Course Exercises

IBM Control Desk 7.6 Foundations

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Contents

Unit 1 Overview

This unit has no student exercises.

Unit 2 Implementation exercises

The exercises for this unit provide an introduction to the class image and how to navigate the IBM Control Desk user interface options, including the application user interface console and the Service Portal. Because of time considerations, there are no exercises on the installation process.

Image information

This course includes a virtual image that has IBM® Control Desk installed. This image is a 64-bit Microsoft Windows 2003 Standard Server. If you need help starting the guest or accessing the operating system login screen, ask your instructor or consult the instructions that you received when you registered for this course.

Note: When running this image locally, the host computer must support 64-bit virtual machines. Most new computers can support 64-bit virtual machines. However, you might have to enable the virtualization technology in your BIOS. For more details, refer to the following VMware Knowledge Base article:

http://kb.vmware.com/selfservice/microsites/search.do?language=en_US&cmd=displayKC&externalId=1003944

Exercise 1 Logging in to the operating system

1. At the windows login screen, press Ctrl+Alt+Delete.

Note: A different key sequence or menu selection might be used, depending on your environment. For example, when running a virtual machine on a Windows host, you might press Ctrl+Alt+Insert to access the login screen on the virtual machine.

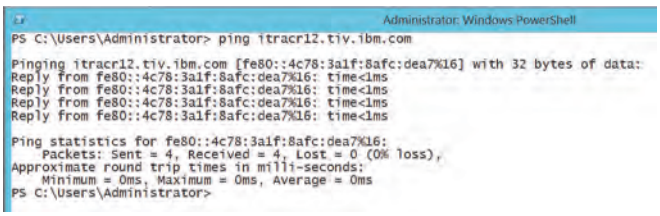
2. Enter the user name **Administrator** and password **object00**.
3. Click **OK** to log in to Windows 2012.

Exercise 2 Verifying image network configuration

The image for this course is designed to use the static IP address of **192.168.1.210** with the host name **itracr.tivoli.edu**. Changing the IP address or host name can cause the software not to operate properly. In this exercise, you verify the network configuration of the system you are using.

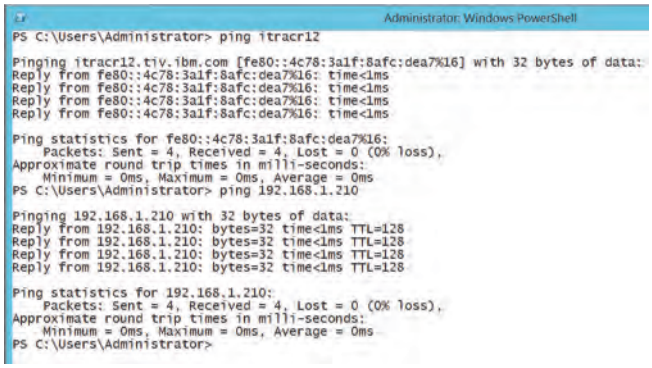
1. Open a command prompt. An icon for the command prompt is added to your system in the bottom row of icons. If it is not there, click the down arrow on the desktop. Then, click inside the desktop and scroll the desktop to the right. The Command Prompt icon is on the right side.
2. Type the following command:

   `ping itracr12.tiv.ibm.com`
3. Verify that the fully qualified host name can be resolved. It is successful when you receive a reply:



4. Repeat the test with the following commands. All commands must receive a reply.

   ```
   ping itracr12
   ping 192.168.1.210
   ```



Note: If you do not receive a reply, your operating system is not configured properly, either by a misconfigured network card or IP stack. Correct the virtual machine configuration. If you are using this system in a classroom or supported lab environment, contact your instructor or lab support personnel.

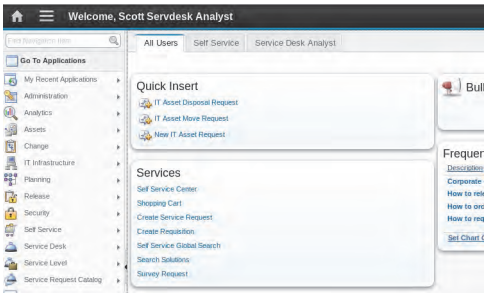
5. Close the command prompt window.

Exercise 3 Starting IBM Control Desk

The IBM Control Desk services are configured for a manual start on the class image. Batch files are provided to start and stop the services as needed. The batch file starts Tivoli Directory Server, WebSphere® Application Server, and the IBM Control Desk application server (MXServer). In this exercise, you start the server.

1. Open **Windows Services**. You can see a shortcut on the desktop in the Administrative Tools group.
2. Verify that the **DB2 - DB2COPY1 - CTGINST1-0** service is started. If it is not, start it.
3. Close **Windows Services**.
4. Double-click the **Start IBM Control Desk** shortcut on the desktop. It takes a few minutes for all the processes to start.

5. When the script completes, verify that the MXServer is open for e-business.

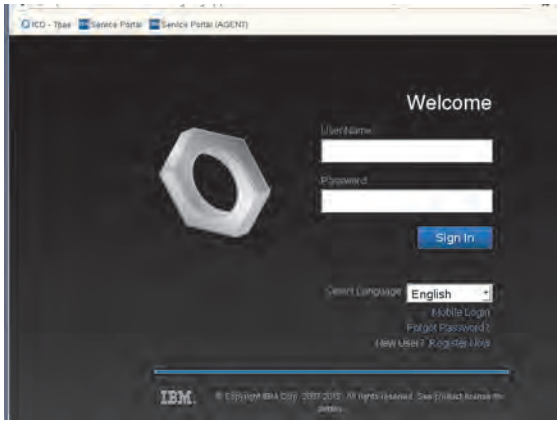


6. Press Enter to close the command prompt.

Exercise 4 Navigating the console

In this exercise, you work with the major navigation elements in the application user interface console.

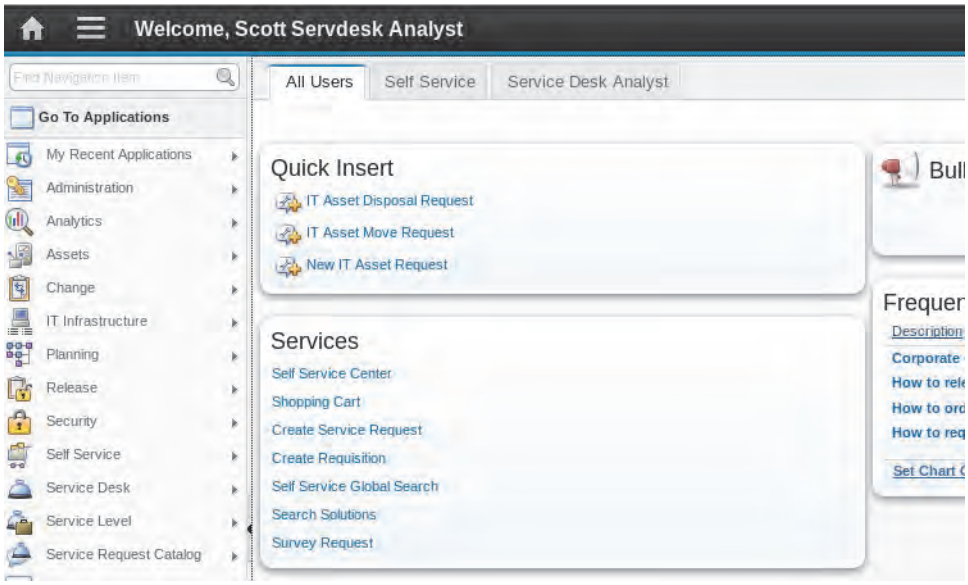
1. Open Internet Explorer. The console login screen is displayed. It is configured as the home page. If you encounter an internal error, wait a few more minutes for the application server to load.



Note: The home page for Internet Explorer is http://itracr/maximo. A bookmark that is called **IBM Control Desk Console** is also available. The default web address for the console is http://*hostname*/maximo.

2. Log in to the console as **scott** with the password **object00**.

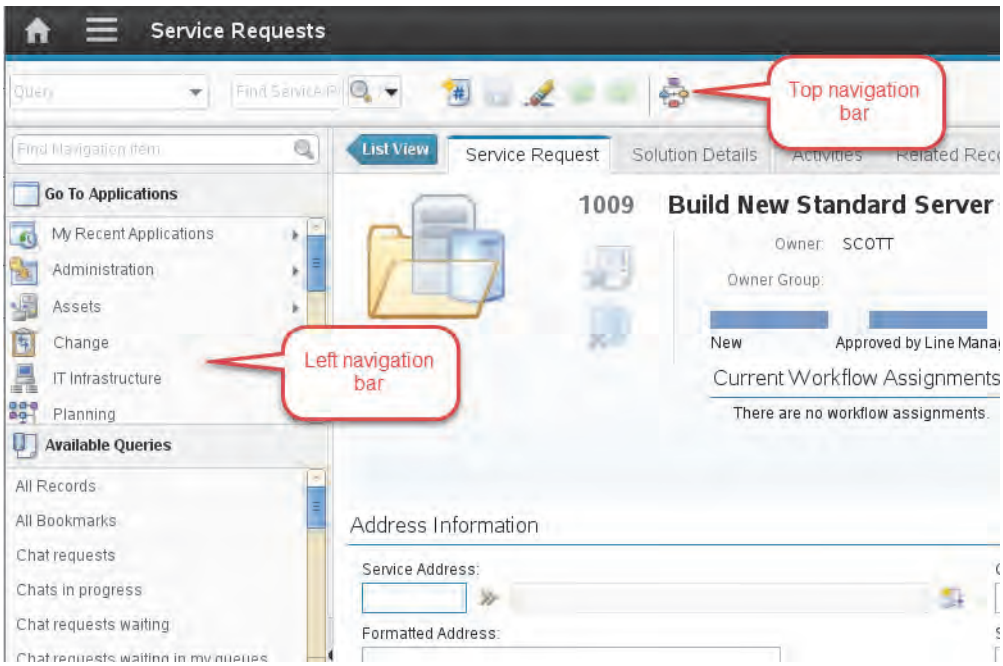
3. Review the console.



Notice that Scott has several Start Centers. One is for all users, another is for the Self Service center, and the third is for those users who have the role of Service Desk Analyst.

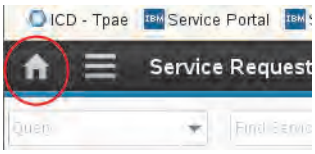
4. Click the **Service Desk Analyst** Start Center and review the portlets on the Start Center.

5. Click one of the service request records in the **My Work** queue. This screen capture shows an example of a request to build a new server image.

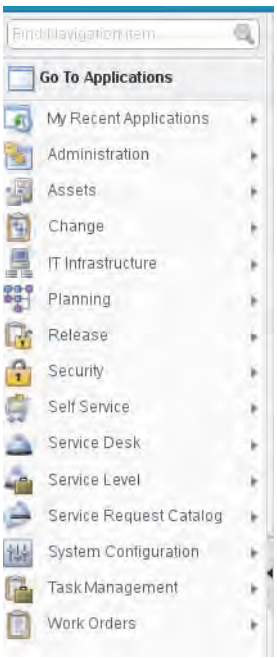


6. Review the top navigation bar to see the queries and actions that you can run.

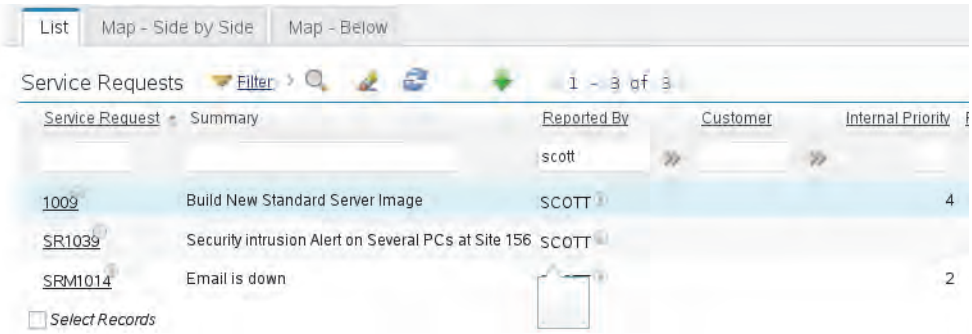
7. Click the **Start Center** icon in the upper left corner to return to the Start Center.



8. Review the navigation bar.



9. Click **Service Desk > Service Requests** in the navigation bar.
10. Press Enter to return a list of all service requests. The first 20 records display.
11. Type **Scott** in the **Reported By** filter and press Enter to return a list of all service requests that Scott reported. The Service Request number is a hyperlink.



12. Click a service request record to open it. Scroll down to observe the different sections of the record. Other types of records such as Incidents or problems contain different types of information, but it is all related to the originating service request.

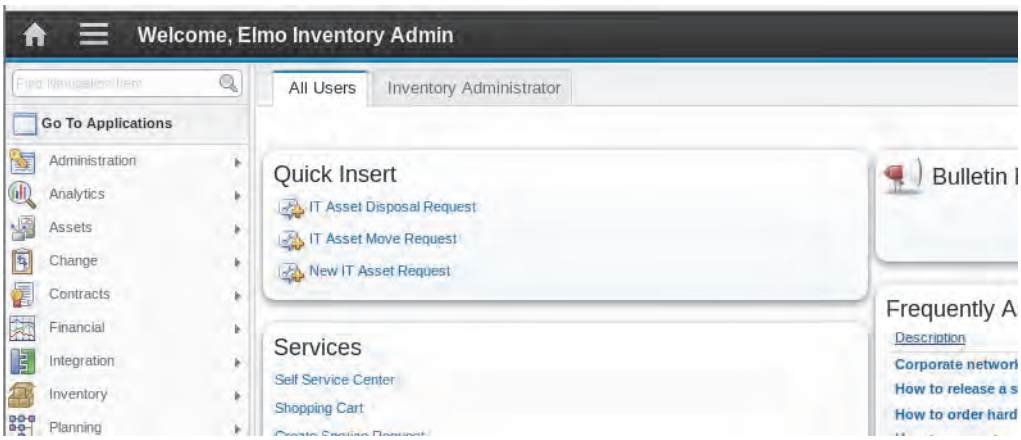
13. Scroll through the Common Actions and the **More Actions** sections of the navigator. The actions that are available depend on ownership of the service request record and the user's assigned security groups.

14. Click the **Solution Details** tab and the other tabs to observe the information that the tabs contain.

15. Click **Sign Out** in the upper right corner.

16. Log in as **elmo** with the password **object00**.

17. Review the console.

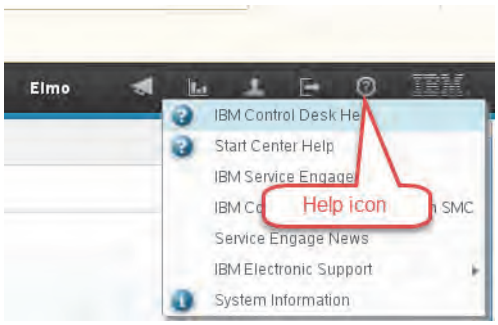


Elmo has a different Start Center called **Inventory Administrator**. This Start Center is for users with the role Inventory Administrator.

18. Review the portlets. Notice that they are different from the portlets on the Service Desk Analyst Start Center.

19. Review the left navigation bar. Elmo has different applications in the left navigation bar than Scott. The security settings of each user determine what applications they can view.

20. Click **Help** in the upper right corner.



21. Click the different help options. If pop-ups are blocked, allow pop-ups for the site **itracr**.

Note: External help options under IBM Electronic Support do not work because the image is not connected to the internet.

22. Close all open help windows.

23. Sign out.

Exercise 5 Navigating the Service Portal

The IBM Control Desk Service Portal is a streamlined interface to the Control Desk database that provides the fields and capabilities that are most pertinent to the task at hand. Users can perform these tasks from the portal:

- Open tickets
- Monitor progress on existing tickets
- Search for solutions to questions or issues
- Initiate a chat session with a service desk agent
- Request hardware, software, or services through the service desk

Additionally, service desk agents can use the portal to review their assigned tickets, to take ownership of tickets, or to update ticket logs with information about attempted solutions and customer contact.

In this exercise, you explore the Service Portal from the perspective of the user and of the service desk agent.

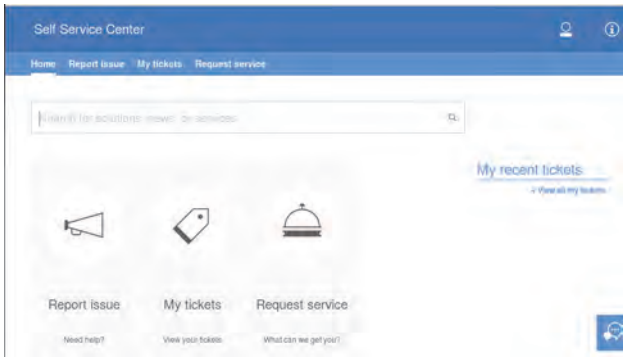
The Firefox browser in your exercise virtual image has three home pages defined:

- The application user interface (console)
- The Service Portal for self-service users
- The Service Portal for service desk agents

You used the first browser tab to access the application console in the previous exercises. Use the second browser tab to log in as a self-service user.

Accessing the Self Service Center

1. Ensure that no user is logged in to the application user interface, the first tab. You can use only one session at a time.
2. Click the second browser tab to access the self-service user URL. Log in as **bob** with password **object00**.



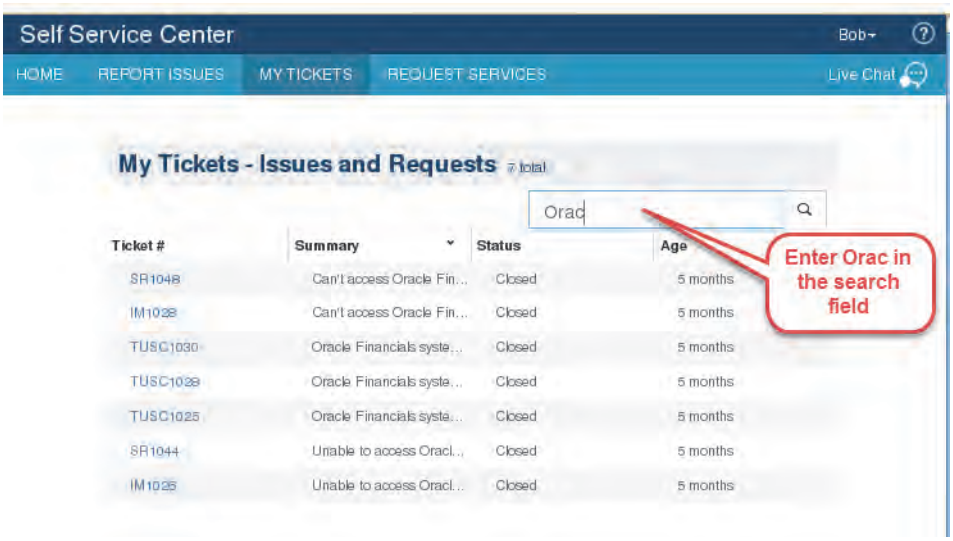
Observe the artifacts on the portal. You see tabs across the top that you can click to report issues, see all of your tickets, or request services. You can also click the labeled icons in the middle of the screen to perform the same functions. There is a **Live Chat** button that you can click to initiate a chat with the service desk. Live Chat is not implemented in the exercise environment.

3. Click the **My Tickets** icon. You see a list of all tickets that list Bob as the affected user. This list can include tickets that were submitted by someone else on Bob's behalf.

   The columns are sortable by clicking the column header. One click sorts in ascending order. Another click sorts in descending order.

   You can search the ticket summaries for keywords or strings. The search is case-sensitive.

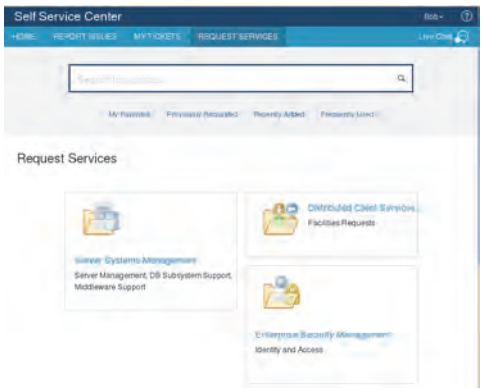
4. Search for all tickets that pertain to Oracle by entering some part of the word in the search field and pressing **Enter**. Be sure to capitalize the leading character.



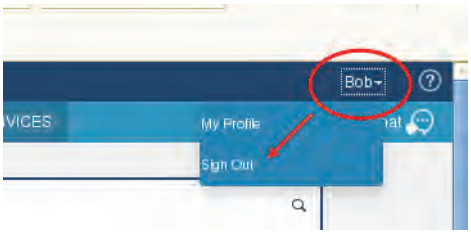
5. Click the **Home** button to return to the Self Service Center.
6. Click either the **Report Issues** button or icon.

   Look over the fields that Bob can use to get help on a problem or issue. The **Type of issue** field is a drop-down list. The other fields are free form. Bob can add attachments such as log files or screen captures to aid the service desk agent in resolving the problem.
7. Click the **Home** button to return to the Self Service Center. Click the **Request Services** button or icon to see what type of services you can request.

   You see predefined services from the service catalog. You also see several navigation aids across the top of the screen, such as **My Favorites**.



8. Click a few services to see what they provide. You can return to the Request Services view at any time by clicking the button at the top of the screen.
9. Click **Bob** in the upper-right corner and click **Sign out**.

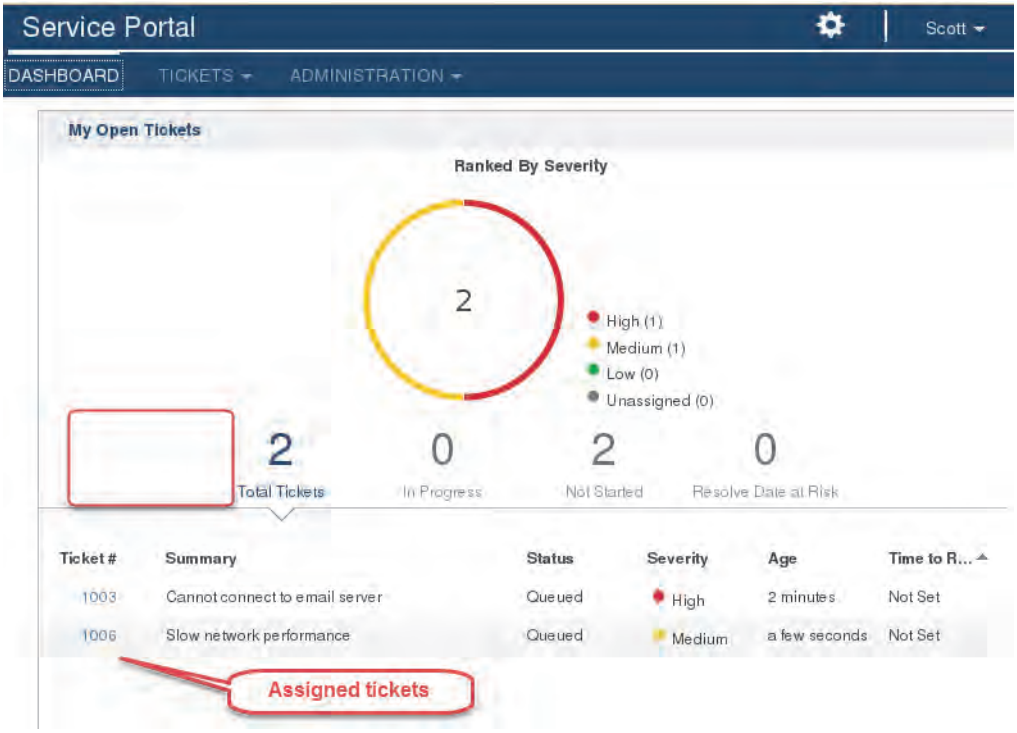


Accessing the Service Desk Agent portal

Access to the service desk agent portal is controlled by security group.

10. Click the third browser tab marked **Service Portal (AGENT)**. Sign in as **Scott** by using password **object00**. Scott is a service desk analyst.

Instead of the Self Service Center, you see the service desk agent's dashboard. Look over the portlets to see what information is available. For example, the My Open Tickets portal shows a list of tickets that Scott owns that you can click.



11. Click the **Tickets** button and click **Search**. A searchable list of tickets opens.

    As with Bob's list of tickets, the column headers sort when you click them. You can also search the **Summary** fields by entering a case-sensitive string into the **Search** field.

12. Search for *Oracle*, and you see a list of tickets that includes those tickets that Bob saw in Step 4 on page 2-9.

13. Click **Tickets > Create** to see how Scott can submit a ticket, either for himself or on behalf of others.

14. Click **Administration > People** to see a list of registered users. The search field searches the **User ID** and **Display Name** fields.

You see more of the Service Portal in later exercises on Service Request Management.

15. Click **Scott > Sign Out** to close the portal.

Unit 3 Basic configuration exercises

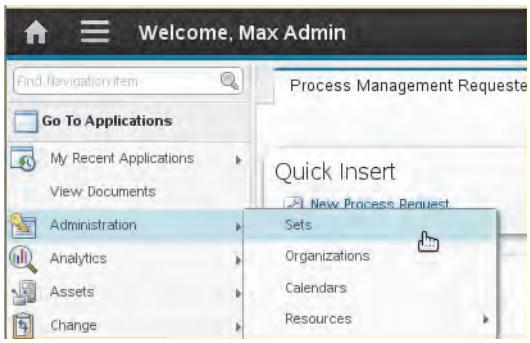
The exercises for this unit demonstrate how to perform the basic configuration steps. You follow a sample scenario to configure IT Foundation data. In the classroom lab image, a sample configuration has already been configured for an enterprise called PMSCIBM. This organization is headquartered in the US. In the scenario, the company has subsidiaries in Europe and Asia. Using the Quick Configuration tool and other application, you create the organizations, sites, and financial data to support these subsidiaries in IBM Control Desk.

The scenario for this unit is stand-alone; that is, other units are not dependent on it. The rest of the unit exercises continue to use the PMSCIBM demonstration data that is provided with the classroom image.

Exercise 1 Creating item and company sets

Before you can create an organization, you must define at least one item set and one company set. An ***item set*** allows organizations to share item definition lists. A ***company set*** allows organizations to share vendor information. Grouping companies into sets ensures that all sites and organizations use consistent names for vendor companies. Grouping also allows for a centralized purchasing function and accurate consolidated vendor reporting. In this exercise, you review the existing item and company sets that are used by PMSCIBM and create new sets to be used by the new organizations.

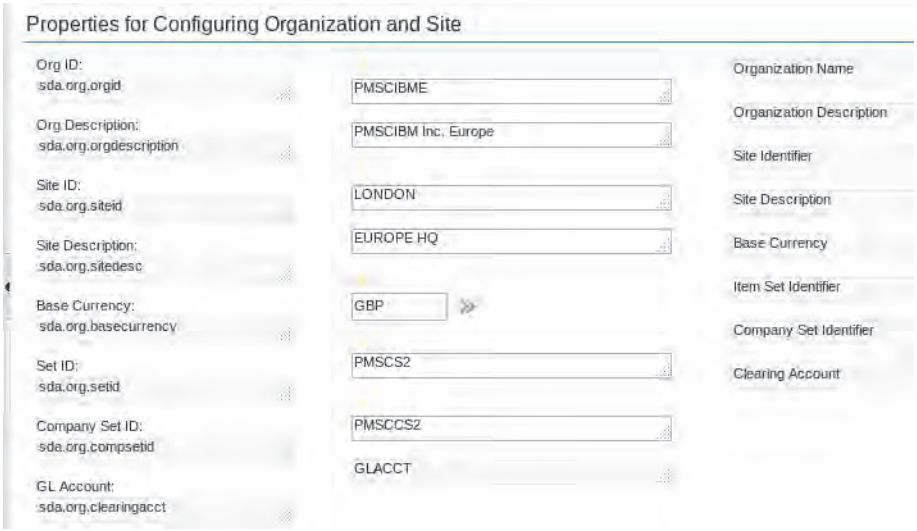
1. Log in to the console as **maxadmin** with the password **object00**.
2. Click **Administration > Sets** in the left navigation bar.



3. Review the existing item and company sets. These sets were created for the PMSCIBM organization.
4. Click **New Row**.

5. Enter the following information to define the item set.

Field	Value
Set	PMSCS2
Set Description	Item set 2
Type	ITEM
Default Item Status	PENDING



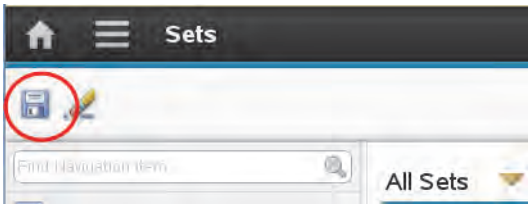
6. Click **New Row**.

7. Enter the following information to define the company set.

Field	Value
Set	PMSCCS2
Set Description	Company set 2
Automatically Add Companies to Company Master?	Selected
Type	COMPANY
Default Item Status	PENDING

Note: You use these item and company sets in a later exercise.

8. Click the **Save Sets** icon that is located above the left navigator.



Hint: If you do not know which icon to click, place your mouse over each icon to view the description. Use this technique every time you are instructed to click an icon that you are not familiar with.

Exercise 2 Reviewing currency codes

Every organization must have one base currency that is assigned to it before it can be activated in the system. Because there is already an organization that is created in the demonstration data, currency codes have already been entered. If this system were blank with no demonstration data, you must enter at least one currency code before creating and activating your organization. In this exercise, you review the currency codes that have already been configured.

Note: Currency codes are created at the enterprise level and therefore can be used by all the organizations in the system.

1. Click **Financial > Currency Codes** in the navigation bar.
2. Review the currency codes.

Note: The new organizations use existing currency codes (**GBP** and **SND**). Therefore, there is no need to create a currency. If you want to create a currency, you click **New Row** and enter the currency code.

Exercise 3 Creating an organization and site using the Quick Configuration tool

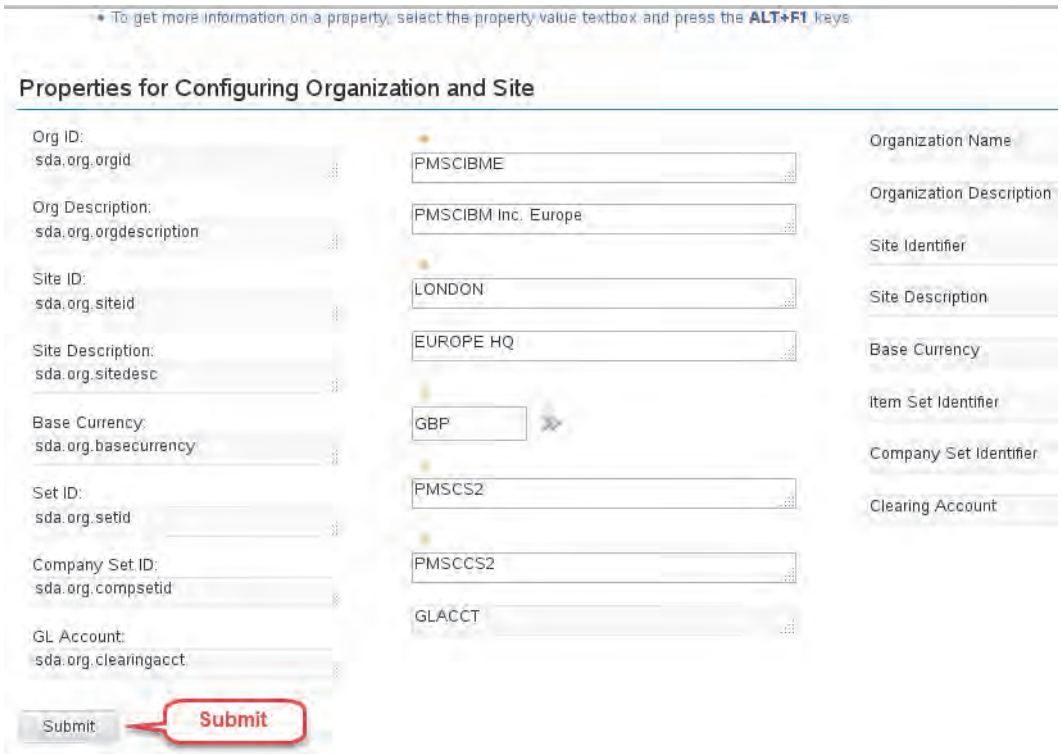
You can use the Quick Configuration tool to perform some of the basic configuration steps as you are getting started with IBM Control Desk. There are two tabs in the Quick Configuration tool, **Org and Site Configuration** and **Data Loading**. In this exercise, you use the **Org and Site Configuration** tab to create an organization and site. Your classroom environment already has an organization as part of the demonstration data. Therefore, you are adding a second organization. However, you can also use this tool to create the initial organization and site.

1. Click **System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.

2. Delete any values in the fields that are marked with an asterisk, such as the **Org ID**, **Org Description**, and so on. Leave the **GL Account** field as is. Enter the following information on the **Org and Site Configuration** tab to define a new organization and site.

Field	Value
Organization Name	PMSCIBME
Organization Description	PMSCIBM Inc. Europe
Site Identifier	LONDON
Site Description	EUROPE HQ
Base Currency	GBP
Item Set Identifier	PMSCS2
Company Set Identifier	PMSCCS2

Note: When creating an organization, you must specify the currency code, item set, company set, and GL Account that the organization uses. Create the currency codes before the organization. If you specify item and company sets that do not exist, they are created for you by the Quick Configuration tool. However, for planning purposes you might want to create the sets first as demonstrated in Unit 3, Exercise 1 on page 3-1. The GL Account is hardcoded in the Quick Configuration tool as GLACCT. If a different GL Account and associated format is required, then create the organization and site using the Organization applications. The next exercise demonstrates how to create an organization from the Organization application.

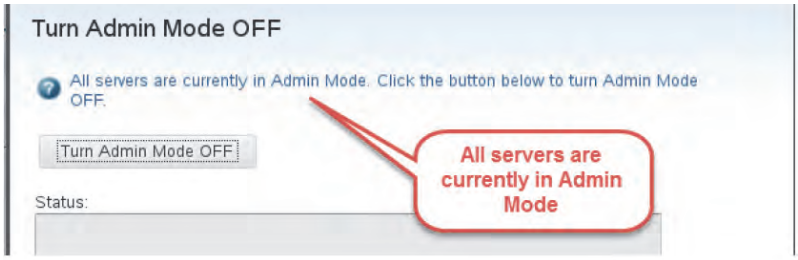


3. Click **Submit**.
4. Click **Yes** to continue past the warning to back up the database.
5. Wait for the creation process to complete.
6. Click **OK** to continue past the organization has been successfully configured message.

Note: The Quick Configuration tool puts the server in Admin Mode when it runs. From ***Admin Mode***, an administration user can perform database tasks without shutting down the application server. Periodically, this mode is not turned off after the Quick Configuration tool runs. In the next step, you verify that Admin Mode is turned off. If it is not, you turn it off. If you do not turn off Admin Mode, users cannot log in to the console.

7. Click **System Configuration > Platform Configuration > Database Configuration** in the navigation bar.
8. Click **Manage Admin Mode** under **More Actions** in the navigation bar.

9. If you see the message **All servers are currently in Admin Mode**, click **Turn Admin Mode Off**. If you do not see this message, skip to Step 15 on page 3- 6.



10. Click **OK** to close the system message indicating that **Starting to set Administration Mode** is off for this server.
11. Review the status messages.
12. Click **Refresh Status** until you see that the Administration mode is **off** system message.
13. Click **OK** to close the system message indicating that Administration mode is off.
14. Click **Close** to close the Turn Admin Mode OFF window.
15. Click **Administration > Organizations** in the navigation bar.
16. Press Enter to retrieve a list of all organizations.
17. Open the **PMSCIBME** organization.
18. Review the organization details.

    Notice that the organization is not active. You cannot activate the organization until you define a clearing account. The accounting data is configured in a later exercise. After that data is configured, you can return to the organization to activate it.
19. Click the **Addresses** tab. You can add addresses to provide default shipping addresses for sites. The addresses are added to the organization and assigned to the sites.
20. Click **New Row**.
21. Enter the following details for the address.

Field	Value
Address Code	EUROHQ
Description	European HQ
Address	1969 Camden Rd
City	London
Zip/Postal Code	NW1 9EU
Country	United Kingdom

22. Click the **Save Organization** icon.
23. Click the **Sites** tab.
24. Click **New Row** in the **Addresses for Site: London** section.

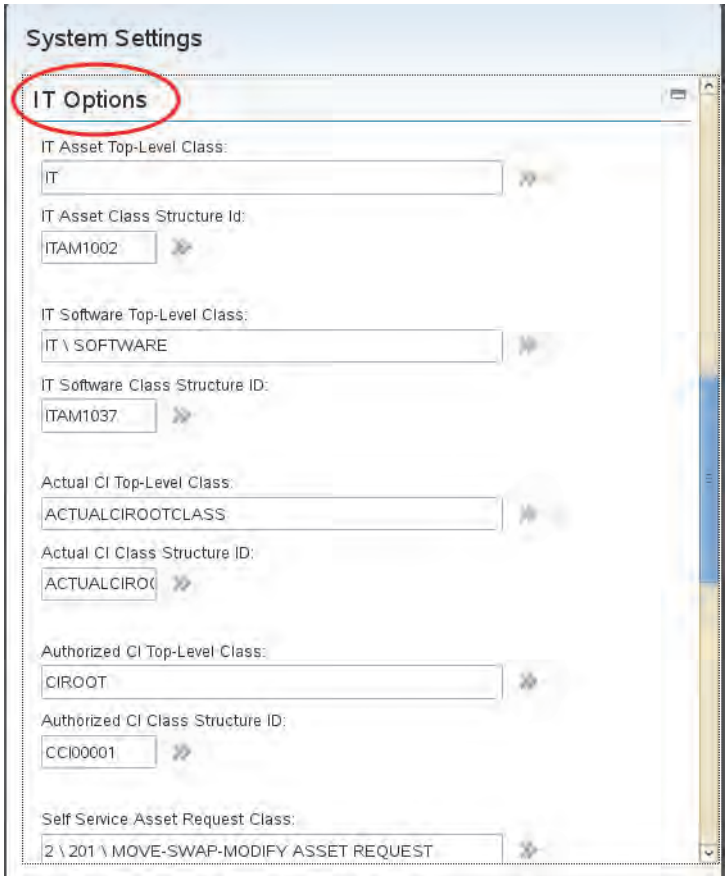
Important: It is possible to have multiple **New Row** buttons on a page. If a step instructs you to click **New Row** in a particular section, make sure that you are in the correct section before clicking **New Row**.

25. Click the **Select Value** icon next to the **Address** field.
26. Click **EUROHQ**. The default address for the London site is now 1969 Camden Rd. You can use this address for financial transactions.
27. Click the **Save Organization** icon.
28. Review the **More Actions** for organizations in the left navigation bar.

Note: Using **More Actions**, you can set various options for applications such as work orders, inventory, assets, purchasing, service desk, service catalog, and SLA. For a description of the options that you can configure for an organization, go to this page: http://www.ibm.com/support/knowledgecenter/SSWT9A_7.6.0/com.ibm.mbs.doc/gp_multiple_sites/c_organization_settings.html

29. Click **System Settings** under **More Actions** in the left navigation bar.

30. Scroll down to review the **IT Options** section of System Settings.



Note: The system settings have been copied from the initial organization included with the demonstration data. For an asset to be considered an IT asset, it must be classified under the Top-level IT Asset Class hierarchy. Any CI that has a classification that occurs in the hierarchy below the top-level CI class is a CI for purposes of reconciliation.

31. Click **Cancel** to close the system settings.
32. Click **Delete Organization** under **More Actions** in the left navigation bar.
33. Review the system message. To ensure database integrity, you cannot delete organizations after sites are associated with the organization. Also, you cannot delete sites.
34. Click **OK** to clear the system message.

Exercise 4 Creating an organization and a site in the Organization application

As mentioned earlier, in certain circumstances you must create your organization in the Organization application. This exercise demonstrates how to create an organization manually.

1. Verify that you are still in the Organization application. If you are not, click **Administration > Organizations** in the navigation bar.

Note: The class image has the Service Provider Edition installed. Therefore, many of the applications have an SP version in the navigation bar. When you are instructed to open an application, open the standard application not the SP version.

2. Click the **New Organization** icon.
3. Enter the following information to define a new Organization and Site.

Field	Value
Organization	PMSCIBMA
Organization Description	PMSCIBM Inc. Asia
Base Currency 1	SND
Item Set	PMSCS1
Company Set	PMSCCS2

Note: In this example, PMSCIBMA is sharing items with PMSCIBM and companies with PMSCIBME.

4. Click the **Addresses** tab.
5. Click **New Row**.
6. Enter the following details for the address.

Field	Value
Address Code	ASIAHQ
Description	Asia Headquarters
Address	13 Orchard Road

Field	Value
City	Singapore
Zip/Postal Code	546080
Country	Republic of Singapore

7. Click the **Save Organization** icon.
8. Click the **Sites** tab.
9. Click **New Row** in the **Sites** section.
10. Enter the following details for the site.

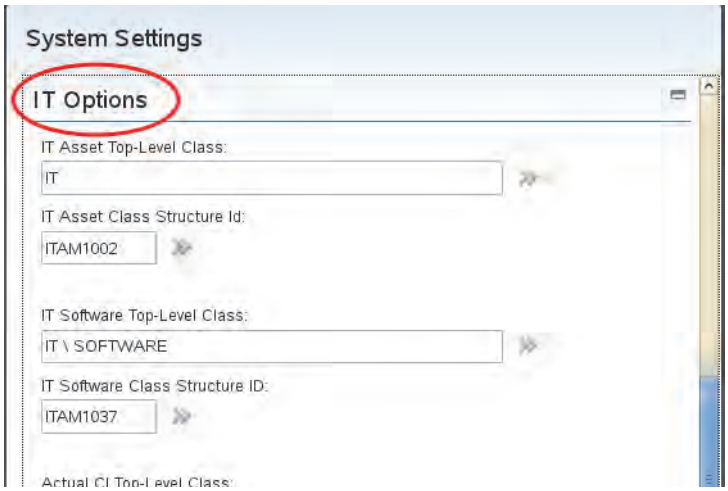
Field	Value
Site	SINGAPOR
Description	ASIA HQ

11. Click **New Row** in the **Addresses for Site: SINGAPOR** section.
12. Click the **Select Value** icon next to the **Address** field.
13. Click **ASIAHQ**. The default address for the Singapore site is now 13 Orchard Rd. You can use this address for financial transactions.
14. Click the **Save Organization** icon.

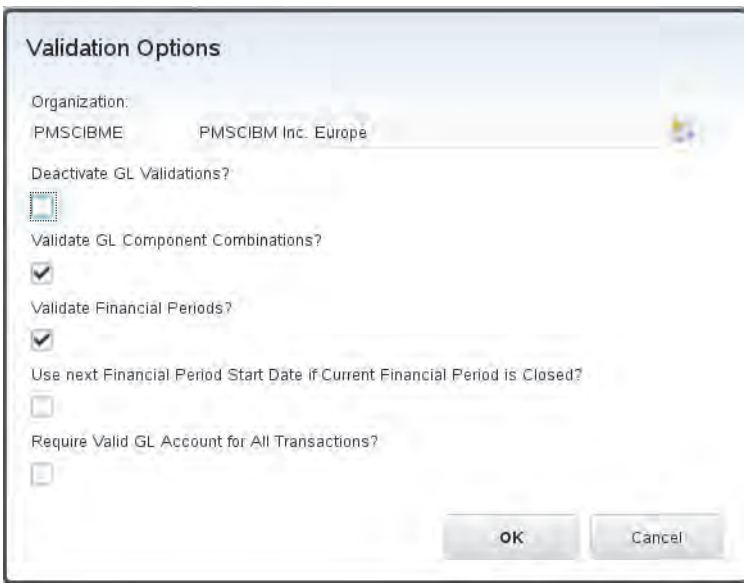
Exercise 5 Setting the financial validation options

At initial implementation, you must review financial options and default requirements. Validation options identify how the chart of accounts is validated and used for an organization. For example, if your organization is not tracking financial transactions with IBM Control Desk, you can disable GL Account validation. This exercise demonstrates how to set the financial validation options.

1. In the left navigator, click **Financial > Chart of Accounts**.
2. Click **PMSCIBME** to select it. Notice that there are no charts of accounts for **PMSCIBME**.



3. Click **Validation Options** under **More Actions** in the navigation bar. The default validation options for **PMSCIBME** are displayed.



Note: These default validation options require you to set up a chart of accounts for this organization because GL component combinations are validated. In addition, at least one valid financial period must be entered for this organization. If you select the **Require Valid GL Account for All Transactions** option, then every transaction in the system requires a valid debit and credit account. If you leave this option cleared, only a subset of the transactions in the system require valid accounts.

4. Select the **Deactivate GL Validations** option. Notice that the other options are unavailable now and cannot be selected.

Note: With this option selected, you can enter anything into the GL debit and credit accounts within the system for transactions and there is no validation for the accounts or financial periods. If you are interfacing with an external system, or if you want to do GL account reporting in the system, do not select this option.

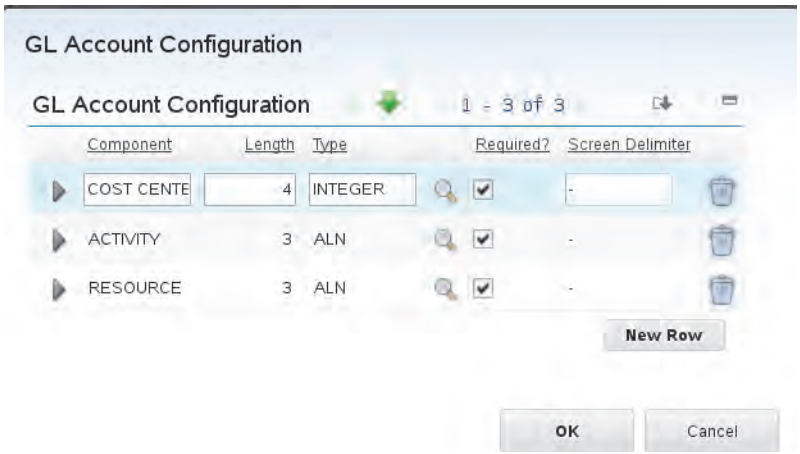
5. Click **Cancel** to keep the defaults as they were.
6. Click **PMSCIBM**. Notice that there is one GL account defined for **PMSCIBM**. This account is the required clearing account.
7. Click **Validation Options** under **More Actions** in the navigation bar. The validation options for **PMSCIBM** are displayed. Notice that the GL account validation is deactivated. This option is selected to simplify demonstrations. However, as stated earlier, if you are sending transactions to an external accounting system, you do not want to deactivate this option.
8. Click **Cancel** to keep the settings as they were.

Exercise 6 Reviewing the enterprise general ledger (GL) format

The GL format defines the attributes of GL components such as length, type, and requirement. This exercise demonstrates how to review the GL format set for the system. This format is applied to GL accounts for all organizations in the system.

1. Click **System Configuration > Platform Configuration > Database Configuration** in the left navigation bar.
2. Click **GL Account Configuration** under **More Actions** in the navigation bar. The GL account format is displayed. This format is used for all of the charts of accounts defined in the system. It

is set up at the system level and is one of the first steps in creating the primary foundation data that is needed to implement the system.



Note: When configuring the GL formats, review any requirements that your external accounting systems have for format and segments. In this case, there are four segments with varying types and length, three of which are required. Be sure to create a format that all organizations can use. You can change the format later, but that requires a database backup and configuration.

3. Click **Cancel**.

Exercise 7 Creating the GL components for the chart of accounts for an organization

Each general ledger account code consists of a number of distinct components, also called *segments*. In the Chart of Accounts application, you create a list of valid GL accounts by pairing valid components together. This exercise demonstrates how to create the valid GL components that can be used in GL accounts for an organization. The component format is managed at the system level. The GL components are managed at the organization level.

1. Click **Financial > Chart of Accounts** in the navigation bar.
2. Click **PMSCIBME** to select it.
3. Click **GL Component Maintenance** under **More Actions** in the navigation bar.
4. Click **Cost Center** to select it and click **New Row**.
5. Enter GL Component Value **2000** and the description **Administration**.

6. Click **Activity** to select it and click **New Row**.
7. Enter GL Component Value **100** and the description **Clearing**.
8. Click **Resource** to select it and click **New Row**.
9. Enter GL Component Value **000** and the description **General**.
10. Click **OK**.

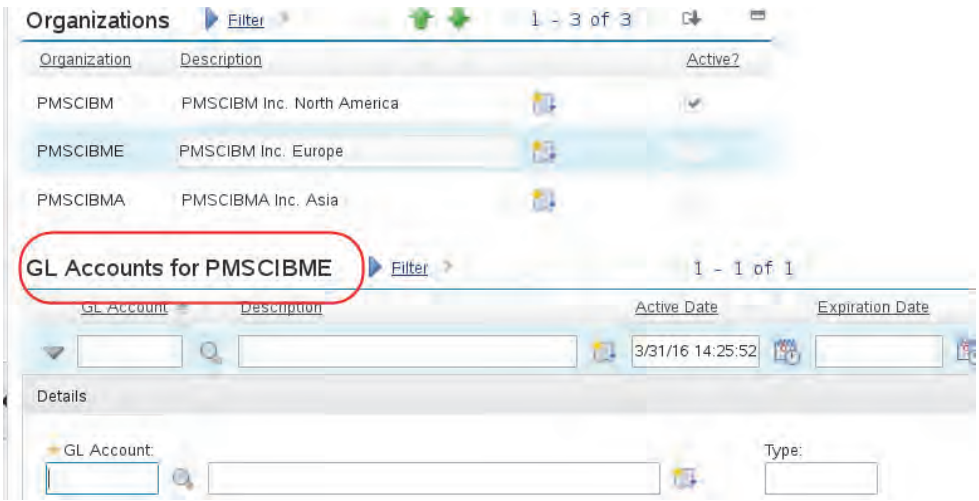
Note: You entered three components manually for PMSCIBME. An external accounting system might have many components that you must enter to interface with it. If there are many components, you can import them using the Integration Framework. This topic is outside the scope of this course, but is covered in the *Tivoli's Process Automation Engine Fundamentals* course. Otherwise, if there is a manageable number of components, you can enter them manually.

11. ***Optional:*** Select **PMSCIBM** and review the GL components that have been configured for that organization.

Exercise 8 Creating a GL account

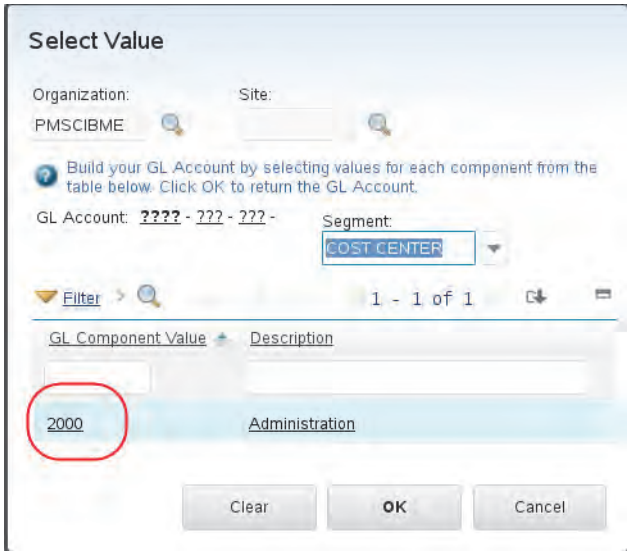
Even if you are not tracking financial transactions in IBM Control Desk, you must create one GL account called a clearing account. This exercise demonstrates how to create a GL account in the Chart of Accounts. This account is used as the clearing account so that you can activate the PMSCIBME organization.

1. Verify that you are still in the Chart of Accounts application. If you are not, click **Financial > Chart of Accounts** in the left navigation bar.
2. Click **PMSCIBME** to select it.
3. Click **New Row**. The GL Accounts For table window heading indicates **PMSCIBME**.



4. Click the **Select Value** icon for the **GL Account** field. The following steps demonstrate how to build a GL account by using the defined components. Only one value per segment has been defined. In a production environment, you would typically have several values defined.

5. Click the **2000** to select this value as the COST CENTER segment for the GL account.

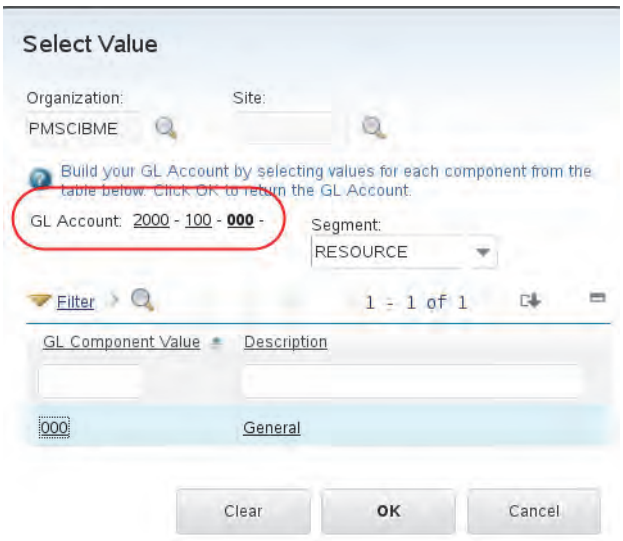


Notice that the segment has changed to **ACTIVITY**. The next step in building the GL account is to select the activity segment value.

6. Click the **100** to select this value as the ACTIVITY segment for the GL account.

   Notice that the segment has changed to **RESOURCE**. The next step in building the GL account is to select the resource segment value.

7. Click the **000** link. When you are finished, your GL account should look like the following example.



8. Click **OK**.

   You are returned to the GL Accounts screen. The **GL Account** field should be **2000-100-000**.

9. Click the **Save GL Account** icon.

Note: You entered one GL account code manually for PMSCIBME. An external accounting system might have many account codes that you must enter to interface with it. If there are many accounts, you can import them using the Integration Framework. This topic is outside the scope of this course, but is covered in the *Tivoli's Process Automation Engine Fundamentals* course. Otherwise, if there is a manageable number of account codes, you can enter them manually. Entering GL account codes is required only if you have selected the **Validation** option to validate all GL component combinations. If you are interfacing with an external accounting system, you must validate.

Exercise 9 Creating a financial period

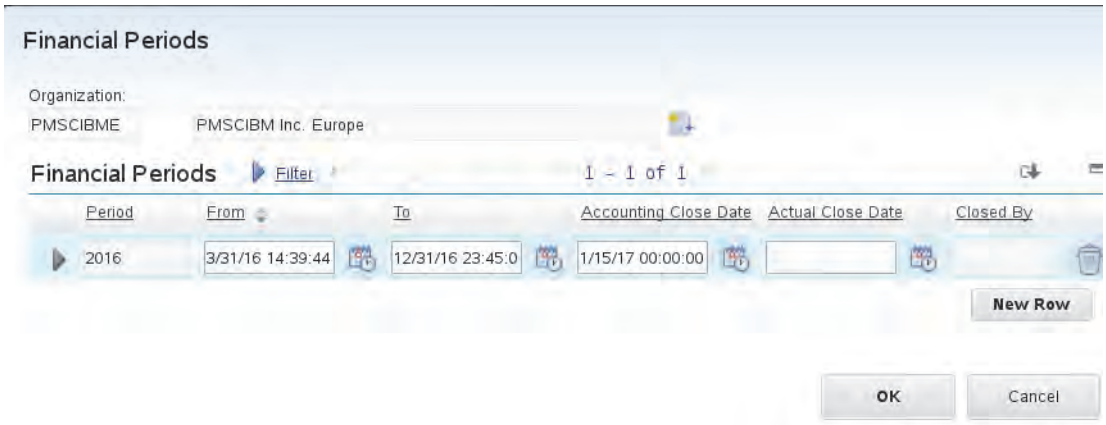
In a previous exercise, you configured validation options that require a valid financial period for all transactions. In this exercise. you create a financial period for the PMSCIBME organization. Financial periods can be defined in days, weeks, months, or years. In this exercise, you create one financial period for the entire year. Consult with your financial system analyst to understand the requirements for your organization.

1. Verify that you are still in the Chart of Accounts application. If you are not, click **Financial > Chart of Accounts** in the navigation bar.
2. Click **PMSCIBME** to select it in the Organizations pane.
3. Click **Financial Periods** under **More Actions** in the left navigation bar. The Financial Periods window shows all the financial periods for the selected organization, PMSCIBME. Financial periods are ordered sequentially by date, with the most recent period at the top. There are no financial periods defined yet for PMSCIBME.
4. Click **New Row**. A new row opens for data entry.
5. Enter the following information.

Field	Value
Period	***YYYY*** (Where *YYYY* is this year)
From	[*Today's date*]
To	[*End of the year*]
Accounting Close Date	[*15 days after the end of the year*]

6. Click **OK**. Your new financial period is added to the database and the Financial Periods window closes.

7. To view your new financial period, click **Financial Periods** under **More Actions** in the navigation bar. The one financial period you entered is displayed.



8. Click **Cancel**.
9. ***Optional:*** Click **PMSCIBM** to select it and review the financial periods that have been configured for that organization. There are several yearly financial periods.

Exercise 10 Reviewing default account codes for an organization

You can set up default accounts such as organization-level accounts and company-level accounts. If all default accounts are set up, the user does not have to enter account information for system transactions. You must consult with your financial department to determine what the default accounts should be.

1. Verify that you are still in the Chart of Accounts application. If you are not, click **Financial > Chart of Accounts** in the navigation bar.
2. Select **PMSCIBME**.
3. Click **Organization Default Accounts** under **More Actions** in the left navigation bar.

   There are no accounts assigned for PMSCIBME. This activity is part of the initial setup for the organization. Account codes must be determined and entered here before transactions are initiated in the system. If you decide not to validate transactions in the system, you can leave these defaults blank or enter them when the transaction is initiated. Entering default accounts saves the user from having to know what accounts must be entered.
4. Click **Cancel**.
5. Click **Company Related Accounts** under **More Actions** in the navigation bar.

   There are no company-related accounts set up for PMSCIBME.
6. Click **New Row**.

For each company type (courier, internal, manufacturer, and vendor), you can enter a default RBNI account, AP suspense account, and AP control account. These accounts become the defaults for each company that you enter into the system.

7. Click **Cancel**.
8. Click **External Labor Control Accounts** under **More Actions** in the navigation bar.
9. Click **New Row**.

   There are no external labor control accounts set up for PMSCIBME. You would enter these accounts to use for default accounts when using external labor companies to work on your assets.
10. Click **Cancel**.
11. Click **Resource Codes** under **More Actions** in the navigation bar.

    There are no labor, tool, or inventory resource codes set up for PMSCIBME.

    You use resource codes when you create work orders and applying actuals. For example, when entering the actual labor used to configure a server in a work order, the default internal labor resource code is merged with the GL account code provided in the work order, asset, or location.
12. Click **Cancel**.

Note: The implementation of the chart of accounts for each organization and corresponding default accounts can be different. These exercises show you the available features that can be implemented from the minimum, where GL account validation is deactivated, to the maximum, where you see many GL accounts and all defaults configured. After you configure these settings for the organizations in your enterprise, the users do not need to know the required account entries to complete transactions.

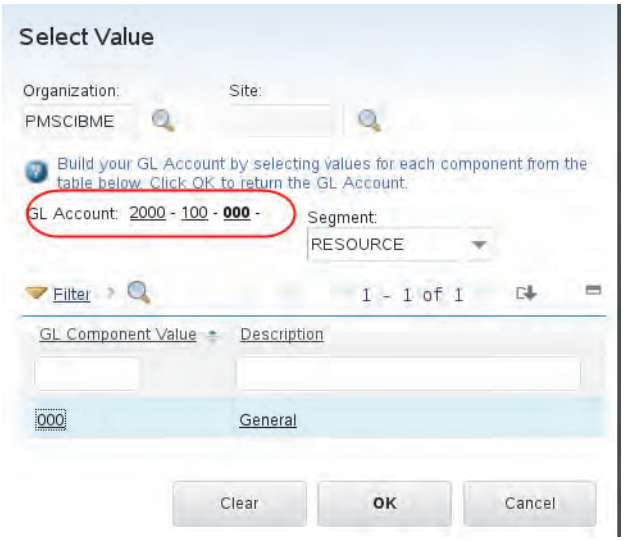
Exercise 11 Activating the organization

After a GL account with a clearing account has been established for the PMSCIBME organization, you can activate it. This exercise demonstrates how to activate an organization.

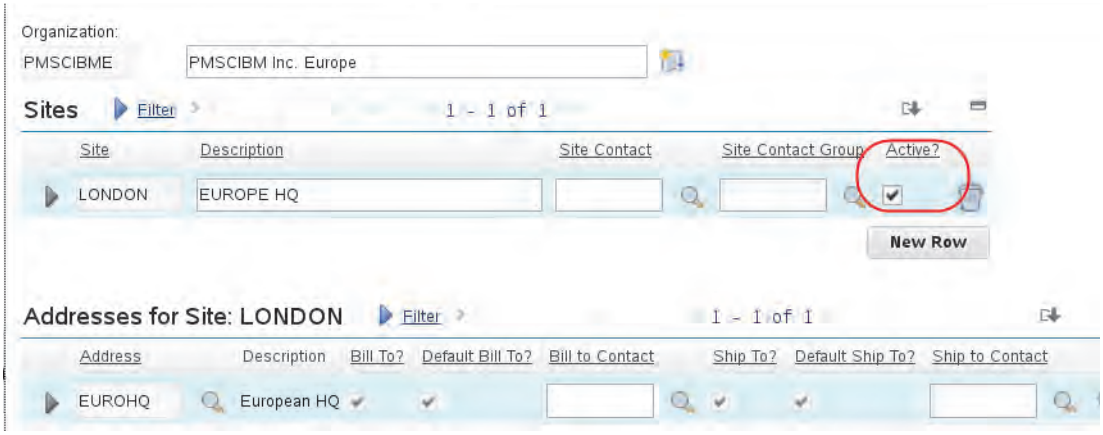
1. Click **Administration > Organizations** in the left navigator.
2. Press Enter to view a list of all organizations.
3. Open the PMSCIBME organization.

   Notice that the **Active** option is not selected. You cannot work with an organization until it is active.

4. Click the **Select Value** icon for the **Clearing Account** field.
5. Select **2000-100-000** for the clearing account for the PMSCIBME organization. Click the value for each component to build the GL account like you did in a previous exercise.



6. Click **OK**. The clearing account is added to the organization.
7. Select the **Active** option.
8. Click the **Save Organization** icon. The organization is now active.
9. Click the **Sites** tab.
10. Verify that the site is active.



Note: To activate the PMSCIBMA organization, you must create the GL components, create a clearing account in the Chart of Accounts, and define a financial period for that organization. You should be able to use the examples given for PMSCIBME to do those steps if you want to reinforce what you have learned. Activating the PMSCIBMA organization is optional.

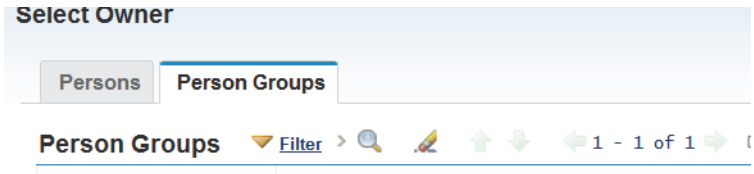
Exercise 12 Managing locations

When an organization is created and the sites are activated, a default holding location is created for each site. The location name is the same as the site. Creating a location hierarchy and systems takes planning. You create a location hierarchy for each site in which you are managing assets. You can simply have one location per site and assign all of your operating assets to it. However, this setup does not indicate precisely where your assets are. You might want to track any work and its associated costs at a specific location, such as a data center on the second floor of your headquarters. To track this work, you must think about how to set up your hierarchy. In addition, you can include virtual locations to represent mobile workers such as your field staff.

1. Click **Assets > Locations** in the left navigation bar.

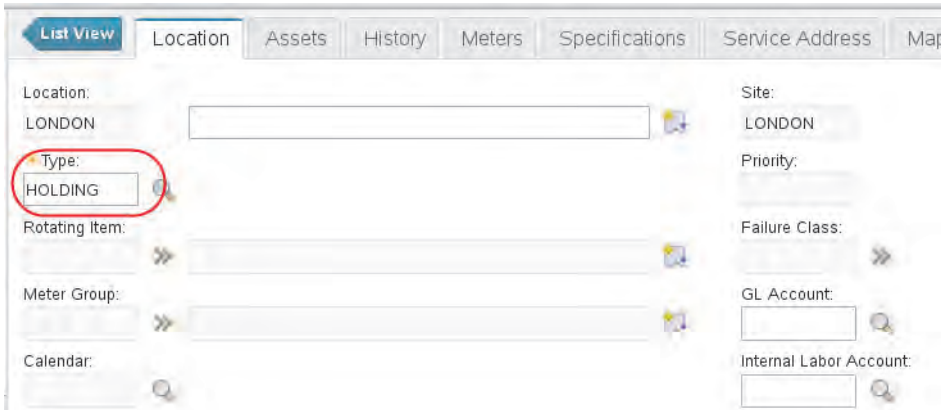
Note: The default insert site is **PMSCRTP**. This site is the default for the **maxadmin** user record. You can change this default site in the Users application or profile for individual users based on the site at which they do most of their work.

2. Press Enter to view a list of all locations in the PMSCRTP site.
3. Enter **LONDON** in the **Site** filter field and press Enter.
   The holding location that was created for LONDON is displayed.



Note: The holding location is used for materials that have been received but are waiting for inspection or serialization.

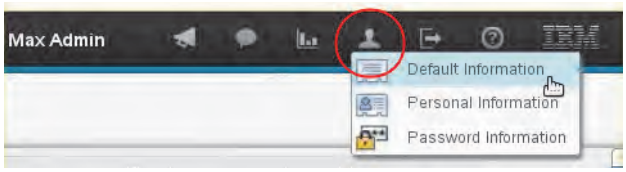
4. Click the **LONDON** location.



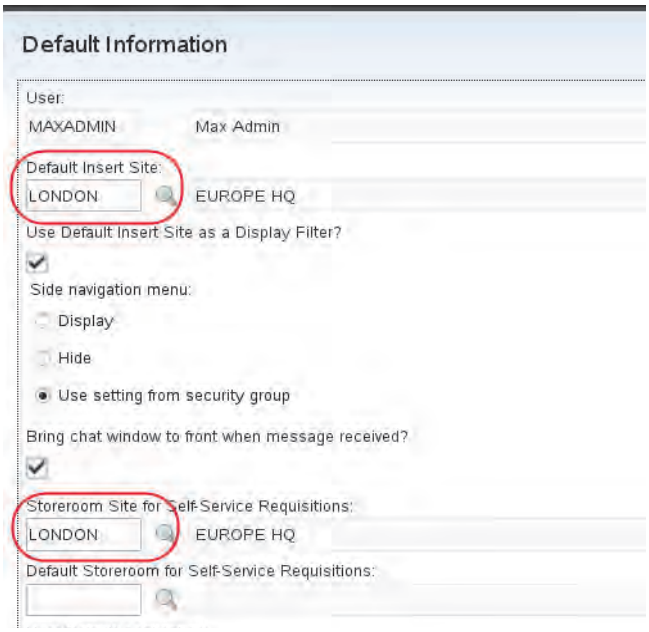
Note: This location is a holding location. Therefore, it cannot be part of a location hierarchy. You can enter a GL account here, which is debited when the material is received and waiting for inspection or serialization. It is then credited after it is received into the storeroom or direct issued.

Creating the primary location

5. Click **Profile > Default Information** in the upper right corner.



6. Change the **Default Insert Site** and **Storeroom Site** for **maxadmin** to **LONDON**.



7. Click **OK**.

Note: Because **maxadmin** has access to multiple sites, you might have changed the **Site** filter in the Locations application to list all LONDON locations. However, these steps demonstrate how to change the default insert site for a user, which then affects how the applications identify the default site.

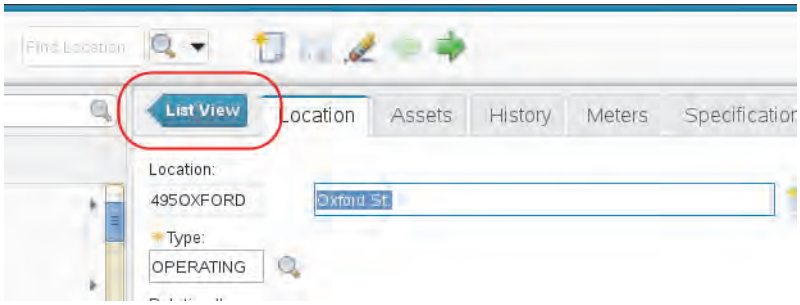
8. Verify that you are still in the Locations application. If not, click **Assets > Locations** in the navigation bar.
9. Click the **New Location** icon.
10. Enter the following information.

Field	Value
Location	495Oxford
Description	Oxford St
Type	OPERATING

11. Click the **Save Location** icon.

Creating the primary system

12. Click the **List View** tab to return to the location list.



13. Place your cursor in the **Location** filter field and press Enter to retrieve a list of all locations.
14. Click **Manage Systems** under **More Actions** in the navigation bar.
15. Click **New Row**.
16. Enter **EUROHQ** for the **System**.
17. Enter **European Headquarters** for the **Description**.
18. Click **OK**. The Manage Systems closes and you are returned to the Location list.

19. Open the **495OXFORD** location.
20. Click **Associate Systems with Location** under **More Actions** in the navigation bar.
21. Click **New Row**.
22. Click the **Select Value** for the **System** field.
23. Click **EUROHQ** and click **OK**.

Creating a child of the first location in the hierarchy

24. Click the **New Location** icon to create another location in the London site.
25. Enter the following information to define the location.

Field	Value
Location	2NDFLOOR
Description	2nd Floor IT Support
Type	OPERATING

26. Click **Associate Systems with Location** under **More Actions** in the left navigation bar.
27. Click **New Row**.
28. Click the **Select Value** for the **System** field.
29. Click **EUROHQ**.
30. Click the **Detail Menu** for the **Parent** field.
31. Click **Select Value**.
32. Click **495OXFORD** for the **Parent** and click **OK**.

Creating a child of the second location in the hierarchy

33. Click the **New Location** icon to create another location in the London site.
34. Enter the following information.

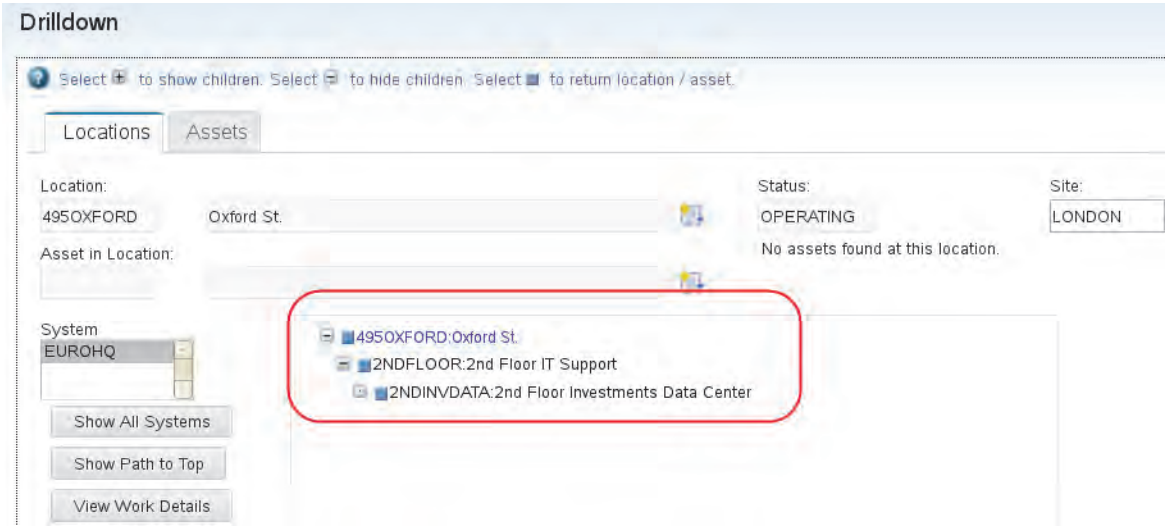
Field	Value
Location	2NDINVDATA
Description	2nd Floor Investments Data Center
Type	OPERATING

35. Click **Associate Systems with Location** under **More Actions** in the navigation bar.

36. Click **New Row**.
37. Click the **Select Value** for the **System** field.
38. Click **EUROHQ**.
39. Click the **Detail Menu** for the **Parent** field.
40. Click **Select Value.**
41. Click **2NDFLOOR** for the **Parent** and click **OK**.

Viewing the Drilldown section

42. Click the **List View** tab.
43. Click **Open Drilldown** under **More Actions** in the left navigation bar.
44. Click **EUROHQ** for the system value to select it.
45. Expand the tree structure to view location hierarchy.



46. Click **Cancel**.
47. Click **Profile > Default Information** in the upper right corner.
48. Change the **Default Insert Site** and **Storeroom Site** to **PMSCRTP**.
49. Set the **Default Storeroom for Self-Service Requisitions** to **ITHARDWARE**.
50. Click **OK**.

Important: Do not skip these steps to revert the default site. The remaining exercises depend on this setting.

Exercise 13 Reviewing the IT asset classification hierarchy

In this exercise, you review the existing IT classification hierarchy that is already in the demonstration data. You also add a classification to the hierarchy. This exercise shows you how to build the hierarchy.

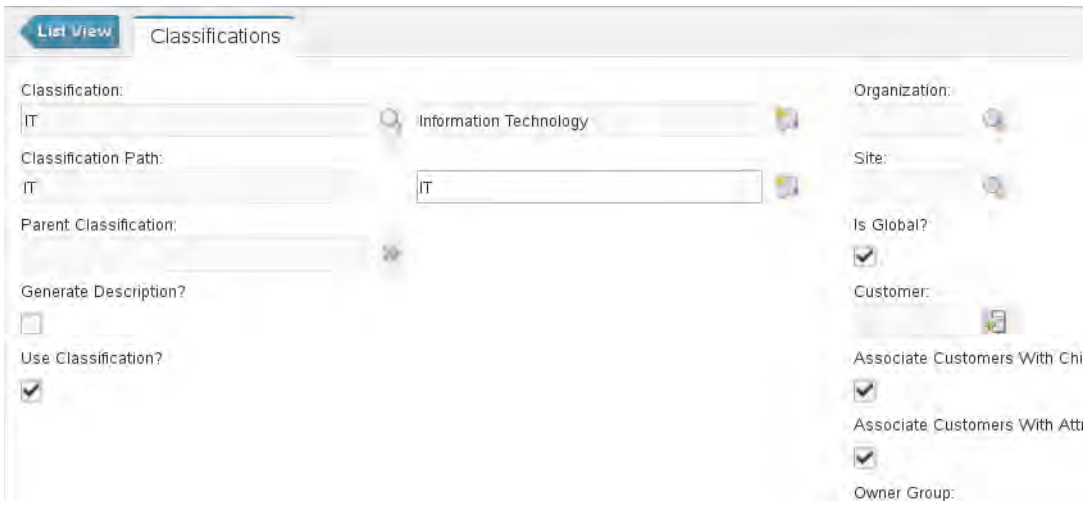
Before creating a hierarchy, you must decide how to classify or describe your assets in the system and identify attributes that provide information about the configuration of the assets.

1. Click **Administration > Classifications** in the left navigator.
2. Enter **=IT** in the **Classification** field and press Enter.

   The demonstration top-level IT classification hierarchy is returned.

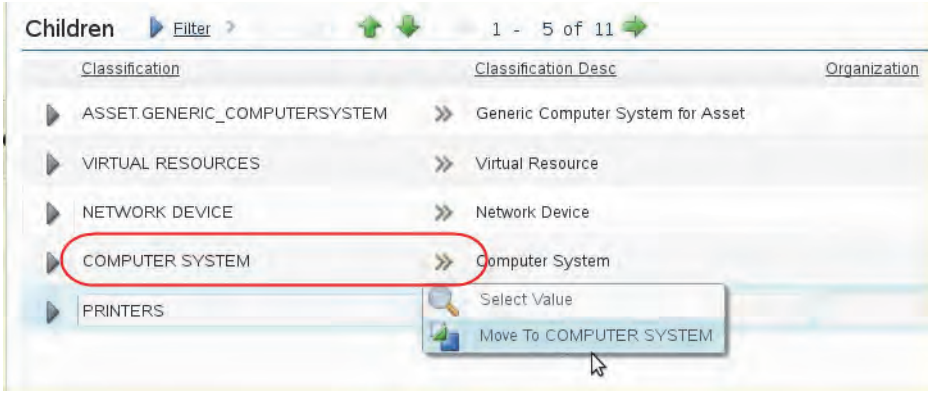
Note: As part of an initial implementation, the classifications must be entered into the system. You can use the UNSPSC coding or create your own classification hierarchy for IT assets. You enter classifications at the enterprise level. All the organizations in the system can use them. It is important to choose one IT classification hierarchy that all organizations doing IT asset management can use. Many system functions rely on the top-level IT class structure to identify assets as IT. Optionally you can make a classification within the hierarchy available only to a particular organization and site.

3. Open the **IT** classification.

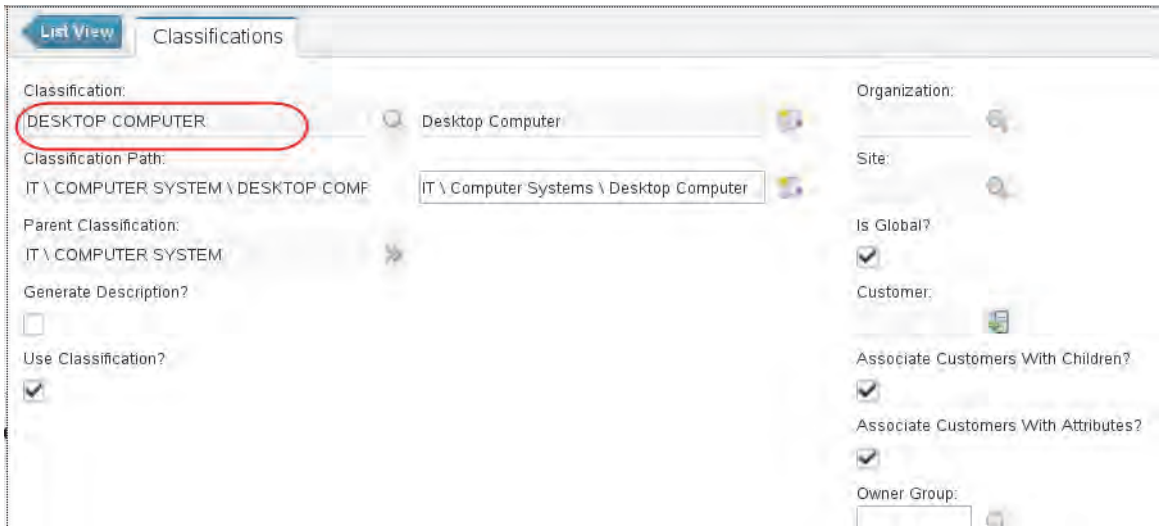


Note: There is no parent classification and the organization and site are not populated. Therefore, all organizations and sites within the system can use this classification. The Use With section defines which objects can use this classification. There are 11 children of the top-level class. You can continue to drill down through the hierarchy.

4. Scroll down to see the different sections.
5. Click the **Detail Menu** icon for the child classification **COMPUTER SYSTEM** and select **Move to COMPUTER SYSTEM**.

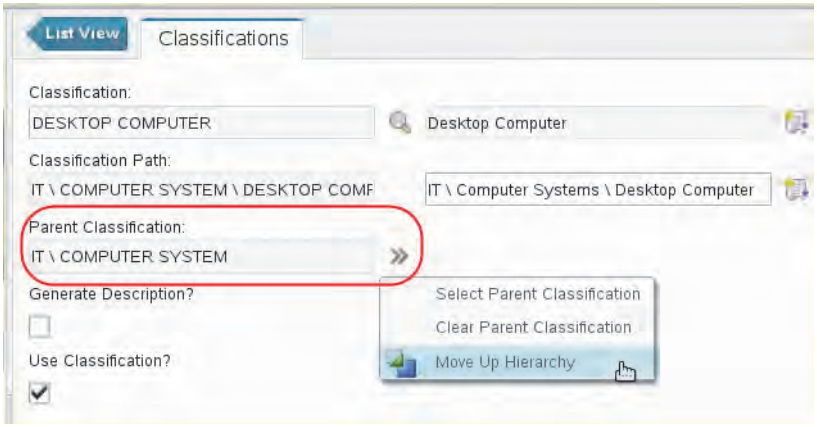


6. Continue to move down the hierarchy by selecting and moving to **DESKTOP COMPUTER**.



Note: There are attributes for the DESKTOP COMPUTER classification. These attributes are applied to the item and asset when you classify them. You can then enter the values. After an object is classified, these attributes become specifications for that particular instance.

7. Move up to the parent classification by selecting **Move Up Hierarchy** in the **Detail Menu** of the **Parent Classification** field. The COMPUTER SYSTEM classification is displayed.



You want to add a new classification to the hierarchy to specifically categorize a smartphone. The following steps show you how to add a classification to the hierarchy.

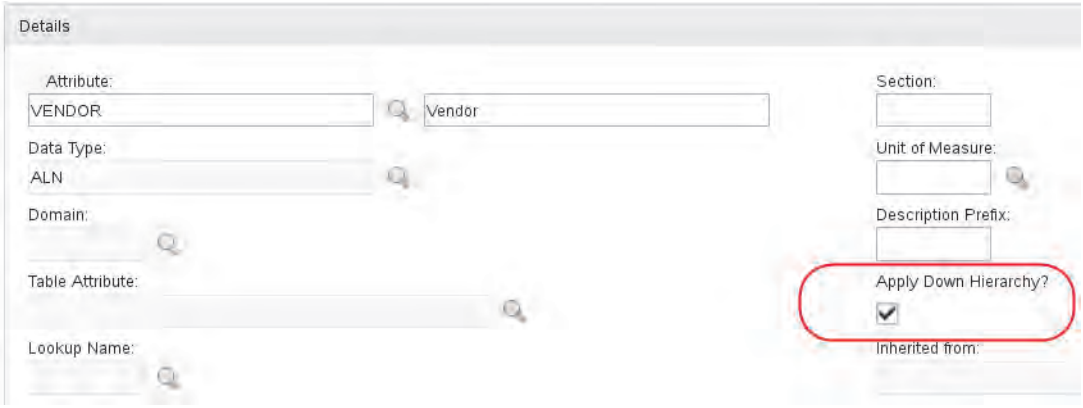
8. Click **New Row** in the **Children** section.
9. Enter **SMARTPHONE** in the **Classification** field and press the Tab key.

   The system message identifies SMARTPHONE as a new classification in the hierarchy and requests that you confirm whether you want to add it.

Note: You can use this method to create the hierarchy structure, first adding the top-level class (parent) and then continuing to add children.

10. Click **Yes** to add it.
11. Enter **Smart phone** in the **Description** field.
12. Click the **Save Classification** icon.
13. Click the **Detail Menu** for SMARTPHONE and click **Move to SMARTPHONE**.
14. Click **New Row** in the **Attributes** section.
15. Click **Select Value** for the **Attribute**.
16. Find and click **Vendor**.

17. Select the **Apply Down Hierarchy** option.



Note: **Apply Down Hierarchy** is helpful when you are creating a large classification manually. It applies the attributes created for the parent to all the attributes of the child so you can enter them once.

18. Click the **Save Classification** icon.

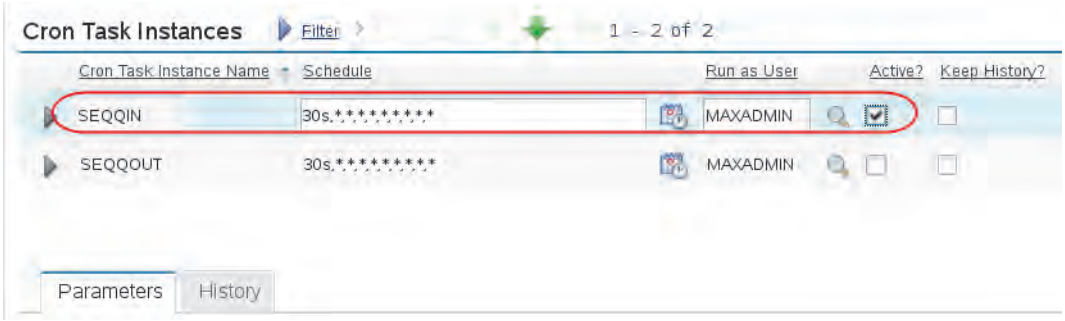
19. If you are prompted to wait for the operation, click **Yes** to continue.

Exercise 14 Loading data with the Quick Configuration tool

In an earlier exercise, you learned how to create organizations and sites by using the Quick Configuration tool. You can also use the Quick Configuration tool to load data such as users, assets, and configuration items (CIs). With this feature, you can populate the database with assets that you have already purchased or leased and CIs that you are currently managing. This exercise demonstrates how to import data with the Quick Configuration tool.

1. Click **System Configuration > Platform Configuration > Cron Task Setup** in the left navigation bar.
2. Search for the **JMSQSEQCONSUMER** cron task.
3. Open the **JMSQSEQCONSUMER** cron task.

4. If the SEQQIN instance is not active, select the **Active** option and click **Reload Request** under **More Actions** in the navigation bar. If it is active, continue to the next step.



Note: The SEQQIN cron task instance must be active to process the data that you loaded with the Quick Configuration tool.

5. Minimize the browser window.

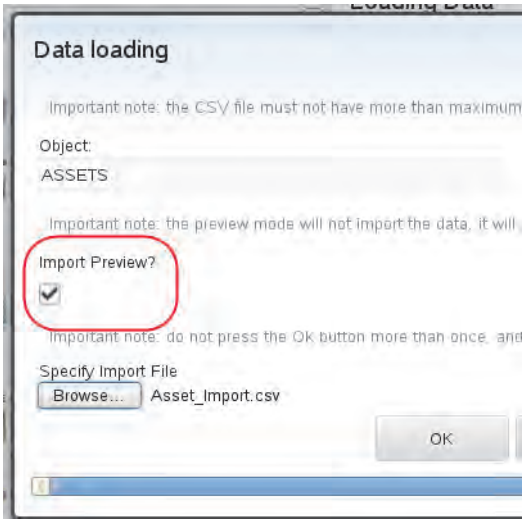
Importing assets

6. Open a file browser and change directory to **/labfiles**.
7. Double-click the **Asset_Import.csv** file to open it.
8. Review the contents of the file by using a text editor. Close the file if you open it.

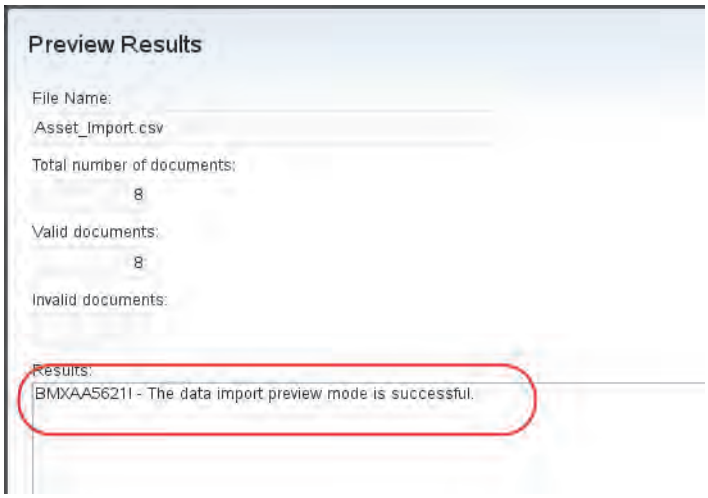
Note: This spreadsheet provides a simple example of how to format an asset import. The file must be saved to a comma-separated value (CSV) file. It contains a subset of attributes that you can define for the imported assets. For a more comprehensive example, download the example import CSV files from https://www.ibm.com/developerworks/community/groups/service/html/communityview?communityUuid=e25892f0-20f7-46ff-bbe9-c7c03fb3036f#fullpageWidgetId=Wb33da0c91d92_4cec_a8a7_57df877f617b&file=30e3411c-9a41-4d10-a1e7-e54dea00f9a3.

9. Maximize browser window.
10. Click **System Configuration > Platform Configuration > Quick Configuration** in the left navigation bar
11. Click the **Data Loading** tab.
12. Select **ASSETS** to select it for the Object and click **Load data**.
13. Click **Browse** and change to the **/labfiles** directory.

14. Select the **Asset_Import.csv** file and click **Open**.
15. Verify that the **Import Preview** option is selected and click **OK**.



16. Review the **Preview Results**. There should be eight records processed and no errors.

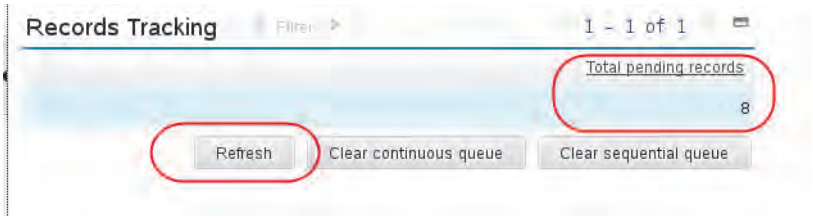


17. Click **OK** to close the preview results.

Note: You must ensure that there are no errors before performing the actual import.

18. Click **Load data** again.
19. Browse and select the **Asset_Import.csv** file again.
20. Clear the **Import Preview** option and click **OK** to perform the import.
21. Click **OK** to close the inbound transaction has been processed message.

22. Verify that eight records are pending in the queue.



23. Click **Refresh** until the Total pending records is **0**.
24. Click **Assets > Assets** in the left navigation bar.
25. Type **ITAM6** in the **Asset** filter field and press Enter to search for assets that begin with ITAM6.
26. Verify that **ITAM6006 - ITAM6010** are in the list. These assets were in the **Asset_Import.csv** file.
27. Minimize the browser.

Importing CIs

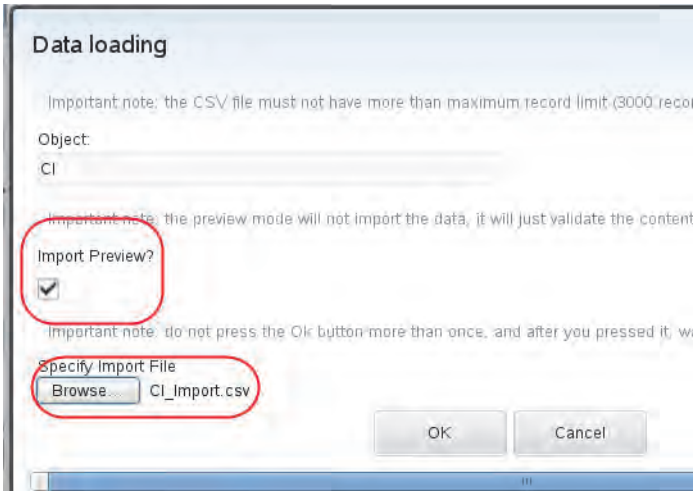
28. Open a file browser and change directory to **/labfiles**.
29. Double-click the **CI_Import.csv** file to open it.
30. Review the contents of the file by using a text editor. Close the file if you open it.

Note: This spreadsheet provides a simple example of how to format a CI import. The file must be saved to a comma-separated value (CSV) file. It contains a subset of attributes that you can define for the imported CIs. For a more comprehensive example, download the example import CSV files from the location mentioned earlier.

You can only import one type of CI per csv file. It is more common for customers to use the discovery tool, Tivoli Application Dependency Manager to import actual CIs and promote those actual CIs to CIs. This data import is for customers who are not using Tivoli Application Dependency Discovery Manager.

31. Click **System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.
32. Click the **Data Loading** tab.
33. Select **CI** for the **Object** to select it and click **Load data**.
34. Click **Browse** and change to the **/labfiles** directory.
35. Select the **CI_Import.csv** file and click **Open**.

36. Verify that the **Import Preview** option is selected and click **OK**.



37. Review the preview results. There should be three records processed and no errors.

38. Click **OK** to close the preview results.

Note: You must ensure that there are no errors before performing the actual import.

39. Click **Load data** again.

40. Browse and select the **CI_Import.csv** file again.

41. Clear the **Import Preview** option and click **OK** to perform the import.

42. Click **OK** to close the inbound transaction has been processed message.

43. Verify that there are three records pending in the queue.

44. Click **Refresh** until the total pending records is **0**.

45. Click **IT Infrastructure > Configuration Items** in the navigation bar.

46. Type **hostname** in the **Configuration Item Name** filter field and press Enter to search for CIs that begin with *hostname*.

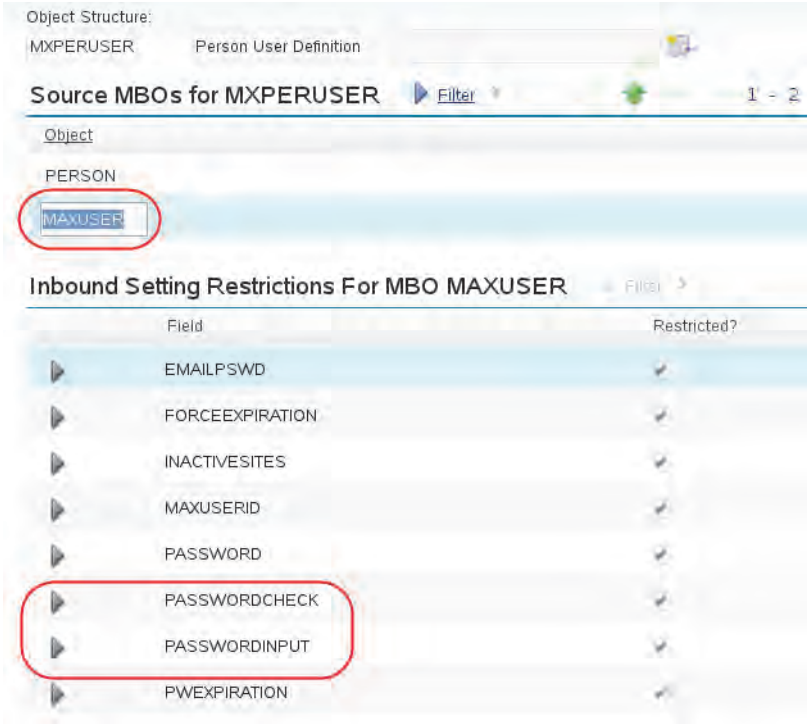
47. Verify that **HOSTNAME4.EXAMPLE.COM**, **HOSTNAME50.EXAMPLE.COM**, and **HOSTNAME60.EXAMPLE.COM** are in the list. These CIs were in the **CI_Import.csv** file.

48. Minimize Internet Explorer.

Importing users

Important: Before you can import user records, you must modify two database objects to suppress password checking. This action should be done as a scheduled change because changing these settings interferes with the use of Migration Manager. Be sure to return the objects to their original setting after the import job finishes.

49. Click **System Configuration > Migration > Object Structures** in the left navigation bar.
50. Enter **MXPERUSER** in the Object Structure field and press **Enter**. Click the MXPERUSER object to select it.
51. Click **Inbound Setting Restrictions** in **More Actions**.
52. Click **MAXUSER** to select it. Locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.



53. Click the **Override** check box on both attributes, and clear the **Restricted** check box on both attributes. You must check the **Override** check box on both attributes before clearing the **Restricted** box.

54. Click **OK** to save the record.
55. Open a file browser and change directory to **/labfiles**.
56. Double-click the **User_Import.csv** file to open it.
57. Review the contents of the file by using a text editor. Close the file if you open it.
58. Click **System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.
59. Click the **Data Loading** tab.
60. Select **PERSON USER** for the **Object** to select it and click **Load data**.
61. Click **Browse** and change to the **/labfiles** directory.
62. Select the **User_Import.csv** file and click **Open**.
63. Verify that the **Import Preview** option is selected and click **OK**.
64. Review the Preview Results. There should be three records processed and no errors.
65. Click **OK** to close the preview results.

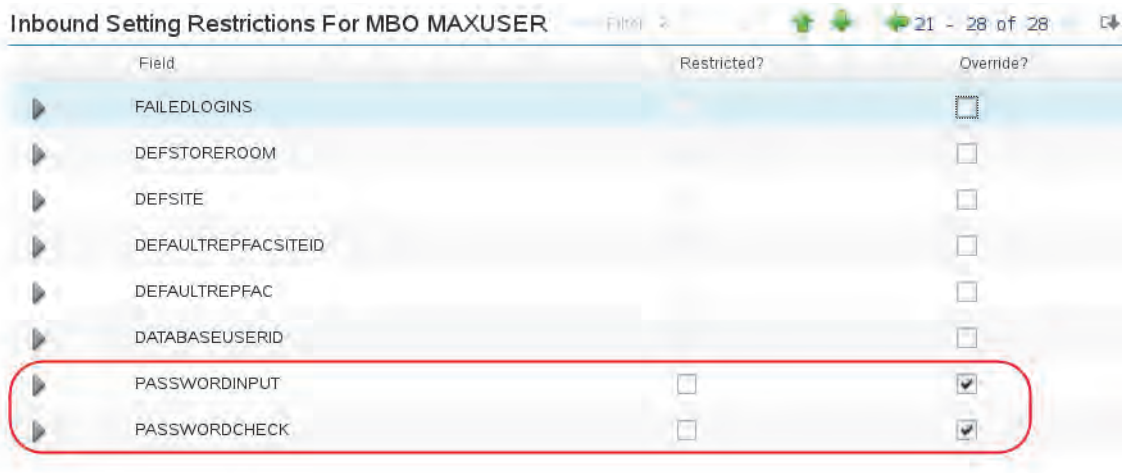
Note: You must ensure that there are no errors before performing the actual import.

66. Click **Load data** again.
67. Browse and select the **User_Import.csv** file again.
68. Clear the **Import Preview** option and click **OK** to perform the import.

69. Click **OK** to close the `inbound transaction has been processed` message.
70. Verify that there are three records pending in the queue.
71. Click **Refresh** until the total pending records is **0**.
72. Click **Security > Users** in the navigation bar.
73. Type **cjenkins** in the **User** filter field and press Enter to search for Clara Jenkins, who was a user in the import file.
74. Verify that Clara has been added.
75. Repeat the previous two steps for **jfraser** (Jamie Fraser) and **kthomas** (Kevin Thomas).

Reverting the password security settings

76. Click **System Configuration > Migration > Object Structures** in the left navigation bar.
77. Enter **MXPERUSER** in the **Object Structure** field and press Enter. Click the MXPERUSER object to select it.
78. Click **Inbound Setting Restrictions** in **More Actions**.
79. Click **MAXUSER** to select it. Scroll forward to locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.



80. Select the **Restricted check** box on both attributes and clear the **Override check** box on both attributes.
81. Click **OK** to save the record.
82. Log out of the console.

Unit 4 Service request management exercises

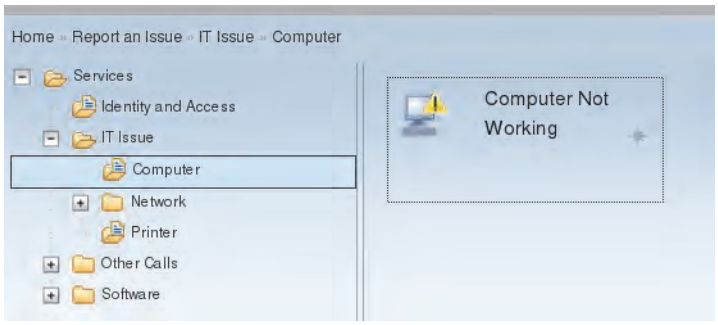
The exercises for this unit demonstrate some of the basic feature of Service Request Management. First, you log in as a user to report an issue. Then, you log in as a Service Desk Analyst to manage the service request. Finally, you also log in as an Incident Analyst to manage an incident.

Exercise 1 Opening a service request

You can create service requests in the Self-Service Center or Service Request application. In this exercise, you log in as different users to report issues.

Using the Self-service Center

1. Log in to the console as **bob** with the password **object00**. Bob is a self-service user.
2. Click **Report an Issue > IT Issue > Computer not working.**



3. Enter the following details for the issue.

   Laptop keeps crashing with a Blue Screen. I can reboot and work for awhile but then it crashes again. The error says nvlddmkm.sys cannot access memory.
4. Enter **1** for the priority.
5. Click the **Detail Menu** for the affected asset and click **Select Value**.
6. Click **ITAM1004**.

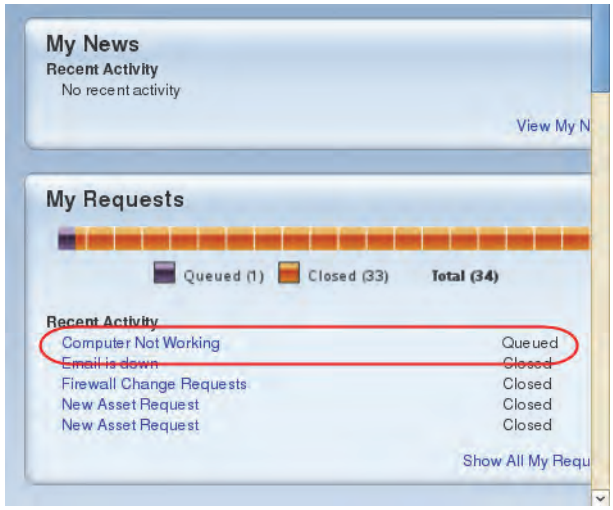
7. Enter the following information for the attributes.

Field	Value
Can the system be booted	Yes
Error message if any	See details
Hardware Type	LAPTOP
What is the Operating System	WINDOWS

8. Click **Submit Now**.
9. Record the service request number. _____

Important: Ensure that you record the number reported in your class environment. You need this number for subsequent steps.

10. Click **OK** to dismiss the message.
11. Click the most recent **Computer not working** service request in the My Request pod.

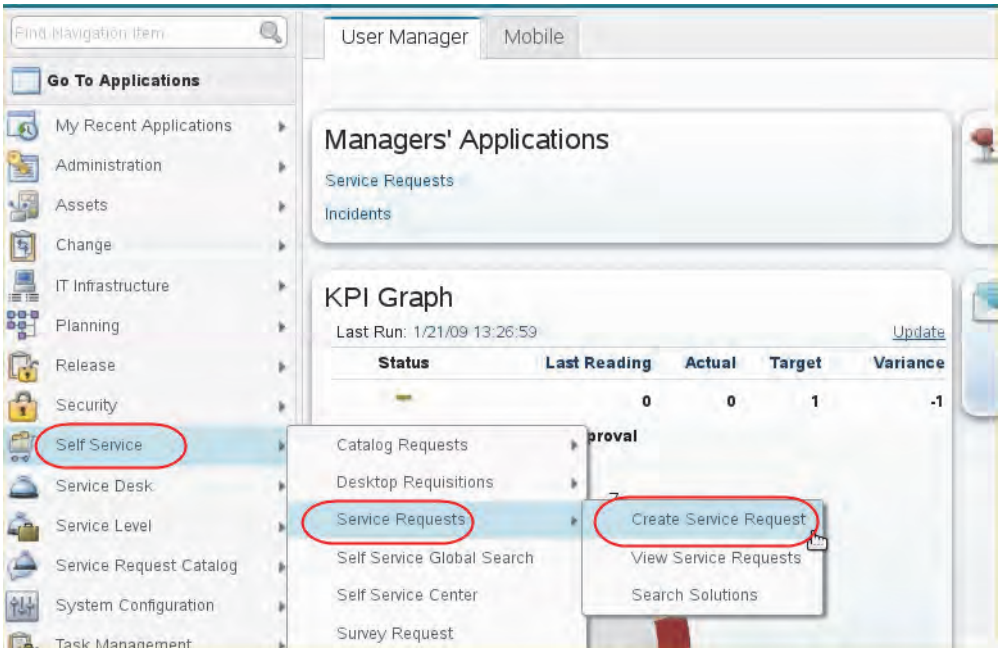


12. Review the request.
13. Click **OK** to close the view.
14. Sign out of the console.

Using the Service Request application

15. Log in to the console as **Fred** with the password **object00**. Fred is a manager and immediately sees the User Manager start center.

16. Fred uses the left navigation menu to create a service request. Click **Self Service > Service Requests > Create Service Request** in the left navigation menu.

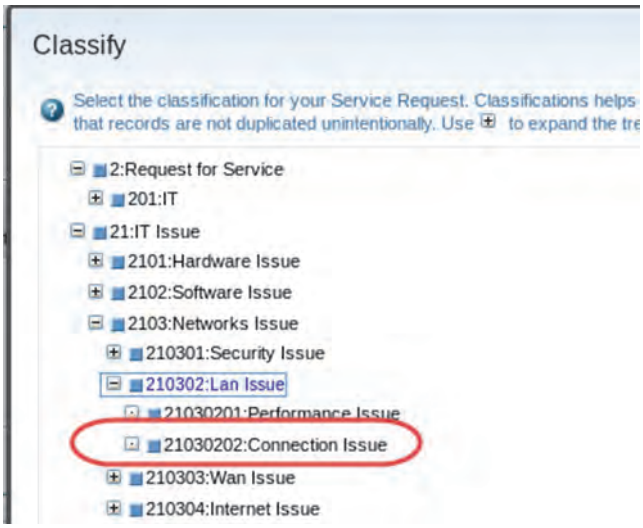


17. Enter the following information in the service request.

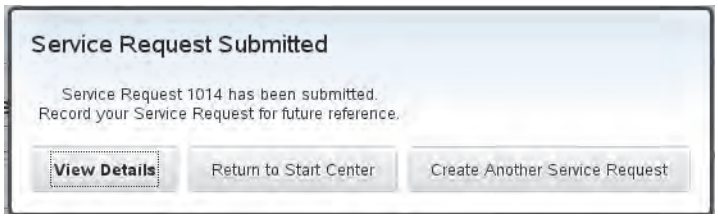
Field	Value
`Reported priority`	1
`Summary`	Network password not working
`Details`	When I try to log on to the network, I keep getting a password is incorrect error.

18. Click the **Details menu** for the Classification and select **Classify**.

19. Expand **21:IT Issue** > **2103:Networks Issue** > **210302: Lan Issue**.



20. Click the blue box next to **21030202 IT Issue \ Networks \ Lan \ Connection Issue** to select it. The classification value is returned to the service request.
21. Click **Submit**.
22. Record the service request number. _____



Important: Your service request number might not match the screen capture. Be sure to write down the number reported in your class environment. You need this number for subsequent steps. Remember this note every time you are instructed to write down a record number in future exercises.

23. Click **View Details** and review the record.
24. Sign out of the console.

Exercise 2 Managing a service request

Service requests are typically managed by Service Desk Analysts. These analysts review the request and try to find a solution. If they cannot find a solution, they open an incident that is passed to an Incident Analyst.

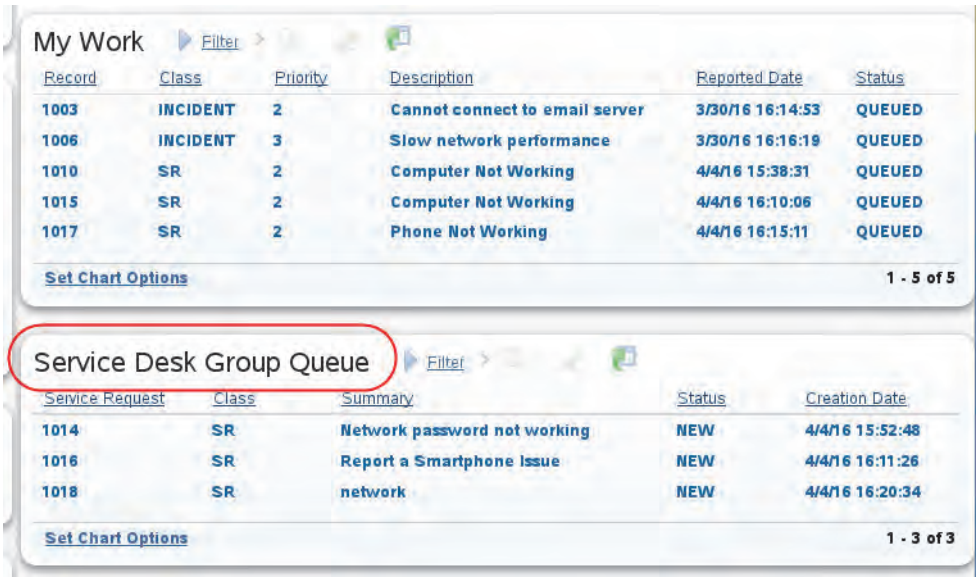
In this exercise, you log in as service desk analysts to manage service requests. One request has a solution. The other request must have an incident opened.

Applying a solution to a service request

1. Log in to the console as **scott** with the password **object00**. Remember from the Unit 2 exercises that Scott is a service desk analyst.

   The **Service Desk Analyst** Start Center is selected by default.

2. Locate the **Service Desk Group Queue** portlet.

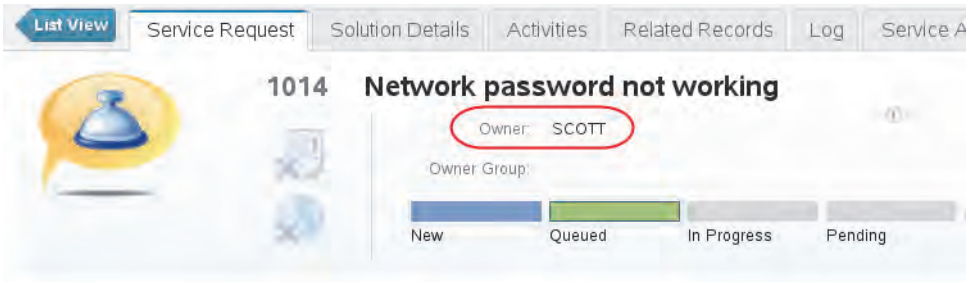


3. Find and open the service request that **fred** entered in Exercise 1, “Opening a service request”.

Hint: You might have to go to the second page to find the service request. You can also filter on service request number and enter the service request number you wrote down for Fred's request in the previous exercise. Remember this tip anytime you are instructed to find a record in a portlet.

4. Click **Common Actions > Take Ownership**.

5. Verify that the **Owner** field is set to **SCOTT**.



6. Review the service request information.
7. Click the **Start Center** icon to return to the Start Center.
8. Verify that the service request for Fred is in the My Work portlet and is no longer in the Service Desk Group Queue portlet. If you filtered by service request in the Service Desk Group Queue, clear the filter.
9. Open the service request for Fred again.
10. Click **Common Actions > Change Status** and set the status to **In Progress**.
11. Click **Common Actions > Search Solutions**.

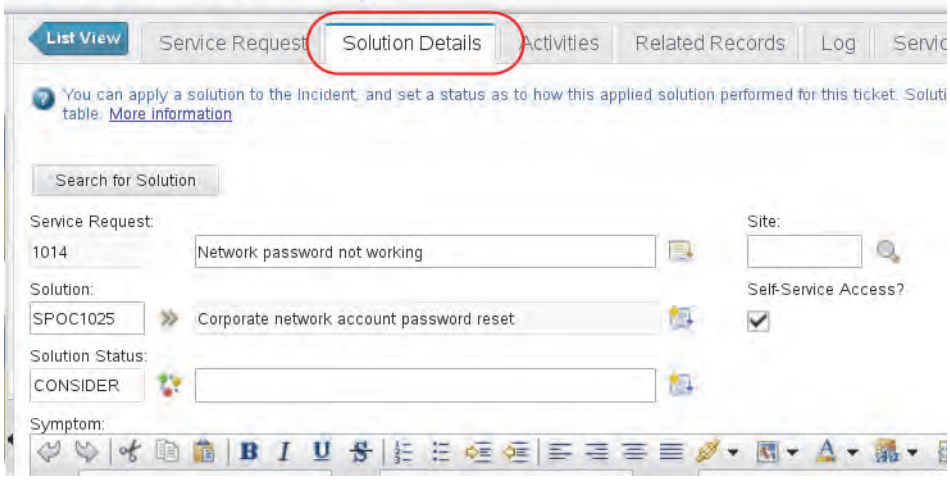
The Search Solutions copies the classification of the service request to the search filters and displays solutions within that class. In this example, there are no matching solutions of that class. Because there might be an applicable solution with a different class, you can clear the filter and search again.

12. Click **Clear Fields** to clear the filters.
13. Enter **password** in the **Search Terms** field and click **Search** to narrow down the search results. Several solutions are returned. One of them is titled *Corporate network account password reset*.
14. Click the **Details** for that solution and review the details of the solution.

Scott would have the affected user try the solution. If the solution solves the problem, Scott can apply it to the service request.

15. Click **Use Solution** to apply this solution to the service request.

16. Click the **Solution Details** tab to verify that the solution was applied.

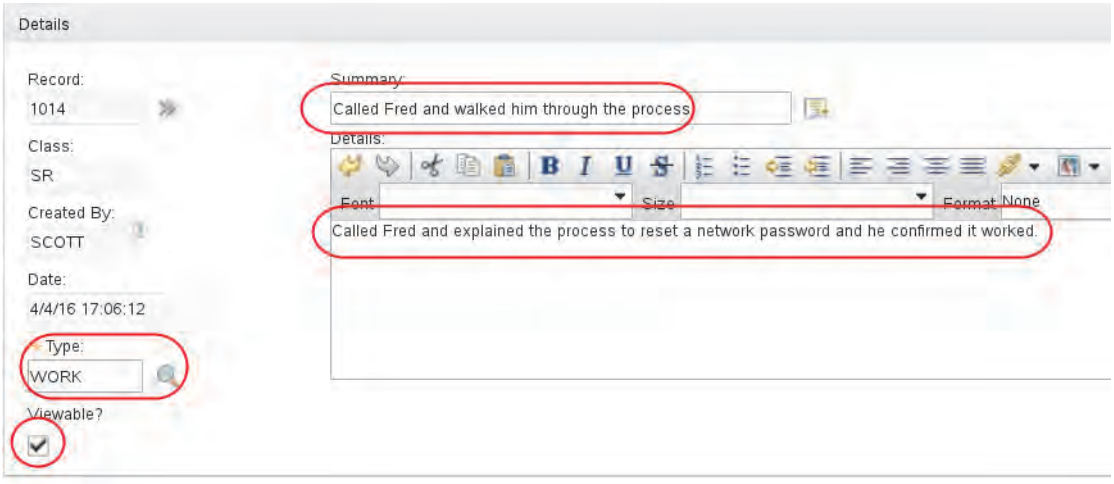


17. Click the **Log** tab.

18. Click **New Row** in the **Work Logs** section.

19. Enter the following information to complete the log entry.

Field	Value
Summary	Called Fred and walked him through process
Details	Called Fred and explained the process to reset a network password. He confirmed it worked.
Type	WORK
Viewable	selected

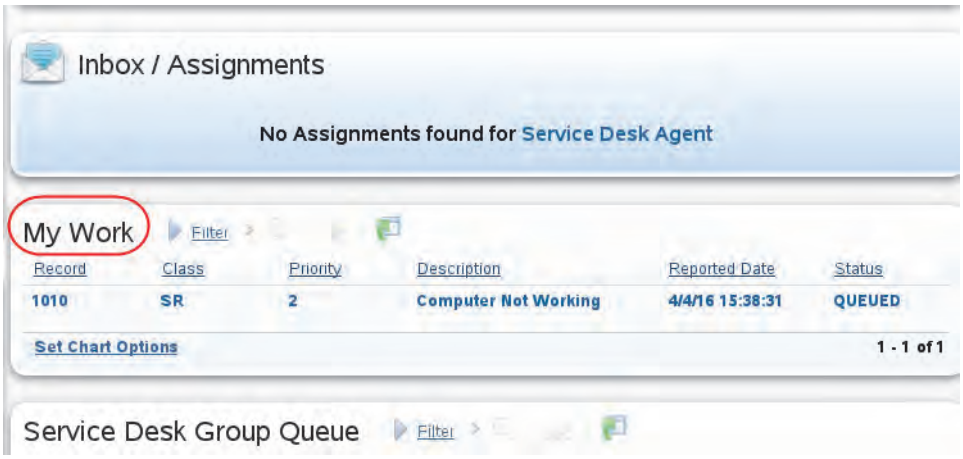


20. Click the **Change Status** icon and set the status to **Resolved**.

21. Sign out of the console.

Opening an incident

22. Log in to the console as **sdagent** with the password **object00**. Sdagent is a level 1 support specialist.
23. Click the **Service Desk Analyst** Start Center tab.
24. Find and open the service request that Bob entered in Exercise 1, “Opening a service request” in the My Work portlet. A ticket template that is associated with the catalog offering routed the service request to the level 1 support group SDATIER1.



25. Click **Common Actions > Take Ownership**.
26. Review the service request information.
27. Click **Common Actions > Change Status** and set the status to **In Progress**.
28. Click **Common Actions > Search Solutions**.
29. Enter **blue screen** in the **Search Terms** field and click **Search**. No results are returned.
30. Enter **nvlddmkm.sys** in the **Search Terms** field and click **Search**. No results are returned.
31. Click **Close** to close the search solution.

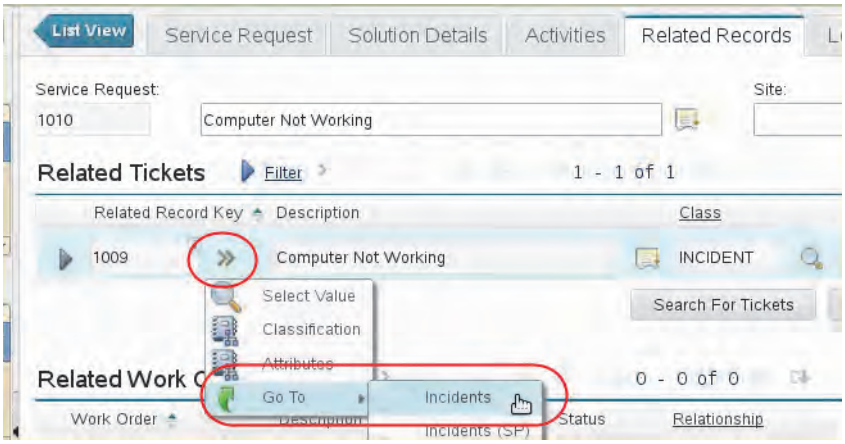
Because there does not seem to be a known solution, the Level 1 support analyst creates an incident. However, before creating the incident, the agent logs the steps taken so far.

32. Click **New Row** in the **Work Logs** section.
33. Enter the following information to complete the log entry.

Field	Value
`Summary`	Searched for solution
`Details`	Tried to find a solution using Search Solutions and Global Search. No match was found.

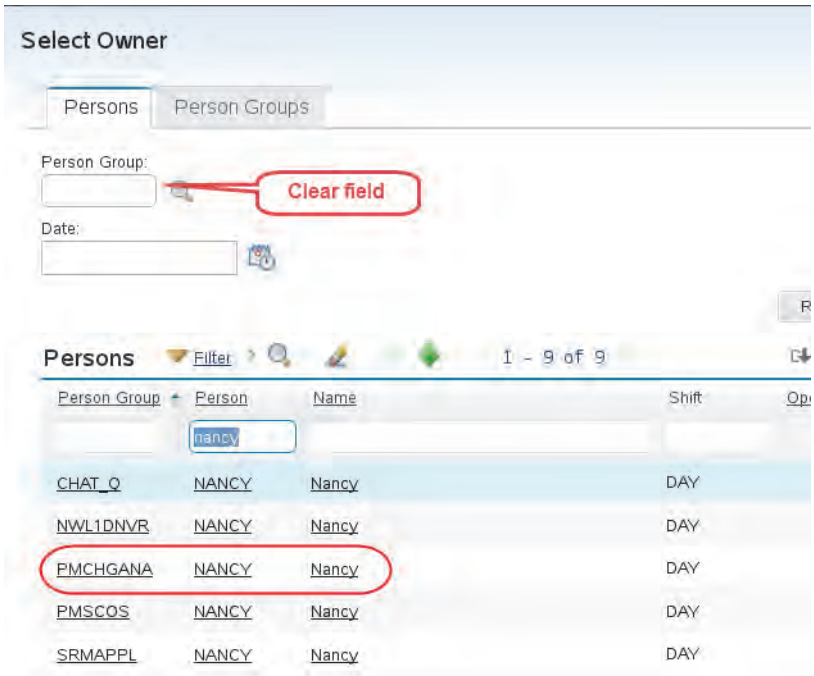
Field	Value
Type	WORK
Viewable	selected

34. Click the **Save Service Request** icon.
35. Click **Common Actions > Create Incident**.
36. Click the **Related Records** tab.
37. Click the **Detail Menu** for the incident and select **Go To Incidents**.



38. Click **Common Actions > Select Owner**.

39. Clear the **Person Group** field and use the filter to search for **Nancy** in the **Person** field. Click **Nancy** in the **PMCHGANA** group to make her the owner of the incident.



Note: You could also use a workflow to route the incident to a user or a group.

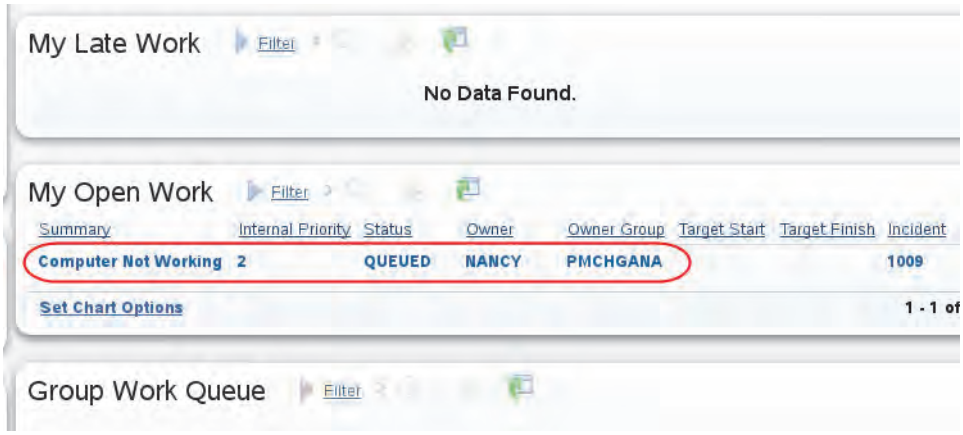
40. Click **Return** in the upper right corner to go back to the service request.
41. Sign out of the console.

Exercise 3 Managing an incident

In this exercise, you log in as an incident analyst to manage an incident.

1. Log in to the console as **nancy** with the password **object00**. Nancy has several roles, including incident analyst.
2. Click the **Incident Analyst** Start Center tab.
3. Review the portlets on the Start Center.
4. Locate the My Open Work portlet.

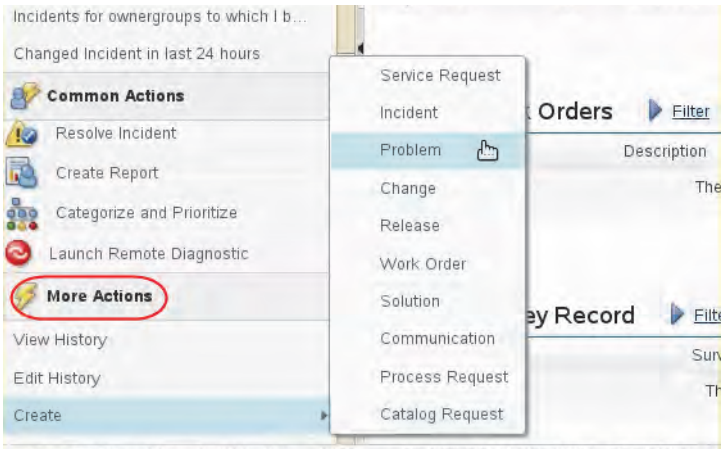
5. Find and open the incident for the **Computer not working** issue that Bob reported.



6. Review the service request information.
7. Click **Common Actions > Change Status** and set the status to **In Progress**.
8. Review the work log.

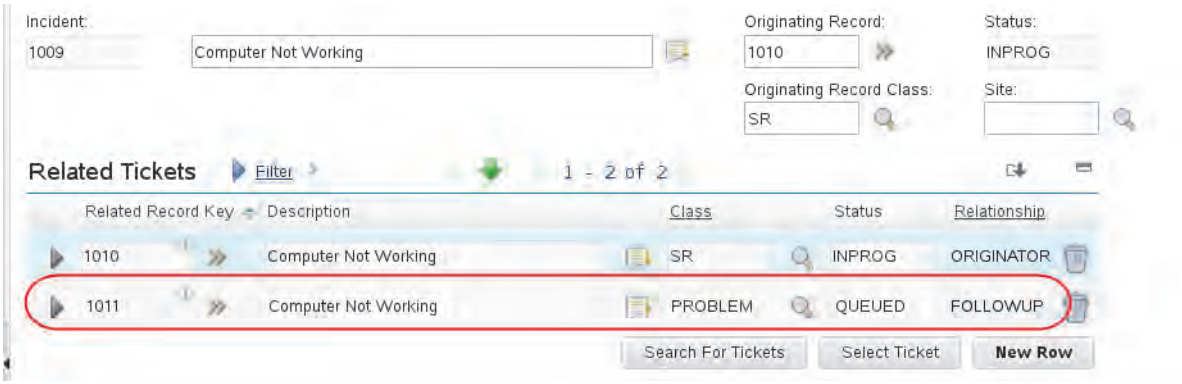
Nancy performs an internet search and determines that the driver for the video card must be updated. However, there are no technicians available to do this update. In the meantime, Bob can lower the resolution to avoid the crash. Nancy sends this information to **sdagent** to communicate to Bob and opens a problem ticket for the update.

9. Click **Create > Problem** under **More Actions** in the navigation bar.



10. Click the **Related Records** tab.

11. Write down the problem ticket number. _____

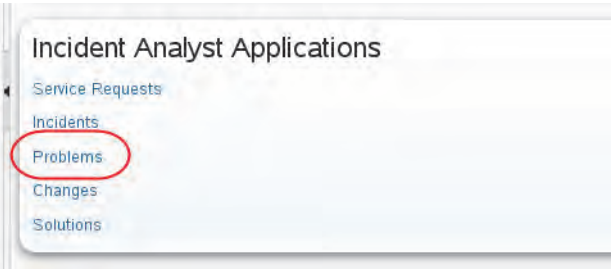


12. Click the **Start Center** icon to return to the Incident Analyst Start Center.

Exercise 4 Managing a problem

The goal of an Incident Analyst is to get the user working as quickly as possible. Often that means that a workaround is applied. In the previous exercise, Nancy gave Bob a workaround, but she did not solve the root cause. The goal of problem management is to determine a more permanent solution. This exercise demonstrates how to manage a problem.

1. Verify that you are on the **Incident Analyst** Start Center tab.
2. Click **Problems** in the Incident Analyst Applications portlet.



3. Find and open the problem created in the previous exercise.
4. Click **Common Actions > Change Status** and set the status to **In Progress**.
5. In the Problem Details section, enter **3** for the Impact and **3** for the Urgency.
6. Click the **Save Problem** icon.
7. Click the **Solution Details** tab.
8. Enter **Blue screen caused by nvlddmkm.sys** for the **Symptom**.
9. Enter **Old video driver** for the **Cause**.
10. Enter **Install latest video driver** for the **Resolution**.

11. Click the **Save Problem** icon.
12. Click the **Log** tab.
13. Click **New Row** on the **Work Log** tab.
14. Enter the following information to complete the log entry.

Field	Value
Summary	Updated video driver
Details	Updated the video driver and increased the video resolution. Laptop no longer crashes. I have documented the solution
Type	WORK
Viewable	selected

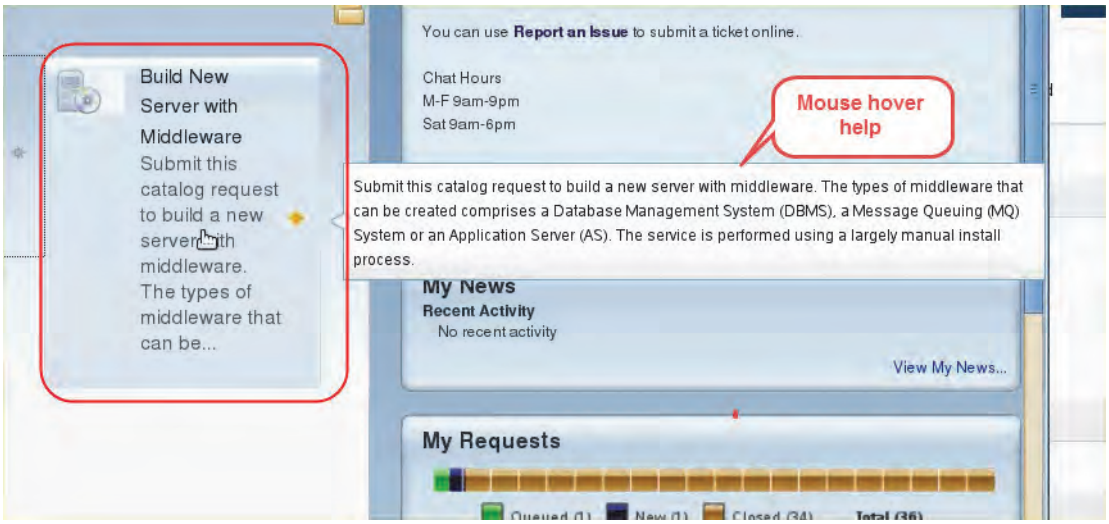
15. Click the **Save Problem** icon.
16. Click **Common Actions > Resolve Problem** and set the status to **Resolved.**
17. Click the **Start Center** icon to return to the Start Center.
18. Locate the My Open Work Queue portlet.
19. Find and open the incident for the **Computer not working** issue that Bob reported.
20. Click **Common Actions > Resolve Incident** and set the status to **Resolved**.
21. Sign out of the console.
22. Log in to the console as **sdagent** with the password **object00**.
23. Click the **Service Desk Analyst** Start Center tab.
24. Find and open the service request entered by Bob in the My Work portlet.
25. Click **Common Actions > Change Status** icon and set the status to **Closed**.
26. Sign out of the console.

Exercise 5 Requesting a Service Catalog offering

The previous exercises demonstrated how to report an issue. However, one key feature of IBM Control Desk is the Service Catalog. The Service Catalog provides a way for users to shop for all types of services. This exercise demonstrates how you can request an offering in the Service Catalog through the Self-Service Center. The offering is a request for a business service that requires approval and work to be completed for it to be fulfilled. The offering is configured to guide the different users through their piece of the fulfillment. This scenario includes links to the IT Asset Management and Configuration and Change Management features of IBM Control Desk. To show the end to end flow, the scenario is continued in Units 5 and 6.

1. Log in to the console as **bob** with the password **object00**.

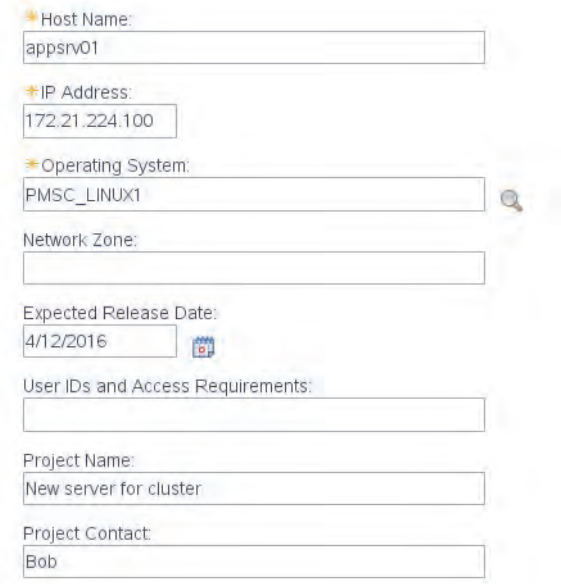
2. Click **Request a new Service > Composite Services > Build New Server with Middleware**. You can hover the mouse pointer over the icon to read about the catalog offering.



3. Enter the following information for the Server Configuration.

Field	Value
Host Name	appsrv01
IP Address	172.21.224.100
Operating System	PMSC_LINUX1
Expected Release Date	one week from today
Project Name	New Server for Cluster

Hint: Use the **Select Value** to define the operating system.

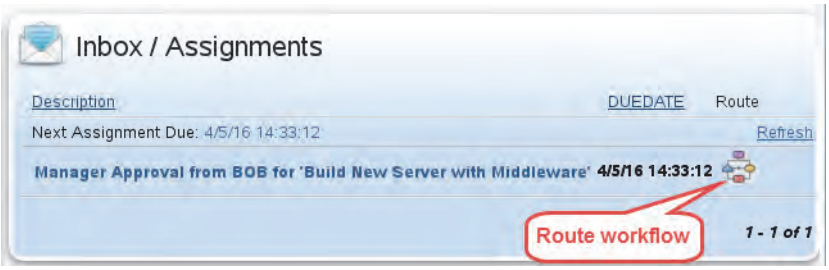


4. Click **Continue**.
5. Select **Install AS** and enter **/opt/IBM/WebSphere/AppServer/** for the AS Directory Locations and click **Continue**.
6. Review the **Summary** and click **Submit Request**.
7. Write down the service request number. _____
8. Click **Show Details** and review the details.
9. Click **OK** to close the View Service Request window.
10. Sign out of the console.

Approving a service request

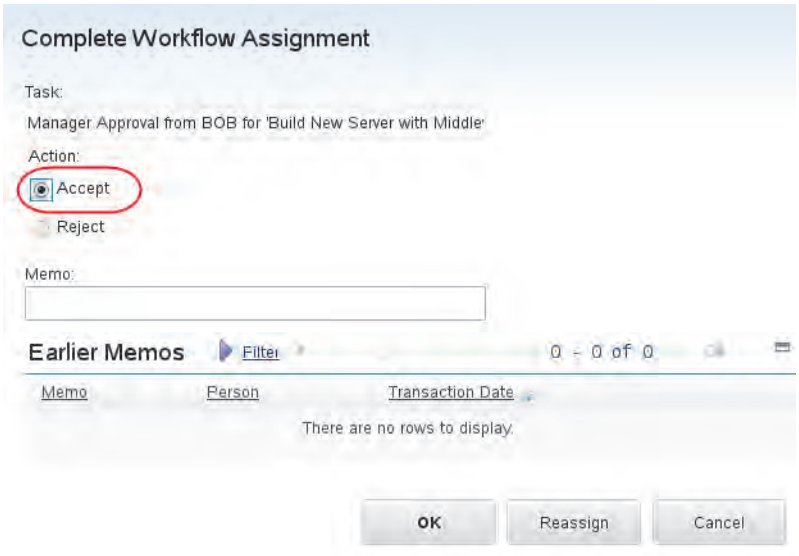
The Service Catalog offering has a workflow associated with it. After the service is requested, the manager for the user is sent an approval request.

11. Log in as **fred** with the password **object00**.
12. Find the **Manager Approval for the Build Server with Middleware** request from Bob in the Inbox/Assignments portlet.



- Fred has the option of either immediately approving or rejecting the request, or opening the record and viewing the details. To immediately approve or reject, Fred can click the **Route** icon.
- But in most cases, the manager wants to review the request before approving or rejecting.

13. Click the service request to open the record. Close the Workflow Help if it opens. Review the details of the request.
14. Fred decides to approve the request. Scroll to the bottom of the view and click **Take Action**,
15. Select **Accept** and click **OK**.



16. Click the Start Center icon to return to the User Manager start center. You no longer see the request from Bob in the Inbox. Workflow has routed it to the next person for action.
17. Sign out of the console.

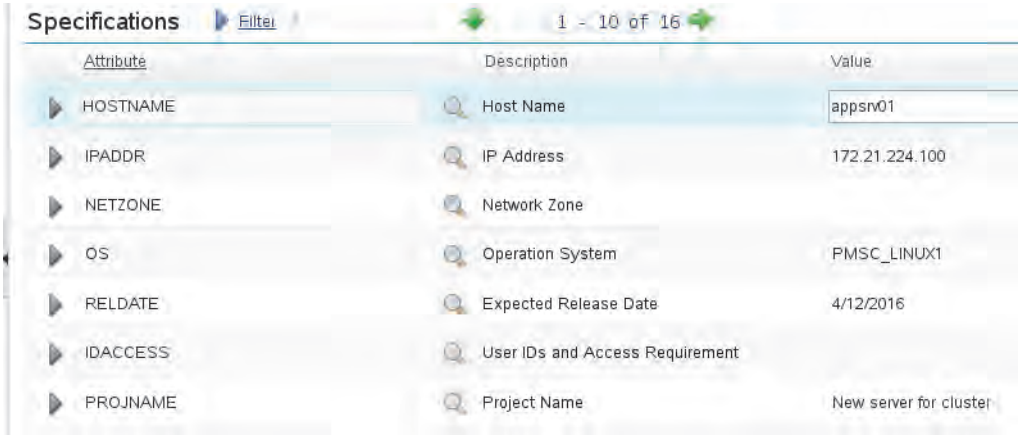
Approving an activity

After the request is approved by management, the workflow routes the request to the operations team. An operations specialist must take action on the request. In this example, Nancy is the operations specialist who takes ownership of the request. The Build New Server with Middleware request has one activity. That activity has several tasks. The top-level activity can be approved and initiated. When the activity is initiated, work orders are automatically created for each task in the job plan for the activity. The steps in this section demonstrate how to take ownership and approve an activity.

18. Log in to the console as **nancy** with the password **object00**.
19. Nancy is a member of several security groups and has multiple Start Centers. Click the **Operations Specialist** Start Center tab.

20. Find and open the **Build New Server with Middleware** service request in the Group SR Queue portlet.

21. Review the service request. Read the details and view the Specifications. Notice that the attributes defined by Bob are copied to the Specifications section.

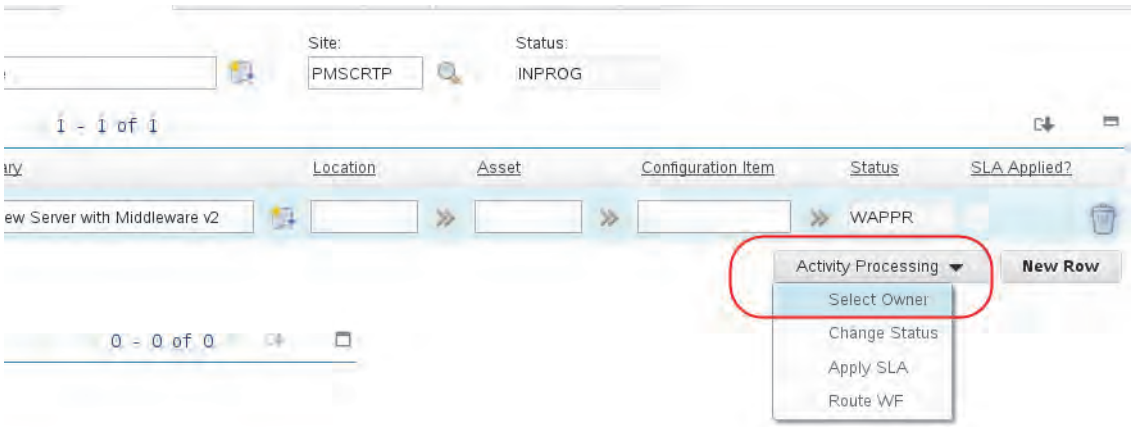


22. Click **Common Actions > Take Ownership** to take ownership of the service request.

23. Click **Common Actions > Change Status** and set the service request status to **In Progress**.

24. Click the **Activities** tab.

25. Click **Activity Processing** next to the **Build New Server with Middleware v2** activity and click **Select Owner**. This activity was added to the service request using a ticket template. The ticket template included a job plan with this activity.



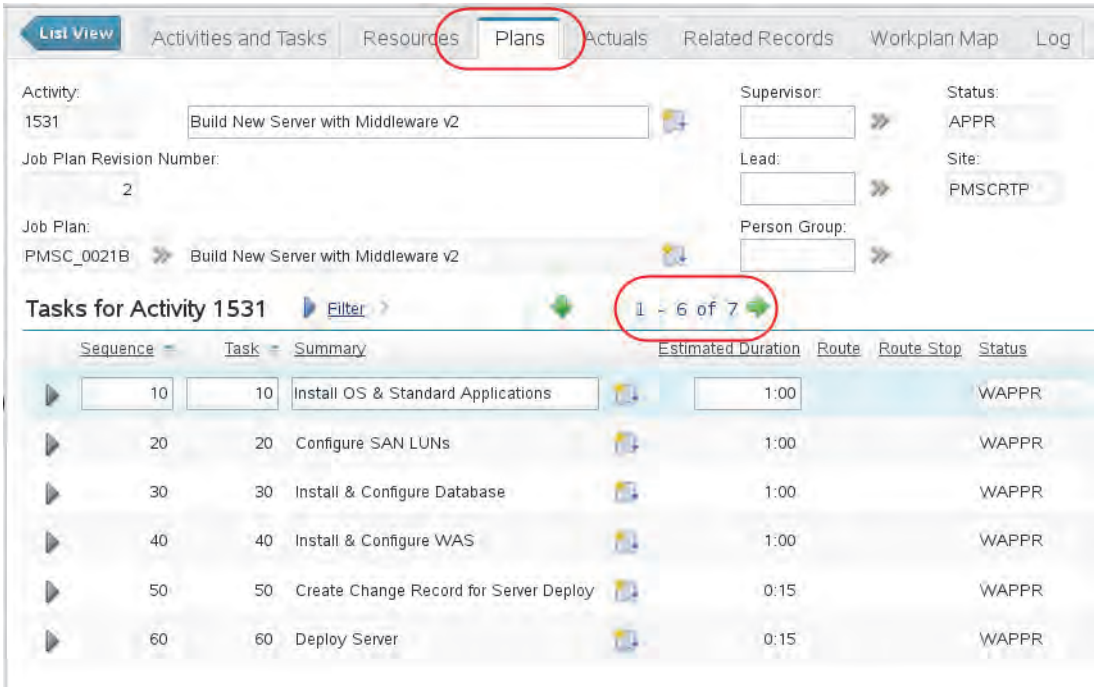
26. Find and click **Nancy** to make her the owner of the overall activity. The individual tasks under the activity can be assigned to other people.

27. Click **Activity Processing** and click **Change Status**.

28. Set the status for the activity to **Approved**.

29. Click the **Detail Menu** next to the activity number and click **Go To > Activities and Task** to view the planned tasks for this activity.

30. Click the **Plans** tab and review the planned tasks for the activity. Notice that there are more tasks than fit on a single screen. You use the forward arrow to see the next screen of tasks.



Assigning task owners

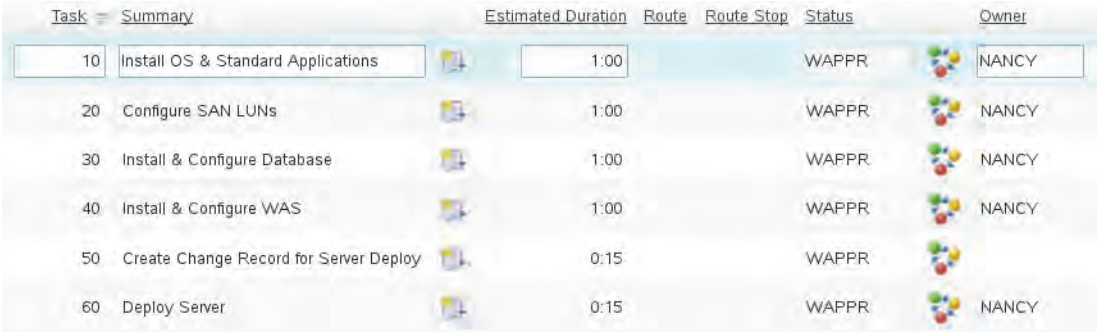
The job plan associated with this offering automatically assigns the tasks to the PMSCOS (Operations Specialist) group. However, in this example as the team lead, Nancy is responsible for assigning the owners to the task and completing a few of the tasks. You can assign the task to a user or group. In this example, you assign the tasks to specific users.

31. Click the **Detail Menu** icon for the **Owner** of the first task and click **Select Value**.

32. Find and click **Nancy** to make her the owner of the task.

33. Repeat the previous two steps for the following tasks to make Nancy the owner.
    a. Task 20 Configure SAN LUNs
    b. Task 30 Install & Configure Database
    c. Task 40 Install & Configure WAS

d. Task 60 Deploy Server



Task	Summary	Estimated Duration	Route	Route Stop	Status	Owner
10	Install OS & Standard Applications	1:00			WAPPR	NANCY
20	Configure SAN LUNs	1:00			WAPPR	NANCY
30	Install & Configure Database	1:00			WAPPR	NANCY
40	Install & Configure WAS	1:00			WAPPR	NANCY
50	Create Change Record for Server Deploy	0:15			WAPPR	
60	Deploy Server	0:15			WAPPR	NANCY

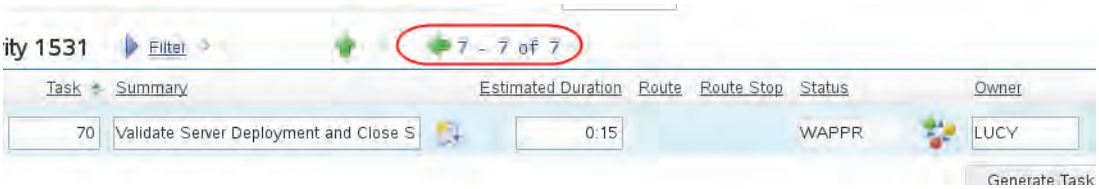
34. Click the **Details Menu** icon for the **Owner** of the fifth task, Task 50 Create Change Record for Server Deployment, and click **Select Value**.

35. Find and click **Schroeder** to make him the owner of the task.

36. Click the **Details Menu** icon for the **Owner** of the seventh task, Task 70 Validate Server Deployment and Close SR, and click **Select Value**.

Note: Task 70 is on the second page of tasks.

37. Find and click **Lucy** to make her the owner of the task.

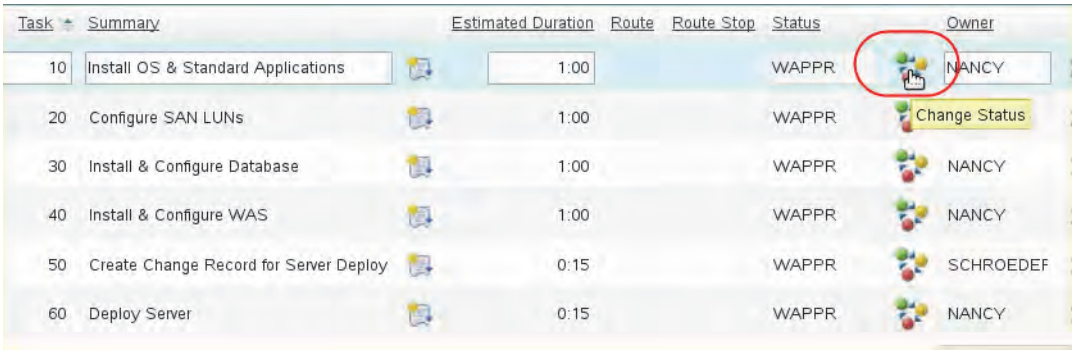


38. Click the **Save the Activity** icon.

Approving tasks

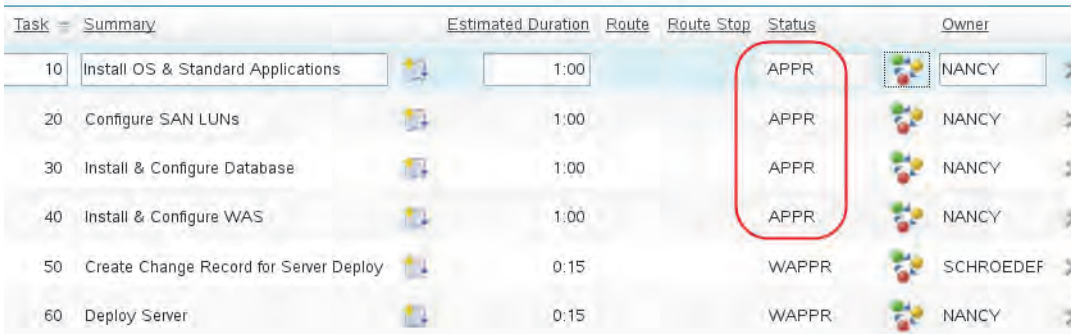
You can have an approval process for each task. You can implement a process to request approval for each of these tasks or approval them manually. In the following steps, you approve the first few tasks that Nancy is assigned. The Task 40 must be approved for a subsequent exercise that demonstrates how license reservations work.

39. Click the **Change Status** icon next to the first task, 10 Install OS & Standard Applications.



40. Set the status to **Approved**.

41. Repeat the previous two steps for the following tasks.
    a. Task 20 Configure SAN LUNs
    b. Task 30 Install & Configure Database
    c. Task 40 Install & Configure WAS



Initiating activities

Tasks in an activity plan are typically completed in sequence. You can use the Initiate Activity feature to start the first task. When that task is complete, the status of the next task is automatically changed to In Progress. The following steps demonstrate how to initiate an activity.

42. Click **Common Actions > Initiate Activity** and set the status to **In Progress**. The Status of the first task changes to INPRG.

43. Click **Return** in the upper right corner to return to the service request.

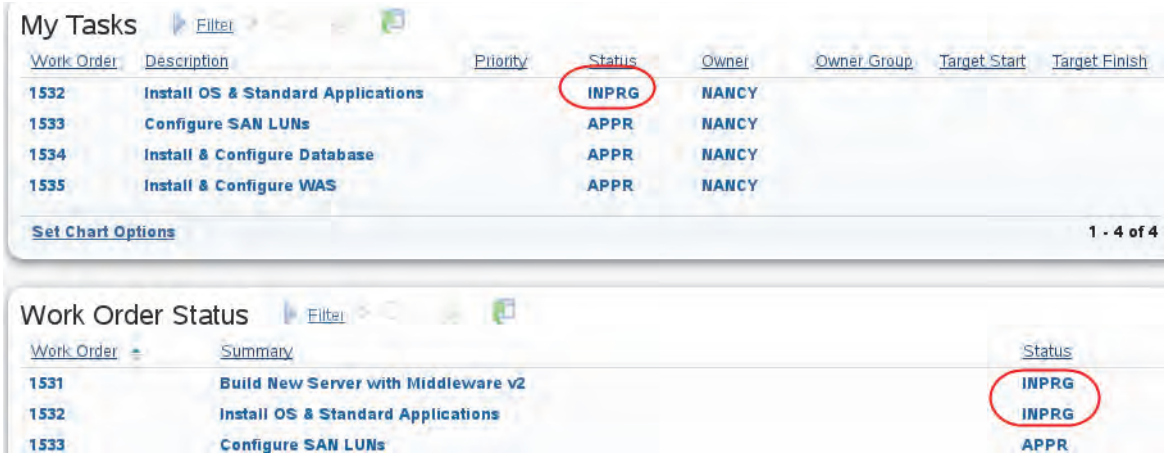
Managing work orders

The process implemented for this service request in the demonstration data creates work orders for the overall activity and each task. You can manage the tasks from these work orders.

44. Click the **Start Center** icon to return to the Operations Specialist start center.

45. Find the Work Order Status and My Tasks portlets and review the work orders and tasks assigned to Nancy.

    Notice that the work order for the overall activity, Build New Server with Middleware v2, and the first task, Install OS & Standard Applications, have a status of INPRG (In Progress). This status was set when the activity status was set.

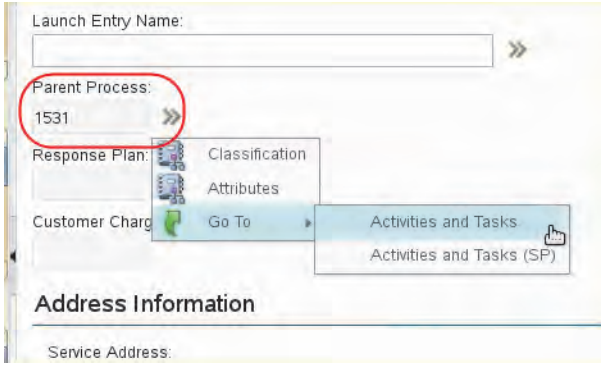


46. Open the **Install OS & Standard Applications** task in the My Task portlet.

47. Review the task.

48. Find the **Parent Process** field. This field is set to the overall activity work order.

49. Click the **Details Menu** icon next to the **Parent Process** field and click **Go To Activities and Tasks**.



50. Click the **Plans** tab.

    Notice that all the tasks of the activity are listed in the Work Order. You can track the progress of the overall activity and work order here.

51. Click **Return** to return to the task activity for the first task, Install OS & Standard Applications.

Now, Nancy would install the operating system and standard applications for this project. After that task is finished, you can mark the activity as completed.

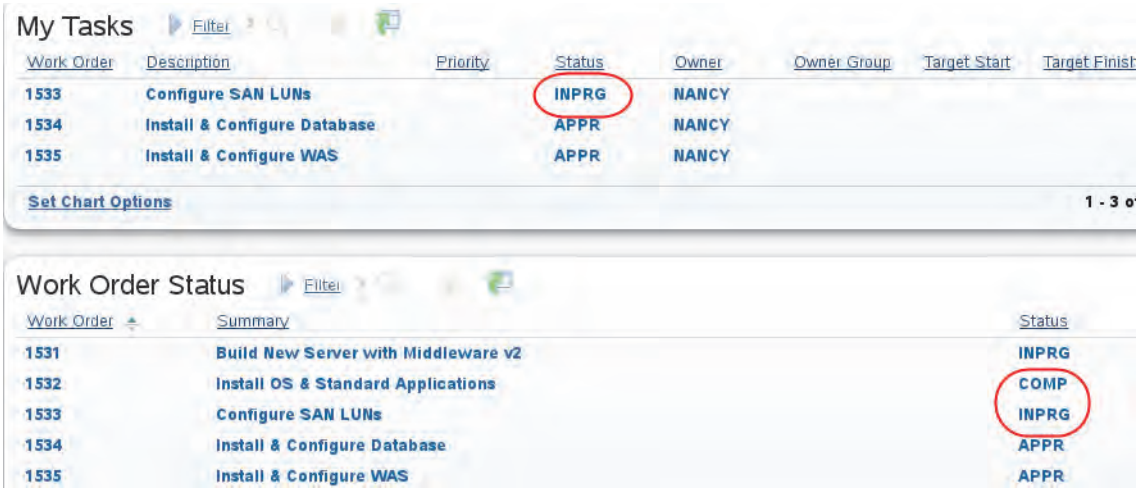
52. Click **Common Actions > Complete Activity**. Verify that the new status is Completed and click **OK**.

This action only completes the work order for the Install OS & Standard Applications task. The parent work order for the Build New Server with Middleware v2 activity is still in progress. In addition, the work orders for the subsequent tasks are still active.

53. Click the **Start Center** icon to return to the Operations Specialist Start Center.

54. Review the Work Order Status and My Tasks portlets.

    Notice that the work order for the first task is complete and the second task, Configure SAN LUNs, is now In Progress.



55. Open the **Configure SAN LUNs** task in the My Task portlet.

Now, Nancy would configure the SAN LUNs for this project.

56. Click **Common Actions > Complete Activity**. Verify that the New Status is Completed and click OK.

57. Click the **Start Center** icon to return to the Operations Specialist Start Center.

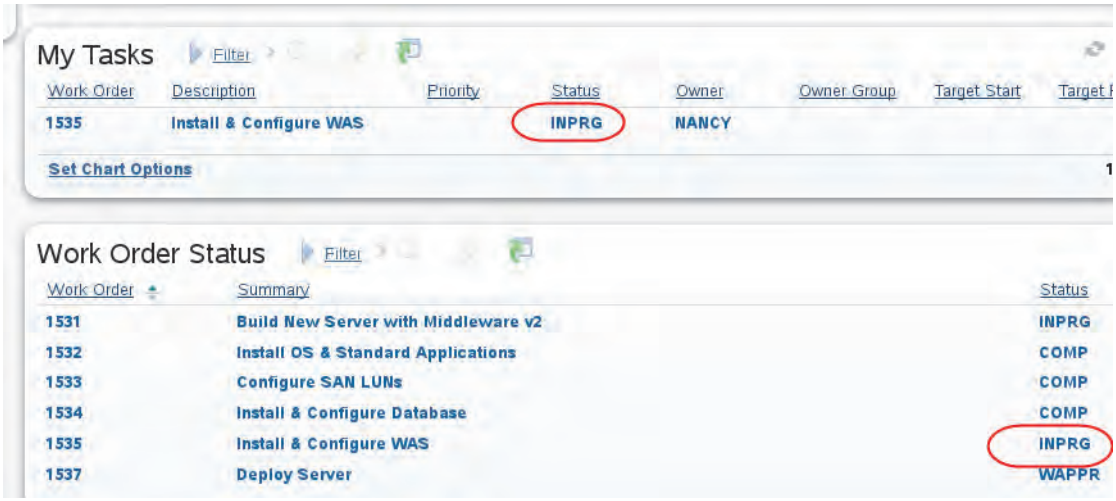
58. Open the **Install & Configure Database** task in the My Task portlet.

Now, Nancy would install and configure the database for this project.

59. Click **Common Actions > Complete Activity**. Verify that the New Status is Completed and click OK.

60. Click the **Start Center** icon to return to the Operations Specialist Start Center.

61. Review the Work Order Status and My Tasks portlets.



The Install & Configure WAS task is INPROG (In Progress). When this task was approved, a WebSphere Application Server Network Deployment license was reserved. This reservation was part of the Job Plan. To demonstrate integration with the License Application, this task is completed in the next unit on IT Asset Management. The remaining tasks are completed in the last unit to demonstrate integration with Configuration and Change.

62. Sign out of the console.

Unit 5 IT asset management exercises

The exercises for this unit demonstrate some of the basic features of IT asset management. You review common roles and the applications that are used by each role. You also perform common IT asset management tasks such as requesting an IT asset, purchasing an IT asset, and managing licenses.

Exercise 1 Reviewing IT asset management roles and applications

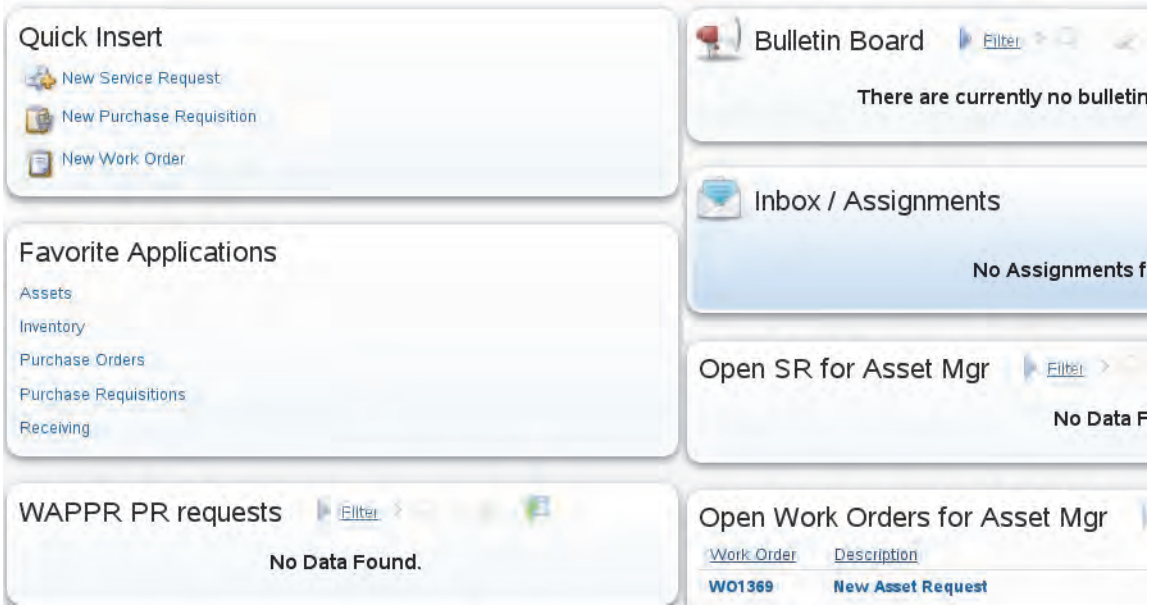
Each organization is different. However, some common IT asset management roles are found in most organizations. One or more people can fill these roles. The optional content that is available with IBM Control Desk includes eight example security groups for common IT asset management roles. For a complete list of IT asset management groups that are included in the optional content, see http://www.ibm.com/support/knowledgecenter/SSWT9A_7.6.0/com.ibm.sccd-adv.doc/content/c_itam_content.html.

In this exercise, you log in as various IT asset management users and review the common tasks and applications for each role. Sample Start Centers are created for each role. You can customize Start Centers for your organization's environment. You can learn how to customize Start Centers in the *Tivoli's process automation engine 7.5 Fundamentals* course. You use each of these roles in subsequent exercises.

Hardware asset manager

1. Log in to the console as **Jake** with the password **object00**. Jake is a hardware asset manager.
2. Click the **Hardware Asset Mgr** Start Center tab.

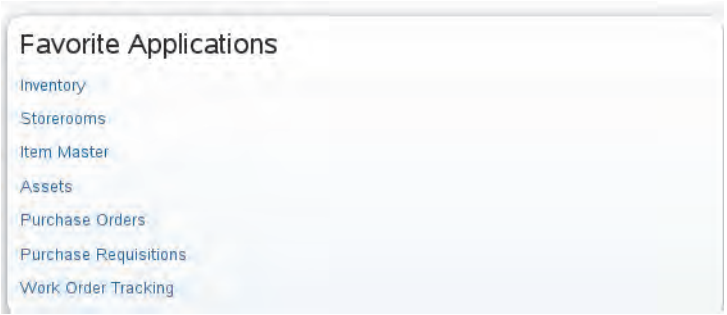
3. Review the portlets on this Start Center.



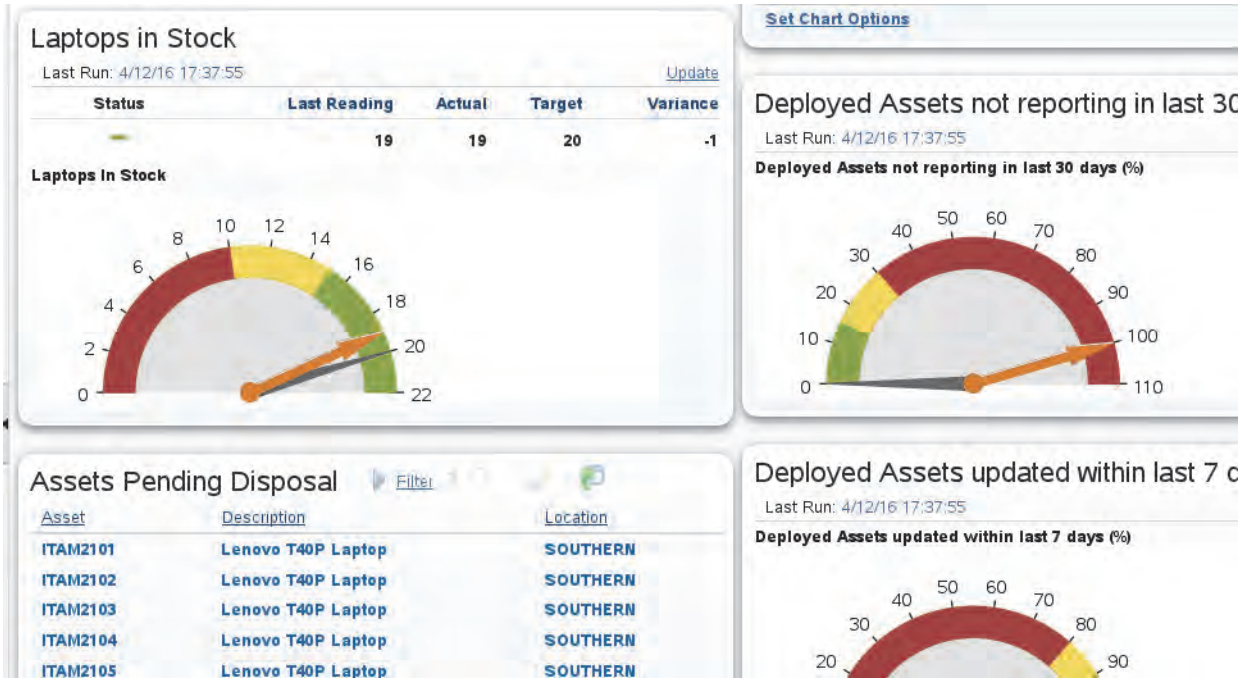
4. Review the Favorite Applications portlet. These applications are commonly used by someone responsible for managing hardware assets.
5. Review the service requests assigned in the Open SR for Asset Mgr portlet. These service requests are tasks that are often assigned to a hardware asset manager.
6. Sign out of the console.

Inventory administrator

7. Log in to the console as **elmo** with the password **object00**. Elmo is an inventory administrator.
8. Click the **Inventory Administrator** Start Center tab.
9. Review the portlets on this Start Center.
10. Review the Favorite Applications portlet. These applications are commonly used by someone responsible for managing inventory.



Notice the KPI (key performance indicator) portlets that show inventory balances.



11. Sign out of the console.

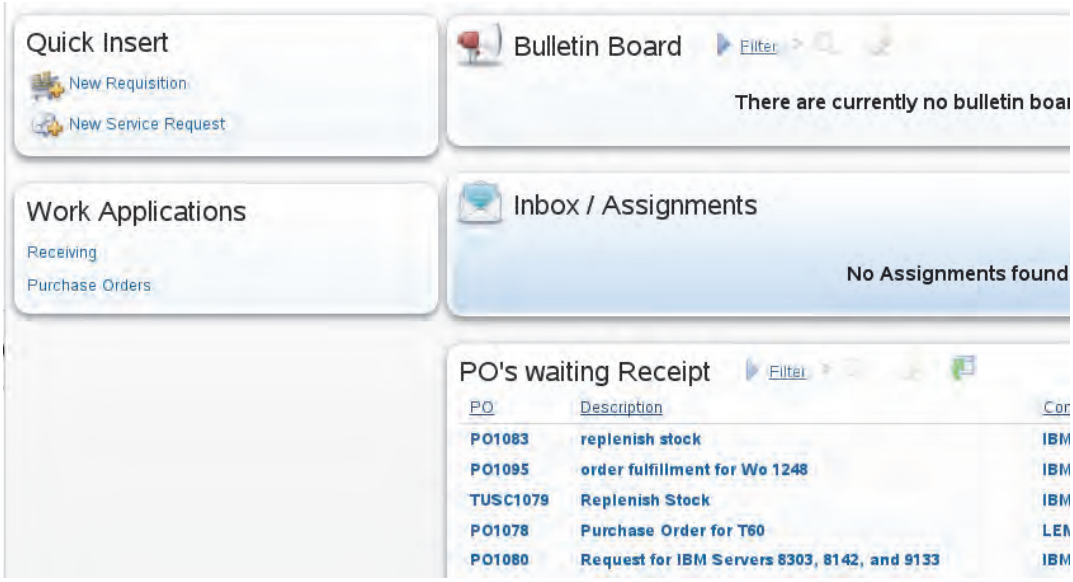
Software asset manager

12. Log in to the console as **ling** with the password **object00**. Ling is a software asset manager.
13. Click the **Software Asset Mgr** Start Center tab.
14. Review the portlets on this Start Center.
15. Review the Software Management Applications portlet. These applications are commonly used by someone responsible for managing software.
16. Sign out of the console.

Asset receiving manager

17. Log in to the console as **maria** with the password **object00**. Maria is an asset receiver.
18. Click the **Receiving Manager** Start Center tab.

19. Review the portlets on this Start Center.



20. Review the Work Applications portlet. These applications are commonly used by someone responsible for receiving assets, both hardware and software.

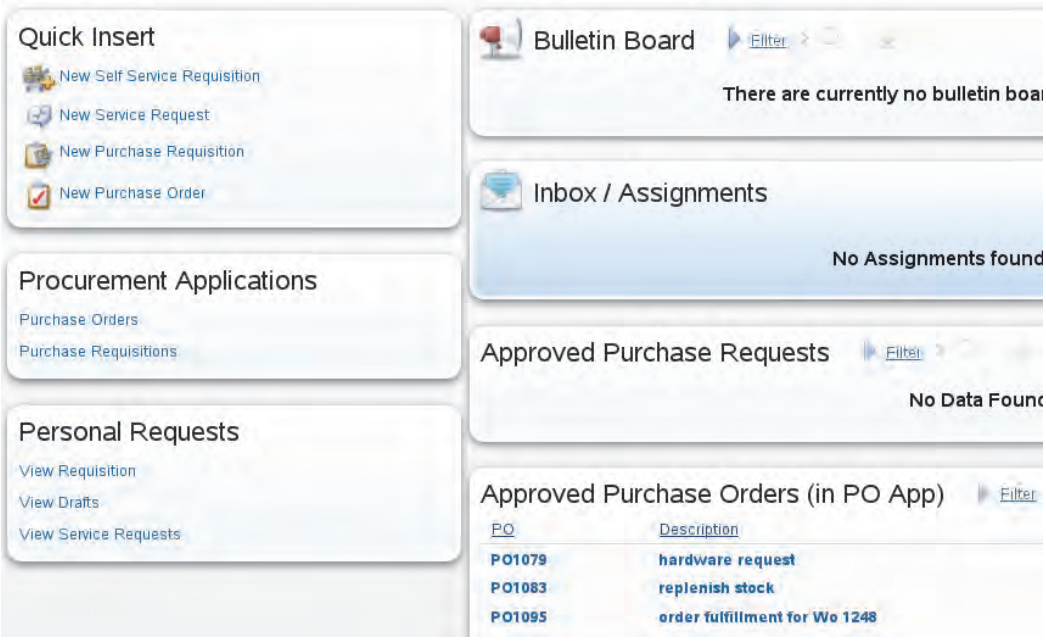
21. Sign out of the console.

Financial analyst

22. Log in to the console as **arun** with the password **object00**. Arun is a financial analyst.

23. Click the **Financial Analyst** Start Center tab.

24. Review the portlets on this Start Center.



25. Review the Procurement Applications portlet. These applications are commonly used by someone responsible for managing procurement.

26. Sign out of the console.

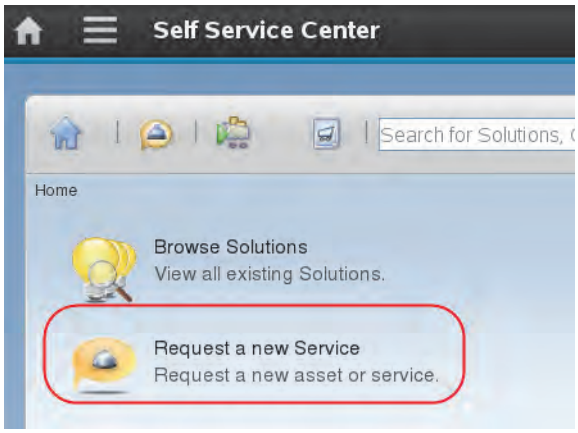
Exercise 2 Requesting and purchasing an IT asset

One of the key benefits of IBM Control Desk is the integration between Service Request Management and IT asset management. For example, a service request can be the initiation point for an IT asset request. This exercise demonstrates how you can request an IT asset and manage the process from an IT asset management perspective. When the requested IT asset is not in inventory, you go through the purchasing steps.

Entering a service request for an IT asset

1. Log in to the console as **bob** with the password **object00**.

2. Click **Request a new Service > Request for Service \ IT > Request for Service \ IT \ New Asset Request** to open the New Asset Request offering.



3. Click the **New Asset Request** offering to enter the request details.

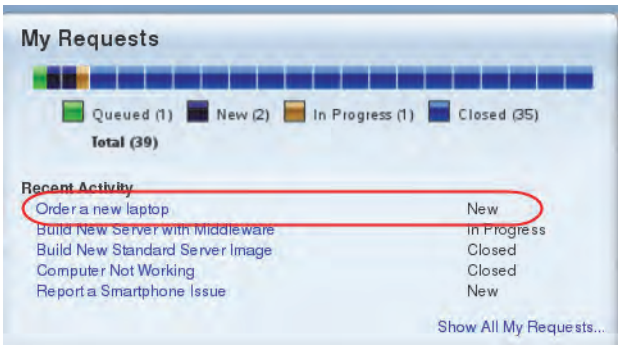
4. Enter **Starting a new role and I need a more powerful notebook to perform my job tasks** for the **Details**.

5. Set the priority to **1**.

6. Enter the following information for the attributes.

Field	Value
Type	T60
Any special instructions	Need 4 GB of RAM

7. Click **Submit Now**.
8. Write down the service request number. _____
9. Click **OK** to close the message.
10. Click the most recent **New Asset Request** service request in the My Request pod.



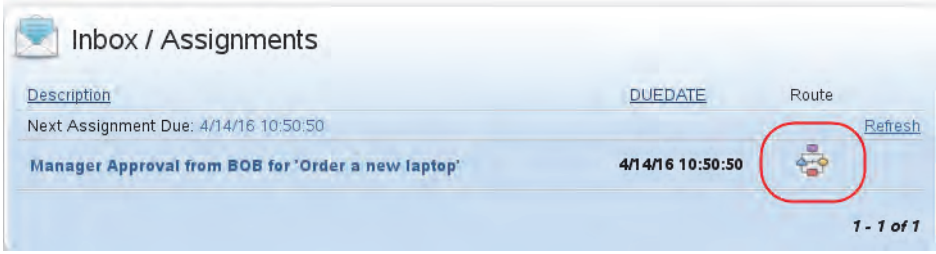
11. Review the request.
12. Click **OK** to close the view.
13. Sign out of the console.

Approving the request

A workflow is associated with the New Asset Request offering. The next step is for the user's manager to approve or reject the request.

14. Log in to the console as **Fred** with the password **object00**.
15. Find the **Manager Approval for New Asset Request** with today's date in the Inbox/Assignments portlet.

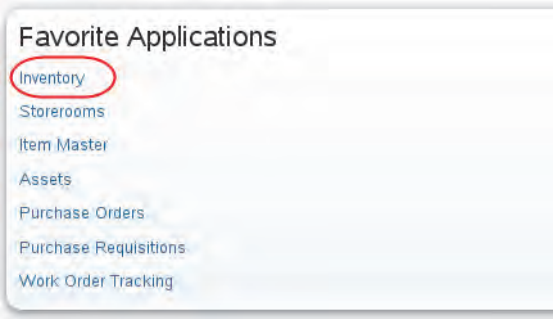
16. Click the **Route** icon.



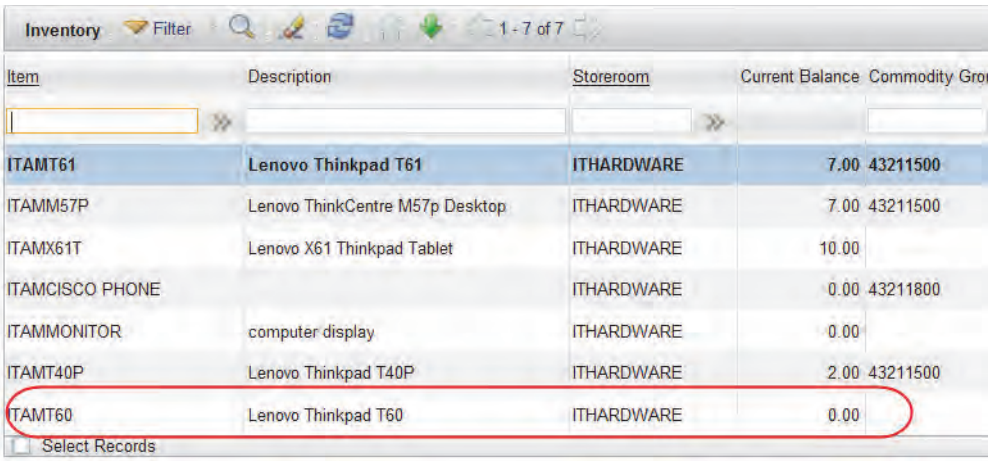
17. Select **Approve** and click **OK**.
18. Sign out of the console.

Checking inventory

19. Log in to the console as **elmo** with the password **object00**.
20. Click the **Inventory Administrator** Start Center tab.
21. Find and open the **Inventory Available to Fulfill Request** assignment with today's date in the Inbox/Assignments portlet.
22. Click **OK** to close the workflow help.
23. Review the service request. Read the details, and scroll down to the **Specifications** section. The specifications list the type of notebook the user is requesting as a T60.
24. Click the **Start Center** icon to return to the Inventory Administrator Start Center.
25. Click **Inventory** in the Favorite Applications portlet.



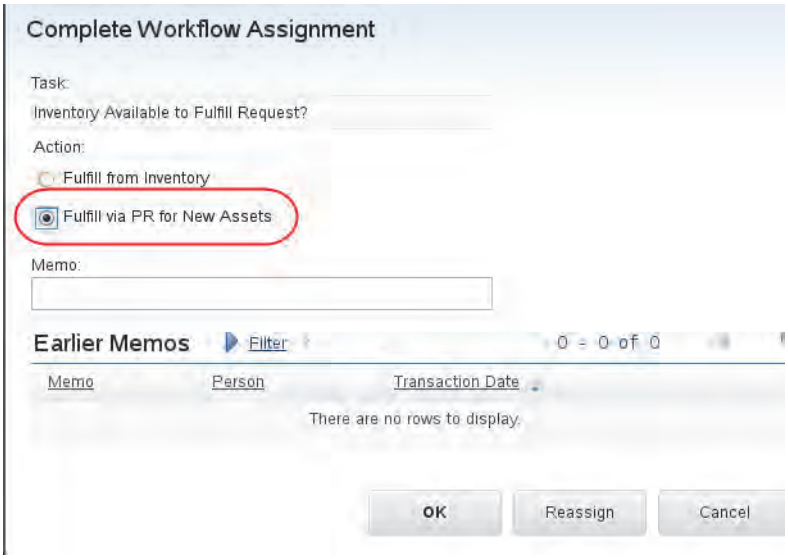
26. Press Enter to view all items in inventory. Notice that no T60 notebooks are currently in inventory.



27. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

28. Click the **Route** icon for the **Inventory Available to Fulfill Request** assignment with today's date in the Inbox/Assignments portlet.

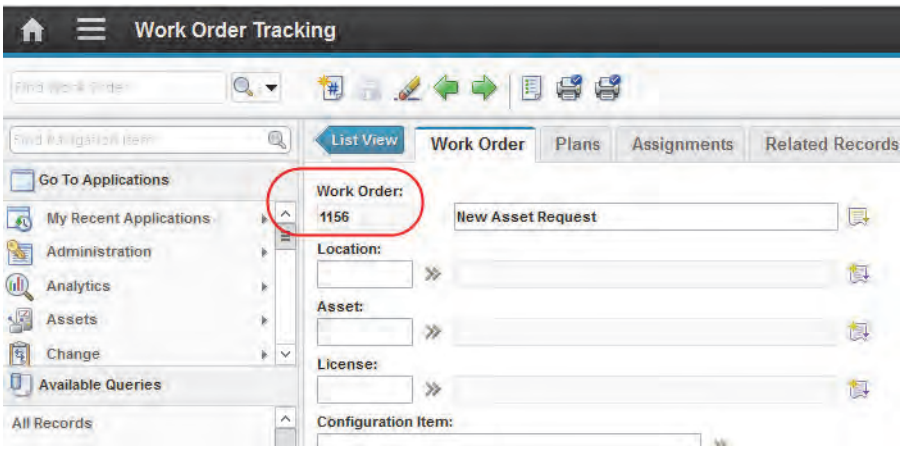
29. Select **Fulfill via PR for New Assets** and click **OK**.



Initiating the work order

The associated workflow creates a work order with a job plan for fulfilling the request with a purchase request. The inventory administrator is taken to the Work Order Tracking application to start the work.

30. Write down the work order number _____



31. Click **Common Actions > Initiate Work Order**. Confirm that the New Status value is In Progress and click **OK**.

32. Click the **Plans** tab. Notice that the first task in the plan, **Create Purchase Request for New Asset**, has a status of INPROG (In Progress).

Creating the purchase request

The first step in the work order plan is to create a purchase request. A purchase request is created in the Purchase Requisition application.

33. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

    Notice that a new task, **Create Purchase Request for New Asset**, is in the Open Tasks for Inventory Admin portlet.

34. Click **New Purchase Requisition** in the Quick Insert portlet.

35. Enter **Purchase request for WO *XXXX*** for the description where ***XXXX*** is the number of the work order that is initiated in the previous steps. You wrote down this number in the previous section.

36. Enter **1** for the **Priority**.

37. Set the Requested Date to 1 week from today.

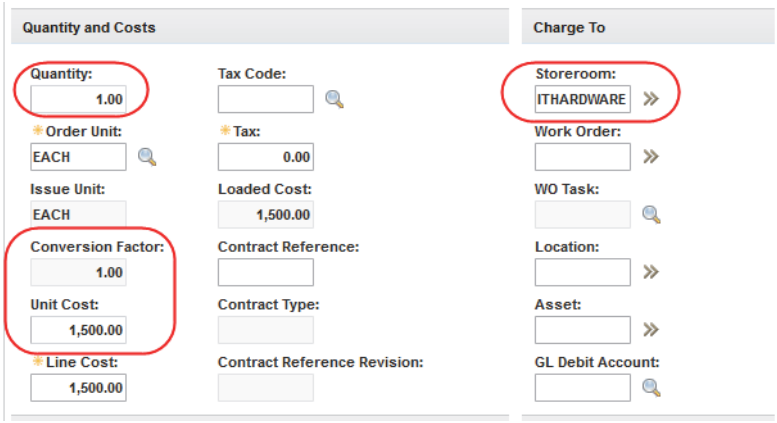
38. Click the **PR Lines** tab.

39. Click **New Row**.

40. Enter the following information for the PR Line.

Field	Value
Item	ITAMT60
Quantity	1
Conversion Factor	1
Unit Cost	1500
Storeroom (Charge To)	ITHARDWARE

Note: Charging to the ITHARDWARE storeroom puts the asset in the storeroom after it is received. It can then be issued from inventory.



41. Click the **Save Purchase Requisition** icon.

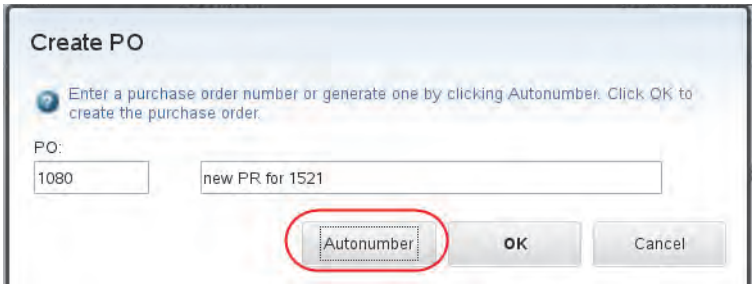
    Notice that the status of the Purchase Requisition is APPR (Approved). The workflow automatically approves the purchase request when it is less than $100,000.

Creating and approving a purchase order

After a purchase request is approved, the next step is to create a purchase order.

42. Click **Create PO** under **More Actions** in the navigation bar.

43. Click **Autonumber** and write down the PO number _____



44. Click **OK** to create the PO.

45. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

The first task, Create Purchase Request, is complete. Therefore, you can mark the task as completed.

46. Find and open the **Create Purchase Request** task in the Open Tasks for Inventory Admin portlet.

47. Click **Complete Activity** under Common Actions, and click **OK** to set the status to **Completed**.

48. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

    Notice that the Create Purchase Request task is no longer in the Open Tasks portlet. The next task in the work order, **Issue Asset from Inventory to Work Order**, is now in the list. You cannot complete this task until the asset is purchased and received.

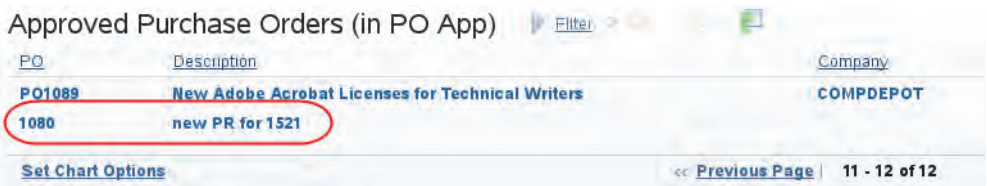
49. Sign out of the console.

Financial analyst approves

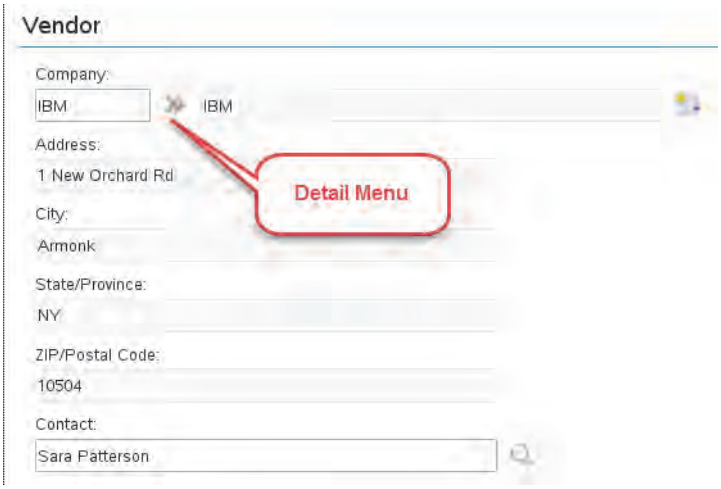
50. Log in to the console as **arun** with the password **object00**. Arun is a financial analyst.

51. Click the **Financial Analyst** Start Center tab.

52. Find and open the PO created in the previous steps in the Approved Purchase Orders (in PO App) portlet. Several approved orders are in the database. You might have to scroll to locate the new PO.



53. Enter **IBM** for the Company in the Vendor section of the **PO** tab. Use the detail menu and click **Select Value**. Click **IBM** to return the value to the field.



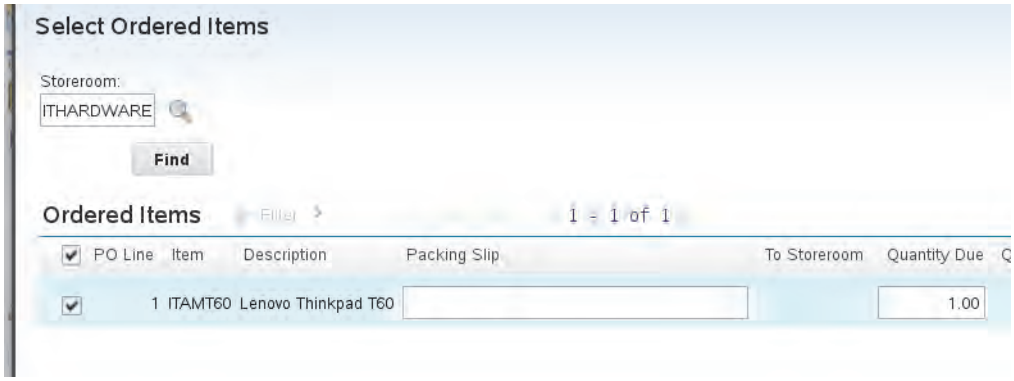
54. Click the **PO Lines** tab.
55. Click the **View Details** icon for the PO line to expand the details.
56. Review the details of the PO lines.
57. Click **Common Actions > Approve Purchase Order**. Confirm that the new status is Approved and click **OK**.
58. Sign out of the console.

Receiving an IT asset

After the PO is approved, the IT asset is ordered. When the asset arrives, it must be received in the system.

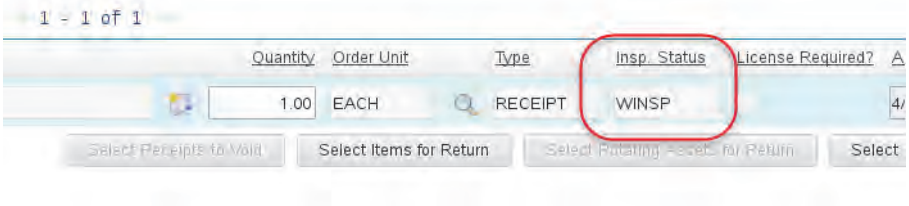
59. Log in to the console as **maria** with the password **object00**. Maria is a receiver.
60. Click the **Receiving Manager** Start Center tab.
61. Find and open the PO created in the previous steps in the PO's waiting Receipt portlet.
62. Click **Select Ordered Items** in the Material Receipts section.

63. Click the check box on the item and click **OK**.



64. Click **Common Actions > Save Receipt**. The receipt is saved and acknowledged.

    Notice that the status of the material receipt for the notebook is WINSP (Waiting Inspection). The receiving manager inspects the notebook.



65. Click **More Actions > Change Inspection Status** in the navigation bar.

66. Select line item and click **OK**. The status of the material receipt for the notebook changes to WASSET (Waiting for serialization).

67. Click **More Actions > Receive Rotating Items** in the navigation bar.

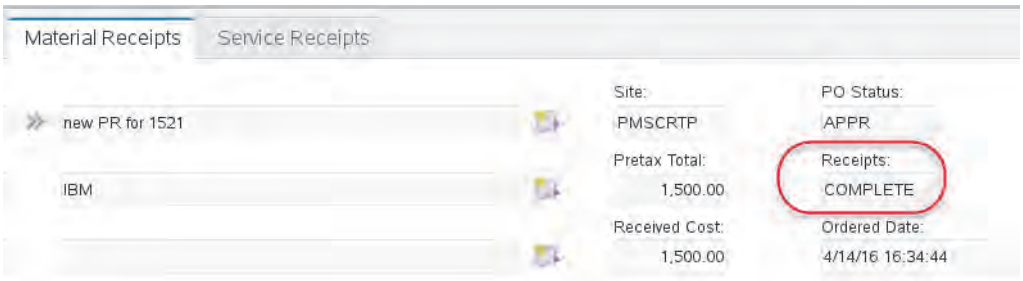
68. Click **Autonumber** to generate an Asset number.

69. Write down the Asset number _____.

70. Enter **1234-567-890** in the **GL Account** field.

71. Enter **ZA6837** for the **Serial #** and click **OK**.

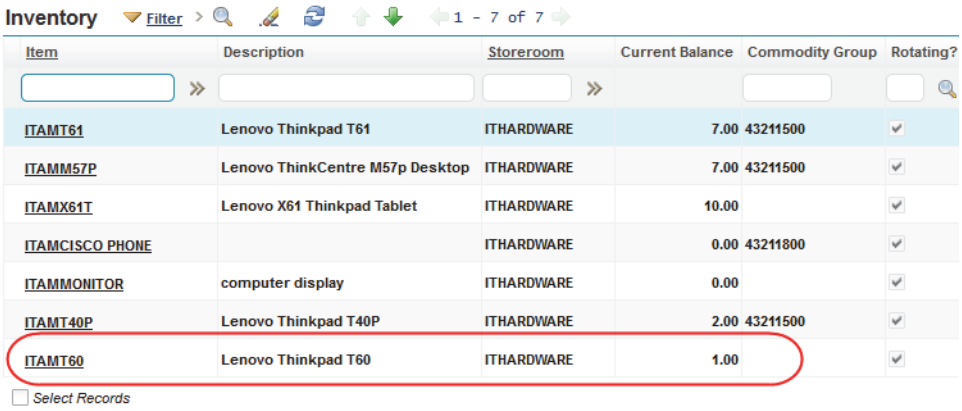
    Notice that the status of the material receipt for the notebook is COMP (Complete).



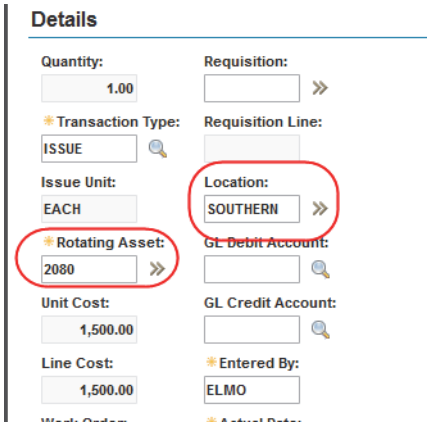
72. Sign out of the console.

Issuing an IT asset

73. Log in to the console as **elmo** with the password **object00**.
74. Click the **Inventory Administrator** Start Center tab.
75. Click **Inventory** in the Favorite Applications portlet.
76. Press Enter to view all items in inventory. A T60 notebook is now in inventory.

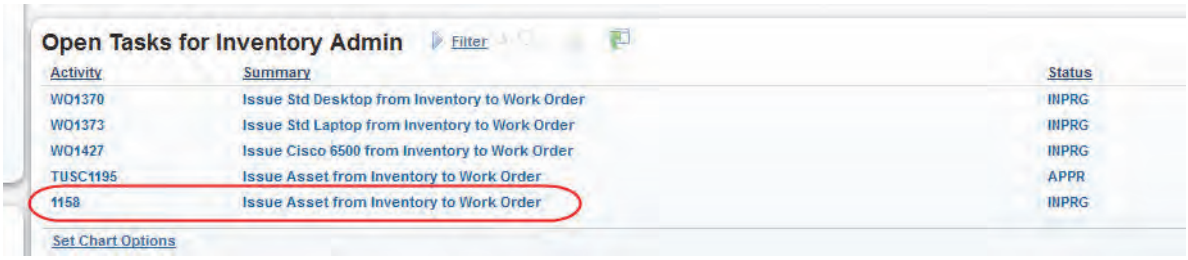


77. Open the **ITAMT60** item.
78. Click **Issue Current Item** under **More Actions** in the navigation bar.
79. Click the **Detail Menu** icon for the **Rotating Asset** field and click **Select Value**.
80. Click the asset that you just received.
81. Enter **SOUTHERN** for the **Location** and click **OK** to issue the item.



82. Click the **Start Center** icon to return to the Inventory Administrator Start Center.

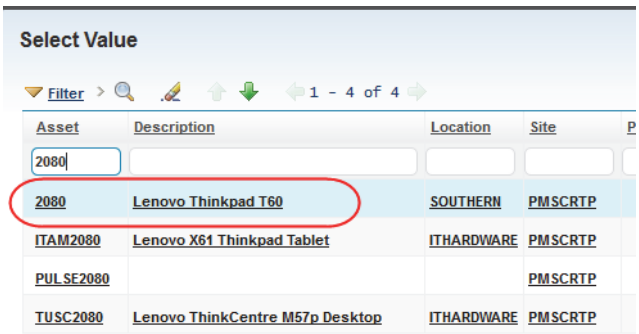
83. Find and open the **Issue Asset from Inventory to Work Order** task with today's date in the Open Tasks for Inventory Admin portlet.



84. Click the **Detail Menu** for the **Parent Process** field and click **Go To > Work Order Tracking**.

85. Click the **Detail Menu** for the **Asset** field and click **Select Value**.

86. Find and click the asset that you just issued. This step associates the asset with the New Asset Request work order. To save scrolling, enter the asset number that you received in Step 69 on page 5-13.



87. Click the **Save Work Order** icon.

88. Click **Return**.

89. Click the **Detail Menu** for the **Asset** field and click **Select Value**.

90. Find and click the asset that you just issued. This step associates the asset with the Issue Asset from Inventory to Work Order task.

91. Click the **Save Activity** icon.

92. Click **Move/Swap/Modify** under **More Actions** in the navigation bar.

93. Click the **Users and Custodians** tab.

94. Click **New Row**.

95. Enter **BOB** in the **Person** field.

96. Select **Will be User** and **Will be Primary**.

97. Click **Save As Plan**. The changes are made when the work order is completed.

98. Click **Common Actions > Complete Activity** and set the status to **Completed**.

99. Log out of the console.

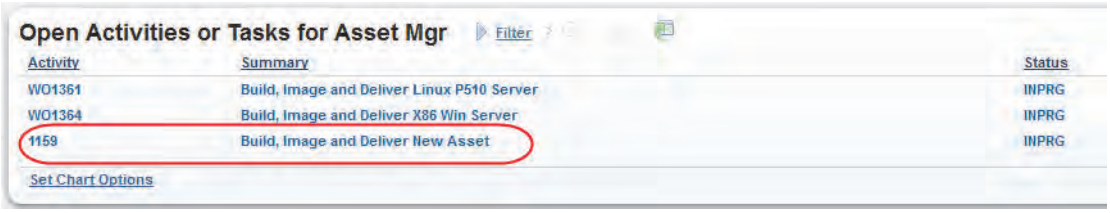
Building and deploying an IT asset

After the IT asset is received and issued from inventory, you can deploy it. The hardware asset manager typically performs this job.

100. Log in to the console as **Jake** with the password **object00**.

101. Click the **Hardware Asset Mgr** Start Center tab.

102. Scroll down to locate the Open Activities or Tasks for Asset Mgr portlet. Find and open the **Build, Image, and Deliver New Asset** row with today's date.



103. Click the **Detail Menu** for the **Parent Process** field and click **Go To > Work Order Tracking**.

104. Verify that the asset you received and issued is listed in the **Asset** field.

105. Click **Return**.

106. Click the **Detail Menu** for the **Asset** field and click **Select Value**.

107. Find and click the asset that you just received and issued.

108. Click the **Save Activity** icon.

Next, Jake puts the standard company image on the notebook and delivers it to Bob.

109. Click **Common Actions > Complete Activity** and set the status to **Completed**. Click **OK**.

Because the last activity is complete, the service request is resolved.

110. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center.

111. Click **Assets** in the Favorite Applications portlet.

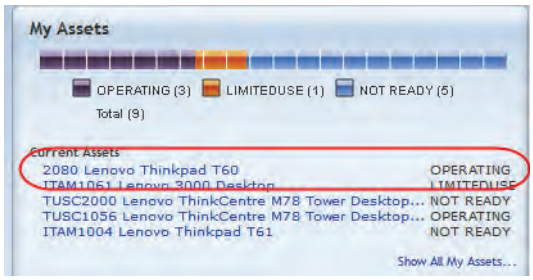
112. Find and open the asset that you built and deployed.

113. Click **Common Actions > Change Status** and set the status to **Operating**. Click **OK**.

114. Log out of the console.

115. Log in to the console as **bob** with the password **object00**.

Notice that the new asset is shown in the My Assets pod.



116. Remain logged in as **bob**.

Exercise 3 Retiring an IT asset

The final lifecycle stage for an IT asset is disposal. Assets that are retired are no longer useful to the organization. This exercise demonstrates how to dispose of an asset.

Requesting disposal

1. Verify that you are still logged in as **bob**. If not, log in.
2. Click **Show All My Assets** in the My Assets pod.
3. Locate the **ITAM1032** asset and double-click it to open the Asset Details window.
4. Review the asset details. Because Bob received a new notebook, you can dispose of this asset.
5. Click **Open a Service Request**.
6. Enter **Asset Disposal** for the **Summary**.
7. Enter **I just received a new notebook and no longer need this tablet** for the **Details**.
8. Enter **3** for the **Priority**.
9. Enter the following information in the Attributes section.

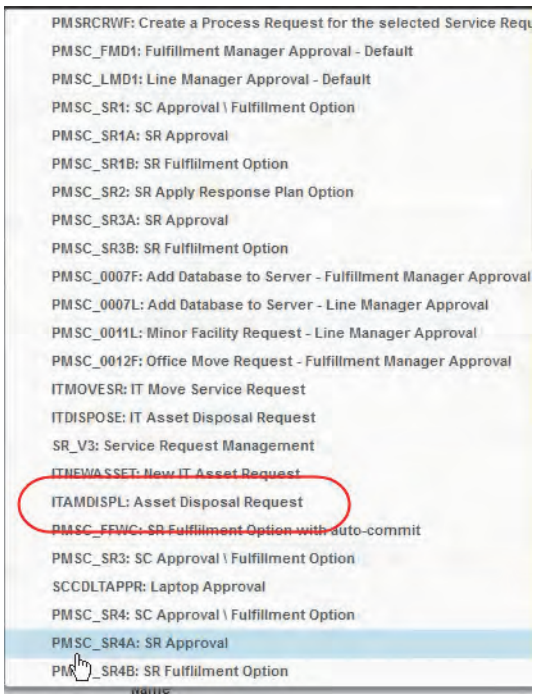
Field	Value
What is the employee name	Bob
What is the new/updated location	Salvage
What is the effective date of the update	Today's date

10. Click **Submit Now**.
11. Write down the service request number _____.

12. Click **OK** to close the system message.
13. Click **Close** to close the Asset Details.
14. Close **My Assets**.
15. Sign out of the console.

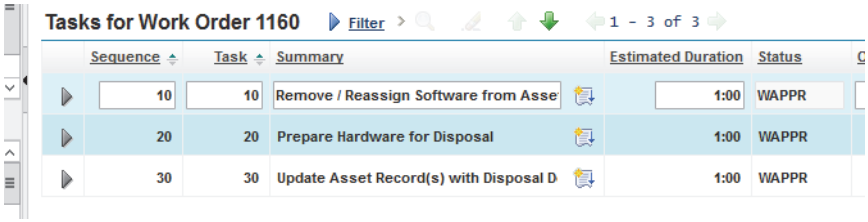
Processing a disposal request

16. Log in to the console as **Jake** with the password **object00**.
17. Click the **Hardware Asset Mgr** Start Center tab.
18. Open the **Asset Disposal** service request with today's date in the Open SR for Asset Mgr portlet.
19. Click the **Route Workflow** icon.
20. Select the **ITAMDISPL** process and click **OK.**



21. Select **Create Asset Disposal WO for this request** and click **OK**.
22. Click the **Plans** tab on the new work order.

23. Review the tasks.



24. Click **Common Actions > Initiate Work Order** and set the status to **In Progress**. Click **OK**.

    Notice that the first task, **Remove / Reassign Software from Asset**, has a status of INPRG (In Progress). This task is assigned to the inventory administrator.

25. Sign out of the console.

26. Log in to the console as **elmo** with the password **object00**.

27. Click the **Inventory Administrator** Start Center tab.

28. Open the **Remove / Reassign Software from Asset** task with today's date in the Open Tasks for Inventory Admin portlet.

29. Review the details.

30. Click the **Detail Menu** for the **Asset** field and click **Go To Assets**.

31. Click the **IT Details** tab.

32. Locate the Software Licenses section. Verify that no licenses are allocated to this asset.

Note: If licenses are allocated, you would click **Manage Software License Allocations** under **More Actions** in the navigation bar. You are presented with a list of licenses. Select the licenses and click **Remove**.

33. Click **Return**.

34. Click **Common Actions > Complete Activity** and set the status to **Completed**.

35. Sign out of the console.

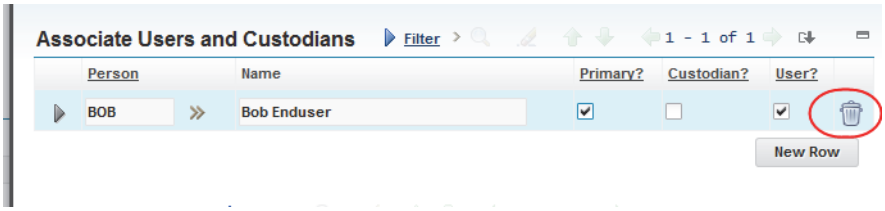
36. Log in to the console as **Jake** with the password **object00**.

37. Click the **Hardware Asset Mgr** Start Center tab.

38. Locate the **Prepare Hardware for Disposal** task with today's date in the Open Activities or Tasks for Asset Mgr portlet. Click the row to open the record.

In this step, Jake clears the notebook of all data and removes the asset tag. Jake also removes Bob as a user of the asset.

39. Click the **Detail Menu** for the **Asset** field and click **Go To > Assets**.
40. Click **Common Actions > Associate Users and Custodians**.
41. Click the **Delete** icon next to **Bob** and click **OK** to remove Bob as a user of the asset.

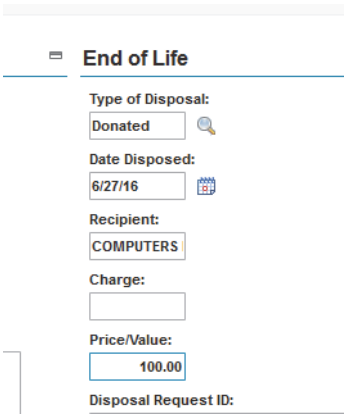


42. Click **Return**.
43. Click **Common Actions > Complete Activity** and set the status to **Completed**.
44. Click the **Start Center** icon to return to the Hardware Asset Mgr Start Center.

Enter details about the asset disposal.

45. Open the **Update Asset Record(s) with Disposal Details** task in the Open Activities or Tasks for Asset Mgr portlet.
46. Click the **Detail Menu** for the **Asset** field and click **Go To > Assets**.
47. Click the **IT Details** tab.
48. Scroll down to locate the End of Life section. Enter the following information about the disposal.

Field	Value
Type of Disposal	Donated
Date of Disposal	Today's date
Recipient	Computers for kids
Price/Value	100.00



49. Click **Common Actions > Change Status** and set the status to **Disposed**.

50. Click **Return**.
51. Click **Common Actions > Complete Activity** and set the status to **Completed**.
52. Sign out of the console.
53. Log in to the console as **bob** with the password **object00**.
54. Click **Show All My Assets** in the My Assets pod.
55. Verify that the **ITAM1032** asset is no longer listed.
56. Close **My Assets**.
57. Sign out of the console.

Exercise 4 Reviewing and allocating licenses

License Management is a key feature of IBM Control Desk. Using the license application, you can track the licenses that you purchased and where you authorized the installation or use of the software. The administrative tracking of authorized installations is called allocation. You can allocate software to locations, computer assets, partition assets, application users, or GL accounts. This exercise demonstrates how to review license records and allocate capacity.

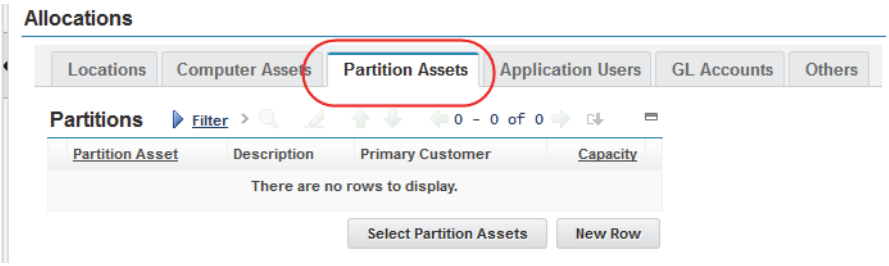
1. Log in to the console as **ling** with the password **object00**.
2. Click the **ITAMSAM** Start Center tab.
3. Click **Licenses** in the Software Management Applications portlet.
4. Press Enter to view a list of all licenses.
5. Open the **ITAM1008** license.
6. Review the license details.

This license is a Processor Value Unit (PVU) license. The organization purchased 700 PVUs for WebSphere Application Server Network Deployment installations. Currently, no capacity is allocated. However, 140 PVUs are reserved. You created this capacity reservation during the Unit 4 exercises. When the task to Install & Configure WAS was approved in Unit 4, Exercise 5 on page 4-14, the license was reserved. A license reservation informs the Software Asset Manager that a license is required for a project. After the software is installed on a managed asset, you can allocate the license. You can manually allocate a license in the license application or allocate a license directly in a work order. Both methods are demonstrated in the following steps.

Manually allocating a license

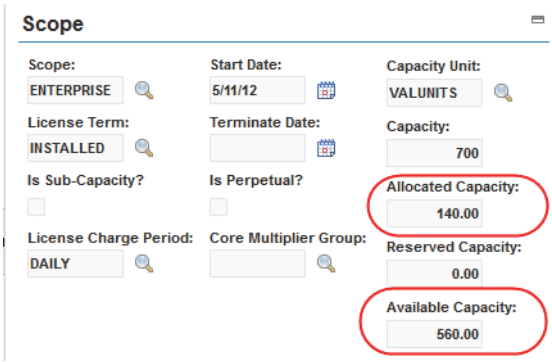
7. Scroll to the **Allocations** section. You can allocate licenses to locations, computer assets, partition assets, application users, or GL accounts.

8. Click the **Partition Assets** subtab.



9. Click **Select Partition Assets**.
10. Enter **140** for the **Capacity**.
11. Click the blue Filter icon. Search for Partition Asset **ITAM6001**. Select **ITAM6001 Deployment Manager server** for the **Partition Asset** and click **OK**.

    Notice that the **Allocation Capacity** and **Available Capacity** in the **Scope** section are updated.



12. Click the **Save** icon.
13. Click the **Start Center** icon to return to the ITAMSAM Start Center.
14. Sign out of the console.

Allocating a license in a work order

You can allocate licenses directly in a work order. The next few steps demonstrate how to allocate a license in a work order.

15. Log in to the console as **Nancy** with the password **object00**.
16. Click the **Operations Specialist** Start Center tab.
17. Open the **Install & Configure WAS** work order in the My Task portlet.
18. Click the **Actuals** tab.
19. Click the **Licenses** subtab and click **Allocate Licenses**.

Notice that the reserved license is listed and selected. The reserved capacity is 140. When allocating the license, you must enter this capacity.

20. Click the **Partition Assets** tab and click **Select Partition Assets**.
21. Enter **140** for the **Capacity**.
22. Select **ITAM6006 AppSrv01** and click **OK**.
23. Click **OK** to allocate the license.
24. Click the **Complete Activity** icon and set the status to **Completed**.
25. Sign out of the console.
26. Log in to the console as **ling** with the password **object00**.
27. Click the **ITAMSAM** Start Center tab.
28. Click **Licenses** in the Software Management Applications portlet.
29. Press Enter to view a list of all licenses.
30. Open the **ITAM1008** license.
31. Review the allocated and available capacities. Notice that the values are updated.

The license reservation was canceled when the work order was marked complete. The available capacity was incremented when the license was allocated on the **Actuals** tab.

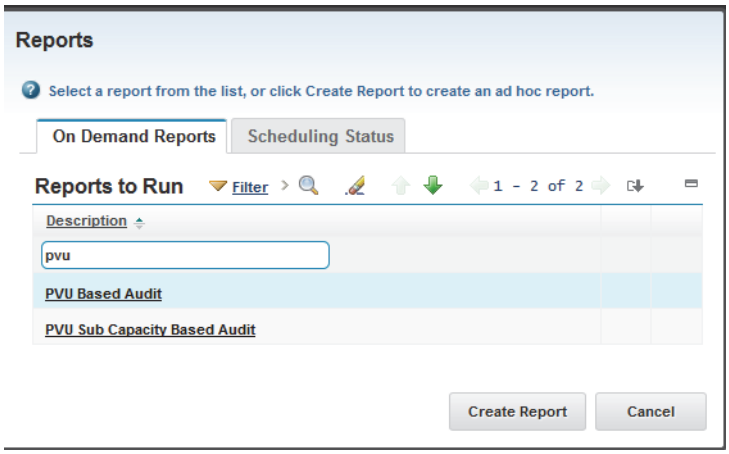
Exercise 5 Running audit reports

License allocation is an administrative feature. It indicates what licenses are authorized. However, it does not necessarily equate to what is installed. To compare what you purchased to what is installed, you must use a discovery tool to identify installed instances. IBM Control Desk supports importing discovered software from many discovery tools, including IBM Tivoli Asset Discovery for Distributed, IBM Tivoli Asset Discovery for z/OS, Tivoli Application Dependency Discovery Manager, IBM BigFix (formerly Tivoli Endpoint Manager), and several non-IBM tools. However, if you want to audit IBM PVU licenses, you must use IBM Tivoli Asset Discovery for Distributed as the discovery tool. After importing discovery data into IBM Control Desk, you can run audit reports to compare what you purchased (license record capacity) to what you is deployed (discovered capacity). This exercise demonstrates how to run audit reports.

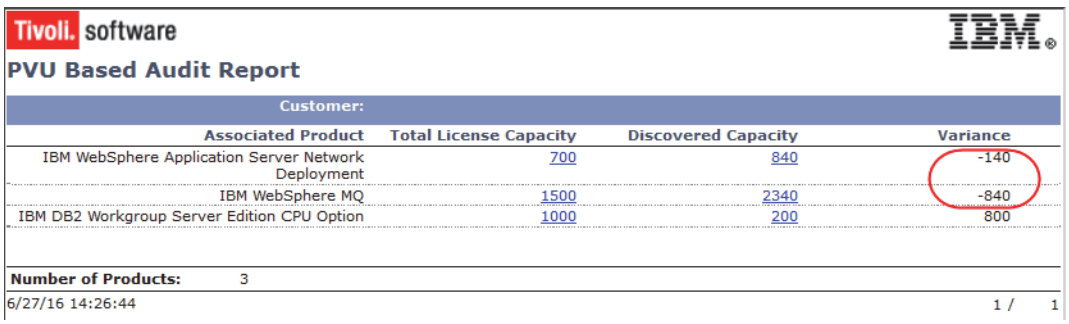
1. Click **View Record List** to return to the list of licenses.
2. Click **Run Reports** under **More Actions** in the navigation bar.

Note: You can run reports from the license list or within a specific license. When you run the reports from license list, it runs the report type that is selected for all the licenses in the query. When you run the reports from within a specific license, it runs the report type that is selected for the open license.

3. Find and click **PVU Based Audit**.



4. Click **Submit** to run the report. A second browser tab opens to display the report.
5. If you receive a **Pop-up blocked** message, select to always allow pop-ups from this site and resubmit the report.
6. Review the report. Notice that the report indicates an underlicensed situation for the IBM WebSphere Application Server Network Deployment and WebSphere MQ.



Note: The software asset manager would investigate these license variances. This topic is covered in-depth in the *IBM Control Desk IT Asset Management Fundamentals* course.

7. Close the report.
8. Click **Cancel** to close the Reports window.

9. Optionally, run a few other report types and review their results.
10. Sign out of the console.

Unit 6 Configuration, change, and release management exercises

The exercises for this unit demonstrate some of the basic features of configuration and change management. In Unit 3, you learned how to import configuration items (CIs) by using the Quick Configuration tool. CIs that are imported in this manner are called *actual CI*s. In this unit, you learn two more methods for creating configuration items:

- Manually
- Using promotion of actual configuration items (CIs)

CIs that are created in this manner are called *authorized CIs.* You also learn how to process a change request on an authorized CI.

Exercise 1 Manually creating a configuration item

You learned in the lecture that a CI is any component that needs to be managed to deliver an IT service. The details for a CI are recorded in a configuration record that is maintained throughout its lifecycle by configuration management. This record is often called a CI or authorized CI. After you create a CI record, you can control the changes to a CI by using change management. In IBM Control Desk, you can create the authorized CI records in three ways:

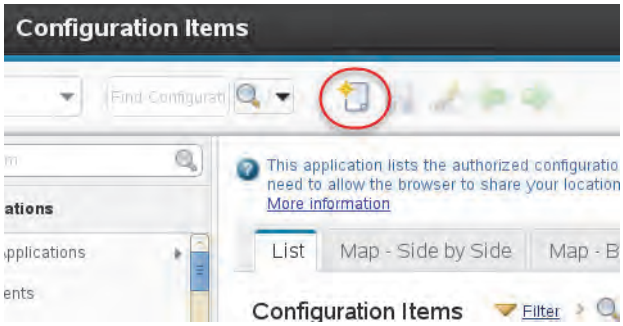
- By importing
- Manually in the Configuration Item application
- By promoting an actual CI

In Information Technology Infrastructure Library (ITIL), three roles typically create CIs depending on your organization:

- The Configuration Librarian is the owner of the configuration library and manager of all master copies of configuration items (CIs).
- The Change Manager manages the change team, approves change requests, and assigns work to change owners.
- The Change Owner is responsible for processing the change, preparing it for approval, obtaining approval, and assigning tasks to Change Implementers.

You imported CIs by using the Quick Configuration tool in Unit 3. This exercise demonstrates how to manually create a CI in the Configuration Item application. In this example, you create the CI as a Change Owner.

1. Log in to the console as **lucy** with the password **object00**. Lucy is a Change Owner.
2. Click **IT Infrastructure > Configuration Items** in the navigation bar.
3. Click the **New CI** icon.

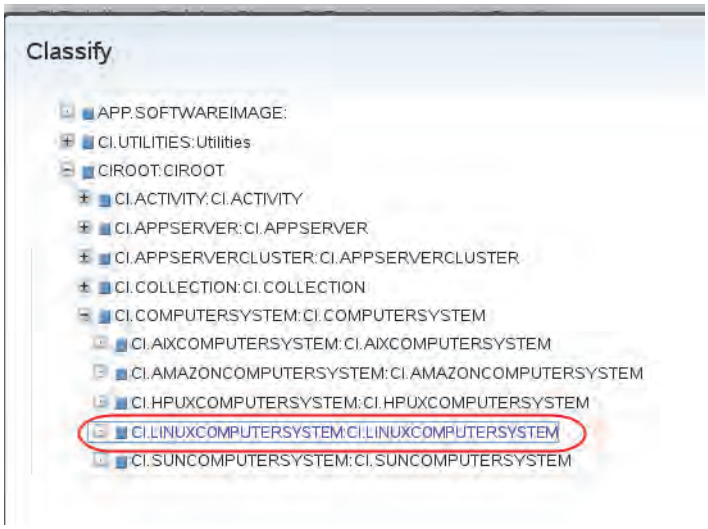


4. Enter the following information for the CI Summary.

Field	Value
`Configuration Item Name`	appsrv01.eu.tide.ibm.com
`Classification`	CIROOT \ CI.COMPUTERSYSTEM \ CI.LINUXCOMPUTERSYSTEM
`Configuration Item Number`	appsrv01.eu.tide.ibm.com

   a. Enter the configuration item name.
   b. To enter the classification, click the **Detail Menu** icon and click **Classify**.
   c. Expand **CIROOT:CIROOT > CI.COMPUTERSYSTEM:CICOMPUTERSYSTEM** and click the blue square next to **CI.LINUXCOMPUTERSYSTEM:CI.LINUXCOMPUTERSYSTEM**.

d. Enter the configuration item number.



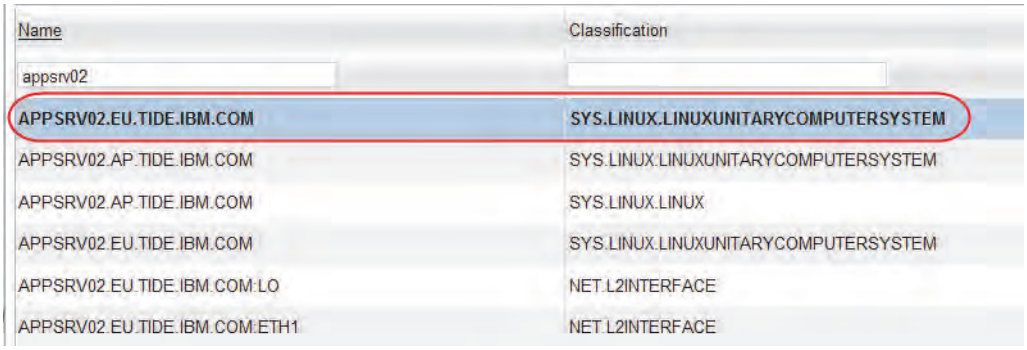
5. Click the **CI Details** tab.
6. Scroll down to the **Specifications** section.
7. Find the COMPUTERSYSTEM_MANAGEDSYSTEMNAME attribute and enter **appsrv01.eu.tide.ibm.com** in the **Authorized Value** field.
8. Find the COMPUTERSYSTEM_UUID (universally unique identifier) attribute and enter **564D95D0-F38E-B494-88A1-6173B3D0BCA7** in the **Authorized Value** field. To avoid typographical errors, this UUID string was copied to a text file named ManualCIUUID.txt in the C:\LabFiles\Foundation directory. You can open this file and copy the string.
9. Click the **Save CI** icon.

Exercise 2 Creating a CI by promoting an actual CI

A common way to add authorized CIs is to promote actual CIs. Actual CIs are CIs that were discovered in your environment. The supported discovery tool for Actual CIs is Tivoli Application Dependency Manager. Actual CIs are imported into IBM Control Desk by using IBM Integration Composer. Demonstration actual CIs are provided on your classroom image. This exercise demonstrates how you can promote an Actual CI to create the link CI.

1. Click the home icon to return to the Change Owner start center.
2. Click **IT Infrastructure > Actual Configuration Items** in the navigation bar.
3. Enter **appsrv02** in the **Name** filter and press **Enter**.

4. Open the first **APPSRV02.UE.TIDE.IBM.COM** actual CI with a classification of SYS.LINUX.LINUXUNITARYCOMPUTERSYSTEM.



Name	Classification
appsrv02	
APPSRV02.EU.TIDE.IBM.COM	SYS.LINUX.LINUXUNITARYCOMPUTERSYSTEM
APPSRV02.AP.TIDE.IBM.COM	SYS.LINUX.LINUXUNITARYCOMPUTERSYSTEM
APPSRV02.AP.TIDE.IBM.COM	SYS.LINUX.LINUX
APPSRV02.EU.TIDE.IBM.COM	SYS.LINUX.LINUXUNITARYCOMPUTERSYSTEM
APPSRV02.EU.TIDE.IBM.COM:LO	NET.L2INTERFACE
APPSRV02.EU.TIDE.IBM.COM:ETH1	NET.L2INTERFACE

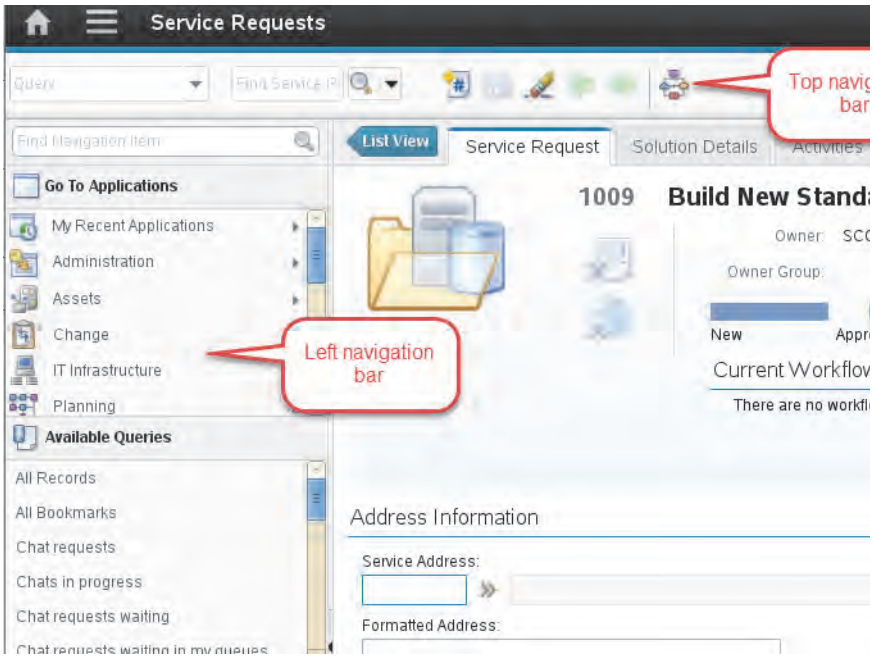
Note: The existence of identical actual CIs is an anomaly of the demonstration data.

Notice that the **Configuration Item Number** field is blank. This Actual CI is not associated with an Authorized CI.

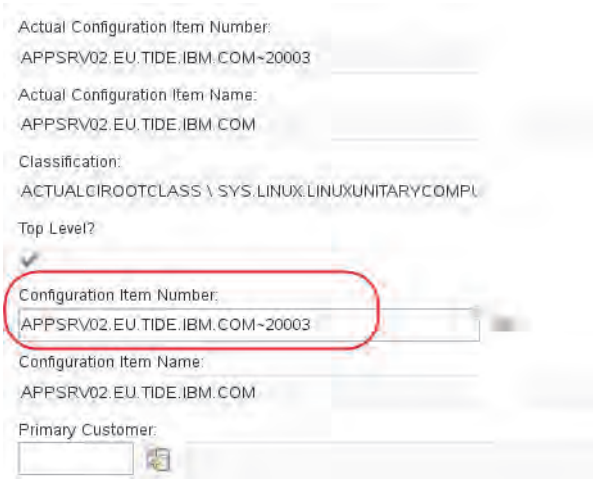
5. Click **Create Authorized Configuration Item** under **More Actions** in the navigation bar.

6. Click the **Detail Menu** icon for the Configuration Item Classification and click **CIROOT \ CI.COMPUTERSYSTEM \ CI.LINUXCOMPUTERSYSTEM**.

7. Select the **Check for Existing CI Using Naming Rules** option and click **OK** to begin the linking process.



Notice that now the **Configuration Item Number** field is populated.

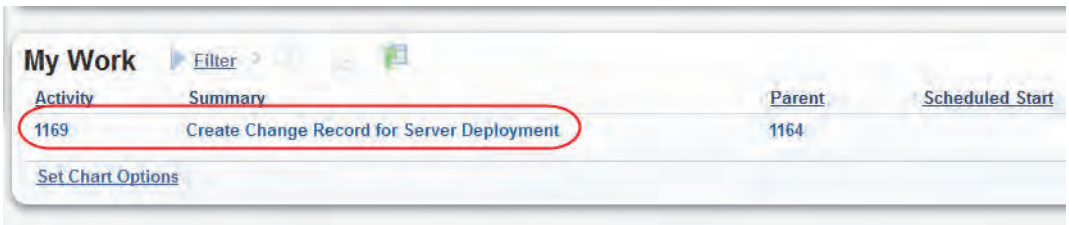


8. Click the **Detail Menu** icon for the Configuration Item Number and click **Go To Configuration Items**.
9. Review the **CI Summary** and **CI Details**.
10. Click **Return**.
11. Sign out of the console.

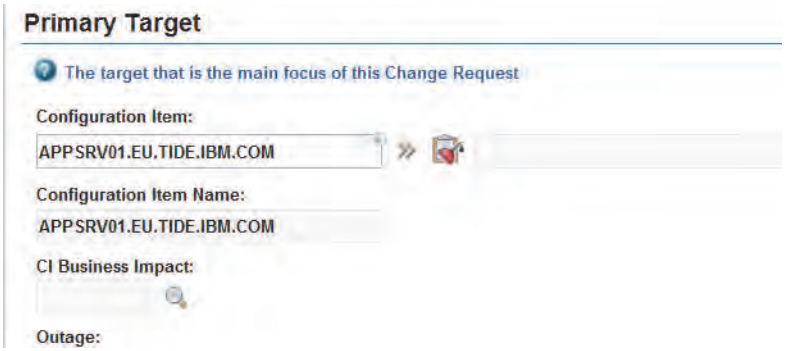
Exercise 3 Creating a normal change

The next task in the end-to-end scenario that you started in Unit 4, Exercise 5 on page 4-14 is to create a change record to deploy the server. This exercise demonstrates how to create a normal change.

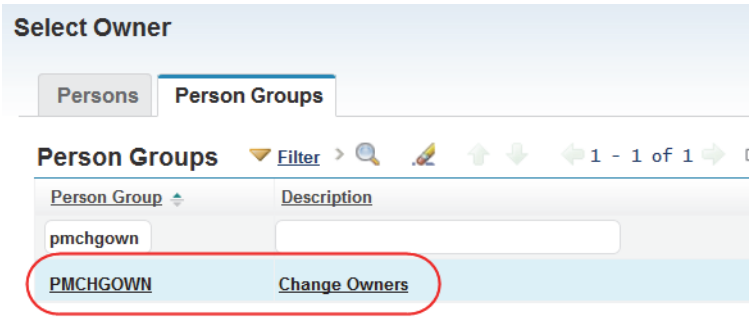
1. Log in to the console as **schroeder** with the password **object00**. Schroeder is a Change Implementer.
2. Click the **Change Approval, analysis and implementation** Start Center tab.
3. Find and open the **Create Change Record for Server Deployment** task in the My Work portlet.



4. Click **Create > Change** under **More Actions** in the navigation bar. Make a note of the change number: _____
5. Click the **Related Records** tab.
6. Click the **Detail Menu** for the Change work order that you created in Step 4 and select **Go To > Changes**.
7. Enter **Deploying new server into cluster** for the **Details**.
8. Enter **3** for the **Priority** and **4** for the **Risk**.
9. Enter **Better load balancing** for the **Reason for Change**.
10. Enter **Cluster performance will not improve** for the **Effect of Not Implementing**.
11. Enter **PMCHG \ PMCHGSFW \ PMCHG_SVRBLD** for the **Classification**. Use the **Detail Menu > Classify** to access the Classification window.
12. Scroll down to locate the Primary Target section.Enter **APPSRV01.EU.TIDE.IBM.COM** for the Configuration Item.

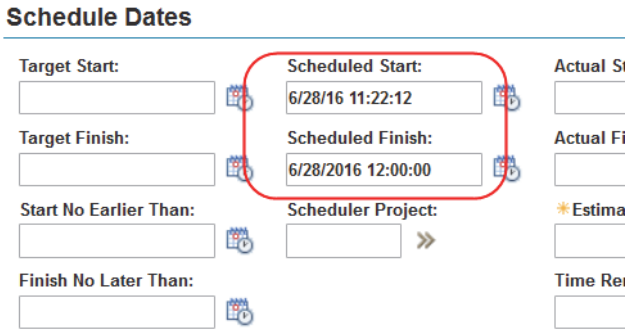


13. Click **Common Actions > Select Owner.** Use the filter on the Person Groups tab to select and set the **Owner** to the **PMCHGOWN** (Change Owners) group.

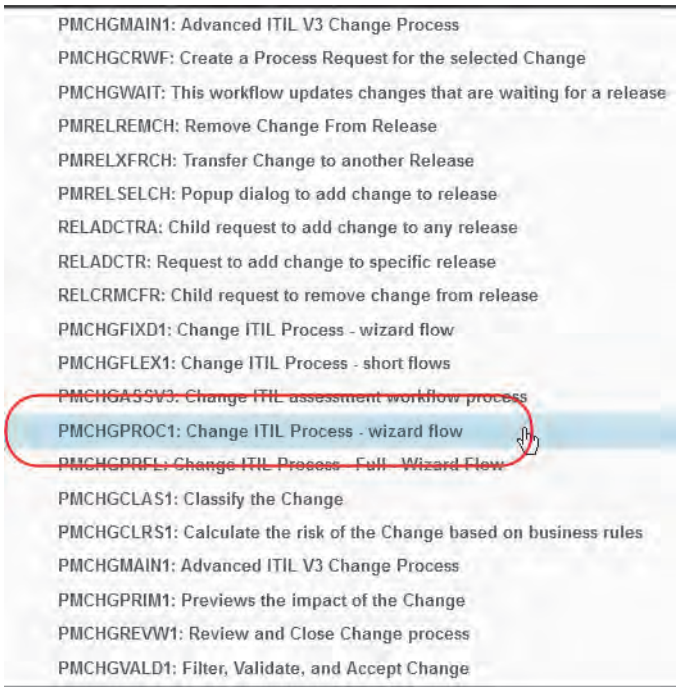


14. Click the **Schedule** tab.
15. Click the **Detail Menu** icon for the job plan and click **Select Value**.
16. Find and click **PMCHGNRML2**.

17. Enter the current date and time in the **Scheduled Start** field.
18. Enter the current date and time plus 30 minutes in the **Scheduled Finish** field.



19. Click the **Save Change** icon.
20. Click the **Route Workflow** icon.
21. Select **PMCHGPROC1** for the **Process** and click **OK**.



22. Review the Change Assessment message and click **Close** to close it.
23. Click the **Route Workflow** icon to send the change assessment assignment to the Change Owner group.

    Notice that the status of the change is now ASSESS. You can see this status in the **Progress Map** and the **Status** field.
24. Click **Return**.

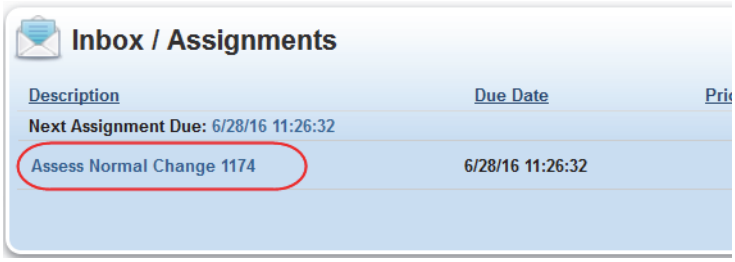
The task to create the change request is complete. Therefore, you can complete the activity.

25. Click **Common Actions > Complete Activity** and set the status to **Completed**.
26. Sign out of the console.

Exercise 4 Managing a normal change

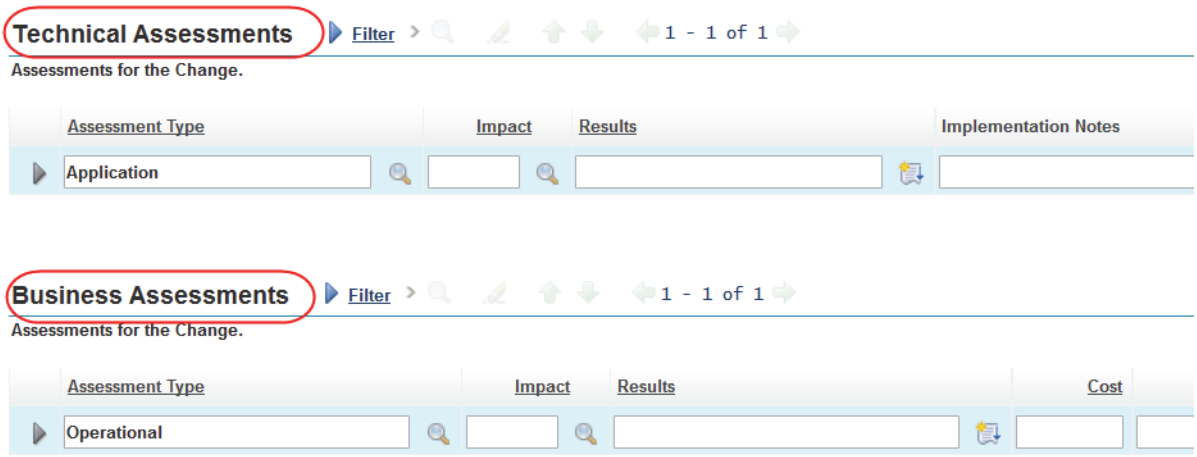
This exercise demonstrates how to manage the change request.

1. Log in to the console as **lucy** with the password **object00**.
2. Find and open the **Assess Normal Change** assignment in the Inbox/Assignment portlet.



3. Click **OK** to close the workflow help.
4. Click the **Assessments** tab.

   Notice the two assessments. The technical assessment is for the Change Analyst group and the business assessment for the Business Analyst group.

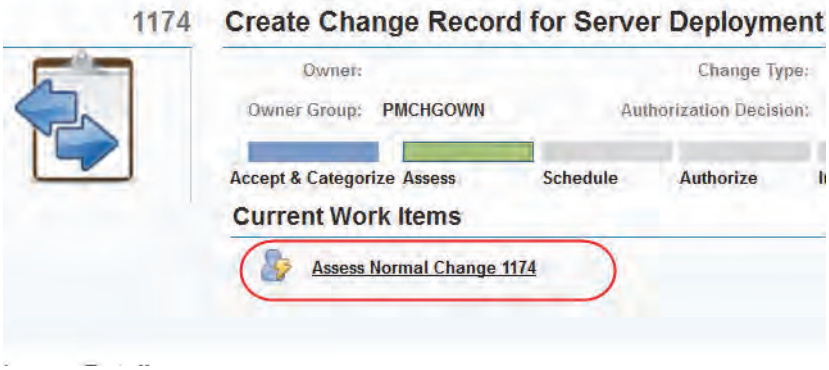


5. Click the **Authorization** tab.

   Notice that the change has one approver. The approver is set to the Change Advisory Board (CAB). You log in as a member of this group in a later step to approve the change.

6. Click the **Schedule** tab.

7. Verify that the job plan is defined and the schedule is set.
8. Click the **Change** tab, and click the **Assess Normal Change** link in the **Current Workflow Assignments** section.



9. Select **Assessment complete. I added a Job Plan and/or verified assessment, authorization, and implementation tasks. I have assigned Configuration Items as needed** and click **OK**.

   Notice that the status of the change is now AUTH.
10. Sign out of the console.

Authorizing a change

11. Log in to the console as **fred** with the password **object00**. Fred is a member of the Change Advisory Board.
12. Find the **Authorize Normal Change** assignment in the Inbox/Assignments portlet.

13. Click the **Route** icon.
14. Select **I authorize the Change** and click **OK**.

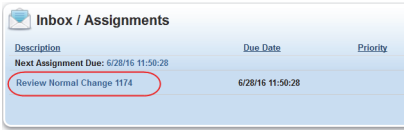
    Notice that the Status of the change is now IMPL.
15. Sign out of the console.

Implementing a change

16. Log in to the console as **schroeder** with the password **object00**.
17. Click the **Change Approval, analysis and implementation** Start Center tab.
18. Find and open the **Coordinate Normal Change** assignment in the Inbox/Assignments portlet.
19. Click **OK** to close the Workflow help.
20. Click the **Coordinate Normal Change** link in the **Current Workflow Assignments** section.
21. Select **Accept the change for implementation and set it to In Progress status** and click **OK**. Notice that the status of the change is now INPRG.
22. Click **Common Actions > Take Ownership**.

Now that the change is approved, Nancy can deploy the server.

23. Sign out of the console.
24. Log in to the console as **nancy** with the password **object00**.
25. Click the **Operations Specialist** Start Center tab.
26. Find and open the **Deploy Server** task in the My Tasks portlet.
27. Click the **Complete Activity** icon and set the status to **Completed**.
28. Sign out of the console.
29. Log in to the console as **schroeder** with the password **object00**.
30. Click the **Change Approval, analysis and implementation** Start Center tab.
31. Find and open the **Review Normal Change** task in the My Work portlet.

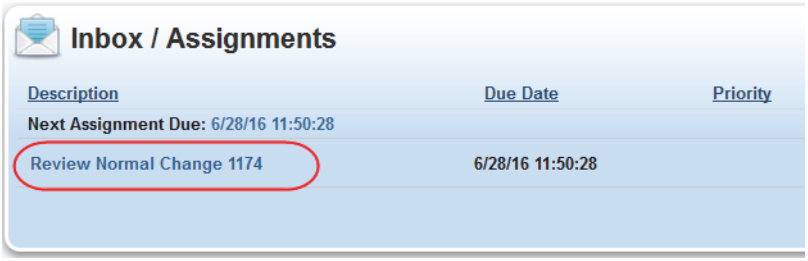


32. Click **Common Actions > Complete Activity** and set the status to **Completed**.
33. Click the Start Center icon to return to the **Change Approval, analysis and implementation** Start Center.
34. Find and open the **Normal Change In Progress** assignment in the Inbox/Assignments portlet.
35. Click **OK** to close the workflow help.
36. Click the **Schedule** tab.
37. Scroll down to the **Tasks for Change** section.

38. Verify that the Implement Normal Change task has a status of COMP (Completed).
39. Click the **Normal Change In Progress** link in the **Current Workflow Assignments** section.
40. Select **All change tasks have been executed, set change to Completed status**, and click **OK**.
41. Sign out of the console.

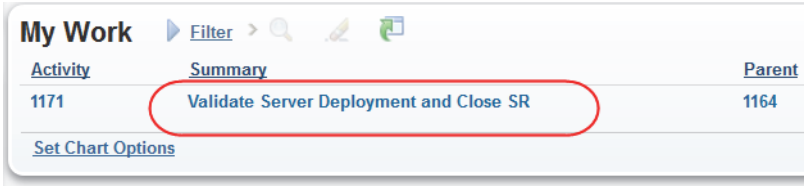
Verifying the change

42. Log in to the console as **lucy** with the password **object00**.
43. Open the **Review Normal Change** assignment in the Inbox/Assignments portlet.



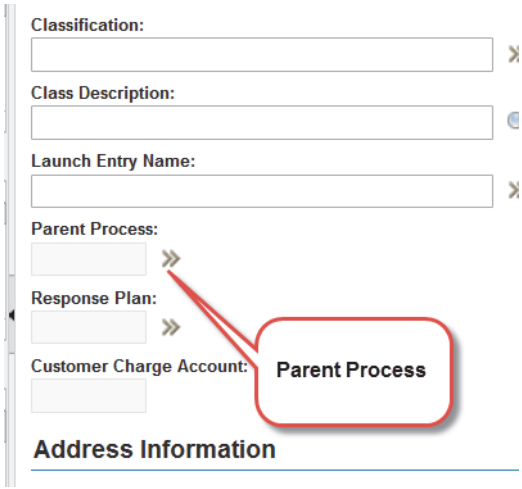
44. Click **OK** to close the Workflow help.
45. Click the **Schedule** tab and verify that all tasks are completed.
46. Click the **Change** tab and click the **Review Normal Change** link in the **Current Work Items** section.
47. Select **The change was successfully implemented and satisfies all stakeholder requirements** and click **OK**.

    Notice that the status of the change is now CLOSE.
48. Click the **Start Center** icon to return to the Change Owner Start Center.
49. Find and open the **Validate Server Deployment and Close SR** task in the My Work portlet.



You must close the service request and complete the validate server deployment task.

50. Click the **Detail Menu** for the parent process and click **Go To Activities and Tasks**.

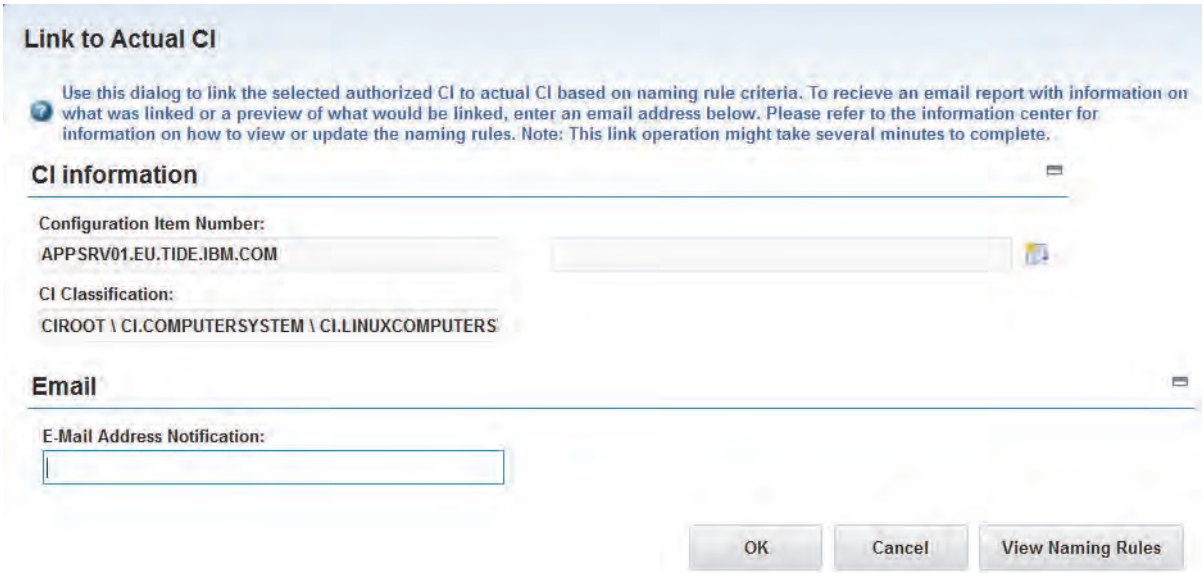


51. Click the **Related Records** tab.
52. Click the **Detail Menu** for the originating record and click **Go To Service Requests**.
53. Click the **Change Status** icon and set the status to **Closed**. The service request that Bob entered is now complete.
54. Click **Return** to return to the Build New Server with Middleware v2 task.
55. Click **Return** to return to the Validate Server Deployment and Close SR task.
56. Click the **Complete Activity** icon and set the status to **Completed**.
57. Click the Start Center icon to return to the Change Owner start center.
58. Remain logged in as Lucy.

Exercise 5 Linking authorized CIs and actual CIs

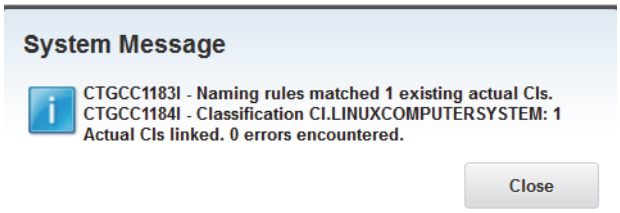
In the first exercise, you created an authorized CI. This CI represents the asset that you want to manage. An actual CI represents the asset as it was discovered in your environment. Actual CIs are read-only data that is imported from a discovery tool such as Tivoli Application Dependency Discovery Manager. It is valuable to link the authorized CIs to actual CIs so you can verify that what is deployed is equal to what is authorized. In the end to end scenario, after the appsrv01 server is deployed, the discovery tool can discover it. You can import the discovery tool data into IBM Control Desk. The demonstration data includes an actual CI for the appsrv01 server. This exercise demonstrates how to link authorized CIs to actual CIs.

1. Click **IT Infrastructure > Configuration Items** in the navigation bar.
2. Find and open the **APPSRV01.EU.TIDE.IBM.COM** CI that you created in the first exercise.
3. Click **Link to Actual CI** under **More Actions** in the navigation bar.

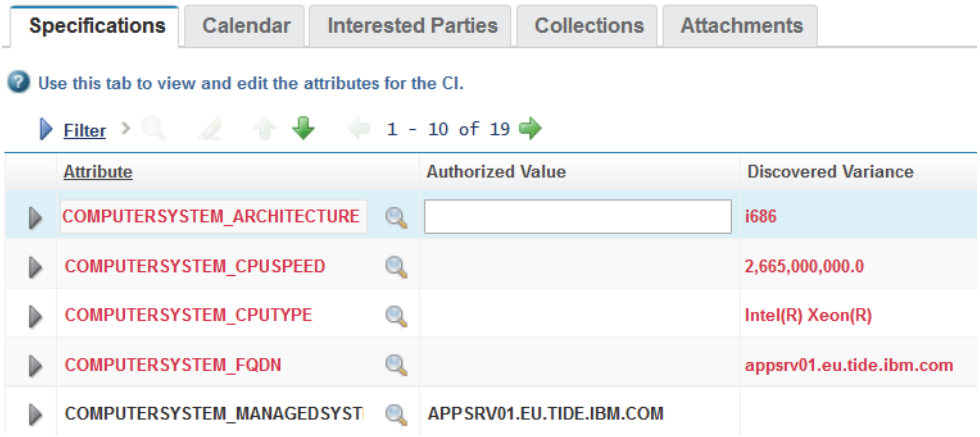


4. Optionally, click **View Naming Rules** to review the attributes that are used to determine a match between the authorized CI and the actual CI. If you click **View Naming Rules**, click **Cancel** to close the Rules to Link CIs with Newly Discovered Actual CIs before you continue to the next step.
5. Click **OK** to start the linking process.
6. Wait for the process to finish.
7. Verify that the naming rules matched one existing actual CI. If a match was not found, verify that the COMPUTERSYSTEM_UUID attribute that is defined for the authorized CI is correct. You

set this attribute in Step 8 on page 6-3. Correct any errors in the attribute and rerun the linking process.



8. Click **Close** to close the system message.
9. Click the **CI Details** tab.
10. Review the attributes in the **Specification** section.



Notice that several attributes are highlighted in red. This highlight indicates a discrepancy between an authorized attribute value and the discovered value. In this case, the differences are because these attributes were not entered when the authorized CI was created.

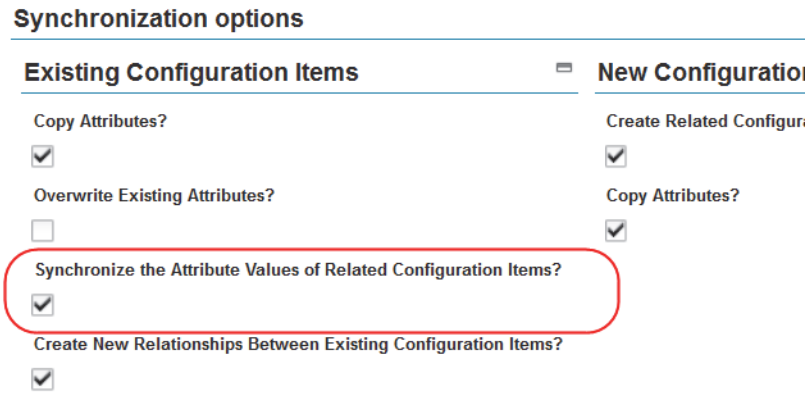
These differences are resolved in the next exercise.

Exercise 6 Synchronizing authorized CIs and actual CIs

After you established a link between the authorized and actual CIs, you can synchronize the attributes. This exercise demonstrates how to synchronize authorized and actual CIs.

1. Click **Synchronize Authorized CI** under More Action in the navigation bar.
2. Scroll down to the Synchronization options section, select the **Synchronize the Attribute Values of Related Configuration Items** option, and click **OK**. When this option is selected, the

attributes that are defined for any CIs related to the currently selected CI are updated with the values from the corresponding actual CIs.



3. Wait for the synchronization to complete.
4. Review the attributes in the **Specification** section.

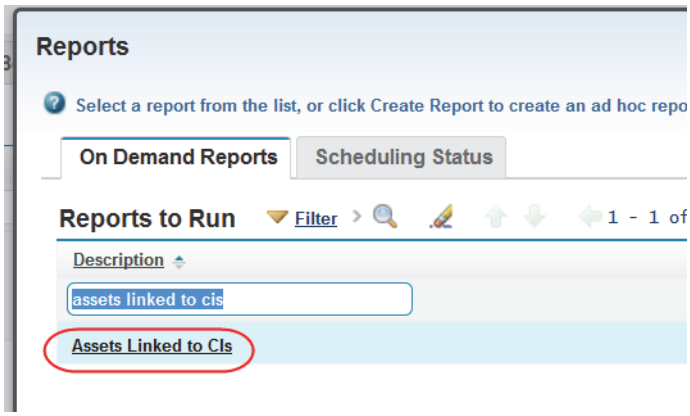
   Notice that the attributes are no longer highlighted and the values for the Authorized Value column are populated.
5. Click the **Related CIs** tab.
6. Review the list of Related Configuration Items. The appsrv01 configuration item is a top-level CI. The CIs listed on this tab have a relationship to appsrv01 such as the configuration item that represents the IP Network interface for appsrv01.
7. Sign out of the console.

Exercise 7 Synchronizing assets and CIs

You learned in the lecture that assets and CIs are often different representations of the same asset. An asset record is typically used to track lifecycle aspects of an asset. While a CI is used to control an asset from an operational perspective. However, because they often represent the same physical asset, it is useful for them to be linked. For example, if you are preparing to change a CI, you can review the details of the asset. Maybe the asset is approaching its refresh date. That knowledge might impact how you handle the change request. This exercise demonstrates how to synchronize assets and CIs.

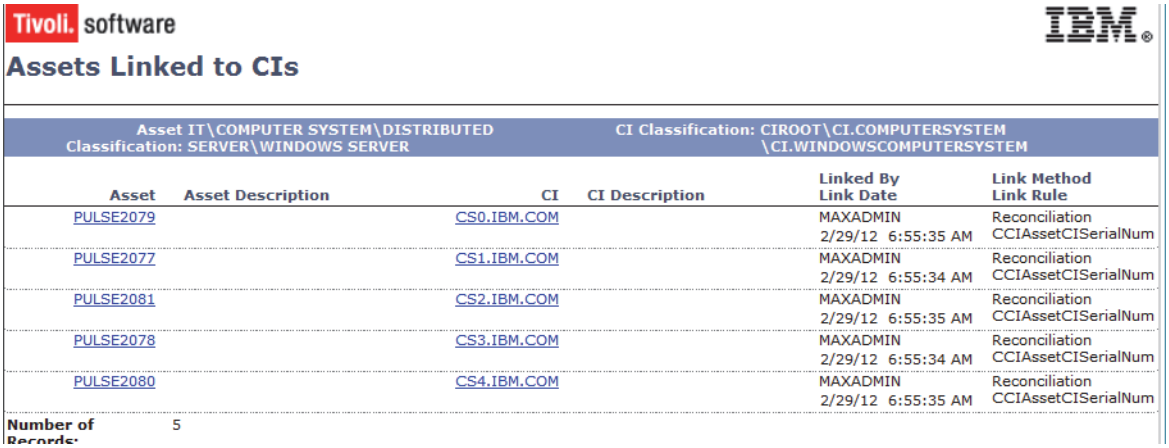
1. Log in as **jake** with the password **object00**.
2. Click **Assets > Assets** in the navigation bar.
3. Click **Run Reports** under **More Actions** in the navigation bar.

4. Find and click the **Assets Linked to CIs** report.



5. Click **Submit** to run the report.

6. Review the report. A few assets and CIs are already linked in the demonstration data.



7. Close the report.

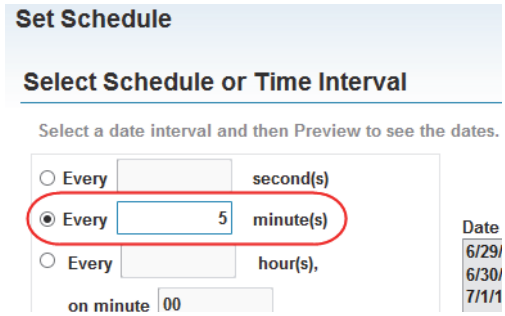
8. Click **Cancel** to close the report list.

9. Click **Administration > Reconciliation > Reconciliation Tasks** in the navigation bar.

10. Press Enter to view a list of reconciliation tasks.

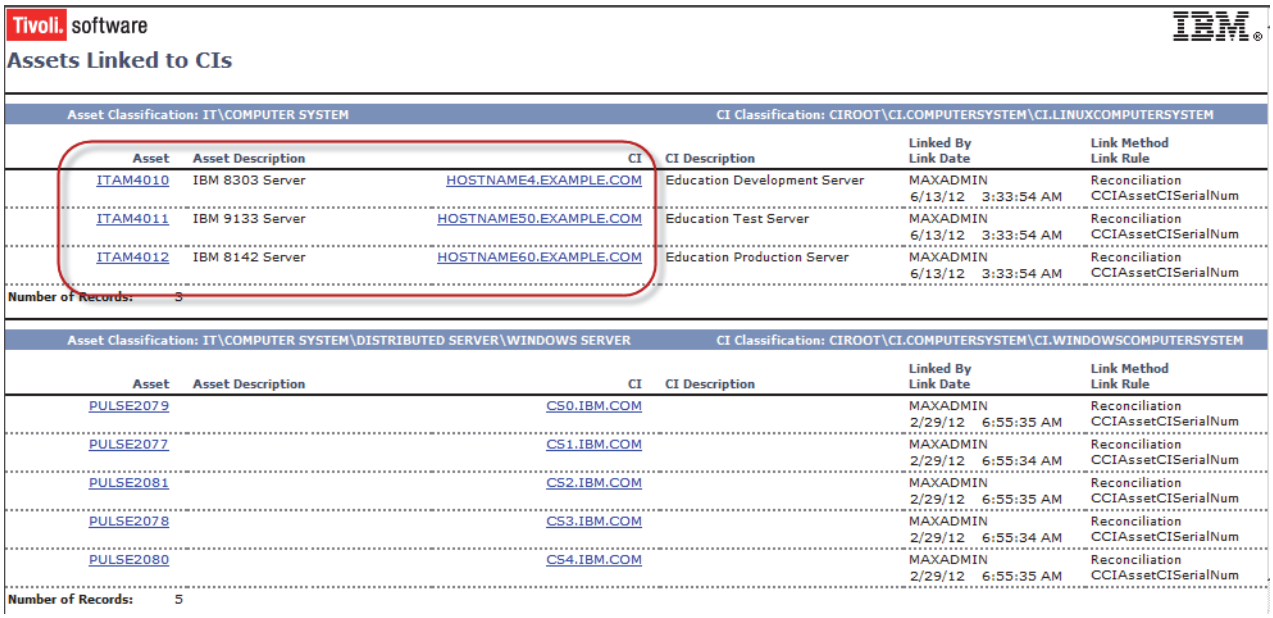
11. Open the **CCILinkAssetsAndCIs** reconciliation task.

12. Set the schedule to every **5 minutes**.



13. Click **Activate/Deactivate Reconciliation Task** under **More Actions** in the navigation bar.
14. Wait 5 minutes or more for the task to run.
15. Click the **List View** tab.
16. Press Enter to refresh the list of reconciliation tasks.
17. Verify that the **Last Completion Date** for the **CCILinkAssetsAndCIs** task was updated. If it is not updated, wait a few more minutes and refresh again.
18. Click **Assets > Assets** in the navigation bar.
19. Click **Run Reports** under **More Actions** in the navigation bar.
20. Find and click the **Assets Linked to CIs** report.
21. Click **Submit** to run the report.
22. Review the report.

    Notice the new linked assets and CIs.



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Assets Linked to CIs

Asset Classification: IT\COMPUTER SYSTEM — **CI Classification: CIROOT\CI.COMPUTERSYSTEM\CI.LINUXCOMPUTERSYSTEM**

Asset	Asset Description	CI	CI Description	Linked By / Link Date	Link Method / Link Rule
ITAM4010	IBM 8303 Server	HOSTNAME4.EXAMPLE.COM	Education Development Server	MAXADMIN 6/13/12 3:33:54 AM	Reconciliation CCIAssetCISerialNum
ITAM4011	IBM 9133 Server	HOSTNAME50.EXAMPLE.COM	Education Test Server	MAXADMIN 6/13/12 3:33:54 AM	Reconciliation CCIAssetCISerialNum
ITAM4012	IBM 8142 Server	HOSTNAME60.EXAMPLE.COM	Education Production Server	MAXADMIN 6/13/12 3:33:54 AM	Reconciliation CCIAssetCISerialNum

Number of Records: 3

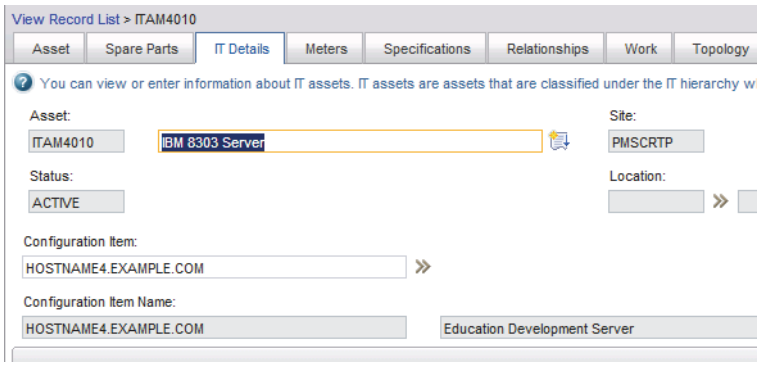
Asset Classification: IT\COMPUTER SYSTEM\DISTRIBUTED SERVER\WINDOWS SERVER — **CI Classification: CIROOT\CI.COMPUTERSYSTEM\CI.WINDOWSCOMPUTERSYSTEM**

Asset	Asset Description	CI	CI Description	Linked By / Link Date	Link Method / Link Rule
PULSE2079		CS0.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAssetCISerialNum
PULSE2077		CS1.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAssetCISerialNum
PULSE2081		CS2.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAssetCISerialNum
PULSE2078		CS3.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAssetCISerialNum
PULSE2080		CS4.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAssetCISerialNum

Number of Records: 5

23. Close the report.
24. Click **Cancel** to close the report list.
25. Find and open the **ITAM4010** asset. This asset is a newly linked asset.
26. Click the **IT Details** tab.

Notice that the **Configuration Item** is populated.



27. Sign out of the console.

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