Type** field start to **Model based**. This allows us to define a plan against a model.

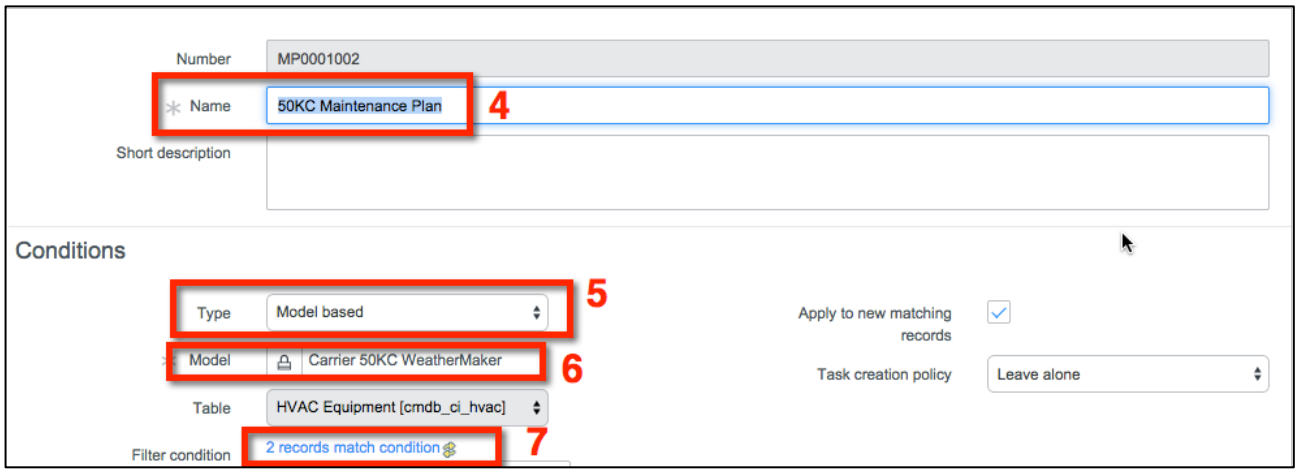
   Note: "General" is available as well, to allow customer to apply a maintenance plan to any object in the system, not just asset models. Use "model based" for this exercise.

6. Click the **lock** next to the **Model field**.



7. Begin typing **Carrier 50KC WeatherMaker** in the **Model** reference field and **choose it**. The **Table** field below is automatically defined and made read-only.

8. Click the **2 records match condition** hyperlink. A window pops up with the included records. Confirm that the 2 records are related to the **50KC WeatherMaker** HVAC unit.



9. In the **Maintenance plan** form right-click the header and choose **Save**. Two related lists are exposed at the bottom of the form: **Maintenance Schedules** and **Maintenance Plan Records**.

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Lab Goal

This lab explains how to create a maintenance schedule for the plan.

Lab 4.2 Create a Maintenance Schedule

Create a Maintenance Schedule

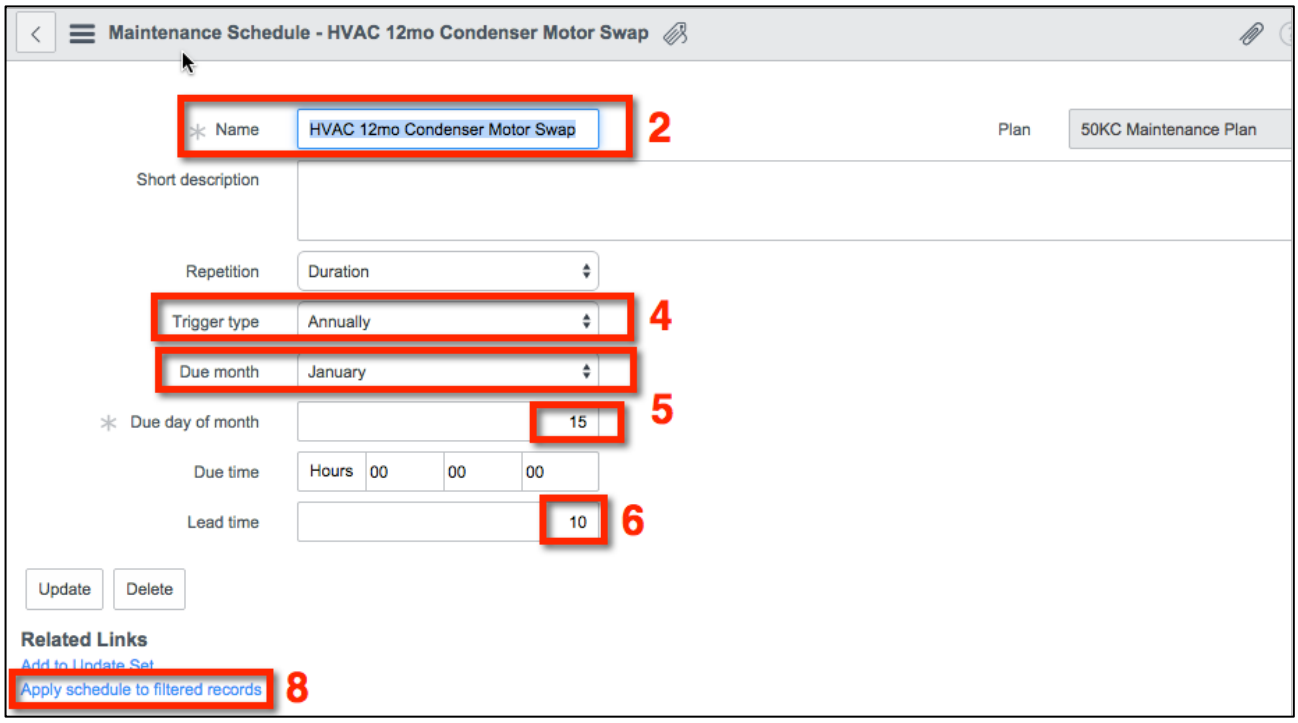
1. On **Maintenance Schedules** related list, click **New**.
2. In the **Name** field type **HVAC 12mo Condenser Motor Swap**.
3. Leave **Repetition** at **Duration**.

   Note: The other choice “Meter” allows customers to base the schedule around a cycle count vs. a time-based interval of maintenance. For this lab, use “Duration”.
4. In the **Trigger type** field choose **Annually**.
5. In the **Due Month** field choose **January**, and in the **Due day of month** type **15.**
6. In **Lead time** type **10**.

   Note: This means the system creates a preventative activity 10 days in advance of the due date (in this example, January 5th for a due date of January 15th).
7. In the **Maintenance Schedule** form header **right click** then **Save** the record.

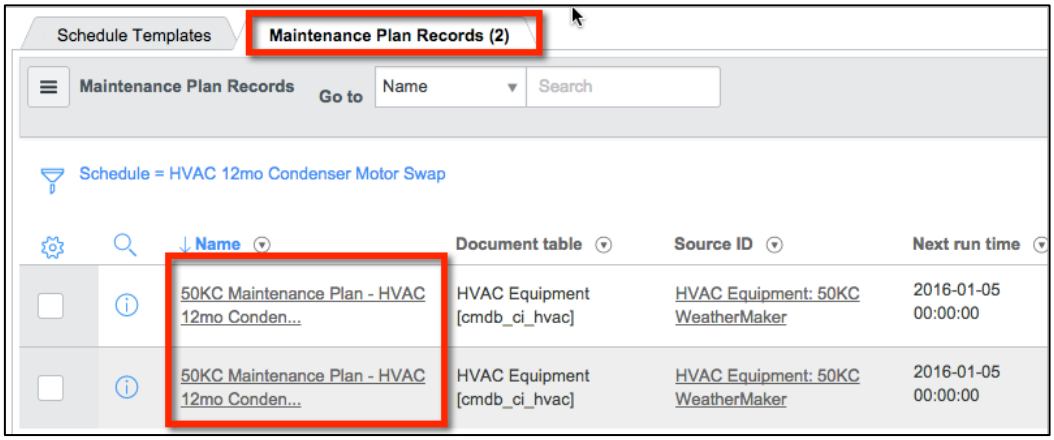
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8. Under **Related Links**, click **Apply schedule to filtered records**. The schedule is applied to the two HVAC equipment assets from the filtering step.



Lab Success Verification

1. The screen should look like the example, with two records in the **Maintenance Plan Records** related list.



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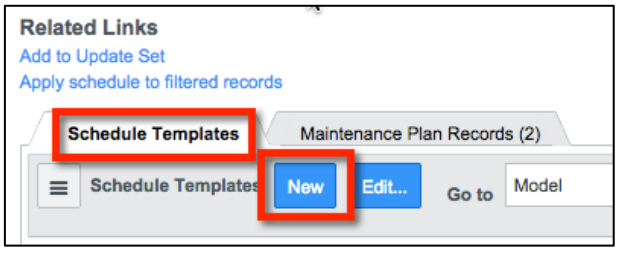
Lab Goal

This lab explains how to create a maintenance template for the plan.

Lab 4.3
Create a Maintenance Template

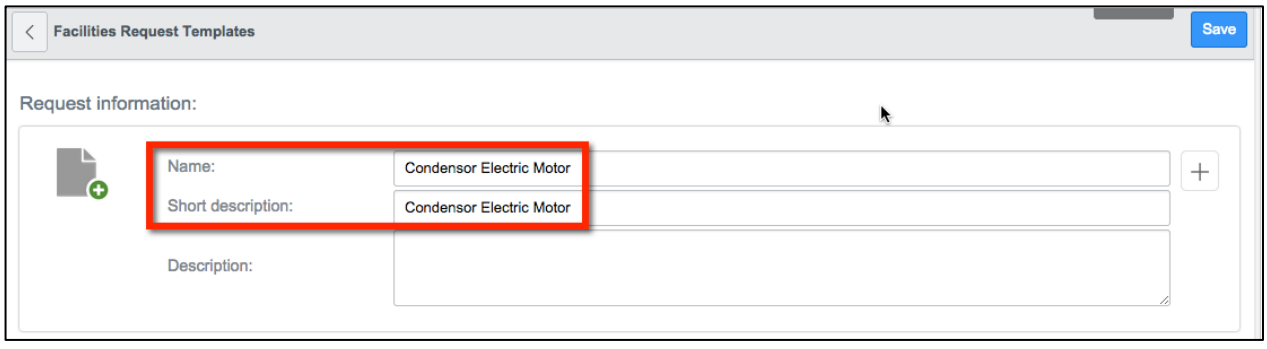
Create a Template

1. Click the **Schedule Templates** related list and click **New**.



2. Choose **Facilities Request Model** from the list of Service Order Models.
   Enter the following information in the **Request information section** of the form:

   Name: **Condenser Electric Motor**
   Short Description: **Condenser Electric Motor**



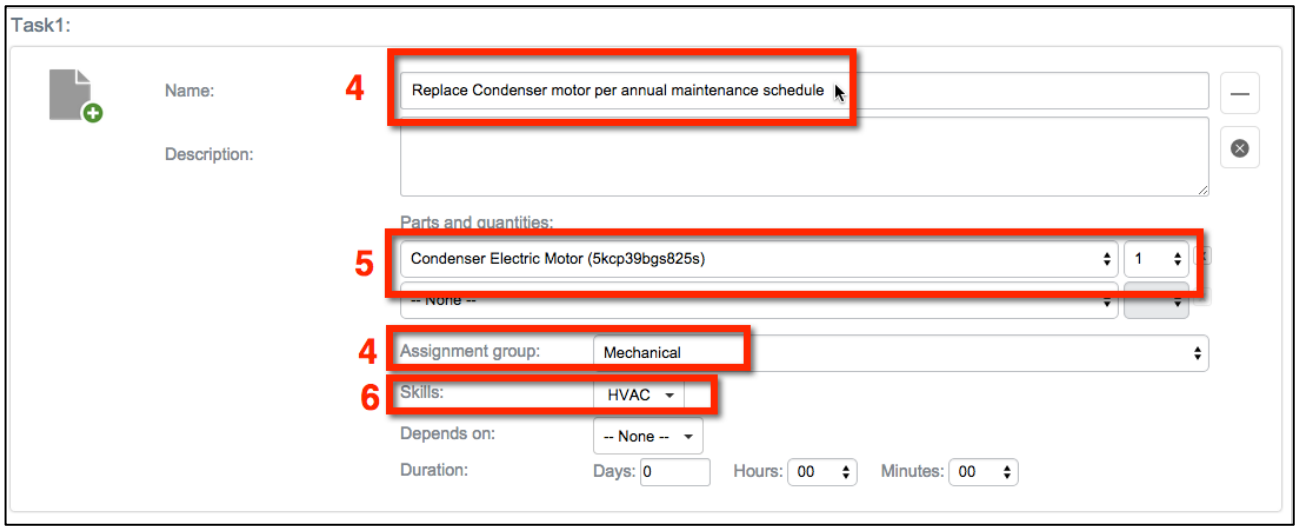
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3. Enter the following information for **Task 1**:

   Name: **Replace condenser motor per annual maintenance schedule**
   Assignment group**: Mechanical**

4. **In the Parts and quantities** section start typing **Condenser Electric Motor** in the **Parts** field and select it from the prompts. Leave the quantity at **1**.

5. In the **Skills** field select **HVAC** to apply a skills requirement to the task. This advises the Mechanical Shop to assign this work to an HVAC specialist.



6. Scroll to the top of the form and click **Submit**.

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Lab Goal

This lab explains how to execute the maintenance plan by simulating the schedule being enforced.

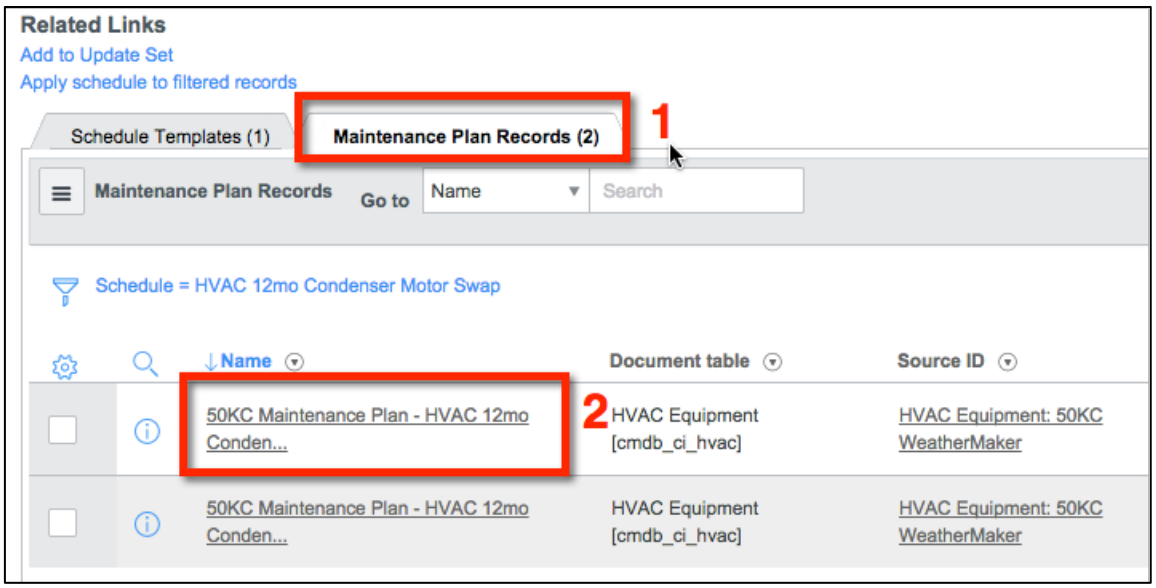
Lab 4.4
Execute the Maintenance Plan

Simulate the Maintenance Schedule Being Enforced

1. Click on the **Maintenance Plan Records** related list.

2. Click either one of the records.

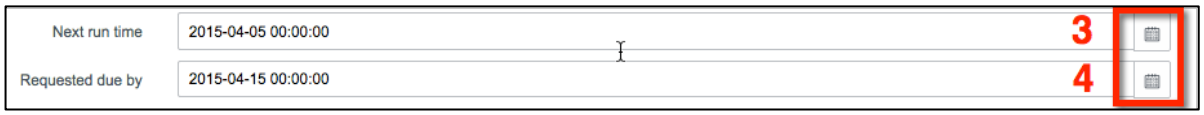
   Note: The **Requested due by** field represents the due date defined on the schedule (January 15th), and the **Next run time** takes in to account the 10-day lead time also defined on the schedule (January 5th).



3. On **Next run time** click the **calendar** icon to the right of the field. Choose **Go to Today**. The calendar moves to April. Choose **April 5th** and click the **green** check mark.

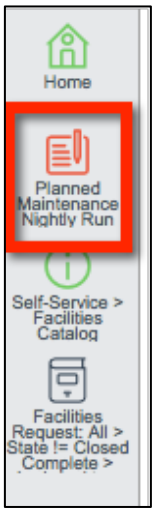
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4. On **Requested due by** click the **calendar** icon to the right of the field. Choose **Go to Today**. The calendar moves to April. Choose **April 15th** and click the **green** check mark.



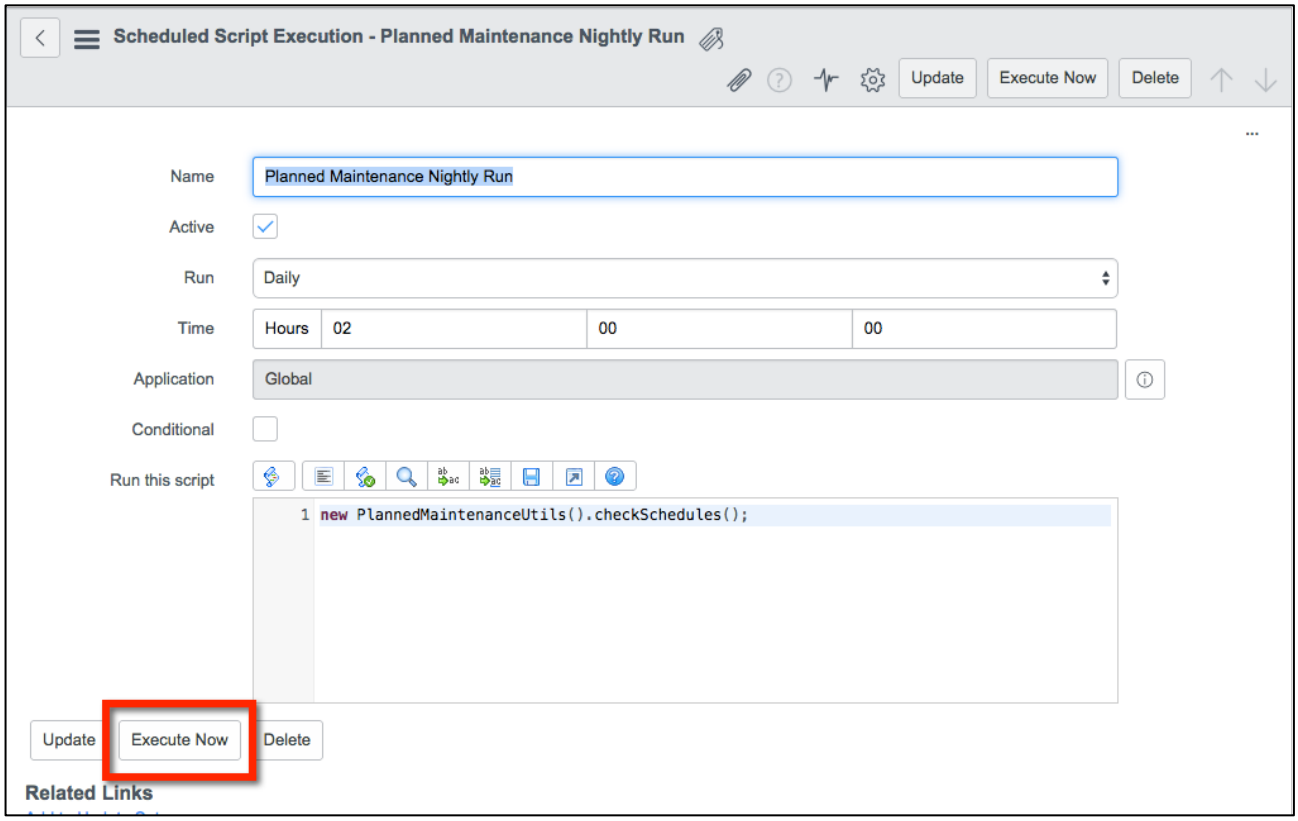
5. Click **Update**.

6. On the **PowerEdge**, click the **Planned Maintenance Nightly Run** bookmark. A window pops out with the scheduled job that powers the creation of tasks based on Maintenance Schedules.



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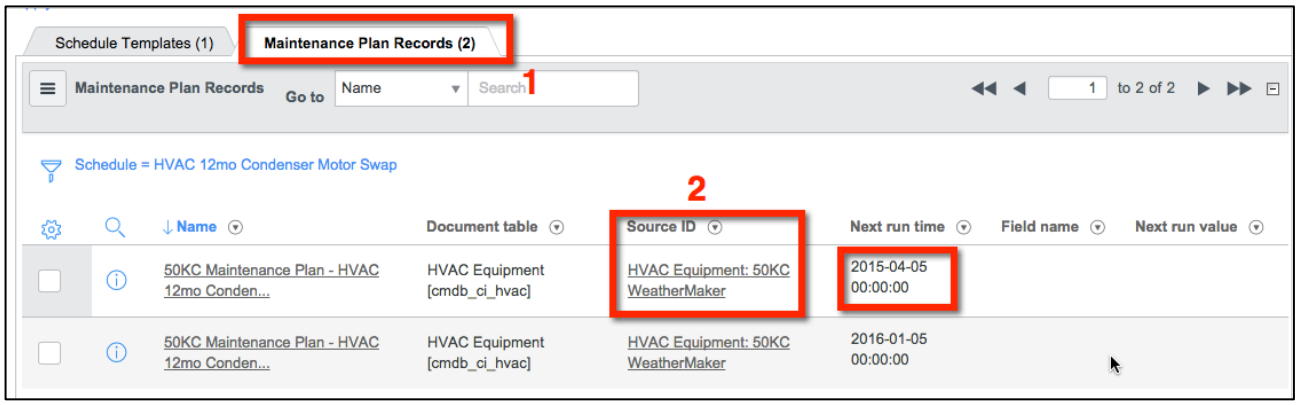
7. Click the **Execute Now** button then close the window.



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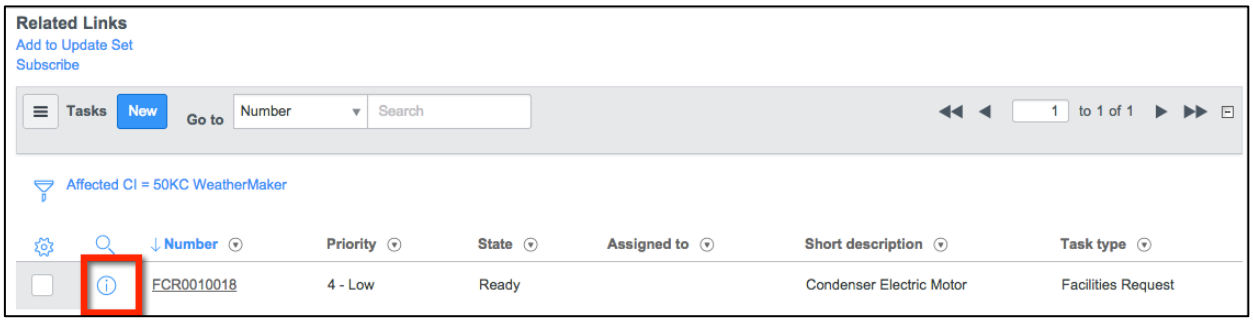
Lab Success Verification

1. Scroll to the Maintenance Plan Records related list and click it.



2. Locate the row with **Next run time = 2014-04-05** and click the **Source ID** for that row.

3. Scroll to the **Tasks list** and find the auto-generated task from the plan. Click the **more information** icon next to the record.



4. Note the following values on the **Facilities Request**:

   Affected CI: **50KC WeatherMaker by way of the Maintenance Plan**
   Template: **Condenser Electric Motor from a previous lab step**
   Facilities Request Tasks related list: **One created by way of the template**
   A **parts requirement** shows for the condenser electric motor

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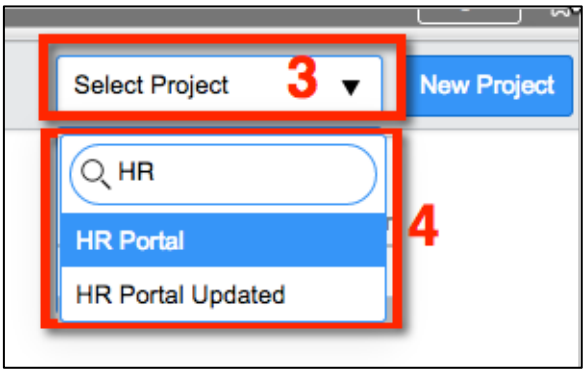
Lab Goal

This series of labs covers how to use Project Management for Facilities. The first lab explains the Project Workbench using demonstration data for a non Facilities project.

Lab 5.1 Project Workbench

Navigate the Project Workbench

1. On the left navigation bar, in the **navigator filter text** type **Project.** The Application Menu filters down as you type.
2. Under **Project > Projects** click **Workbench**:
3. In the **form header** click the **Select Project** field.

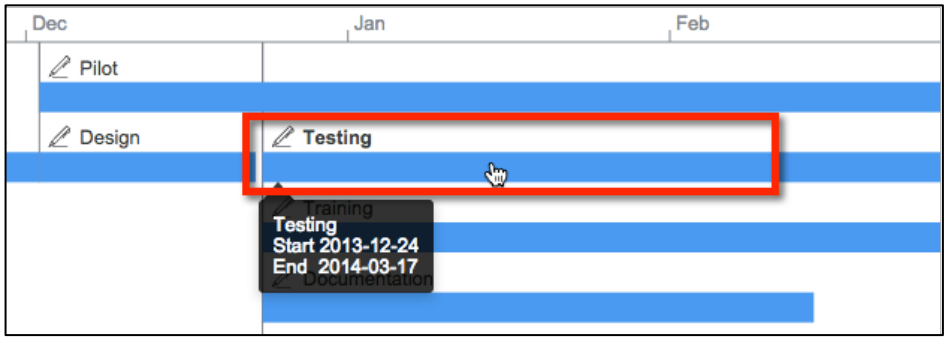


4. Start typing **HR Portal** in the **search box** and select that project.
5. In the top left of the form click **Toggle Navigator** to close the application navigator.

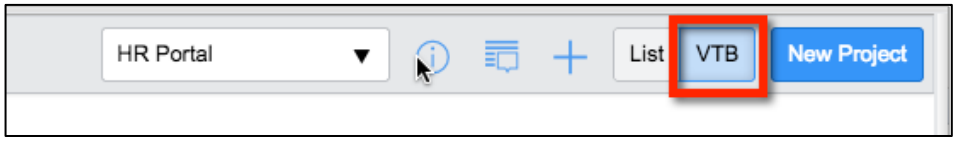


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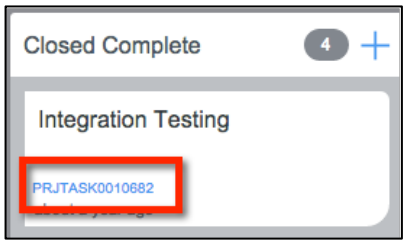
6. In the workbench click on the **Testing task**. The list view shows child tasks for **Testing**.



7. In the form header click the **VTB button**. The visual task board replaces the list view.



8. Click on the hyperlink for one of the project tasks in the Visual Task board. The task details show in a window.



9. Click **X** in the upper right of the Project Task window to close the window.

10. In the workbench, click the **Training task**. The visual task board shows child tasks for **Testing**.

11. In **the top left** of the form click **Toggle Navigator** to open the application navigator.

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Lab Goal

This lab explains how to create a project Template using Project Task Creator.

Lab 5.2 Project Template and Task Creator

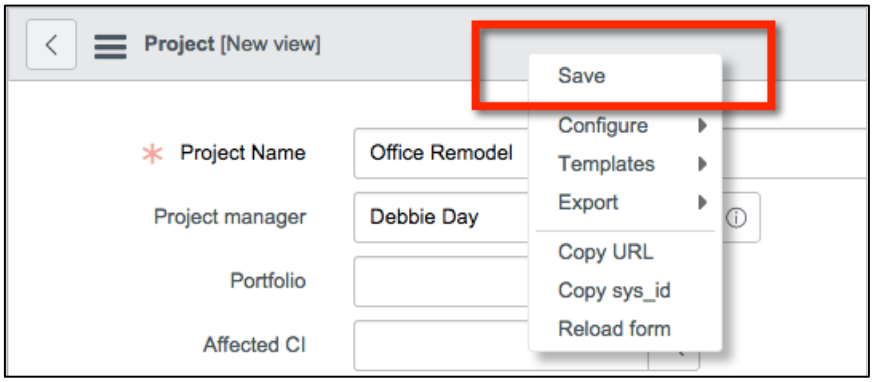
Create a Project Template with Project Task Creator

1. Under **Project > Projects** click **Create New**.

2. Enter the following information in the Project Form:

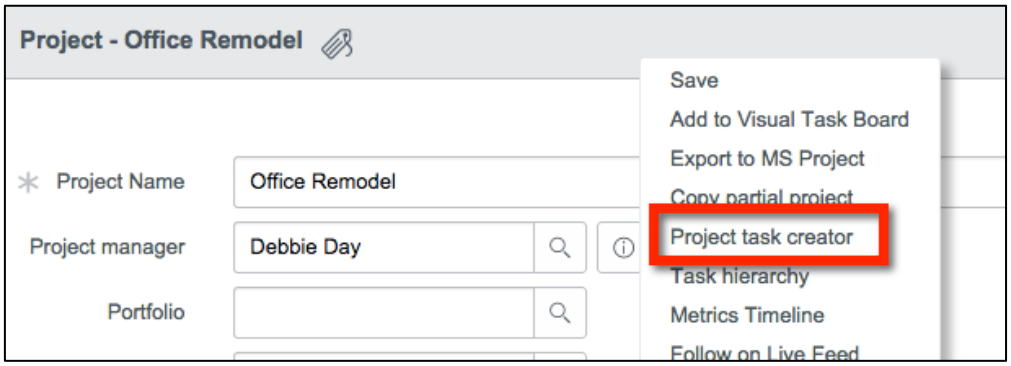
   Project Name: **Office Remodel**
   Project Manager**: Debbie Day**
   Planned Start Date**: 2015-06-01**

3. In the Project form **header right-click** and **Save** the record.



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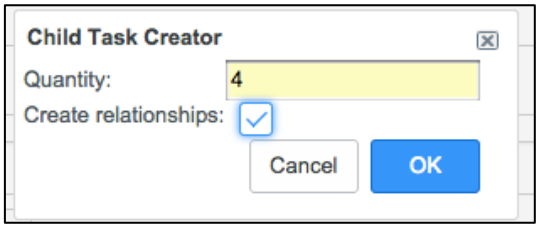
4. In Project form **header right-click** and select **Project Task Creator**. The Child Task Creator appears.



5. Enter the following information in the Child Task Creator:

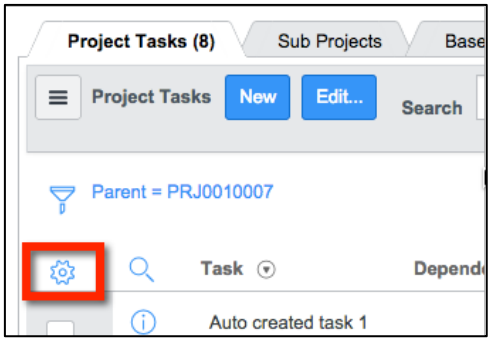
   Quantity: **4**
   Create Rel**a**tionships: **Check the box**

   Click **OK *onl*y** once when **finished.**



6. Scroll to the **Project Tasks** related list. Four tasks with relationships have been created.

7. In the column header, click the **blue** gear to personalize the List View.



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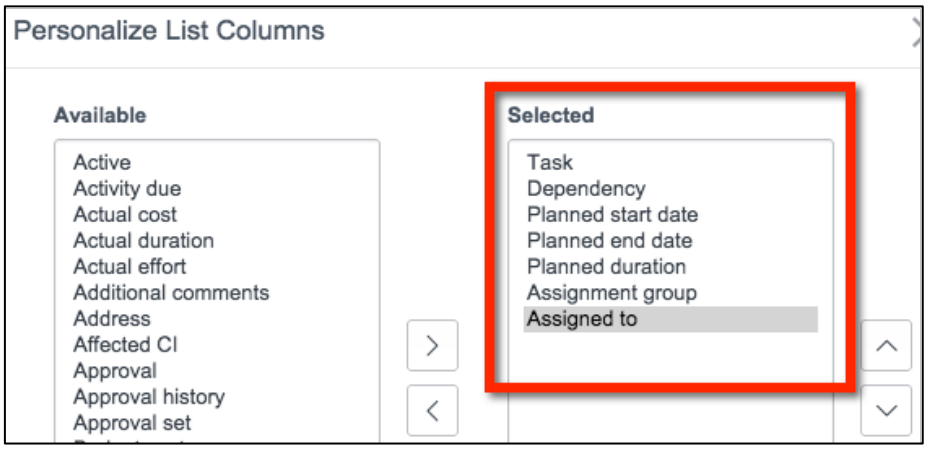
8. Remove the following fields from the List View by selecting them from the **right slush bucket** and clicking the **left pointing arrow** in the center of the dialog box.

   Percent Complete
   State
   Actual end date
   Actual start date

9. Add the following fields to the List View by selecting them from the **left slush bucket** and clicking the **right pointing arrow**.

   Assignment group
   Assigned to

10. **The screen sh**ould look like the example.



11. Click **OK** in **Personalize List Columns**. The dialog box closes.

12. Double-click in the name of the first task. Rename the task **Remove existing furnishings and carpet**.

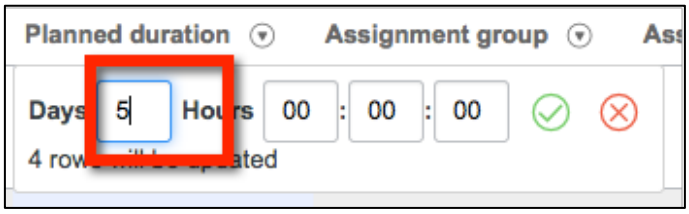
13. Repeat for each task renaming them as follows:

    Auto created task 2: **Check mechanical systems**
    Auto created task 3: **Check electrical systems**
    Auto created task 4: **Install new furnishings and carpet**

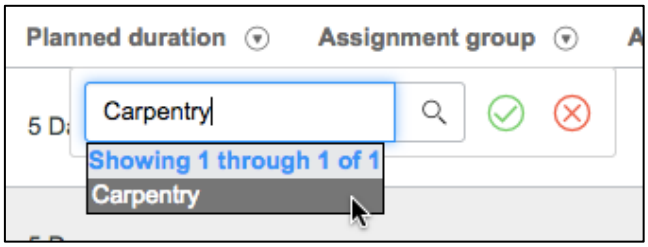
14. **Command+click** each of the **Planned duration fields** to select them. Double-click the selected fields**.** The duration dialog opens with a message that confirms 4 rows updated.

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15. Enter **5** in the **Days** field and click the **green** check mark. All tasks are given a duration of five days.



16. Double-click in the blank space for **Assignment group** in the first Task. Start typing **Carpentry** in the select box and **choose it** from the prompts. Click the **green** check mark to assign this task to the Carpentry Shop.



17. Repeat for each task assigning them as follows:

    Check mechanical systems: **Mechanical**
    Check electrical systems: **Electrical**
    Install new furnishings and carpet: **Carpentry**

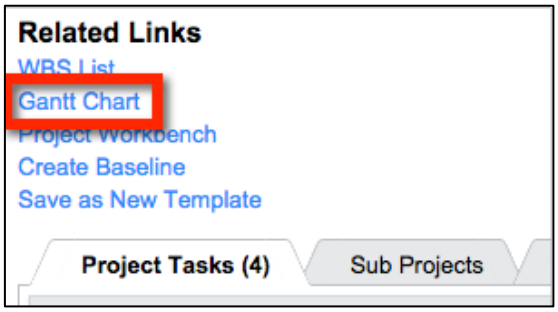
18. In the **Project form** header right-click and **Save** the record. The record is saved and in the Project Tasks related list the values in the Dependency column reflect the new task names.

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19. The list should look like the example.

Task	Dependency	Planned start date	Planned end date	Planned duration	Assignment group
Remove existing furnishings and carpet PRJTASK0010026		2015-06-01 08:00:00	2015-06-05 17:00:00	5 Days	Carpentry
Check mechanical systems PRJTASK0010027	Remove existing furnishings and carpet	2015-06-08 08:00:00	2015-06-12 17:00:00	5 Days	Mechanical
Check electrical systems PRJTASK0010028	Check mechanical systems	2015-06-15 08:00:00	2015-06-19 17:00:00	5 Days	Electrical
Install new furnishings PRJTASK0010029	Check electrical systems	2015-06-22 08:00:00	2015-06-26 17:00:00	5 Days	Carpentry

20. Above the Project tasks related list **click Gantt Chart**. The Gantt Chart opens.



21. Above the Project Tasks related list click **Save as New Template**. The create template dialog appears.

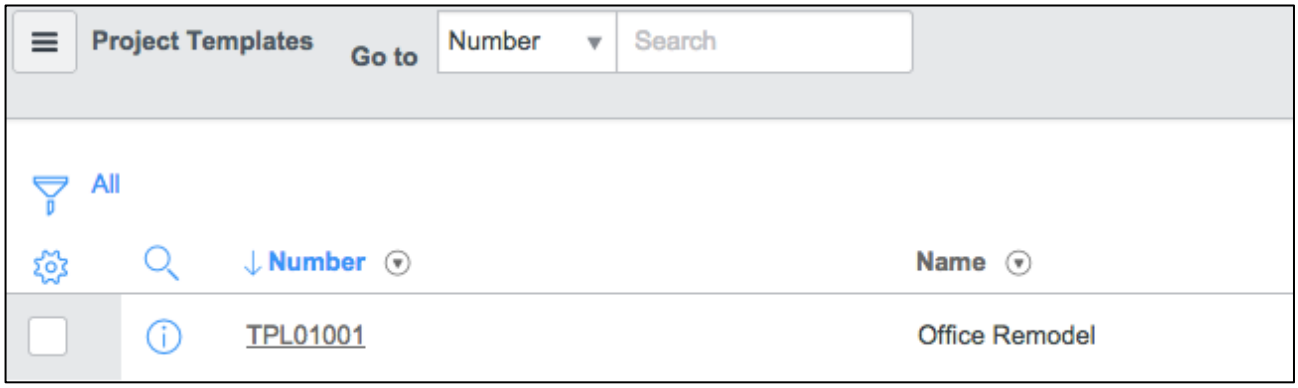


22. Type **Office Remodel** in the **Template name field** and click **OK**. The Project Template form opens.

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Lab Success Verification

1. Under **Project > Projects** click **Templates**.
2. The screen should look like the example, with one project template named Office Remodel.



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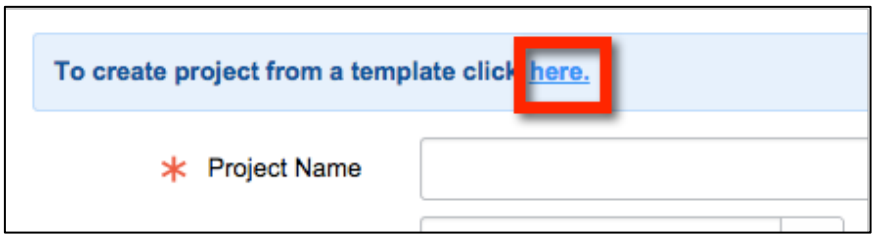
Lab Goal

This lab explains how to execute a Project from a Project Template and estimate the cost.

Lab 5.3 Execute and Estimate a Project

Execute and Estimate a Project from a Project Template

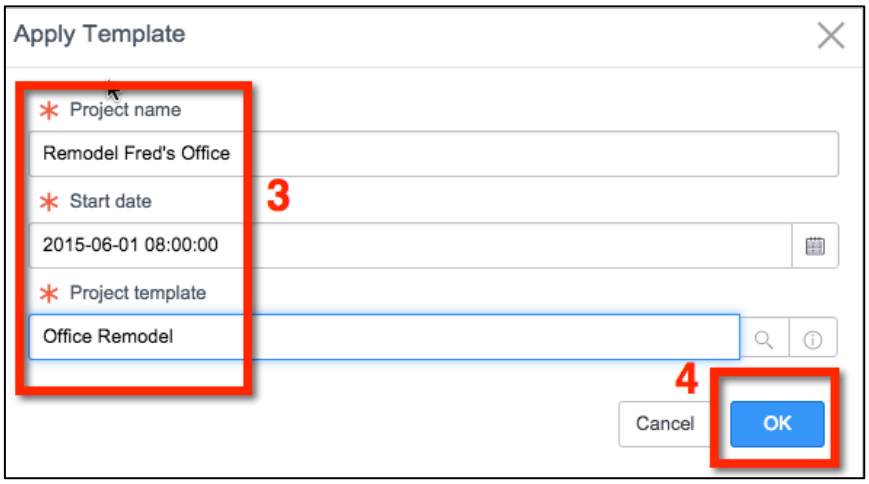
1. Under **Project > Projects** click **Create New**.
2. Click the **hyperlink** in the **blue** message at the top of the form.



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3. Enter the following in the Apply Template dialogue:

   Name: **Remodel Fred's Office**
   Start Date: **2015-06-01**
   Project Template: **Office Remodel Project**



4. Click **OK.** The Project is created from the template selected with the name and start date entered in step 3.

5. Scroll to the **Project Tasks** related list.

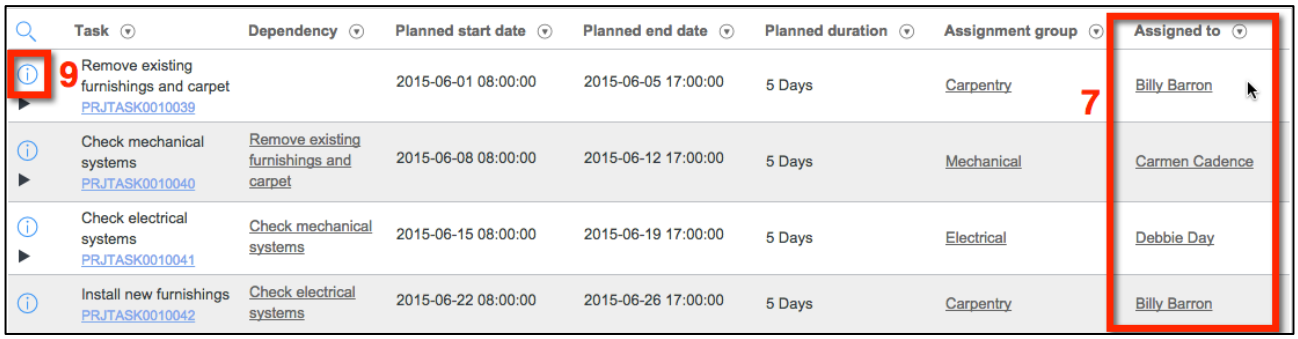
6. Double-click in the blank space for **Assigned to** in the first Task. Start typing **Billy Barron** in the select box and **choose him** from the prompts. Click the **green** check mark to assign this task to Billy.

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7. **Repeat** for each task assigning them as follows:

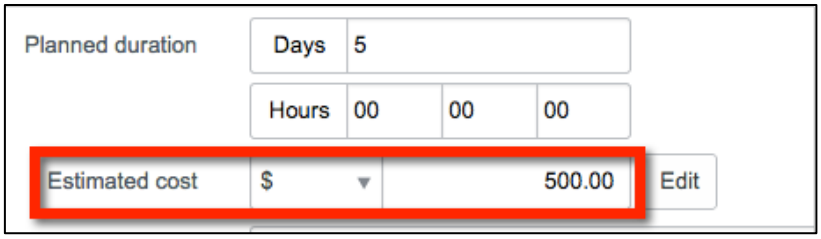
   Check mechanical systems: **Carmen Cadence**
   Check electrical systems: **Debbie Day**
   Install new furnishings and carpet**: Billy Barron**

8. The list should look like the example:

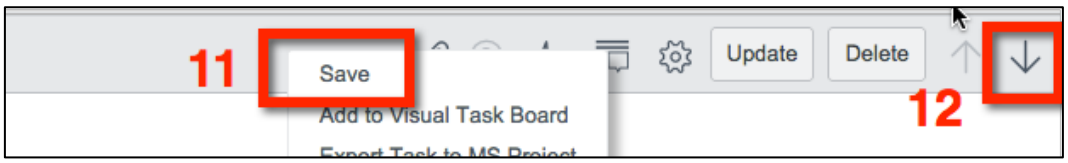


9. Click the **information** icon next to the **first task**. The Project Task form opens.

10. In the **Estimated Cost** field enter **500.00**.



11. In the **Project Task** form header, right-click and **Save** the record.



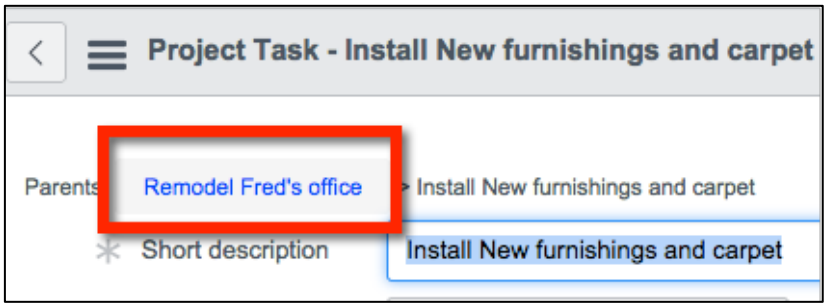
12. In the **Project Task** form header click the **down arrow** to move to the next Project Task.

13. **Repeat** for each task entering **500.00** for the **Estimated cost** to simulate each assignee estimating their portion of the project.

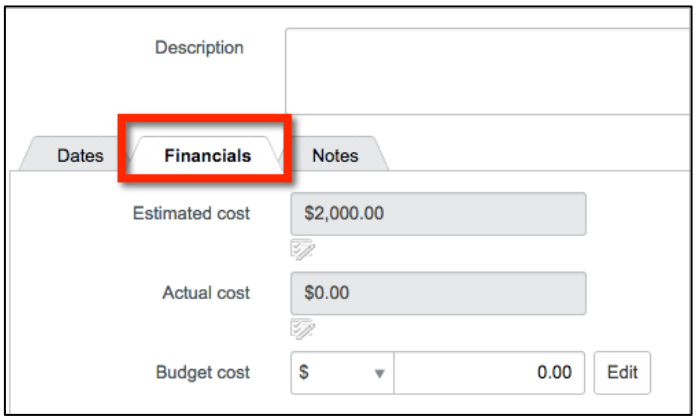
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Lab Success Verification

1. Above **Short description** on the Facilities Task Form click **Remodel Fred's Office**. The Project form loads for the parent.



2. Click the **Financials** tab. The **Estimated cost** for the Project is the sum of estimated costs of the child Tasks.



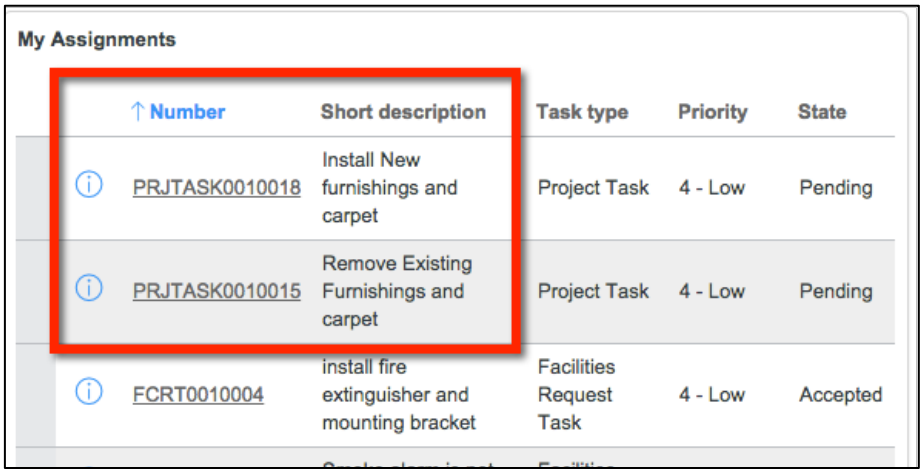
3. At the top left of the screen next to **Welcome: System Administrator** click the **person silhouette** to impersonate an user.



4. In the **Impersonate User** dialog box, select **Billy Barron** then click **OK**.

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5. In the **My Assignments** dashboard widget, the Project Tasks assigned to Billy are viewable along with his other assignments.



6. At the top left of the screen next to **Welcome: Billy Baron** click the **person silhouette** to impersonate an user.

7. In the **Impersonate User** dialog box, select **System Administrator** and click **OK**. You return to the System Administrator login.

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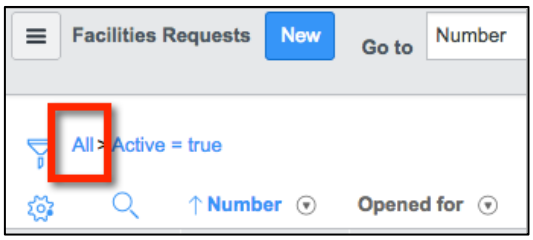
Bonus Lab Goal

This lab explains how to build a report. The specific example is non-billable requests by department.

Bonus Lab 1.0 Build a Report

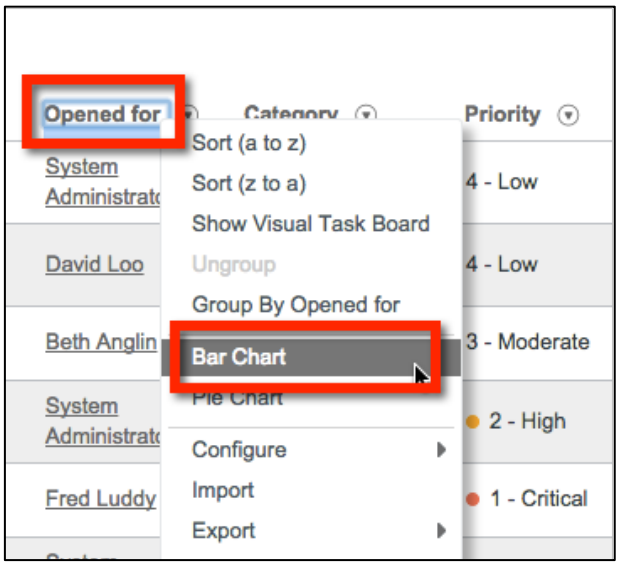
Build a Report for Non-Billable Requests by Department

1. On the left navigation bar, in the **navigator filter text** enter **Facilities**.
2. Under **Facilities > Requests** click **All Facility Requests.** The list view opens.
3. In the breadcrumb trail click **All** to remove the **Active = true** condition from the filter for the list view.

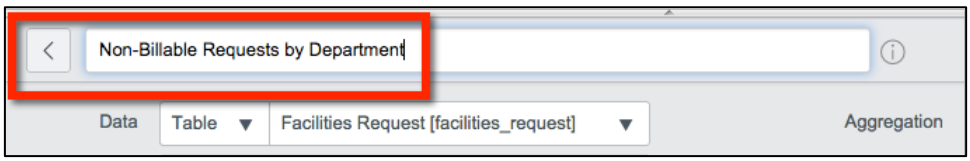


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4. On the **Opened for** column header right-click and select **Bar Chart**. The report builder opens.

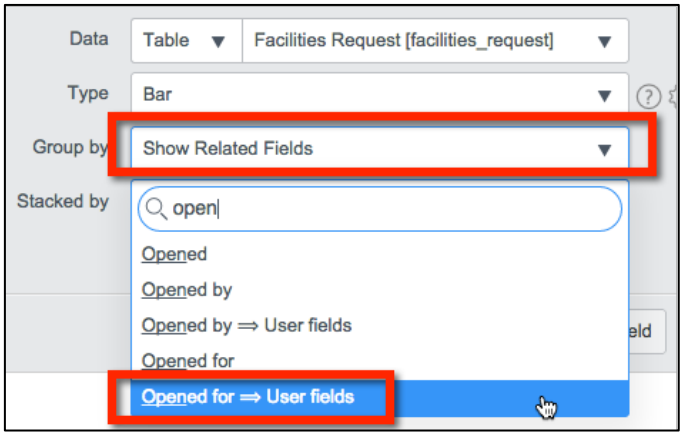


5. In the **Report Title** type **Non-Billable Requests by Department**.



6. Click the **Group by** field and **scroll to the bottom** of the select list. Click **Show Related Fields**.

7. Click the **Group by** field and start typing **Opened for**. Select **Opened for ➔ User fields**.



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8. Click the **Group by** field and start typing **Department** then select it. The report groups by the **Opened for** person's Department.

9. In the form header at right click the **blue Run** button. The report runs. **Empty** is the largest category **due to the demonstration data**.

10. Click the **Stacked by** field and start typing **State** and select it.

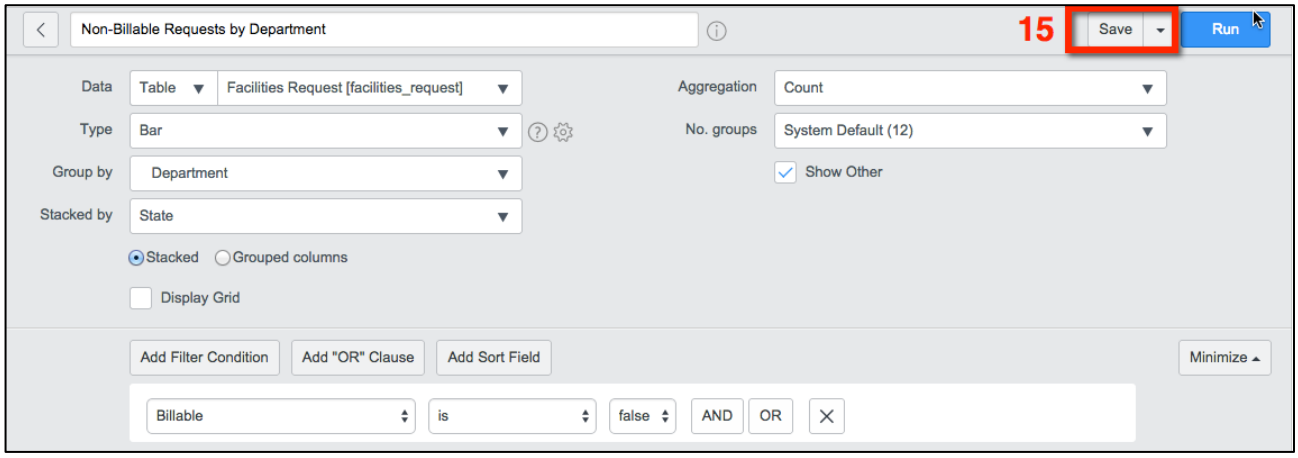
11. In the form header at right click the **blue Run** button. The bars stack by the **Request State**.

12. Click the **Add Filter Condition** button. Build the condition as follows:

    Choose field: **Billable**
    Operator: **Is**
    Value**: False**

13. In the form header at right click the **blue Run** button**.** The report filters to non-billable requests.

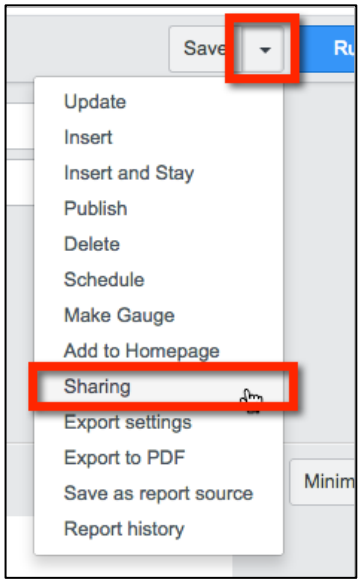
14. The report form should look like the example.



15. In the form header click **Save**.

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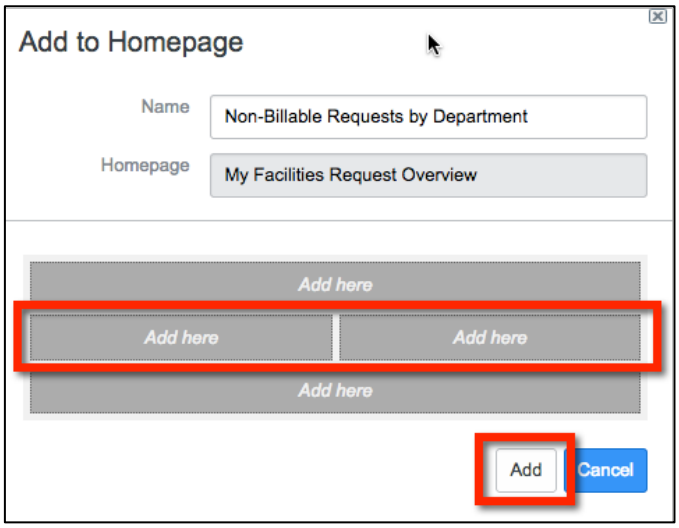
16. Click the **arrow** next to the Save button and select **Sharing** from the menu.



17. Select **Everyone** from the **Sharing settings** and click **Close**.

18. Click the arrow next to the Save button and select **Add to Homepage** from the menu.

19. Choose one of the middle **Add here options** and press **Add.** The homepage loads.



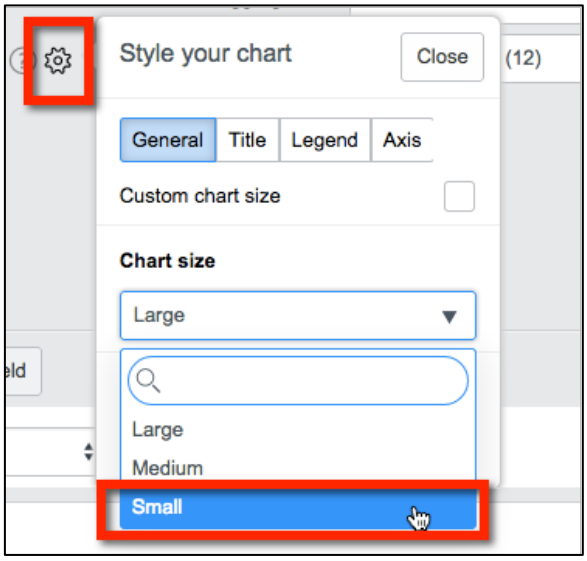
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Lab Success Verification

1. Find the new report on the homepage.
2. **Hover over** the report to expose the **report controls.** Click **the pencil** to edit.



3. Click the **gear** to the right of the **Type** field. For **Chart size** select **Small;** then click **Close**.



4. **Save** the report.
5. Click the ServiceNow label at the top left of the screen. The homepage loads.
6. Locate the report. Drag it to the opposite column.

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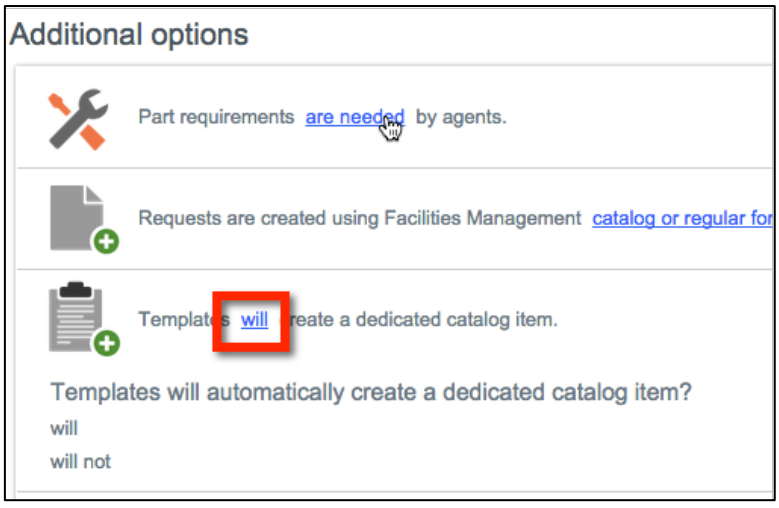
Bonus Lab Goal

This lab explains how to manage catalog items. The specific case will be the catalog item created with the Fire Extinguisher Facilities Template.

Bonus Lab 2.0 Manage Catalog Items

Manage Catalog Items

1. Under **Facilities > Administration** click **Configuration**.
2. Under **Additional options** locate the entry for **Templates will create a dedicated catalog item**.
3. Click the hyperlink for **will** to expose options and illustrate how to modify this setting. It is set correctly for the lab already, so move on to the next step without making a selection.



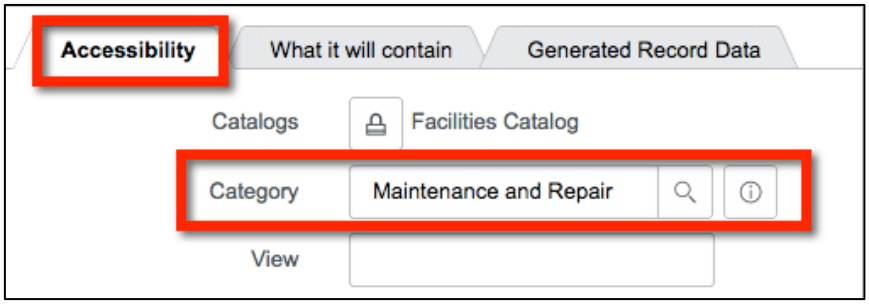
4. Under **Facilities > Catalog & Knowledge** click **Maintain Catalog Items.** The catalog item list view opens.

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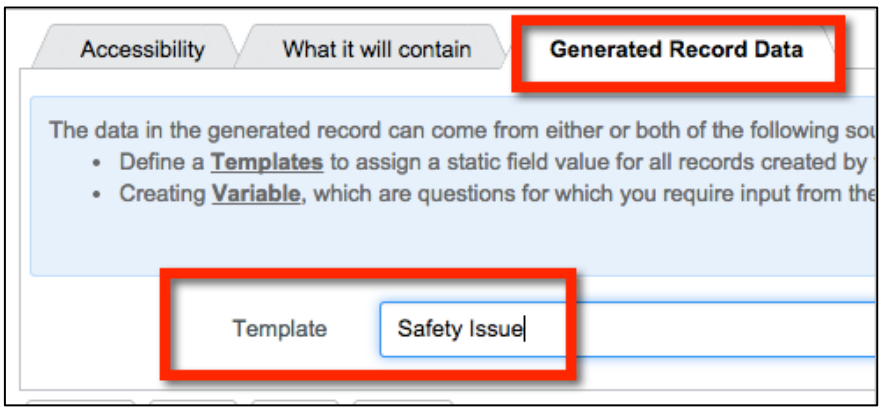
5. Type ***fire** in the **Search** box under **Name** and press **Enter**. The list filters to records with **fire** in the name.

6. Click the **blue information** icon next to the record for **Replace fire extinguisher and mounting hardware**.

7. In the **Accessibility** section for **Category** choose **Maintenance and Repair**.



8. In the **Generated Record Data** section for **Template** choose **Safety Issue**.



9. In the **form header** click **Update**.

10. **In the application navigator under Self-Service** select **Facilities Catalog.**

11. Select the **Maintenance & Repair** category.

12. Locate the **Replace fire extinguisher and mounting hardware** catalog item and select it.

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13. Enter the following information in the request form:

    Opened for: **Debbie Day**
    Building: **Kirkland**
    Room: **Cascade**
    Priority: **1 – Critical**
    Short description: **Fire extinguisher exploded.**
    Detailed Description: **It really did.**

14. The form should look like the example.



15. Click **Submit.**

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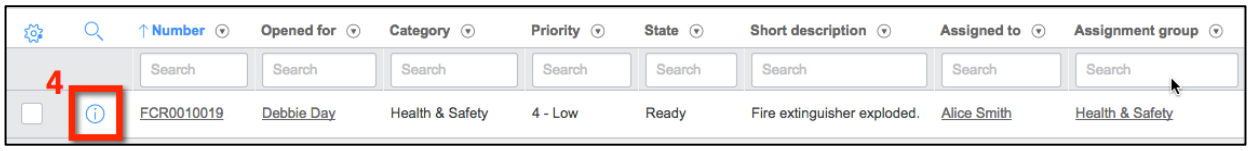
Lab Success Verification

1. Upon submission, the warnings about parts being unavailable trigger.

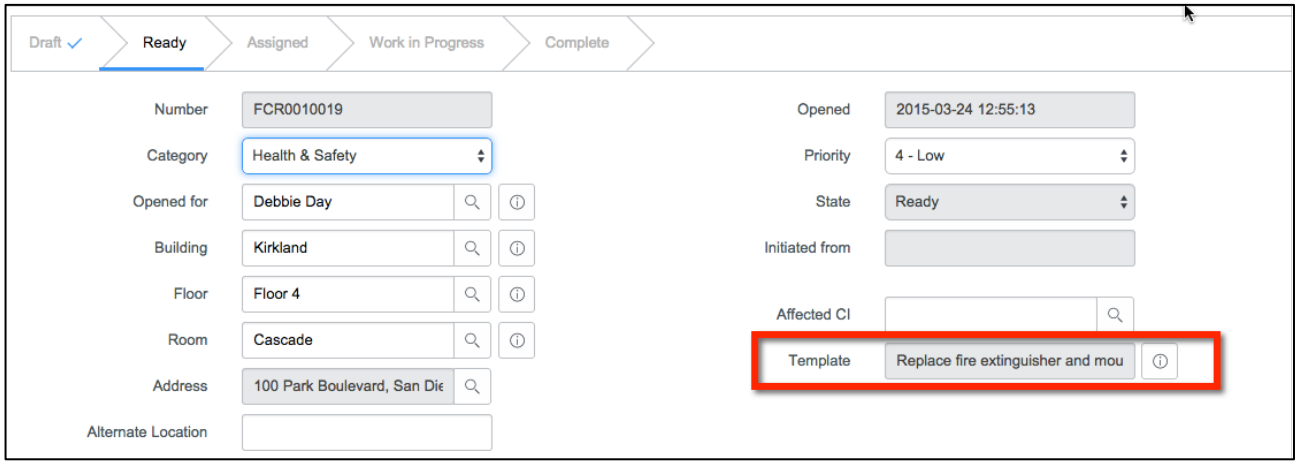
2. Under **Facilities > Requests** click **All Facility Requests**.

3. Locate the request for Debbie Day. Complete as follows:

   Category: **Health & Safety**
   Assigned t**o: Alice Smith**
   Assignment G**roup: Health & Safety**

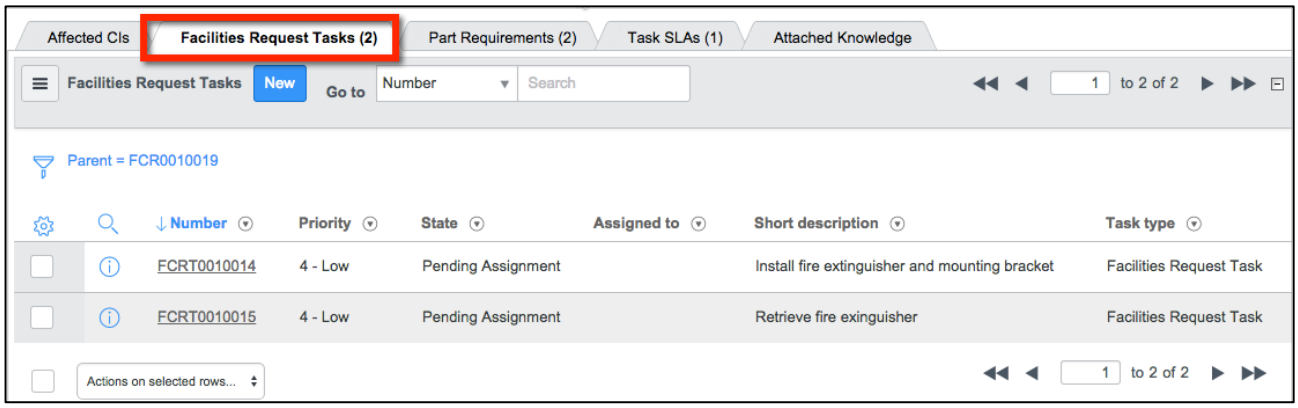


4. Click the **information** icon next to the record. The **Replace fire extinguisher Template** was applied.



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5. Scroll to the **Facilities Request Tasks** related list and click it. Two tasks have been created to accomplish the work.



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