

Capstone Project Challenge Format

60 - 90 Minutes

Capstone Tasks Overview

The Capstone Project has been divided into five task categories to guide your deployment:

1. Incident Management Configuration
2. User Administration
3. Service Catalog Item Fulfillment Automation
4. Update Knowledge Base
5. Task Assignment and Communication
6. Scheduled Reports

These tasks correlate to topics found in the ServiceNow Administration Fundamentals materials.

To successfully complete the Capstone Project, you will need the ServiceNow Administration Fundamentals Course Materials.zip file you downloaded in Lab 1.1.

Task 1: Update Incident Management

Modify the Incident form so that it can support a new process for troubleshooting technical issues reported by Strawberry sFone users. To enable this, you will need to create a new field, configure the default view of the Incident form, and add a new choice (sFone) to the Category field.

Hint: These items were covered in Module 3. Look for concepts such as adding new fields to a form, creating list views, and adding category and reference values.

A. Modify the Incident Form

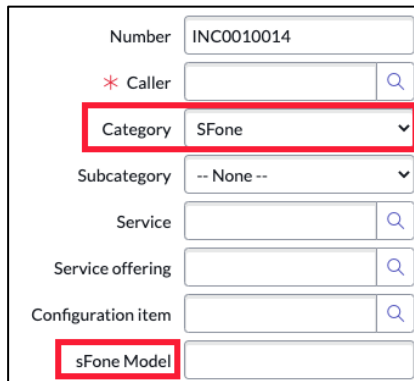
1. Create a new field and add it to the Default view of the Incident form with the following properties:
 - Name: **sFone Model**
 - Type: **String**
 - Field length: **Small (40)**
2. Configure the Default View and place the **sFone Model** field beneath the **Configuration item** field.
3. Modify the **Category** field on the Incident form to include a new **sFone Model** as a new choice.

4. Create a Non-P1 sFone Incident using the following information:

- Caller: **Megan Burke**
- Category: **sFone**
- Short Description: **My sFone will not turn on.**

Task 1 Verification

Upon completion of this task, you should have a modified **Default** view of the **Incident** form. These forms should allow **sFone Model** data to be entered. The forms should also have an additional choice (sFone) in the **Category** field drop-down menu.



The screenshot shows the Incident form with the following fields and values:

- Number: INC0010014
- * Caller: (empty)
- Category: SFone
- Subcategory: -- None --
- Service: (empty)
- Service offering: (empty)
- Configuration item: (empty)
- sFone Model: (empty)

The **Category** and **sFone Model** fields are highlighted with red boxes.

Task 2: User Administration

Create a new user group that is responsible for troubleshooting Strawberry sFone incidents and fulfilling Service Catalog Strawberry sFone requests.

Hint: These items were covered in Module 2 and 3. You will find similar concepts in Lab 2.3. User administration pertains to system security. Modules found on the All menu will allow you to manage users, groups, and roles. There is one slight difference to what you practiced in class. In this scenario, you will create a **child group** that resides under the already existing Service Desk group.

A. Manage Users, Groups, and Roles

1. Navigate to the existing **Service Desk** group.
2. Use the **Groups** tab to create a new child group called **Strawberry Support**. Make Fred Luddy the group manager.
3. Add the **itil** role to the **Strawberry Support** group.
4. **Create or add** the existing users to the **Strawberry Support** group:
 - Beth Anglin
 - Bud Richman
 - David Loo
 - Kara Prince

- Waldo Edberg

Note: To add existing users, you **Edit** group members. If a person does not exist, you create **New** members.

- Select **Fred Luddy** as the **Manager** in Kara Prince's user record.

Note: Remember, sometimes you must modify a form to see the fields you need.

Task 2 Verification

Upon completion of this task, you should have a new child group called Strawberry Support that contains the users depicted below. Ensure the group manager is Fred Luddy and the group has been granted the itil role.

The left screenshot shows the 'Group Strawberry Support' form. The 'Name' field is 'Strawberry Support', the 'Manager' is 'Fred Luddy', and the 'Description' is empty. Below the form are 'Update' and 'Delete' buttons. The 'Roles (1)' tab is selected, showing a list of roles. The 'Group Members (5)' tab is also visible, showing a list of users: Bud Richman, Beth Anglin, David Loo, Waldo Edberg, and Kara Prince.

The right screenshot shows the 'Roles (1)' tab for the 'Strawberry Support' group. It displays a table with one entry:

Created	Role
2022-10-13 07:26:06	itil

Task 3: Automate Service Catalog Item Fulfillment

Automation can be accomplished using **Flow Designer Flows**. Create a flow to automate the fulfillment process for a service catalog item. First, you will **import a Strawberry sFone** item into the Service Catalog to be requested, and then develop a **Flow Designer flow** to support and complete the fulfillment process.

Hint: You will use concepts learned in Module 8 (retrieving and update set, previewing that update set, then committing). For additional information on creating a new flow, refer to Module 4 slides and labs.

Configure your developer instance to accomplish the following:

A. Import a Service Catalog Item

- Import an Update Set (**cd_sfone_catalog_item.xml**), which contains the sFone Service Catalog item, into the instance. Remember to retrieve, preview, and then commit!

B. Create a New Flow Designer Flow

For this activity, refer to Lab 4.2 (Create a Flow Designer Flow) to reflect on what you learned about maintaining catalog items, the Flow Designer interface, Actions, Triggers, and working with data pills. If you need additional guidance, review the Capstone Project Task 3 Flow Designer Help file.

1. Develop an automated process named **Strawberry Workflow** to fulfill Strawberry sFone Service Catalog requests. It should feature the following activities in this particular sequence:
 - Approval by the requester's manager:
 - a) The **Approved** path marks the requested item as approved with an **Approval Action**.
 - b) The **Rejected** path marks the requested item as rejected, sends a rejection email to the requester, and then ends the workflow.
 - Definition of the Approved path (three Catalog Tasks):
 - a) Catalog Task 1 details the steps for **ordering** the Strawberry sFone item and is assigned to the **Procurement** group.
 - b) Catalog Task 2 details the steps for **configuring** the Strawberry sFone and is assigned to the **Software** group.
 - c) Catalog Task 3 details the steps for **delivering** the Strawberry sFone and is also assigned to the **Service Desk** group.
2. Upon completion of all three catalog tasks, mark the requested item complete.

Task 3 Verification

A. Test the Flow – Order a Strawberry sFone

Note: To test the Flow, you will impersonate David Loo and order the Strawberry sFone. Then you will impersonate David's manager to approve the request.

1. Impersonate **David Loo**.
2. Navigate to **All > Self-Service > Service Catalog**.
3. Select the **Mobiles** category.
4. Locate and select the **Strawberry sFone** item.
5. Confirm the *title*, *description*, and *picture* are displayed.
6. Click **Order Now**.
7. Impersonate **Bud Richman** (David's manager).
8. Navigate to **All > Service Desk > My Approvals**.
9. Open the approval request by selecting the **Requested** hyperlink.
10. Click **Approve**.
11. **End impersonation**.

B. Complete the Tasks to Fulfill the Request

Note: As the System Administrator, you will test the flow logic by completing the catalog tasks rather than impersonating users in the fulfillment groups.

1. Navigate to **All > Service Catalog > Open Records > Tasks**.
2. Open the task with the short description, **Order the Strawberry sFone**.
3. Select **Close Task**.
4. From the **List Controls** menu, select **Refresh List** (or refresh your browser).
5. Open the task with the short description, **Configure the Strawberry sFone**.
6. Select **Close Task** and **Refresh** the list.
7. Open the task with the short description, **Deliver Strawberry sFone**.
8. Select **Close Task**.

C. Review Flow Execution

1. Navigate to **All > Process Automation > Flow Designer**.
 2. Select **Executions**.
 3. Open the **Strawberry Workflow execution**.
1. Review the status of the workflow (Completed) and the State of each step. Is it what you expect? If not, troubleshoot and work through the Lab Verification steps again.

EXECUTION DETAILS Strawberry Workflow			Completed	Open Flow	Open Context Record
Show Action Details		State	Start time		
FLOW STATISTICS		Run as: System	Open Flow Logs	Completed	2023-09-08 18:00:22 1634ms
TRIGGER					
Catalog Item Requested					
ACTIONS					
1	Ask For Approval	Core Action	Completed		2023-09-08 18:00:22 2245ms
2	Wait For Condition	Core Action	Completed		2023-09-08 18:02:32 2ms
3	If Requested Item Approved	Flow Logic	Evaluated - True		2023-09-08 18:02:32 444ms
4	Create Catalog Task Order	Core Action	Completed		2023-09-08 18:02:32 185ms
5	Create Catalog Task Configure	Core Action	Completed		2023-09-08 18:02:55 90ms
6	Create Catalog Task Deliver	Core Action	Completed		2023-09-08 18:03:10 169ms
7	Else If Requested Item Rejected	Flow Logic	Evaluated - False		0ms
8	Send Email		Not Run		0ms
9	End	Flow Logic	Not Run		0ms
10	Update Record	Core Action	Completed		2023-09-08 18:03:24 131ms
ERROR HANDLER					

Task 4: Update Knowledge Base

Populate the Knowledge Base with a new category that will contain two articles to support internal requesters and fulfillers. Additionally, you will apply company security protocols to ensure information is accessible only to the appropriate parties.

Note: *The publishing and retirement processes for a knowledge article are controlled by workflows defined for the knowledge base that the article belongs to. You will enable automatic publishing for the IT Knowledge Base.*

A. Enable Automatic Publish

Adjust the settings for the IT Knowledge Base to allow for Knowledge Base articles to instantly publish upon submission – using a publish workflow to bypass any review period.

B. Create a New IT Knowledge Base Category

Add a new sFone category to the IT knowledge base.

C. Create the Requester Article

1. Create an article containing instructions for requesting an sFone through the ServiceNow Catalog. This article must be available to all users and located in the IT Knowledge Base under the **sFone** category. It should contain the following properties:

- Short description: **Requesting an sFone from the Service Catalog**
- Text:

To request an sFone, navigate to All > Self-Service > Service Catalog. Then, select the Mobile category and locate the Strawberry sFone item. You may also use the Service Catalog search field to locate the item.

Select the Strawberry sFone item name to open the ordering screen where you can customize your request. Once satisfied, click Order Now.

D. Create the Fulfiller Article

1. Create an article containing instructions for supporting inquiries about sFone requests through the ServiceNow Catalog. This article must be available to all users with the **itil** role and located in the IT Knowledge Base under the **sFone** category. It should contain the following properties:
 - Short description: **Supporting sFone Service Catalog Requests**
 - Text:

If the requester has a question about requesting an sFone, redirect them to the Knowledge Base article: *Requesting an sFone from the Service Catalog*.

If the requester has placed an order and would like to know about their request, direct them to Employee Center. From Employee Center, they can select My Requests to review the status.

Task 4 Verification

Upon completion of this task, you should have two knowledge base articles as shown below. Note that your article numbers may be different from what is shown.

Knowledge Number Search Actions on selected rows... New						
All > Workflow = Published						
<input type="checkbox"/>	Number	Short description	Author	Category	Workflow	Updated
<input type="checkbox"/>	KB0010005	Supporting sFone Service Catalog Requests	System Administrator	sFone		2022-10-13 11:57:39
<input type="checkbox"/>	KB0010003	Requesting an sFone from the Service Cat...	System Administrator	sFone		2022-10-13 11:41:35

Task 5: Enhance Task Assignment and Communication

Set up automatic assignment of incidents to the Strawberry Support group for Strawberry sFone issues. You will do this using the baseline assignment feature for Services and Service Offerings.

Then, develop an email notification related to new critical sFone incidents assigned to the Strawberry Support group. Afterwards, test to ensure the email sends correctly.

Hint: Notifications were covered in Module 5. Refer to lab 5.2 (Configure Notifications), where you practiced setting up a notification. Auto-assignment was covered in Module 3. Refer to Lab 3.3 (Add Category and Reference Values).

A. Enable Auto-Assignment using Services and Service Offerings

1. Define a Service and Service Offering with the following details:

Service:

- Name: **Telephone Services**
- Support group: **Service Desk**

Service Offering:

- Name: **Strawberry sFone**
- Support Group: **Strawberry Support**

B. Create an sFone Priority 1 Incident Notification

1. Create an email notification containing details about newly opened Priority 1 incidents that have **sFone** as the category.
2. This notification should go to the **Strawberry Support** group only when a new Priority 1 sFone incident is created or updated and the Assignment group is Strawberry Support.
3. Utilize the following information to create the notification:
 - Name: **P1 sFone Incident**
 - Table: **Incident [incident]**
 - Subject: **A new P1 sFone Incident has opened: \${number}**
 - The **Message HTML** text should contain a collection of dynamic information listing:
 - when the incident was opened
 - who opened the incident
 - the description of the incident
4. Verify the email is sending to the **Strawberry Support** group by creating or updating a new Priority 1 sFone incident, which should be auto-assigned to the Strawberry Support group.
5. Check the **System Outbox** to ensure the notification was sent.

Task 5 Verification

Created	Recipients	Subject
2022-10-14 11:35:23	kara.prince@cloudt.com	Incident INC0010020 was created
2022-10-14 11:35:23	fred.luddy@example.com,waldo.edberg@exam...	Incident INC0010020 has been assigned to group Strawberry S
2022-10-14 07:28:11	fred.luddy@example.com	On-Call Schedule: Hardware

Note: Your incident number may be different than shown.

Task 6: Schedule a Report

In this task, you will create a report and then schedule it to be shared with the Strawberry Support group on a weekly basis.

1. Work with the Report Designer to create a report which displays the number of incidents that are active and tied to the sFone category. Additionally, group the data by priority.
2. Schedule the report by sharing it with the Strawberry Support group every Monday to coincide with their incident review meeting.

Hint: Dashboards and reports were covered in Module 5. Refresh yourself with the concepts you practiced in Lab 5.1 (Create Dashboards and Reports).

A. Create a Report

1. Set the following properties for the new report:
 - Name: **Active sFone Incidents by Priority**
 - Source type: **Table**
 - Table: **Incident [incident]**
 - Type: **Pie**
 - Group by: **Priority**

B. Schedule the Report

1. Schedule the Report to run **weekly, every Monday at 8:30am**, and sent to the **Strawberry Support** group.
2. Add the following schedule details which will appear within the email containing a copy of the report:
 - Subject: **Current sFone Active Incidents Count**
 - Introductory message:
Please find included the current count of all active sFone incidents grouped by priority. This information will be discussed during the team's incident review meeting today at 9:00am

Task 6 Verification

