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

Lab Guide

IT Financial Management 102: A Holistic View of Cost Management

Chris Fowler & Simon Grice

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

This

Page

Intentionally

Left

Blank

Lab Goal

Create an automatic expense line each time a password reset Incident is logged via the Service Desk. In this lab, you create a template for capturing a standard incident and link this to a fixed cost rate card. This rate card will generate expense lines.

Lab 1
Create Password Reset Costs

What is a Template?

Templates simplify the process of submitting new records, such as incidents by populating selected fields on the record form. They can be used for any task in the system, typically Incident, Problem and Change Management.

Templates can be scheduled and run regularly, or selected by fulfillers during the process of creating a record.

What is an Expense Line?

Expense lines track costs and record expenses incurred. Expense lines can be created manually or generated automatically when costs are created by scheduled processing.

Expense lines are a key component of IT Cost Management because they can be generated from any application and are used to allocate expenses to business entities.

®2015 ServiceNow, Inc. All rights reserved.

Log on to Your Lab Instance

1. Navigate to the instance reservation URL provided by the instructor.
   https://itfm102instructor1.lab.service-now.com/instance_reservation.do

   Or: **http://bit.ly/1JLkMsO**

2. Enter your email address and click **Submit**.

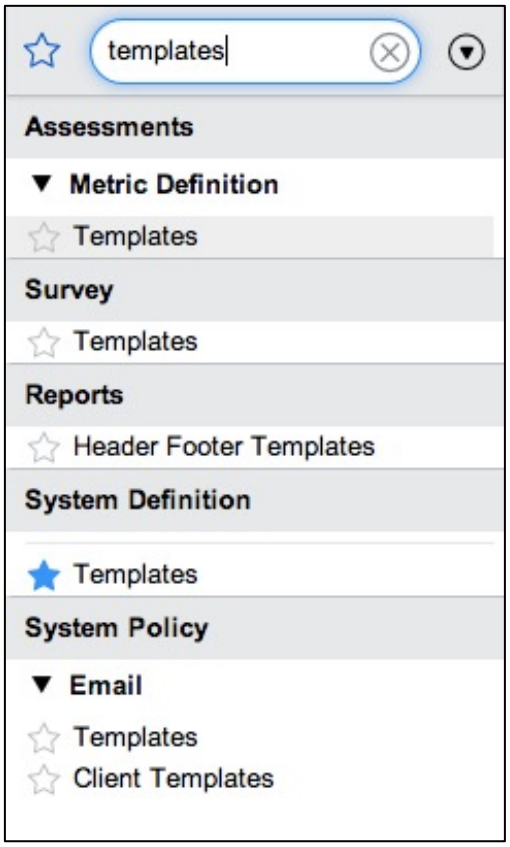
3. Note the login credentials for the instance assigned to you. Click on the **link** to the instance.

4. Log on as **admin** using the provided password.

®2015 ServiceNow, Inc. All rights reserved.

Create a New Incident Template

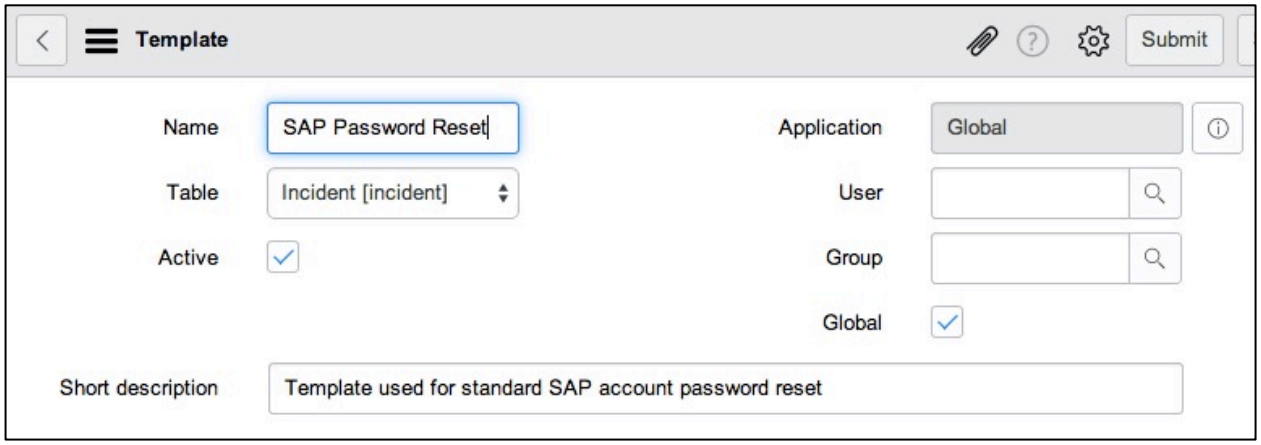
1. Navigate to **System Definition > Templates** by typing **templates** in the application navigator filter box.



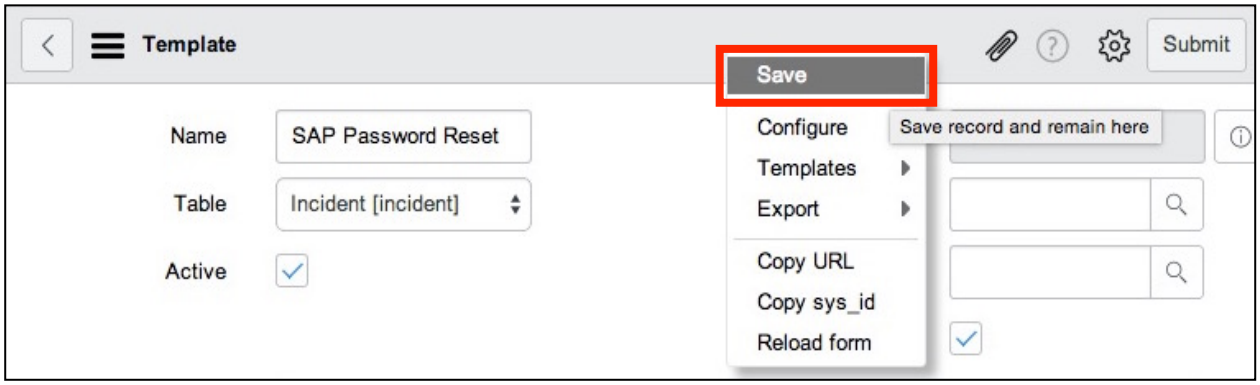
©2015 ServiceNow, Inc. All rights reserved.

2. Click the **New** button and enter the details below:

   Name: **SAP Password Reset**
   Table: **Incident [incident]**
   Active: **True** (checked)
   User: (blank) **note**: this field will initial be set to a default of **System Administrator**
   Group: (blank)
   Global: **True** (checked)
   Short Description: **Template used for standard SAP account password reset**



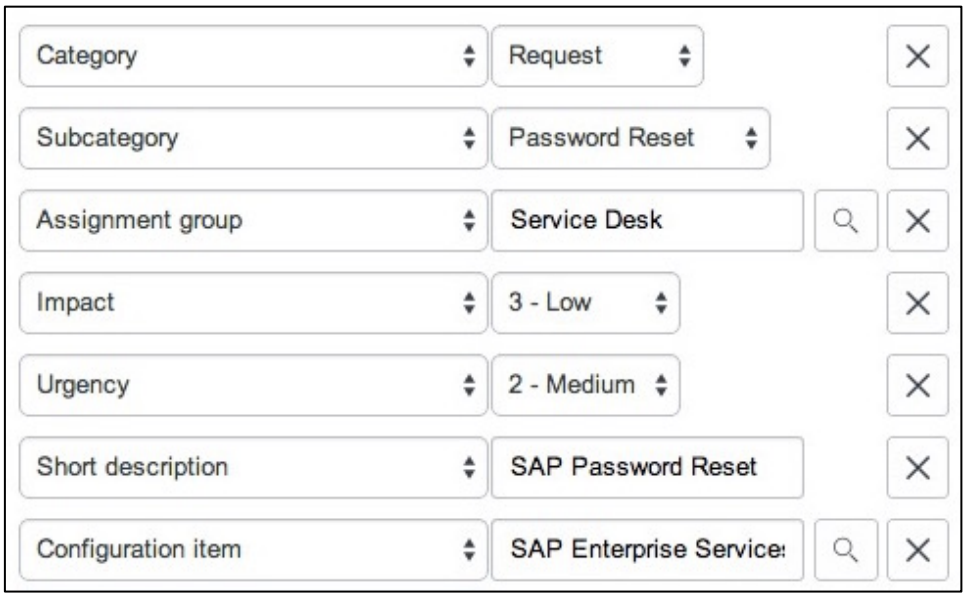
3. Right-click on the form header and select **Save**:



®2015 ServiceNow, Inc. All rights reserved.

4. Fill in the template fields using the values shown below:

   Category: **Request**
   Subcategory: **Password Reset**
   Assignment group: **Service Desk**
   Impact: **3 – Low**
   Urgency: **2 – Medium**
   Short description: **SAP Password Reset**
   Configuration item: **SAP Enterprise Services**

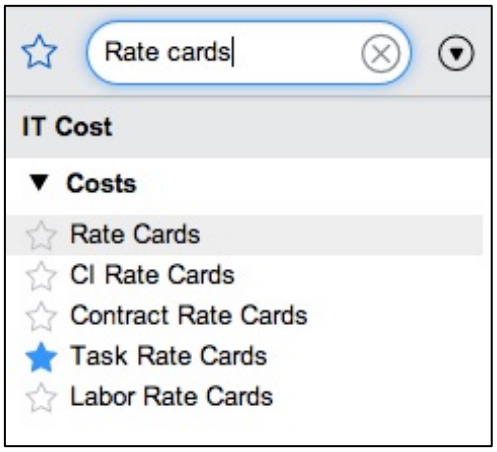


5. Click **Submit**.

®2015 ServiceNow, Inc. All rights reserved.

Create a New Task Rate Card

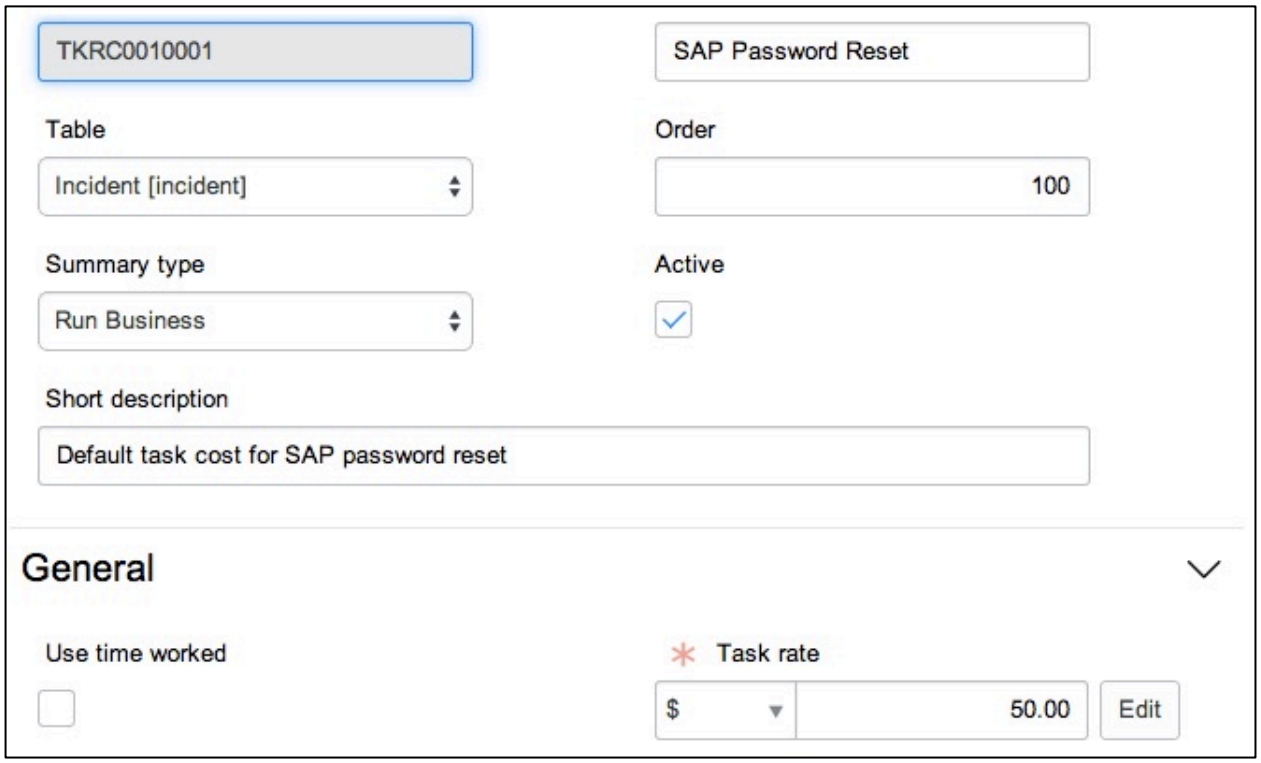
1. Navigate to **IT Cost > Task Rate Cards** by typing **rate cards** in the application navigator filter box.



©2015 ServiceNow, Inc. All rights reserved.

2. Click the **New** button, then enter the following information:

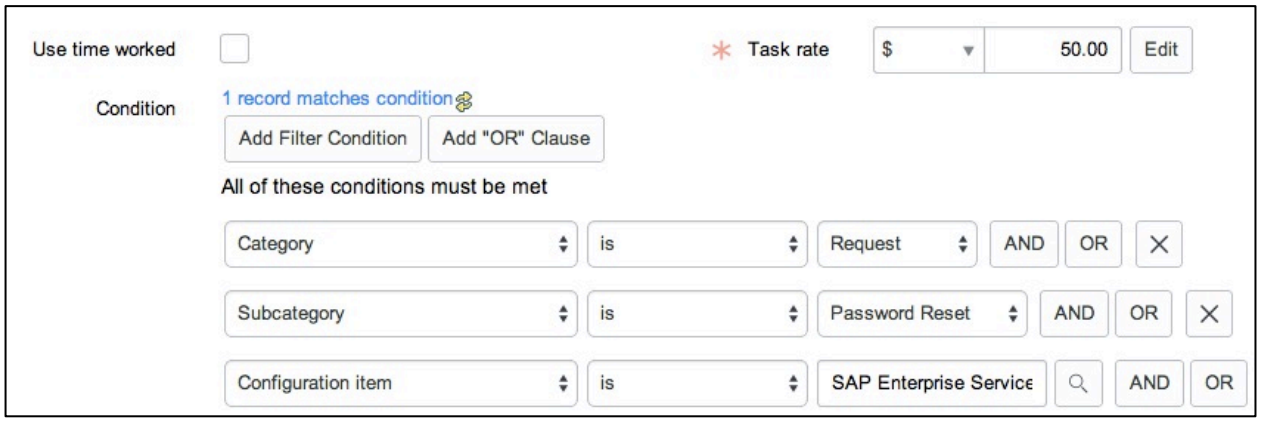
   Table: **Incident [incident]**
   Summary type: **Run Business**
   Short Description: **Default task cost for SAP password reset**
   Name: **SAP Password Reset**
   Order: **100**
   Active: **True** (checked)
   Use Time Worked: **False** (un-checked)
   Task rate: **$50**



®2015 ServiceNow, Inc. All rights reserved.

3. Use the condition builder to define the criteria for generating the rate card. Enter the following information:

   Category: **Request** *AND*
   Subcategory: **Password Reset** *AND*
   Configuration Item: **SAP Enterprise Services**

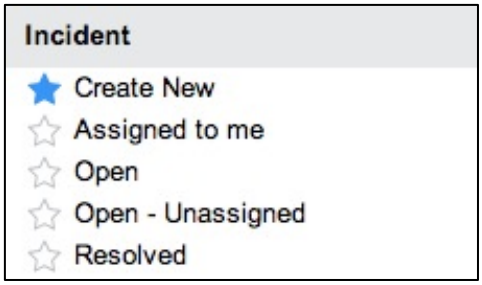


4. Click **Submit** to save the rate card.

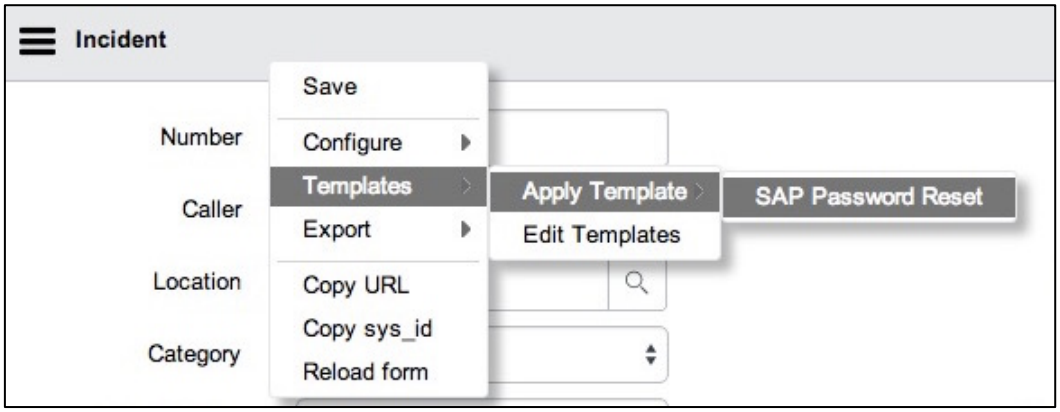
®2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Incidents created using the new template will now have a $50 Expense Line related upon closure. To test this, create a new Incident. Select **Incident Management > Create New** from the application navigator



2. Right-click on the Incident header and select **Templates > Apply Template > SAP Password Reset**



3. Close the Incident by completing the following fields:

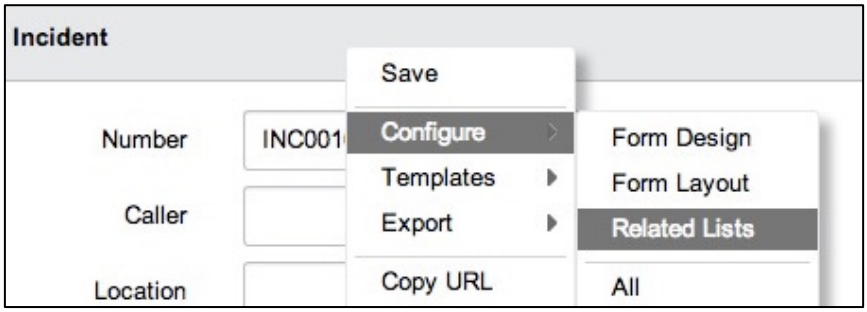
   Caller: **Natasha Ingram**
   State: **Closed**
   Close code: **Solved (Permanently)**
   Close notes: **Closed by template**

4. Right-click on the Incident header and select **Save**

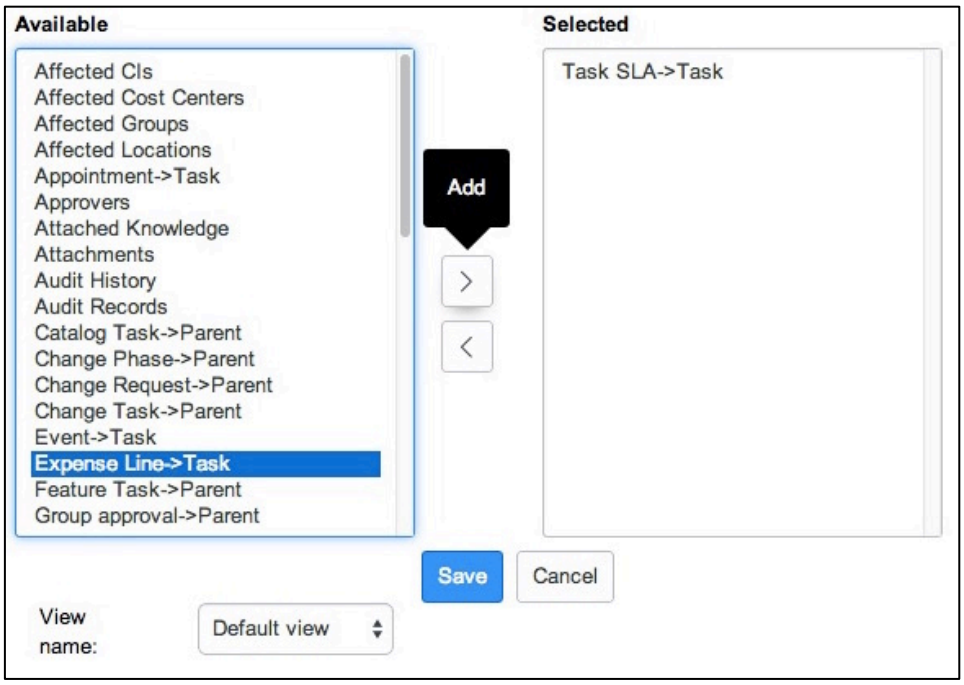
   Note*:* Task Rate Cards are processed when a task is closed and Expense Lines are added to the closed task.

©2015 ServiceNow, Inc. All rights reserved.

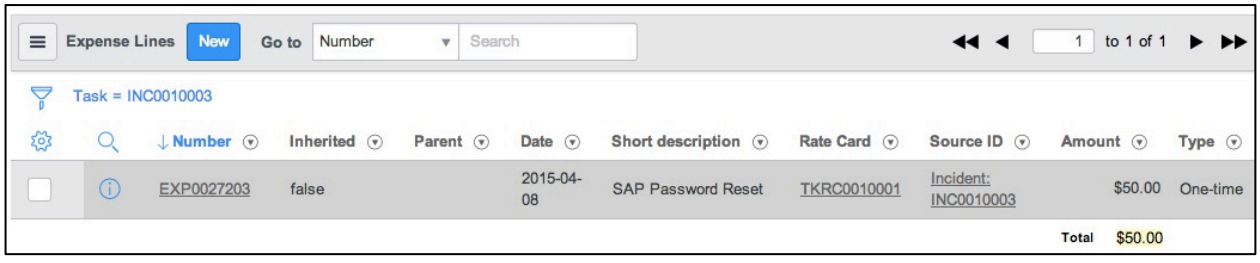
5. To display the newly created Expense Line, right-click on the Incident Header and select **Configure > Related Lists**:



6. Select **Expense Lines-> Task** and click **>** (right arrow) to add the related list to the Incident form, then click **Save**:



7. The incident form should now display a new Related List for **Expense Lines** with a single entry:

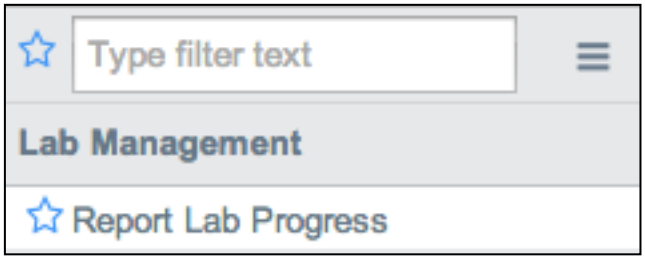


©2015 ServiceNow, Inc. All rights reserved.

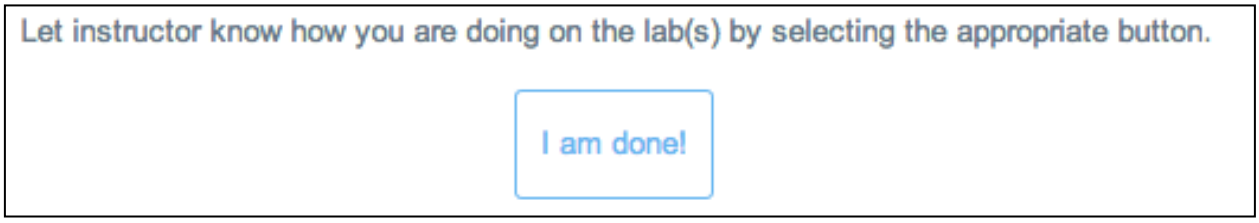
Progress Report

Let the instructor know you are done.

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



2. Click **I am done**!



®2015 ServiceNow, Inc. All rights reserved.

Lab Goal

Use an Allocation Rule to automatically link Expense Lines to the appropriate Cost Center.

Lab 2
Allocate Expense Lines to Cost Center

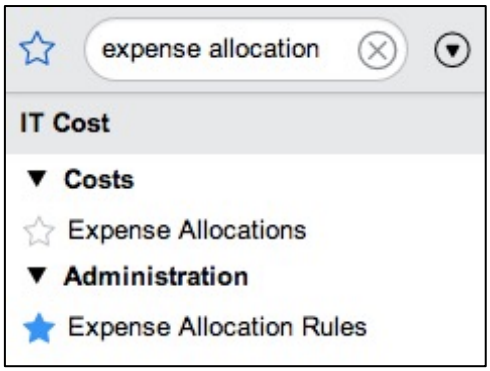
®2015 ServiceNow, Inc. All rights reserved.

Create a New Allocation Rule

Expense Allocation Rules

Expense allocation rules enable you to associate expenses with an item, such as a user, group, or department.

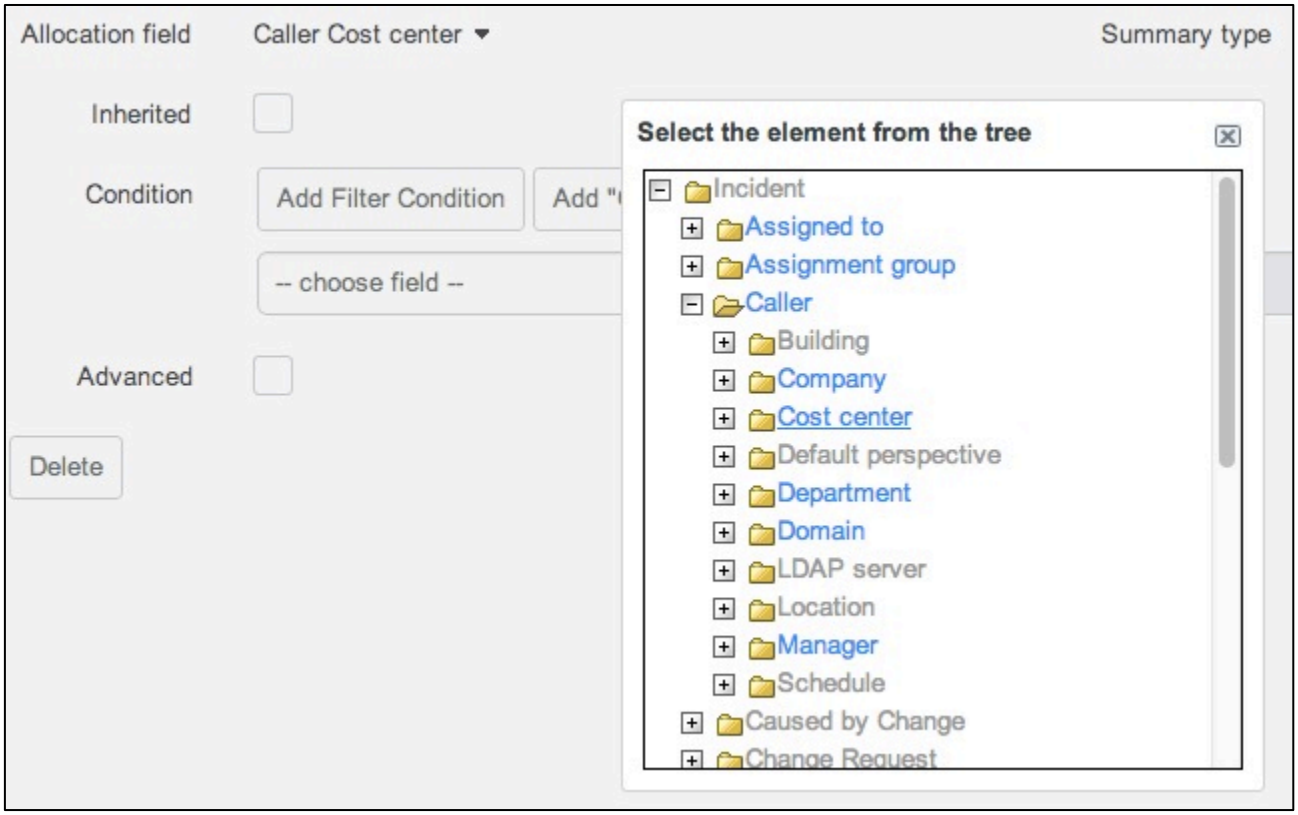
1. Navigate to **IT Cost > Expense Allocation Rules** by typing **expense allocation** in the application navigator filter box.



©2015 ServiceNow, Inc. All rights reserved.

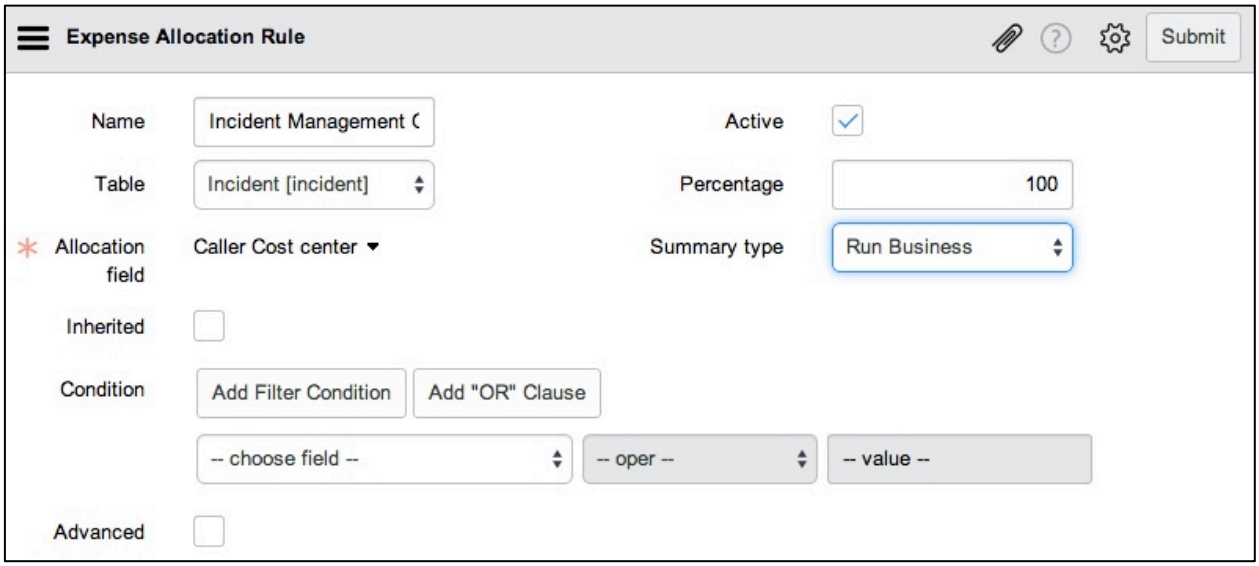
2. Click the **New** button and enter the details below:

   Name: **Incident Management Costs**
   Table: **Incident [incident]**
   Allocation field: **Caller > Cost Center** (*click the* **+** *next to* **Caller** *in the element list to expose additional related fields*)



   Active: **True** (checked)
   Percentage: **100**
   Summary Type: **Run Business**
   Inherited: **False** (unchecked)
   Condition: (leave blank)

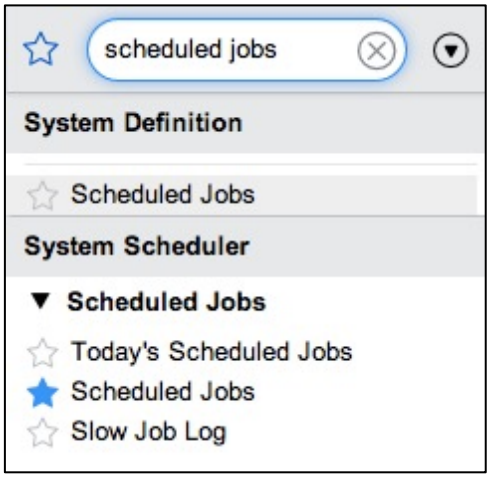
©2015 ServiceNow, Inc. All rights reserved.



3. Right-click on the header and select **Save**.

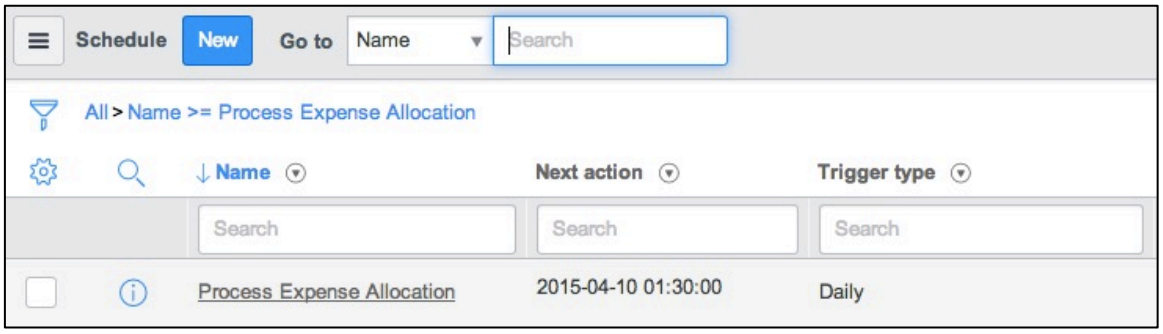
   Note: Expense allocations are processed as a Scheduled Job by the ServiceNow instance on a daily basis. The Scheduled Job can be executed manually to check the success of this configuration.

4. Navigate to **System Scheduler > Scheduled Jobs** (not **System Definition > Scheduled Jobs**) by typing **scheduled jobs** in the application navigator filter box (denoted by the blue star below).

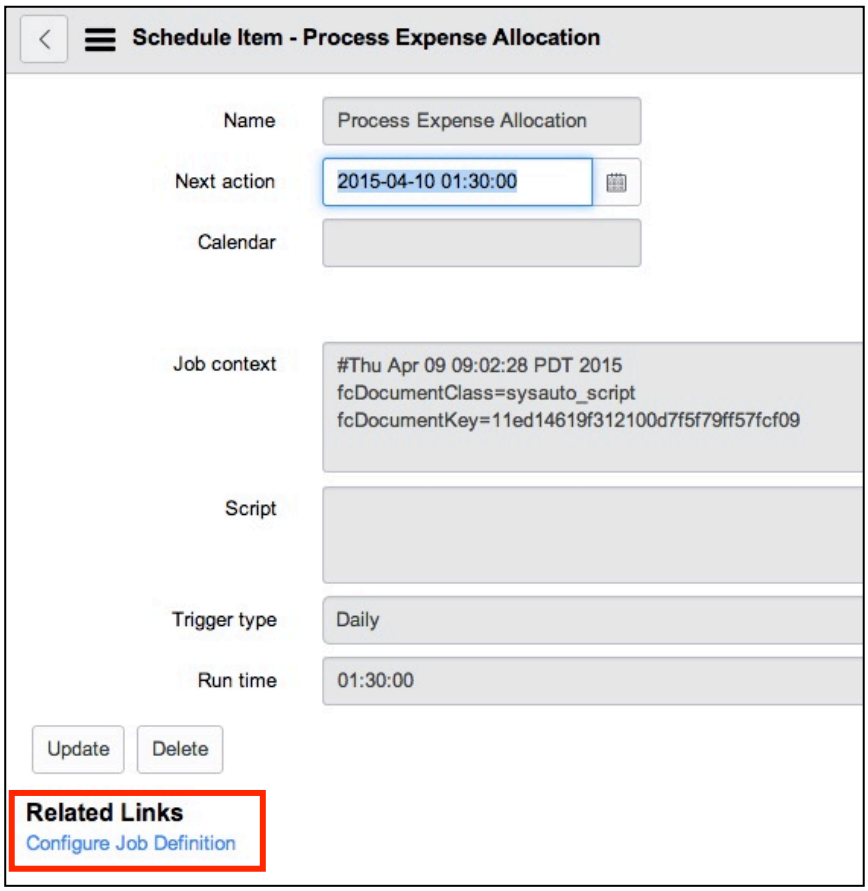


©2015 ServiceNow, Inc. All rights reserved.

5. Search for the job named **Process Expense Allocation** by typing **process expense** into the **Name** search box, then click on the job name to open the job.



6. Click **Configure Job Definition** at the bottom of the form.



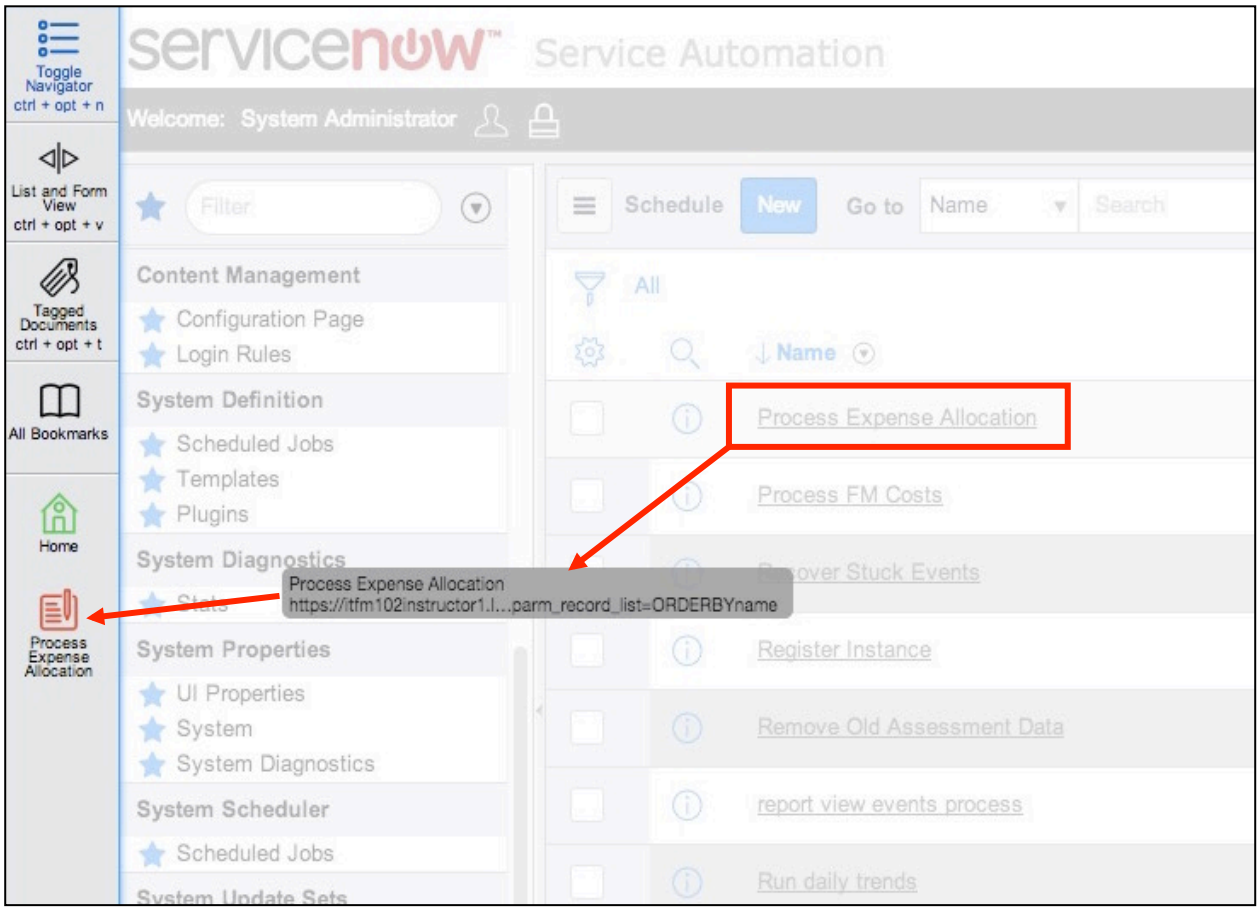
®2015 ServiceNow, Inc. All rights reserved.

7. Click **Execute Now** on the form header. This will run the job and process all expense allocations.



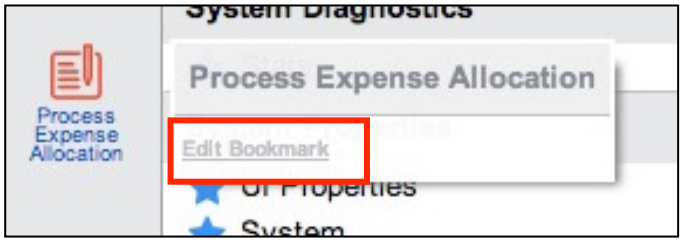
As we'll need to run this step again later, creating a bookmark will avoid having to repeat these steps. Bookmarks can be used to access any form or list of records. In this case we can create a new bookmark for the job form.

8. Click and drag, then release the **Process Expense Allocation** job onto the bookmark bar on the left of the screen. This will create a bookmark.

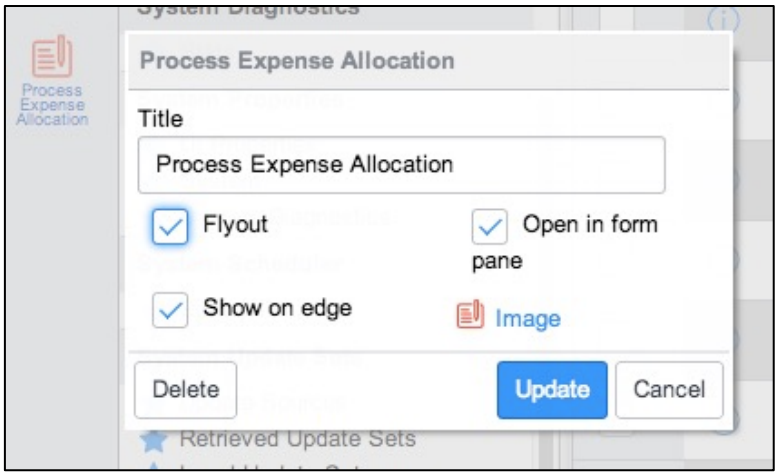


©2015 ServiceNow, Inc. All rights reserved.

9. Hover over the new bookmark then click **Edit Bookmark**.



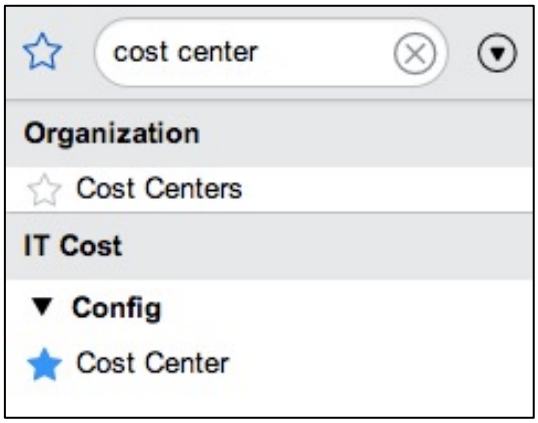
10. Tick the **Flyout** box then click **Update.** This allows the bookmark to be used without losing focus on the current activity.



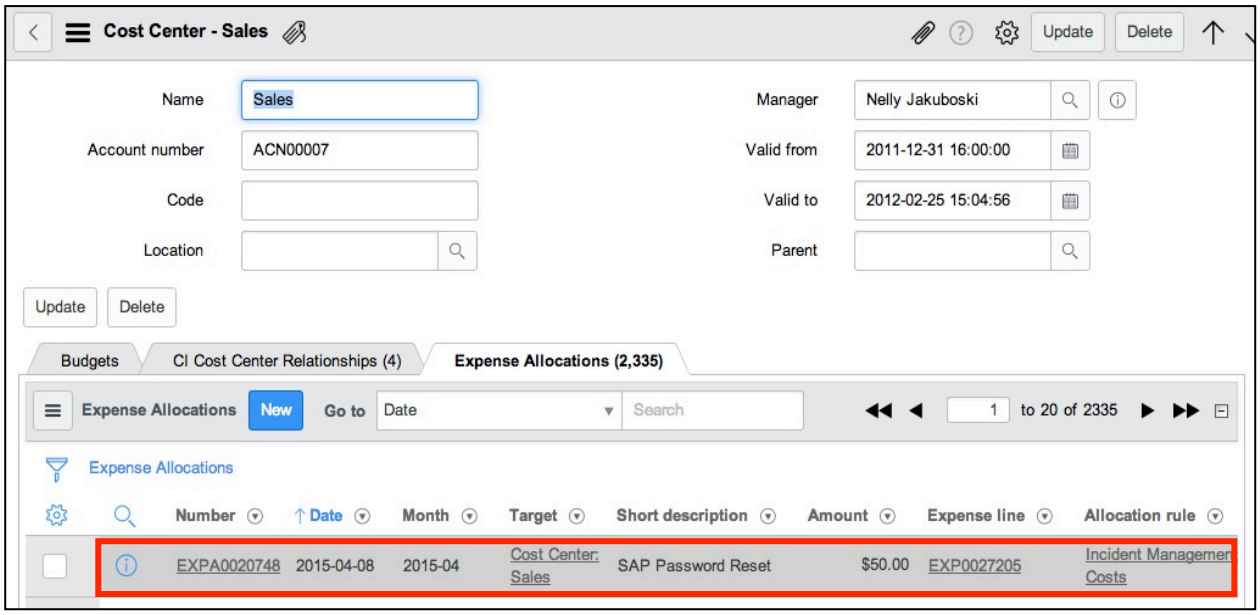
®2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

1. Navigate to **IT Cost > Cost Center** by typing **cost center** in the application navigator filter box.



2. Open the record for the **Sales** Cost Center and select the **Expense Allocations** Related List. Click the **Date** column to sort by most recent. There will be an Expense Allocation for the **SAP Password Reset** incident logged earlier for Natasha Ingram:

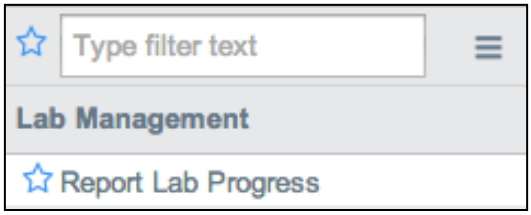


©2015 ServiceNow, Inc. All rights reserved.

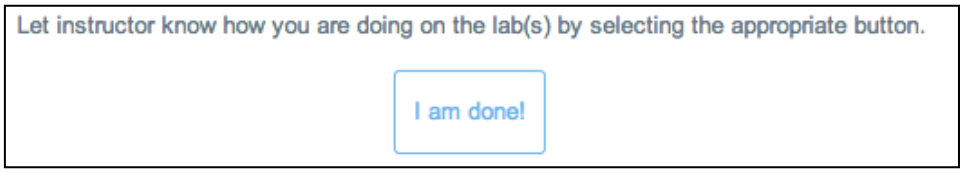
Progress Report

Let the instructor know you are done.

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



2. Click **I am done!**



©2015 ServiceNow, Inc. All rights reserved.

Lab Goal

Create an automatic charge back to a user's department for mobile assets requested through the Service Catalog. In this lab, you modify the workflow associated with mobile assets to create an expense line, create a new expense allocation rule to direct that expense to the user's department, and build a new report to see those charge backs

Lab 3 Mobile Asset Charge Back

What is Graphical Workflow?

The Graphical Workflow engine automates multi-step processes. Each workflow generates a sequence of activities, such as generating records or running scripts, and transitions between them based on conditions.

For each step in the workflow:

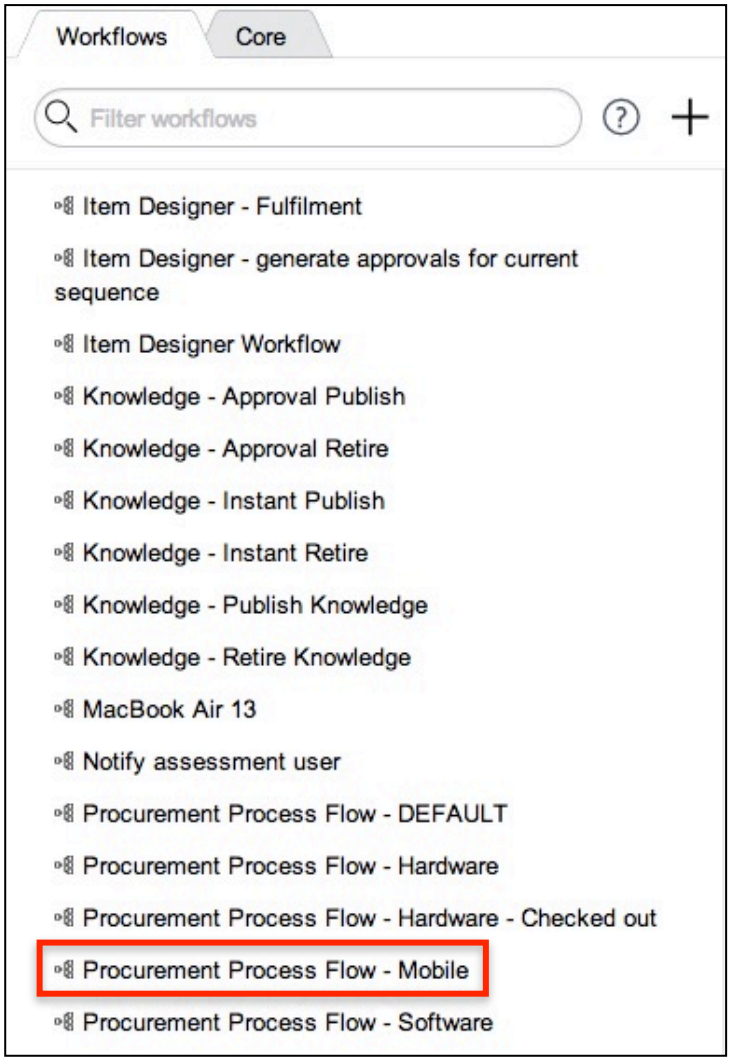
- An activity is processed; the behavior determined by the activity occurs.
- When the action completes, the workflow checks each of the activity's conditions.
- For each matching condition, the workflow follows the transition to the next activity.

When the workflow runs out of activities, the workflow is complete.

®2015 ServiceNow, Inc. All rights reserved.

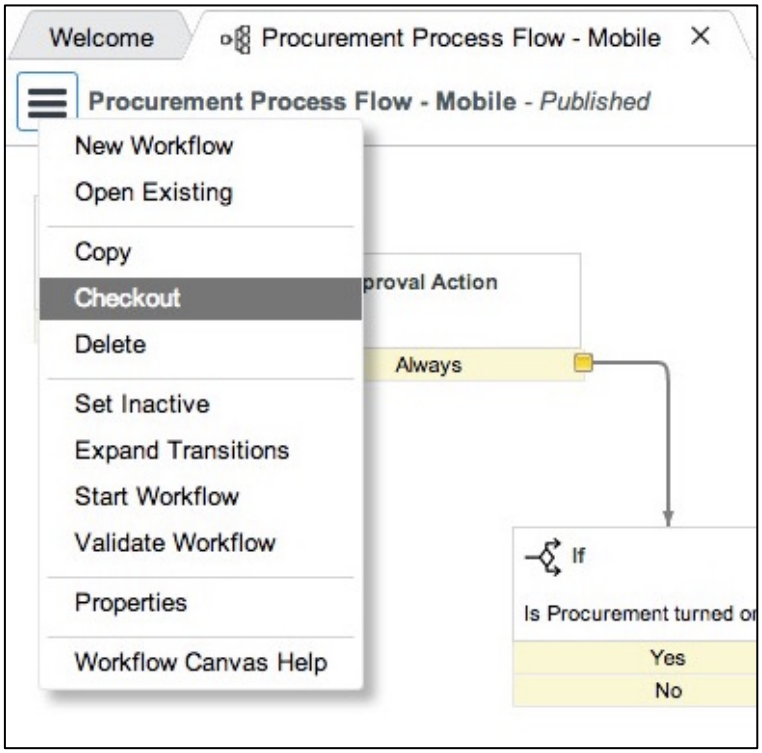
Create the Expense Generation Workflow Activity

1. Navigate to **Workflow > Workflow Editor**.
2. Use the **Workflows** list to select the **Procurement Process Flow – Mobile** workflow.



©2015 ServiceNow, Inc. All rights reserved.

3. At the top-left corner of the browser, click the ☰ (**hamburger** icon**)**, then select **Checkout**.



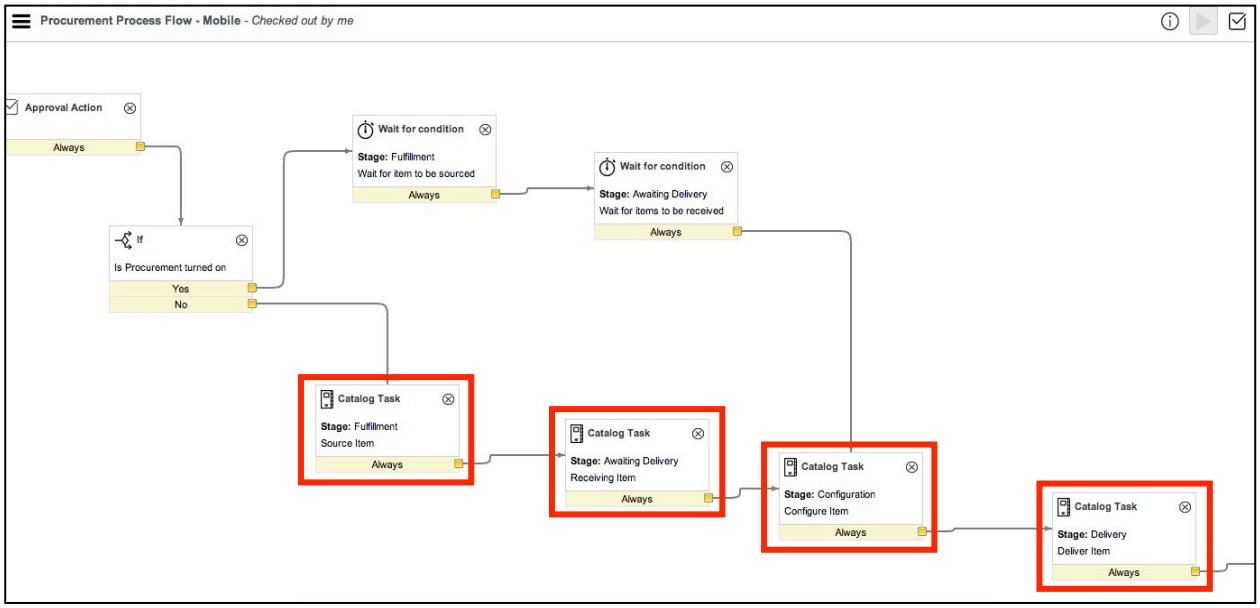
The Workflow menu

Checkout: Creates a personal Workflow Version, which can be edited. Click Checkout to open an existing, published workflow for edit. This option only appears on the menu when the current workflow has been published.

Publish: Makes the personal Workflow Version public, over-writing the current Published Workflow Version. Published workflows cannot be edited until checked out. This option only appears on the menu when the current workflow is checked out.

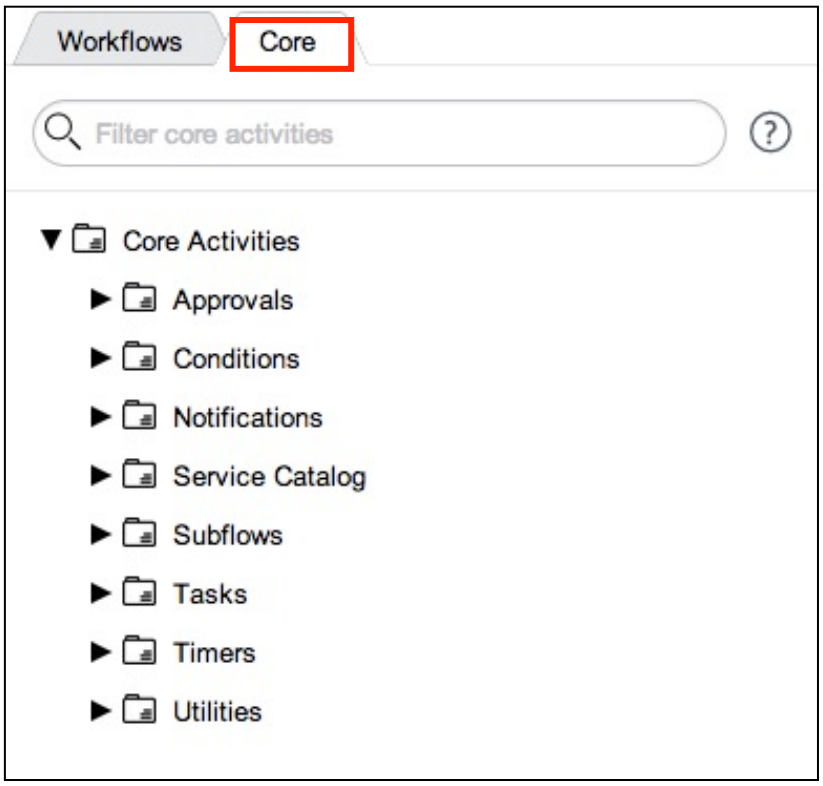
©2015 ServiceNow, Inc. All rights reserved.

4. Click on the ⊗ for all Catalog Task activities in the workflow, deleting all four (**4**) of them. You may have to scroll the window to view the far right activity. Delete all four.

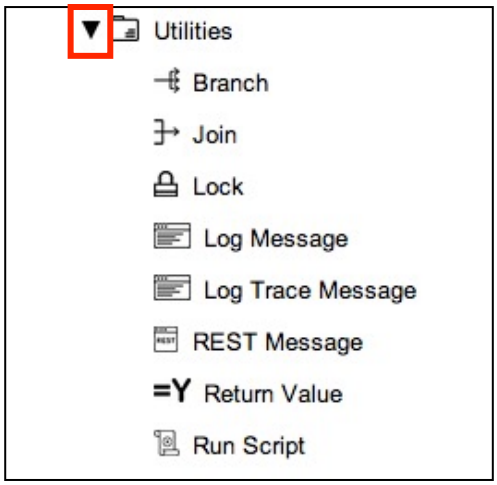


®2015 ServiceNow, Inc. All rights reserved.

5. On the right side of the browser, select the **Core** tab:

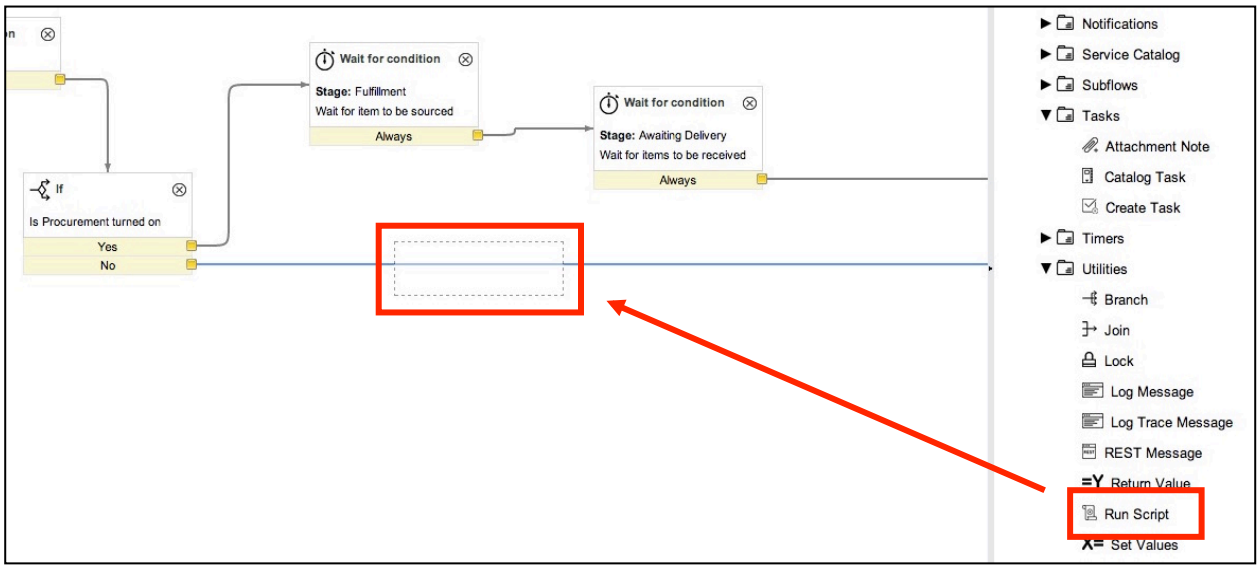


6. Expand the **Utilities** container by clicking the arrow:



©2015 ServiceNow, Inc. All rights reserved.

7. Click-and-drag the **Run Script** activity out onto the editor canvas, holding it over the line at the bottom of the workflow until the line turns **BLUE**, then release the mouse button.

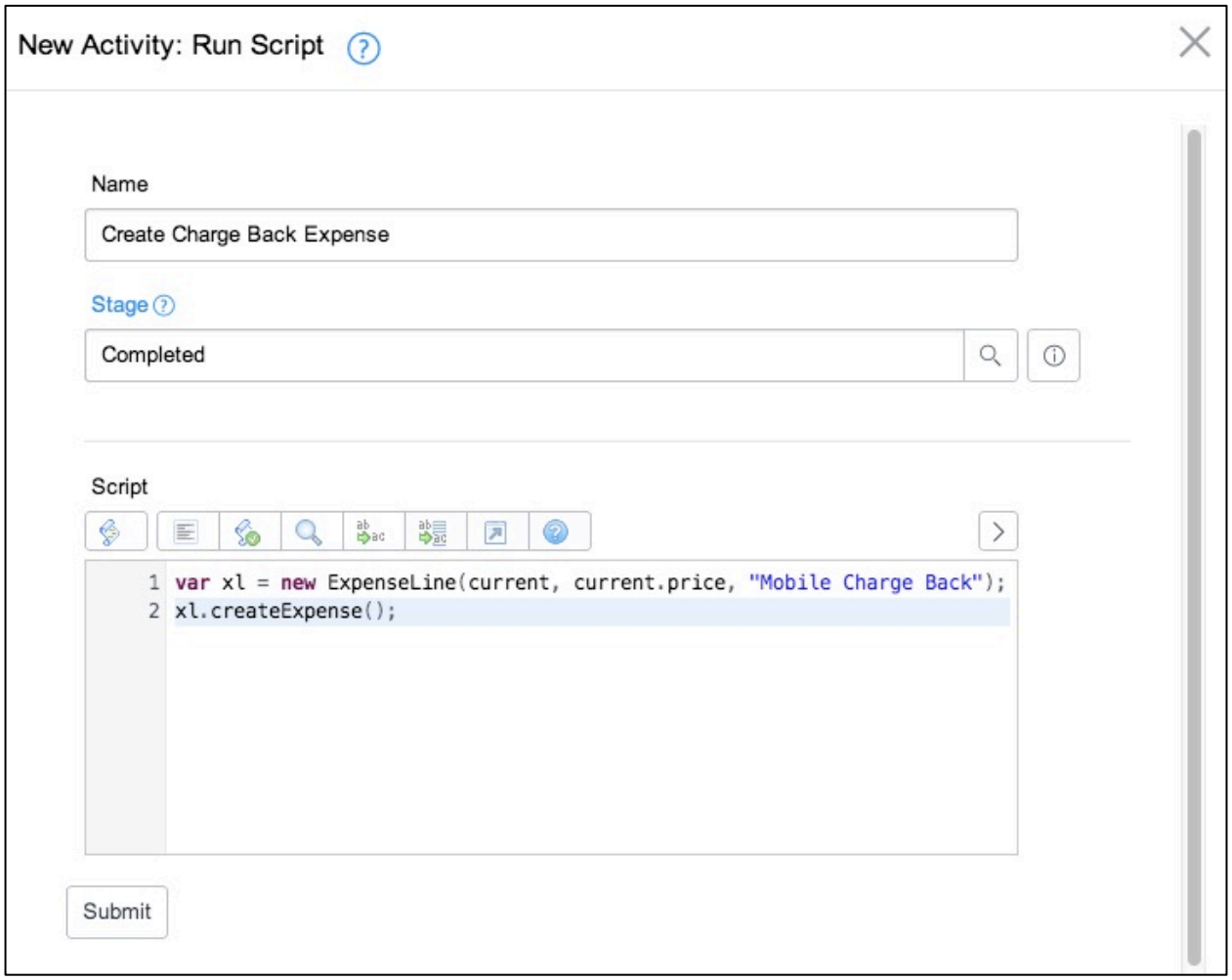


©2015 ServiceNow, Inc. All rights reserved.

8. Type **Create Charge Back Expense** into the **Name** field, select **Completed** in the **Stage** field, and enter the following two lines of JavaScript into the **Script** field:

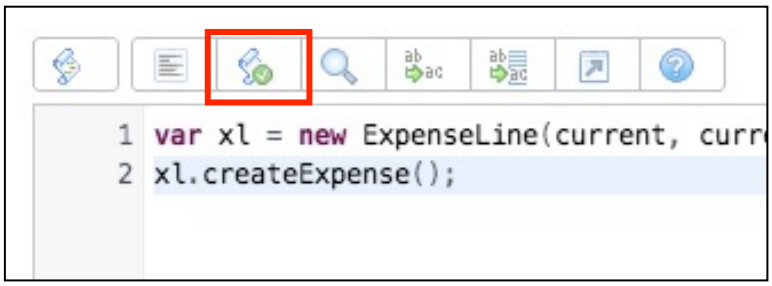
```
var xl = new ExpenseLine(current, current.price, "Mobile Charge Back");
xl.createExpense();
```

This short script will generate a new expense line record using the **Requested Item Number** (`current`), Requested Item Price (`current.price`) and a Short Description of `"Mobile Charge Back"`



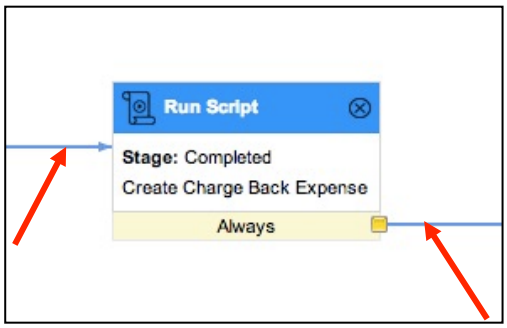
©2015 ServiceNow, Inc. All rights reserved.

9. Check the syntax of the script by clicking the **Check Syntax** button:

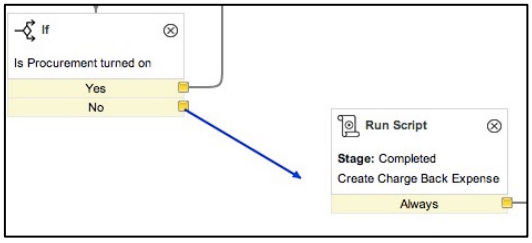


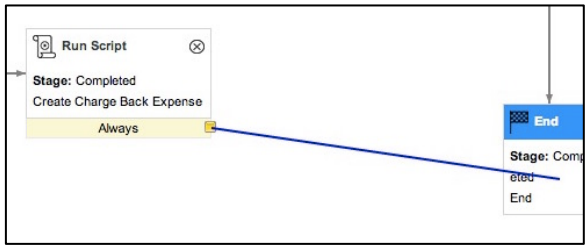
10. If the script executes correctly, click **Submit,** otherwise check the script for errors.

11. Ensure the **Create Charge Back Expense** activity is connected to the workflow.



12. (Optional) Only if the activity is not connected (the line did not turn BLUE), click on the line passing under/by the activity, press the **Delete** key, click-and-drag from the **No (yellow square)** port of the **Is Procurement turned on** activity to the **Create Charge Back Expense** activity. Repeat the click-and-drag from **Create Charge Back Expense** activity to the **End** activity.





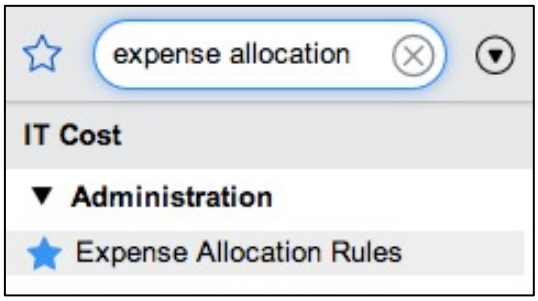
13. Click the ≡ (**hamburger icon)**, then click **Publish**.

14. Close the browser tab to navigate back to the main ServiceNow system.

©2015 ServiceNow, Inc. All rights reserved.

Create the Expense Allocation Rule

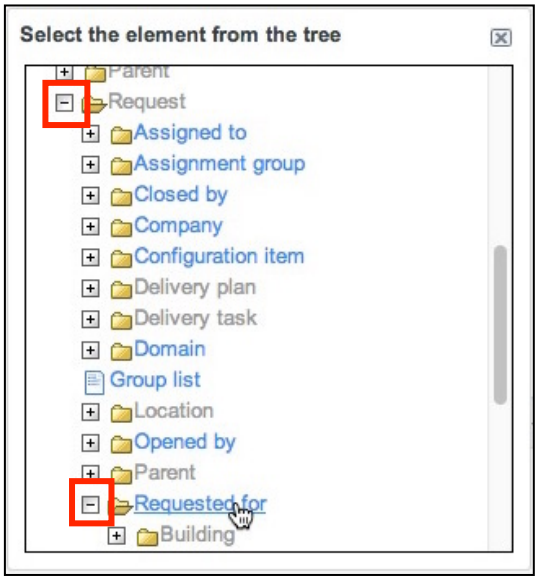
1. Navigate to **Cost Management** > **Expense Allocation Rules** by typing **expense allocation** in the application navigator filter box.

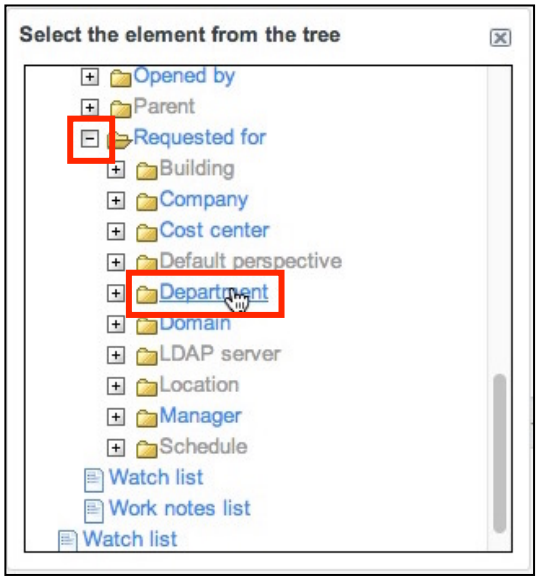


®2015 ServiceNow, Inc. All rights reserved.

2. Click the **New** button, then enter the following details:

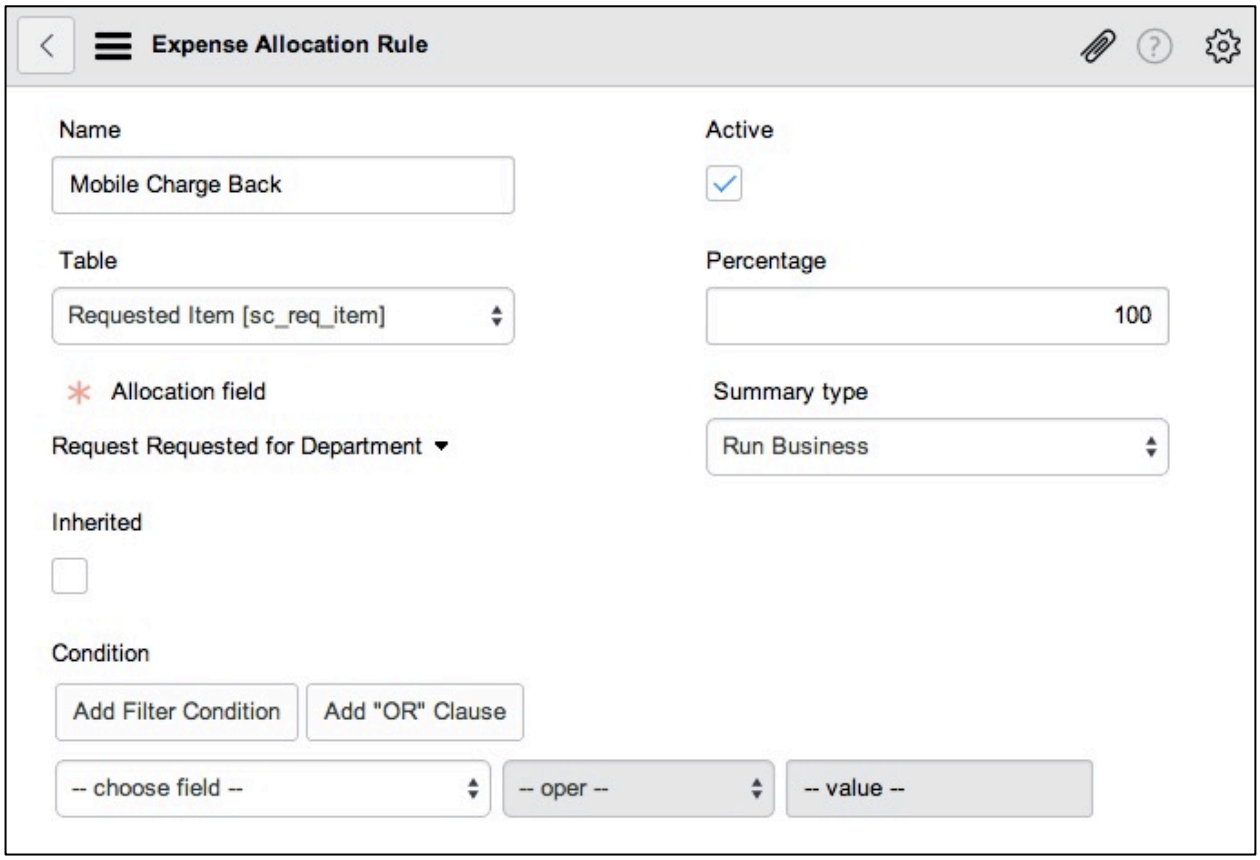
   Name: **Mobile Charge Back**
   Table: **Requested Item [sc_req_item]**
   Allocation Field: **Request > Requested for > Department** (Click the plus (**+**) to expand **Request**, then click **+** next to **Requested for**, then select **Department**)





   Active: **True (checked)**
   Percentage: **100**
   Summary Type: **Run Business**
   Inherited: **False (un-checked)**
   Condition: **(leave empty)**

®2015 ServiceNow, Inc. All rights reserved.



3. Click **Submit**.

®2015 ServiceNow, Inc. All rights reserved.

Order Some Mobile Devices to Generate Charge Back Records

1. Click the **Head Silhouette** icon to impersonate Abel Tuter, a member of the Product Management department.

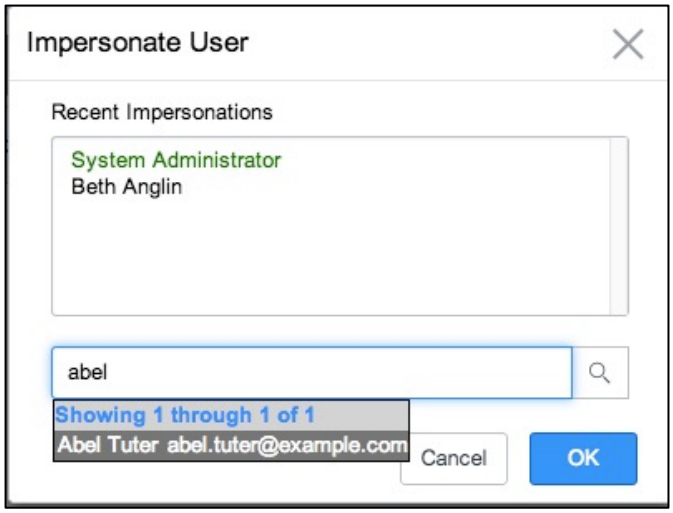


Impersonating a User

Administrators can impersonate other users for testing purposes. When impersonating another user, the administrator has access to exactly what that user would have access to in the system, including the same menus and modules. ServiceNow records anything the administrator does while impersonating another user as having been done by that user.

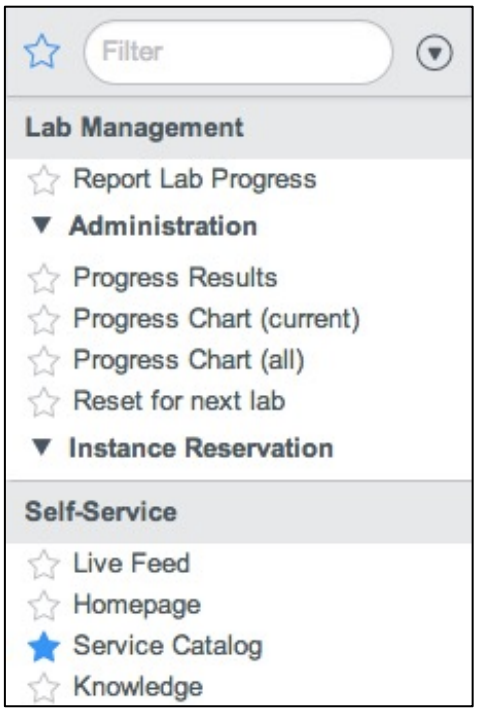
Use this feature to test what different users can do in the system and to perform actions for them in their stead.

2. Type **abel** in the **Lookup Box**, click **Abel Tuter**, then click **OK**.



©2015 ServiceNow, Inc. All rights reserved.

3. Navigate to **Self-Service > Service Catalog** in the application navigator.



Service Catalog

The Service Catalog application is a way for customers to order pre-defined, bundled goods and services from your IT organization or other departments. It offers a consistent and intuitive online ordering experience with as much flexibility as you need. The catalog is a structured commodity with its own description, fields, price, and execution schedule.

End users will see all the goods and services they can order (a new laptop, an office desk, business cards...), grouped into categories (IT, Facilities, Office and Printing...) and subcategories (Computer Hardware, Furniture and Decor, Document Services...).

Once an order is placed, the customer can track its progress against the execution plan. **Approvers** will authorize the order if necessary, and **Fulfillment Groups** perform any tasks related to item/service delivery, based on the tickets (work orders) generated by the order.

©2015 ServiceNow, Inc. All rights reserved.

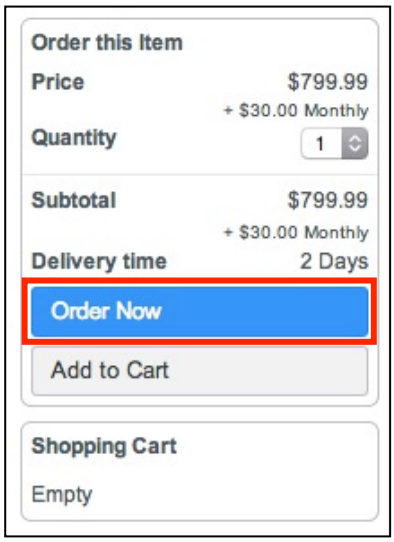
4. Click on **Hardware**.



5. Click the **Apple iPhone 5**.



6. Click **Order Now**.



7. Repeat steps 1 through 6 for **Adela Cervantsz**, a member of Customer Support.

©2015 ServiceNow, Inc. All rights reserved.

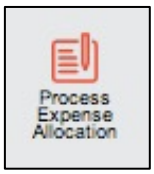
Create the Charge Back Report

Reports

In ServiceNow, a report can be a list, chart, or calendar-based view of data in a particular table. ServiceNow also offers a range of predefined reports that pertain to applications and features like incident management and service catalog requests. If none of these meet your needs, you can create your own reports at any time. Use reports on homepages to display key information to different users. You can also publish reports to a URL that can be sent out through email.

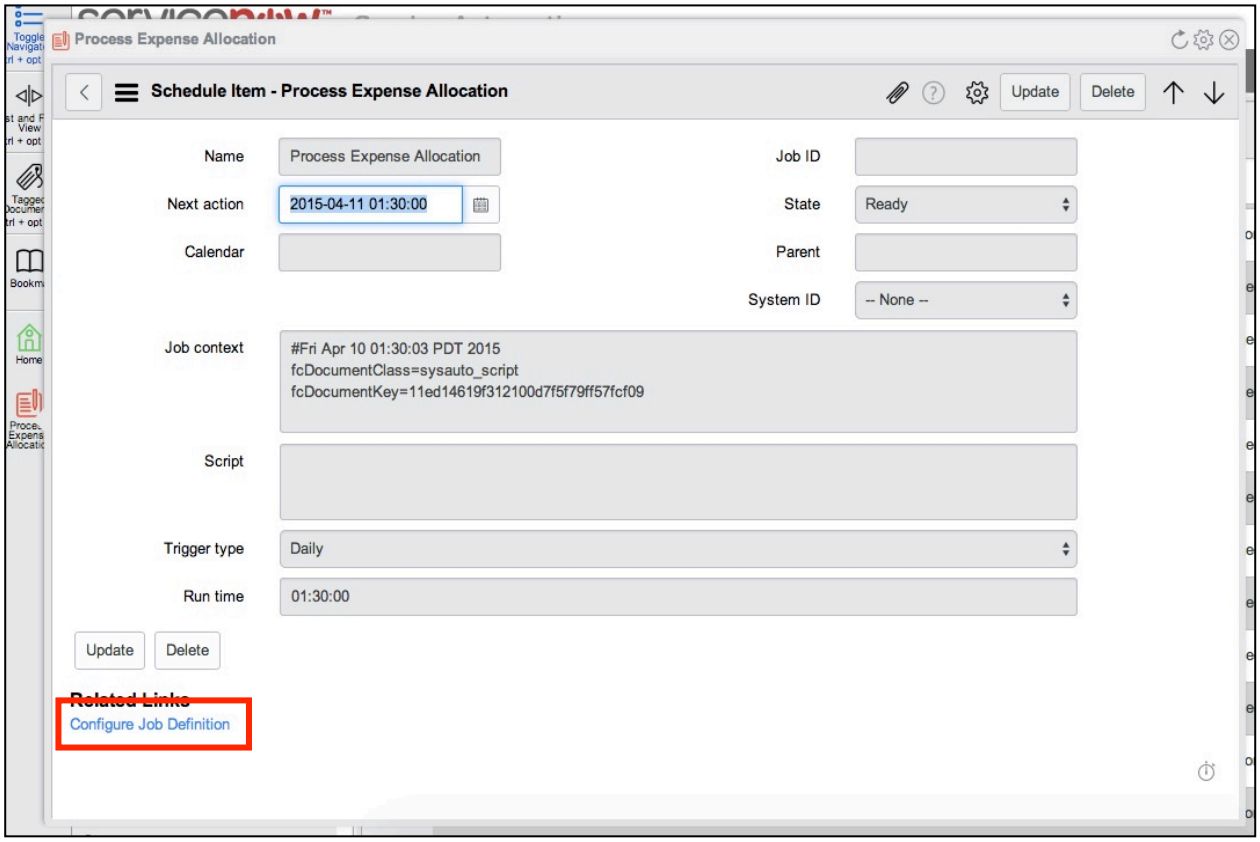
1. Return to **System Administrator** persona (e.g., steps 1 and 2 in previous section), only double-click the green **System Administrator** under **Recent Impersonations**.

2. Click the **Process Expense Allocations** bookmark created earlier.



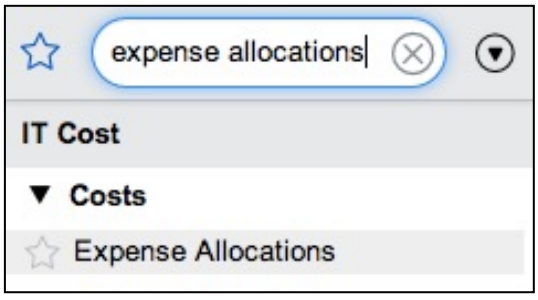
©2015 ServiceNow, Inc. All rights reserved.

3. Scroll down and click **Configure Job Definition**.



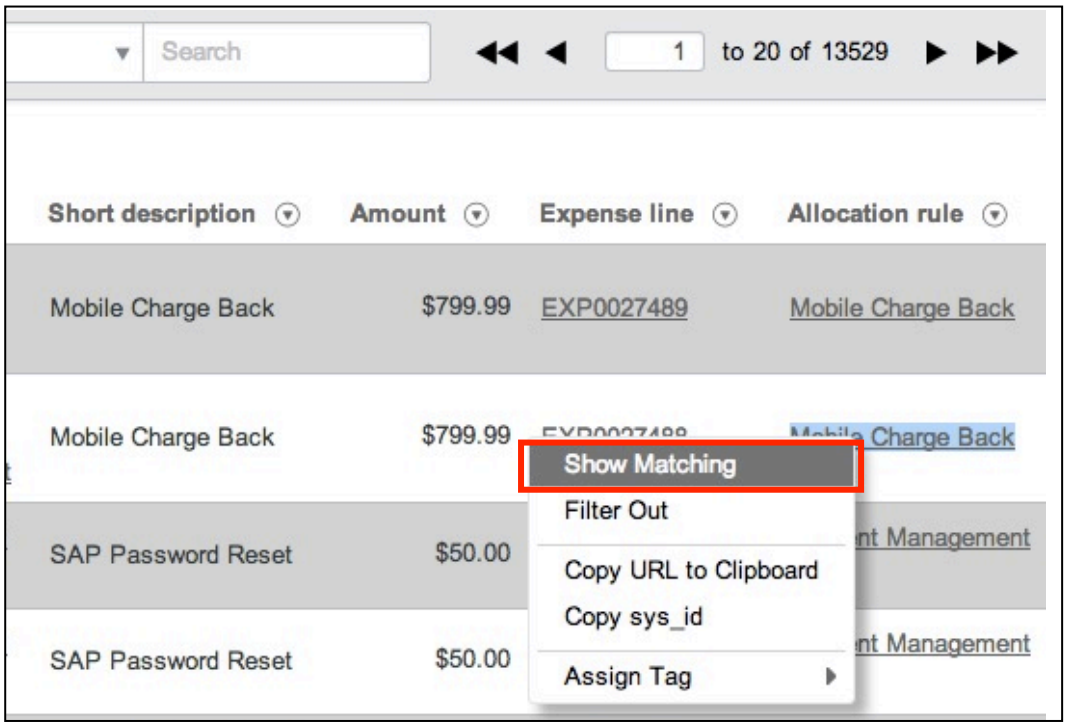
4. Click **Execute Now** and close the Flyout using the ⊗ button.

5. Navigate to **IT Cost > Expense Allocations** by typing **expense allocations** in the application navigator filter box.

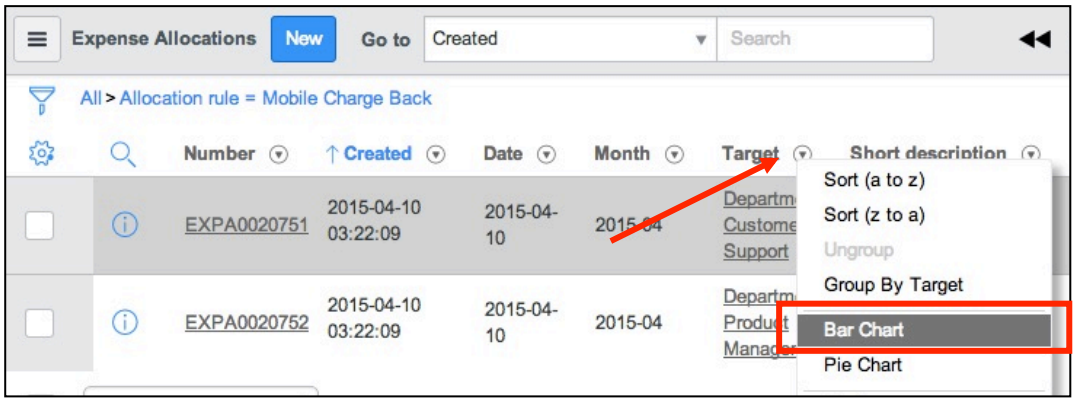


©2015 ServiceNow, Inc. All rights reserved.

6. In the right-most column, right-click on one of the **Allocation rule** fields that contain **Mobile Charge Back** (should be at the top of the list), and click **Show Matching**.

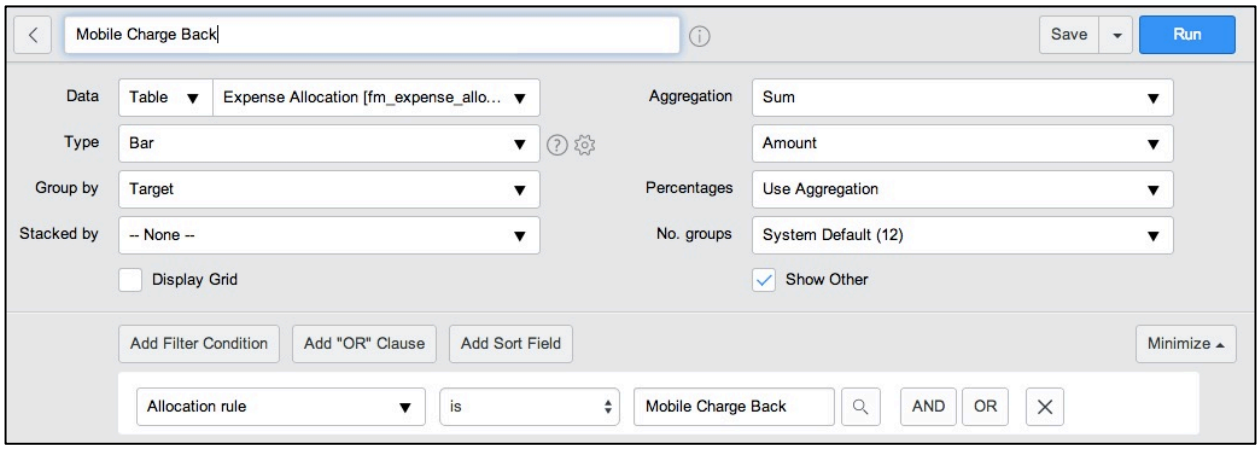


7. In the list header, click the icon on the **Target** column header, and click **Bar Chart**.



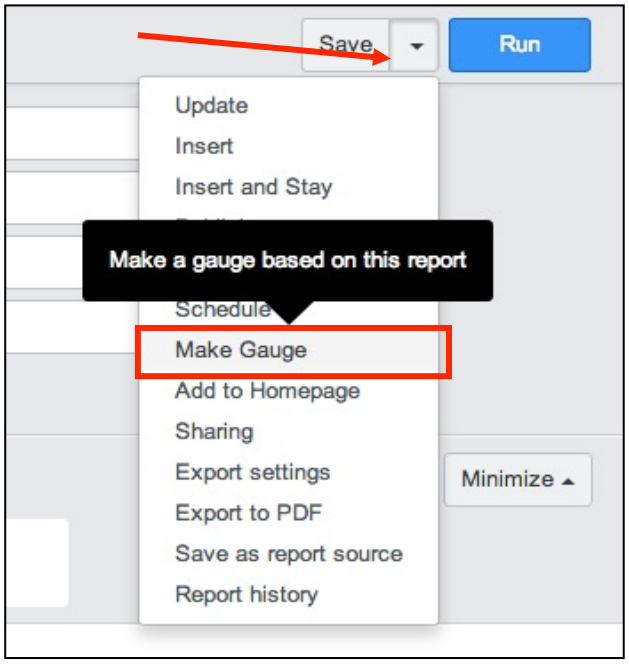
©2015 ServiceNow, Inc. All rights reserved.

8. Enter **Mobile Charge Back** in the **Name** field, and select **Sum > Amount** in the **Aggregation** field.



9. Click **Save**.

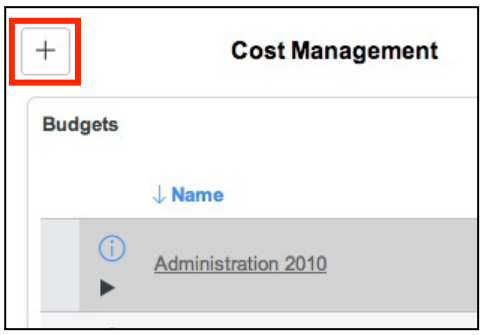
10. Click the **down** arrow next to the **Save** button and select **Make Gauge**.



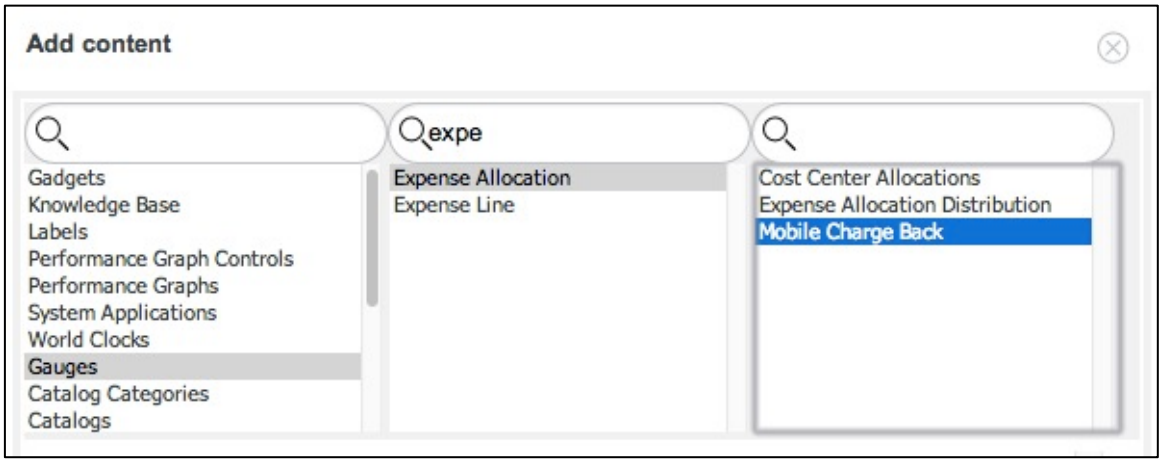
11. Navigate to **IT Cost > Cost Overview**.

©2015 ServiceNow, Inc. All rights reserved.

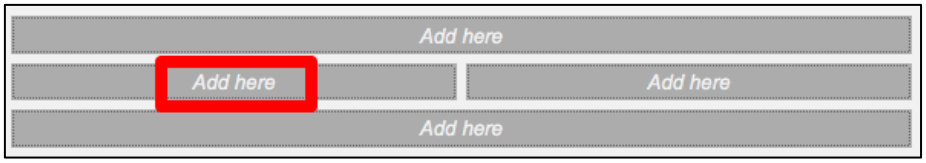
12. In the top-left corner of the dashboard, click the (**+**) button.



13. Select **Gauges > Expense Allocation > Mobile Charge Back**.

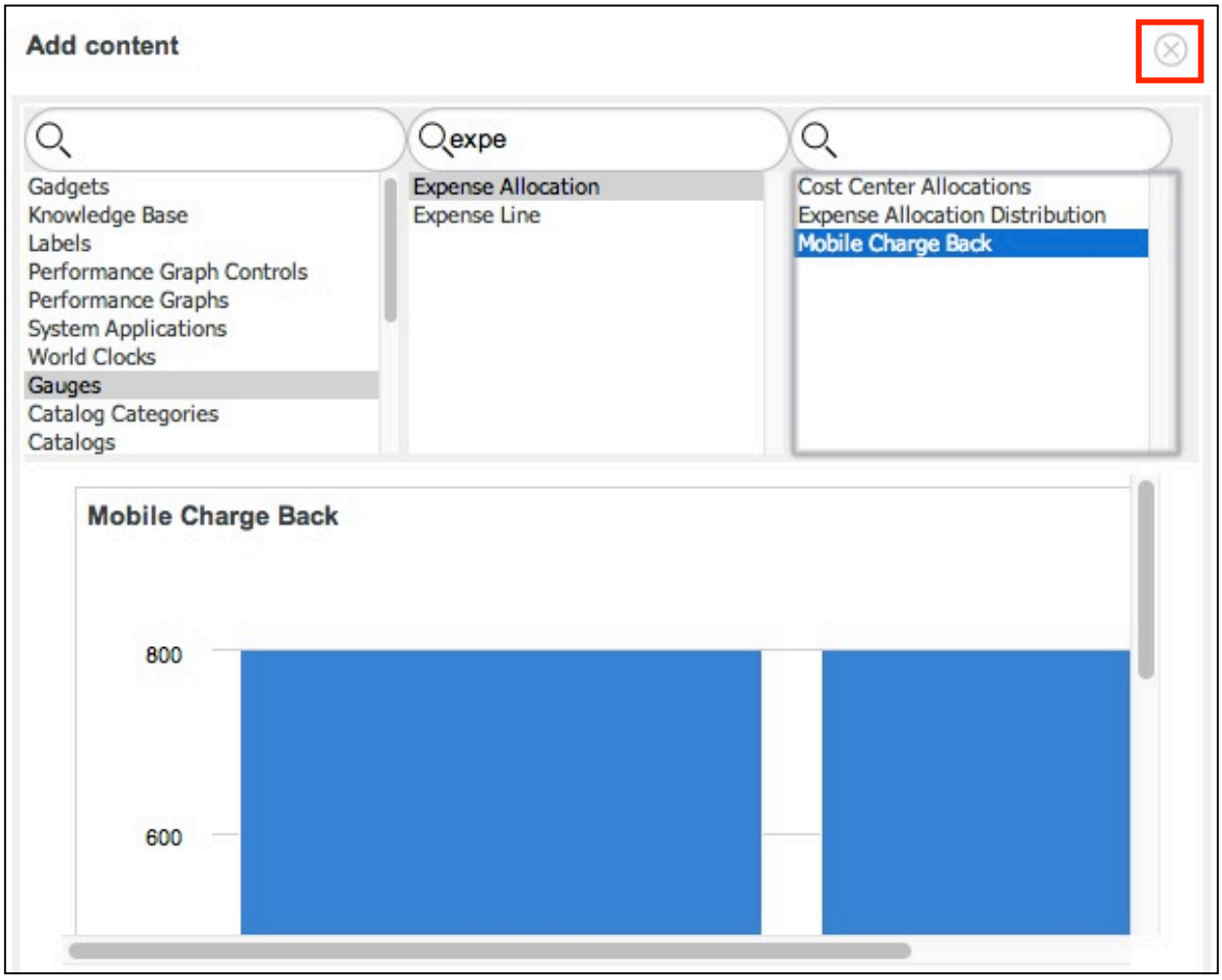


14. Click on the left **Add here** button.



®2015 ServiceNow, Inc. All rights reserved.

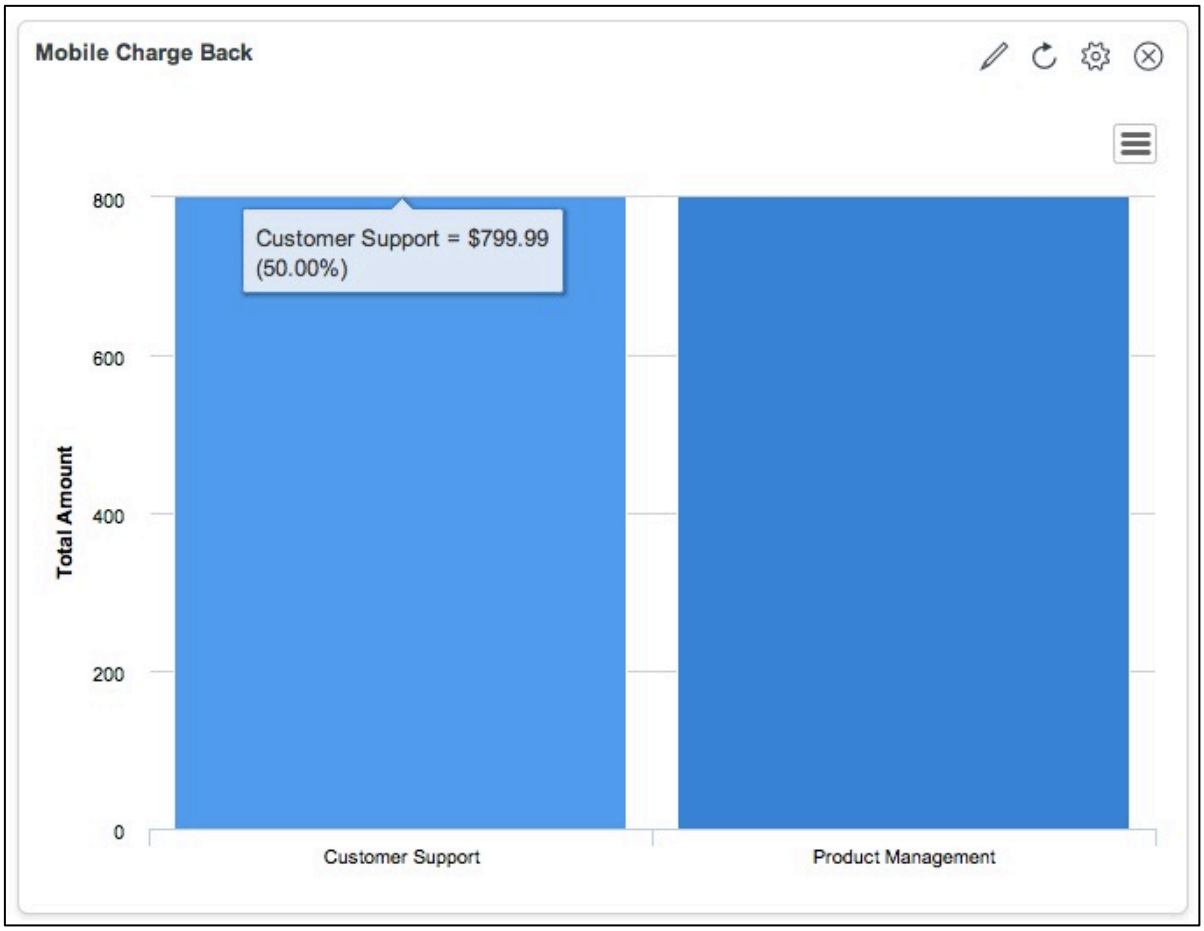
15. At the top-right corner of the **Add content** dialog, click the ⊗



©2015 ServiceNow, Inc. All rights reserved.

Lab Success Verification

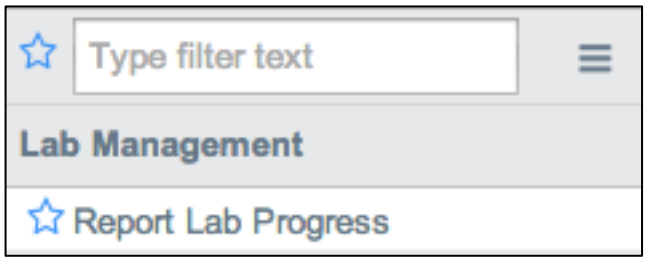
1. The charge backs for the mobile phone orders you made as Abel and Adela should be in the new **Mobile Charge Back** gauge.



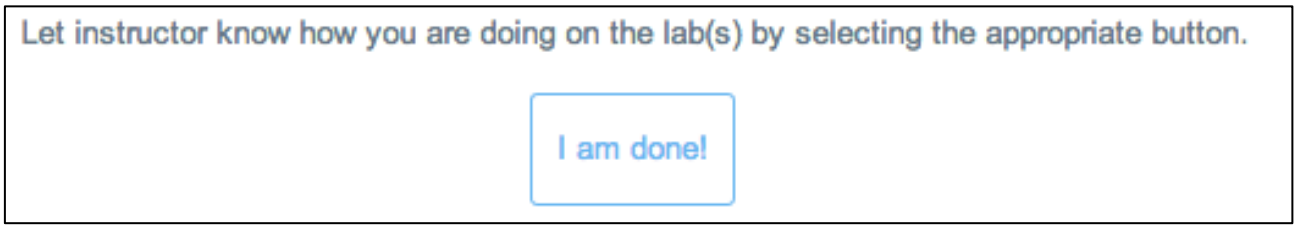
©2015 ServiceNow, Inc. All rights reserved.

Progress Report

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



2. Click **I am done!**



©2015 ServiceNow, Inc. All rights reserved.