What is this ITSM Assessment tool?
The ITSM Assessment Update Set (v1.0) is free to any ServiceNow customer that is interested in discovering how well their Business Stakeholder/Approver users are utilizing these paid ITSM subscriber roles.

A Business Stakeholder / Approver is licensed to do two things on the ServiceNow platform:

- Review, Approve or Reject things
- Examine reports on ITSM data (*beyond just data on themselves, but rather all ITSM data for all users*)

The ITSM Assessment tool will examine the usage patterns of these users to see how well-used these privileges are. If they are not being used, or are being used infrequently, you could correct this by investing in **Checklist Pro** and replacing "Approval" requests in your workflows with Checklist Approvals.

Free, "Requester" users (*i.e., those without any ServiceNow roles*) can be assigned Checklist Approvals and these approvals can be called just as easily in your Flows / Workflows as the out-of-the-box Approvals (*which required Business Stakeholder / Approver subscription licenses)*.

How Does it Work?
There is a scheduled job called "CLP Approver Assessment" which runs as the System Administrator (admin) in the Global scope on a daily basis to examine two things:

- All sysapproval_approver records created in the past year
- The syslog_transaction records (*in search of Report & Dashboard viewing activity*)

Important Notes:

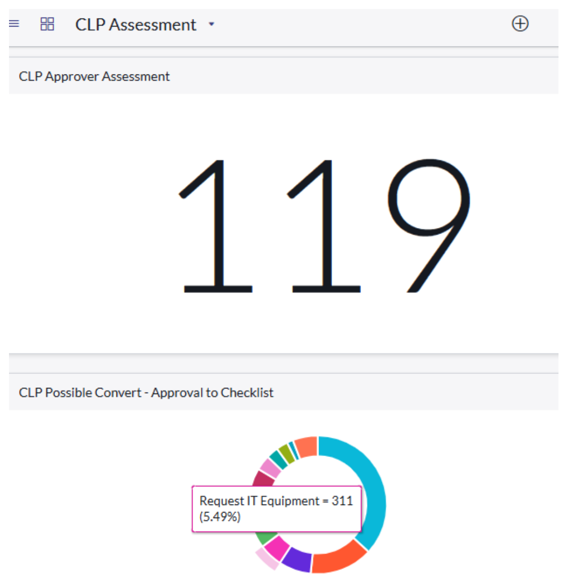
1. Examining the transaction history needs to run in the Global scope as an admin user account due to ServiceNow table access controls. Running in a scoped app would require changes to ACL permissions.
2. It is important to run this scheduled job every day as the Transaction table has a limited capacity, usually only keeping transactions from the last 45 days, thus, to gain accurate knowledge of whether users are reviewing reports and/or dashboards, it is important to have this scheduled job run daily. It will take time before this tool can get accurate information about if, or how frequently users are viewing reports / dashboards. The longer the scheduled job runs, the more accurate the data will be.

The schedule job makes uses of the u_clp_license Database View (*included in this update set*) for determining what is the class of user (Business Stakeholder / Approver, Fulfiller or Requester) found in the Approval records or the Transaction records.

As these records are scanned, information about each user is updated in the u_clp_approver_assessment table (*a custom table included in this update set*). This table contains the following information:

- User: Reference to the user record in the sys_user table
- Type: Business Stakeholder, Fulfiller or Requester
- Report Count: a count of how many reports or dashboards this person looked at in the past year
- Last Report View: a Date/Time field holding the most recent report/dashboard view
- Approval Count: a count of how many Approval records this person completed in the past year
- Last Approval: a Date/Time field hold the most recent Approval record completion.

Next, we've created a dashboard called "CLP Assessment" which has two reports:
- CLP Approval Assessment
- CLP Possible Convert – Approval to Checklists



These reports can be tweaked to expand or shrink the list of Business Stakeholder/Approver candidates.

The CLP Possible Convert – Approval to Checklist report calls a script include from the update set called CLPAssessUtil().bsConvCandidates() to find the list of users from our CLP Approval Assessment table and the Catalog Item workflows that were executed to help give a perspective of where the work ahead to remediate may exist if there were an interest in converting out-of-the-box approvals (*which incur subscription license costs*) to free Checklist Approval records.

TYGR has a growing list of Checklist Pro certified ServiceNow Partners that can assist with this assessment and remediation process.

Visit https://checklistpro.app/#get-started to schedule a meeting and learn more.