

Course Exercises

IBM Control Desk 7.6.0.2 Fundamentals

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Unit 1 Overview exercises

In these exercises, you ensure that the lab environment is operational by logging in, checking the network settings, and starting IBM Control Desk. Next, you use the features of the Service Desk to resolve various issues.



Note: Your environment might differ slightly from the one shown in the screen captures that are used in this exercise book. Sometimes your results might not exactly match the book, but the results should be similar.

Exercise 1 Logging in to the operating system

Your first step is logging in to the operating system of the lab machine.

1. Ensure that your virtual machine image is running

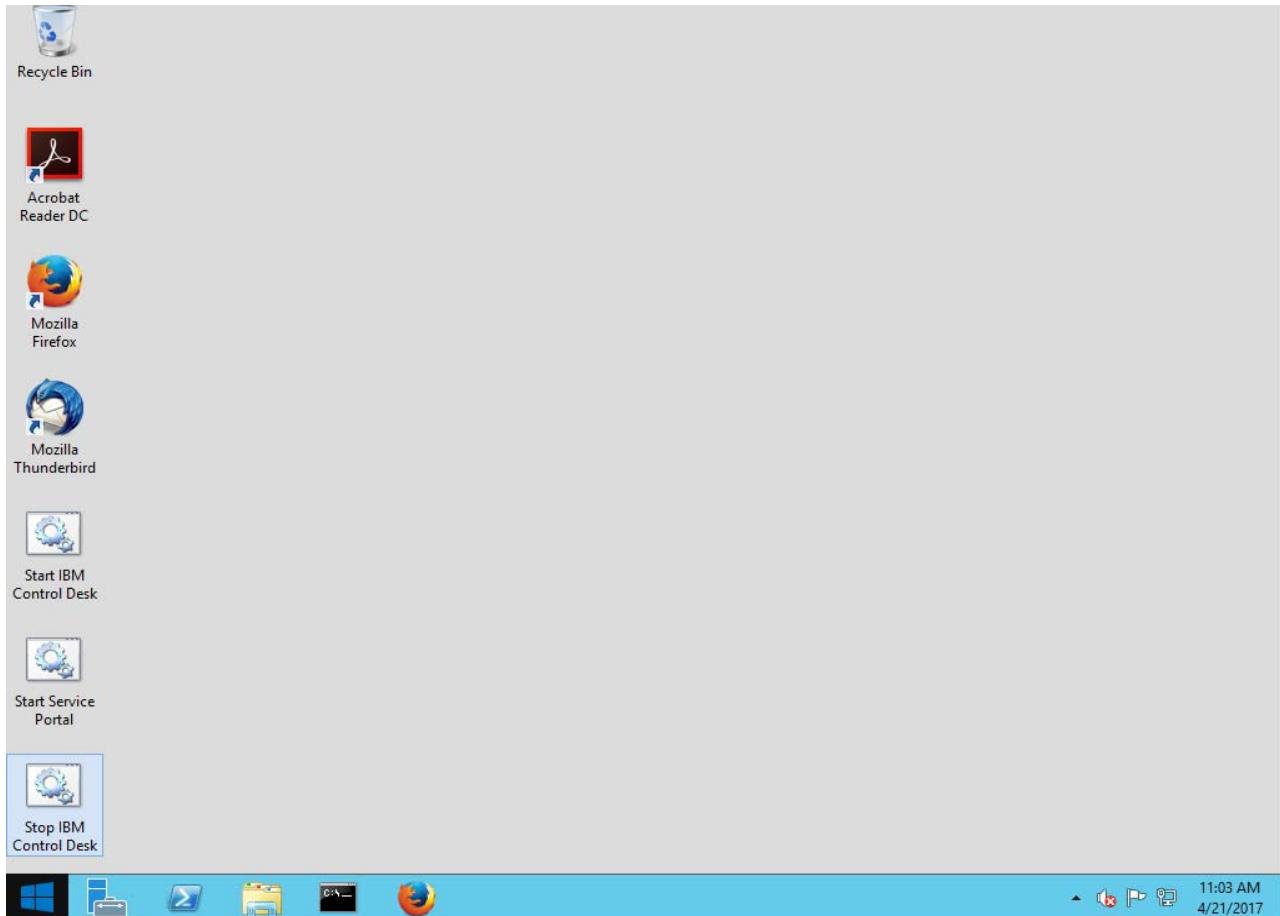


Note: You might use a different key sequence or menu selection, depending on your environment. For example, when running a virtual machine on a Windows host, you might press Ctrl+Alt+Insert to access the login screen on the virtual machine.

2. Click the left mouse button anywhere in the screen two or three times to display the login screen. The login screen defaults to Administrator as the user.
3. Enter the password **object00**.
4. Press the Enter key to log in to Windows 2012.

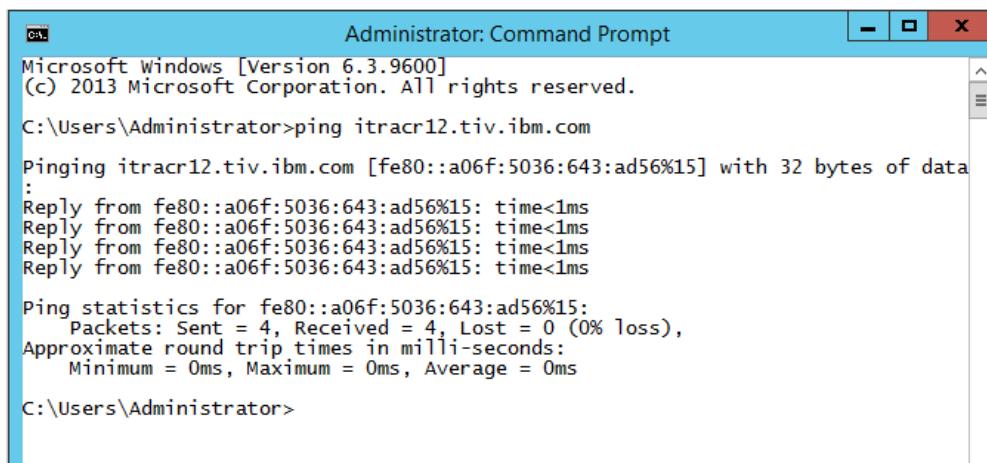
Exercise 2 Verifying image network configuration

The image for this course is designed to use the static IP address of **192.168.1.210** with the host name **itracr12.tiv.ibm.com**. Changing the IP address or host name can cause the software to not operate properly. In this exercise, you verify the network configuration of the system you are using.



1. Single click the **Command Prompt** icon on the taskbar. The main desktop is displayed and a command window is active.
2. Type the following command:
`ping -4 itracr12.tiv.ibm.com`

3. Verify that the fully qualified host name can be resolved. You receive a reply from the system by using the host name.



The screenshot shows a Windows Command Prompt window titled "Administrator: Command Prompt". The output of the command "ping itracr12.tiv.ibm.com" is displayed. The command sends four packets and receives four replies, all with a time less than 1ms. The statistics show 0% loss.

```
Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>ping itracr12.tiv.ibm.com

Pinging itracr12.tiv.ibm.com [fe80::a06f:5036:643:ad56%15] with 32 bytes of data
:
Reply from fe80::a06f:5036:643:ad56%15: time<1ms
Reply from fe80::a06f:5036:643:ad56%15: time<1ms
Reply from fe80::a06f:5036:643:ad56%15: time<1ms
Reply from fe80::a06f:5036:643:ad56%15: time<1ms

Ping statistics for fe80::a06f:5036:643:ad56%15:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\Users\Administrator>
```

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

```
ping -4 itracr12
ping 192.168.1.210
```

Note: If you do not receive a reply, your operating system is not configured properly, either by a mis-configured 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.

Exercise 3 Starting IBM Control Desk

The IBM Control Desk services are configured to automatically start the class image. Batch files are provided to start and stop the services as needed. The batch file starts WebSphere Application Server, and the IBM Control Desk application server (MXServer). In this exercise, you locate and review the start and stop batch files.



Note: Do not execute the batch scripts. IBM Control Desk is already running. The purpose of this exercise is to show you a method of starting and stopping the system manually.

1. Right-click the **Start IBM Control Desk** shortcut on the desktop and select **Edit**. When you complete your review, close the Notepad without saving the file.

```
@echo off
c:
cd "C:\Program Files (x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\bin"
call startnode
call startserver MXServer
pause
```

2. Repeat Step 1 for the **Stop IBM Control Desk** shortcut

```
@echo off
c:
cd "C:\Program Files (x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\bin"
call stopserver MXServer -username wasadmin -password object00
call stopnode -username wasadmin -password object00
pause
```

3. Locate the **Start Service Portal** icon on the Windows 2012 desktop and double-click it to run the batch file to start the Service Portal.
4. Minimize the window but do not close it. The window has to be active in order for the browser to connect to the Service Portal in the next unit's exercises.

Unit 2 Basic configuration exercises

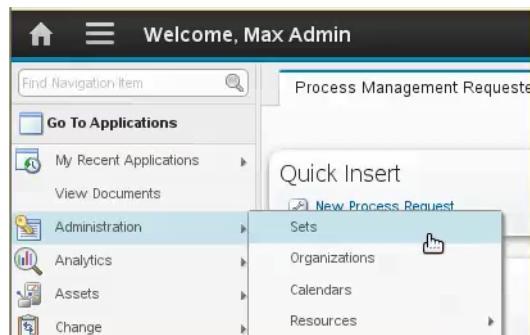
The exercises for this unit demonstrate how to perform the basic configuration steps. You follow a sample scenario to configure IT foundation data. In the classroom lab image, a sample configuration is configured for an enterprise called PMSCIBM. This organization is headquartered in the US. In the scenario,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

The scenario for this unit is stand-alone. 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**.

- Enter the following information to define the item set.

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

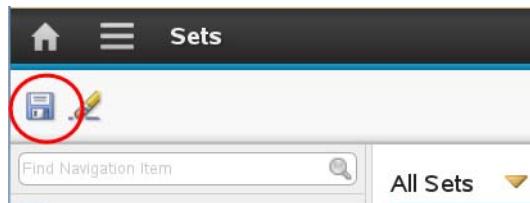
The screenshot shows the SAP Fiori interface for creating item sets. At the top, there is a navigation bar with 'All Sets' and various filter and search options. Below this is a table view where a new row for 'Item set 2' has been created. The table columns include Set, Description, Type, and Default Item Status. The 'Set' field contains 'PMSCS2', 'Description' contains 'Item set 2', 'Type' is set to 'ITEM', and 'Default Item Status' is 'PENDING'. Below the table, there is a 'Details' section with fields for Set, Type, and Default Item Status, all of which are populated with the same values. A checkbox for 'Automatically Add Companies to Company Master?' is also present. At the bottom right of the table view, there is a 'New Row' button. Below the table view, there is another section titled 'Organizations Using PMSCS2' which displays a message: 'There are no rows to display.'

- Click **New Row**.
- 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 are previously entered. On a new system with no demonstration data, you would have to enter at least one currency code before creating and activating your organization. In this exercise, you review the currency codes that were previously configured.



Note: Currency codes are created at the enterprise level and therefore are 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, you do not have to create a currency. If you want to create a currency, you click **New Row** and enter the currency code.

3. Click the home icon to return to maxadmin's start center.

Exercise 3 Creating an organization and site with 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**, and **Org Description**. 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 by using the Organization applications. The next exercise demonstrates how to create an organization from the Organization application.

- To get more information on a property, select the property value textbox and press the **ALT+F1** keys

Properties for Configuring Organization and Site

Org ID: sda.org.orgid	*	PMSCIBME	Organization Name
Org Description: sda.org.orgdescription		PMSCIBM Inc. Europe	Organization Description
Site ID: sda.org.siteid	*	LONDON	Site Identifier
Site Description: sda.org.sitedesc		EUROPE HQ	Site Description
Base Currency: sda.org.basecurrency	*	GBP >	Base Currency
Set ID: sda.org.setid	*	PMSCS2	Item Set Identifier
Company Set ID: sda.org.compsetid	*	PMSCCS2	Company Set Identifier
GL Account: sda.org.clearingacct		GLACCT	Clearing Account
<input type="button" value="Submit"/> Submit			

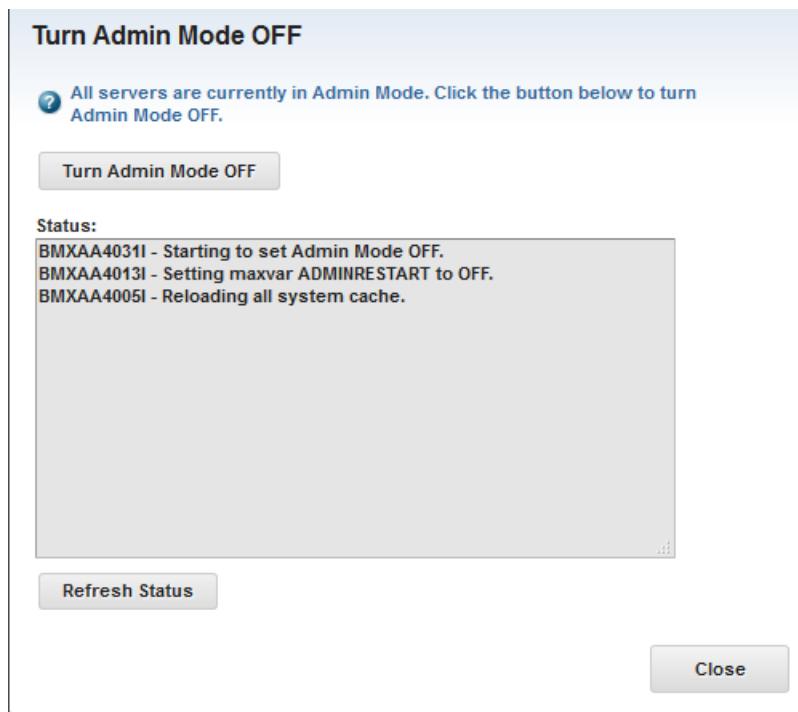
- Click Submit.**
- Click Yes** to continue past the warning to back up the database.
- Wait for the creation process to complete.
- Click OK** to continue past the organization has been successfully configured message.



Note: The Quick Configuration tool puts the server in Admin Mode when it runs. It is designed to allow the admin user to perform database tasks without shutting down the application server. However, in the current software version and the current virtual image, this mode is not turned off after the Quick Configuration tool runs, and, the database configuration tool does not successfully return control to the user when it is used to turn off Admin Mode. It is still necessary to use the database configuration tool to turn off admin mode off, however, stopping and starting the image is required to complete the process. In the next step, you verify whether or not Admin Mode is turned off. If it is not, which is likely, you turn it off. If you do not turn off Admin Mode, non-admin users cannot log in to the console.

- Click System Configuration > Platform Configuration > Database Configuration** in the navigation bar.
- Click Manage Admin Mode** under **More Actions** in the navigation bar.
- If you see the message that **All servers are currently in Admin Mode**, click **Turn Admin Mode Off**. If you do not see this message, skip to [Step 21](#) on page 3- 8.

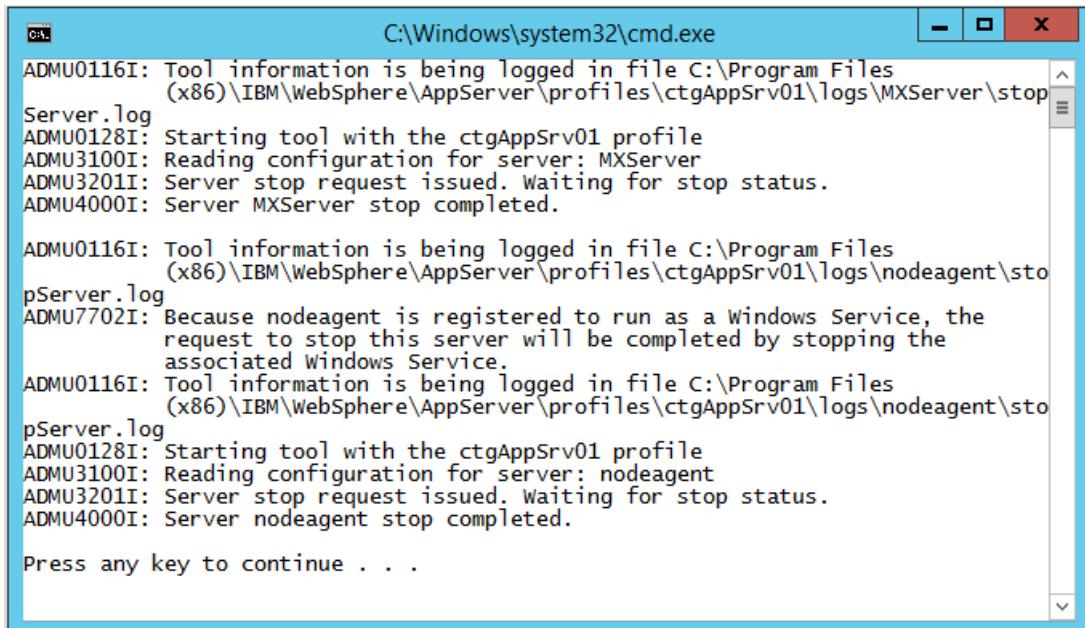
10. Click **OK** to close the system message indicating that **Starting to set Administration Mode is off** for this server.



11. Review the status messages.
12. Wait approximately 5 minutes.
13. Click the **Refresh Status** button. If the status has not changed, continue with the next step. If the Status window indicates Admin Mode has been turned off, go to [Step 21](#) on page 2-8.
14. Click **Close** to close the **Turn off Admin Mode** window.
15. Log out of the console and minimize the browser.

16. Double-click the desktop icon named Stop IBM Control Desk.

A command window is displayed. When the application server is stopped, you see a screen similar to the one shown here:



```
C:\Windows\system32\cmd.exe
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\MXServer\stop
Server.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: MXServer
ADMU3201I: Server stop request issued. Waiting for stop status.
ADMU4000I: Server MXServer stop completed.

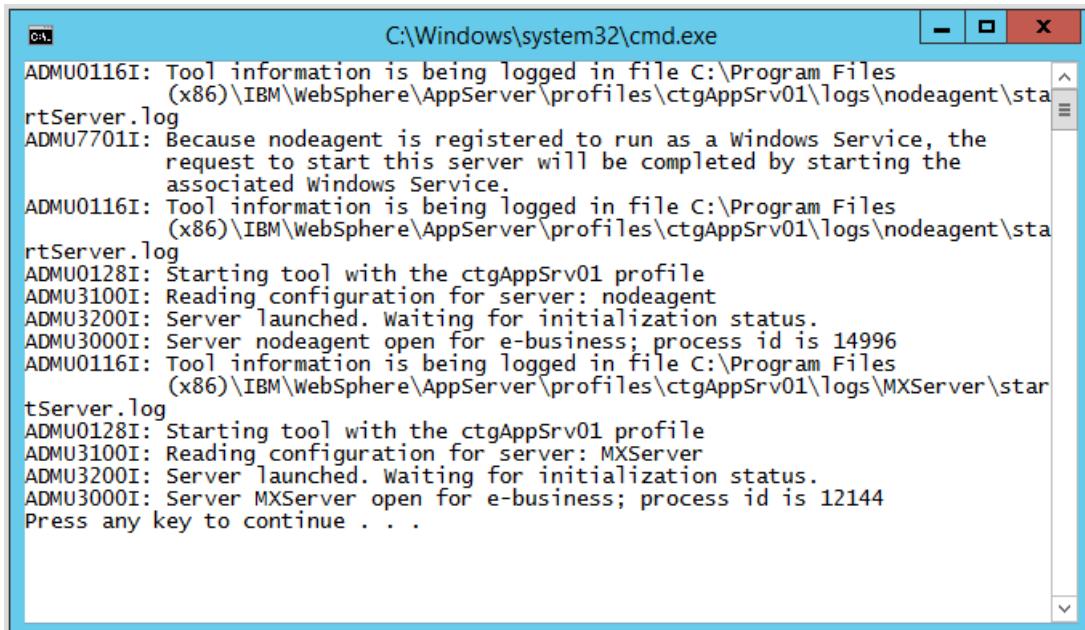
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sto
pServer.log
ADMU7702I: Because nodeagent is registered to run as a Windows Service, the
request to stop this server will be completed by stopping the
associated Windows Service.
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sto
pServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: nodeagent
ADMU3201I: Server stop request issued. Waiting for stop status.
ADMU4000I: Server nodeagent stop completed.

Press any key to continue . . .
```

17. Press the **ENTER key to close the command window.**

18. Double-click the desktop icon named Start IBM Control Desk.

A command window is displayed. When the application server is started, you see a screen similar to the one shown:



```
C:\Windows\system32\cmd.exe
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU7701I: Because nodeagent is registered to run as a Windows Service, the
request to start this server will be completed by starting the
associated Windows Service.
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: nodeagent
ADMU3200I: Server launched. Waiting for initialization status.
ADMU3000I: Server nodeagent open for e-business; process id is 14996
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\MXServer\star
tServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: MXServer
ADMU3200I: Server Launched. Waiting for initialization status.
ADMU3000I: Server MXServer open for e-business; process id is 12144
Press any key to continue . . .
```

19. Press the **Enter** key then wait approximately 5 - 8 minutes while the server completes the startup process.
20. Log in as **maxadmin** with the password **object00**
21. Click **Administration > Organizations** in the navigation bar.
22. Press Enter to retrieve a list of all organizations.
23. Open the **PMSCIBME** organization.
24. 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.
25. 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.
26. Click **New Row**.
27. 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

28. Click the **Save Organization** icon.
29. Click the **Sites** tab.
30. 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**.

31. Click the **Select Value** icon next to the **Address** field.
32. Click **EUROHQ**. The default address for the London site is now 1969 Camden Rd. You can use this address for financial transactions.

33. Click the **Save Organization** icon.

34. 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_site_s/c_organization_settings.html

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

36. 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.

37. Click **Cancel** to close the system settings.
38. Click **Delete Organization** under **More Actions** in the left navigation bar.
39. Review the system message. To ensure database integrity, you cannot delete organizations after sites are associated with the organization. Also, you cannot delete sites.
40. 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 Service Provider Edition of IBM Control Desk is installed in the class image. 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
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.

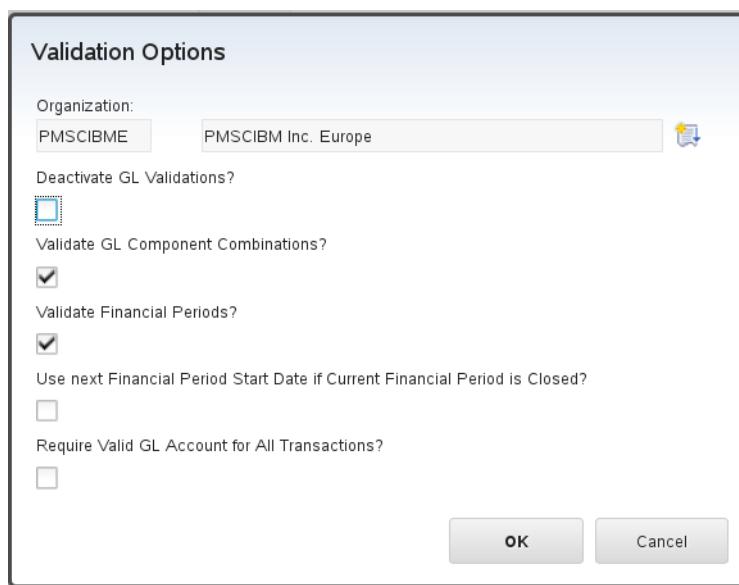
Field	Value
Site	SINGAPOR
Description	ASIA HQ

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.
15. Click the **Home** icon to return to maxadmin's start center.

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 no charts of accounts exist 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. After about 10 seconds, the screen will update. 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 the system does no validation for the accounts or financial periods. If you are interfacing with an external system, or if you want to report on GL accounts in the system, do not select this option.

5. Click **Cancel** to keep the defaults as they were.
6. Click **PMSCIBM**. Notice that one GL account is 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, you do not want to deactivate this option if you are sending transactions to an external accounting system.
8. Click **Cancel** to keep the settings as they were.
9. Click the **Home** icon to return to maxadmin's start center.

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 that are 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.

Component	Length	Type	Required?	Screen Delimiter
COST CENTE	4	INTEGER	<input checked="" type="checkbox"/>	-
ACTIVITY	3	ALN	<input checked="" type="checkbox"/>	-
RESOURCE	3	ALN	<input checked="" type="checkbox"/>	-

New Row

OK Cancel

Note: When configuring the GL formats, review any requirements that your external accounting systems have for format and segments. In this case, four segments of varying types and lengths exist. Three of the four 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**.
4. Click the **Home** icon to return to maxadmin's start center.

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 more components exist than you want to enter manually, 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 a manageable number of components need to be entered, you can use the manual process described.

11. **Optional:** Select **PMSCIBM** and review the GL components that are 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 that is 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**.

The screenshot shows two windows side-by-side. The top window is titled 'Organizations' and lists three organizations: PMSCIBM, PMSCIBME, and PMSCIBMA. The PMSCIBME row is selected. The bottom window is titled 'GL Accounts for PMSCIBME' and shows a table with columns for GL Account, Description, Active Date, and Expiration Date. A red circle highlights the window title 'GL Accounts for 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 is defined. In a production environment, you would typically have several values that are defined.
5. Click the **2000** to select this value as the COST CENTER segment for the GL account.

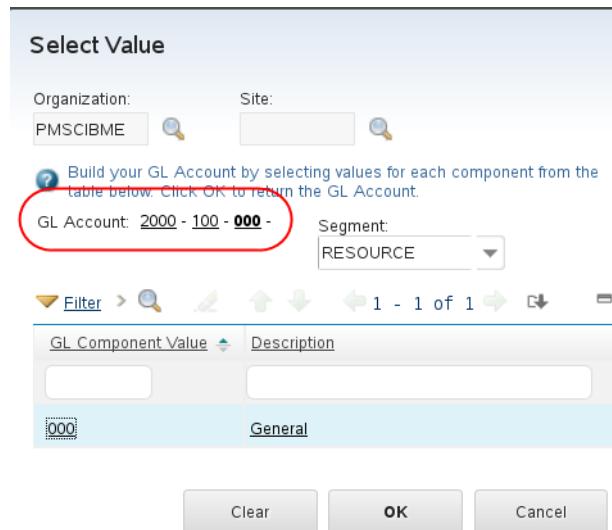
The screenshot shows the 'Select Value' dialog box. It has fields for Organization (PMSCIBME) and Site. Below is a note: 'Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.' The GL Account field shows '???? - ??? - ??? -'. The Segment dropdown is set to 'COST CENTER'. The bottom table shows 'GL Component Value' and 'Description' with a single row containing '2000' and 'Administration'. A red circle highlights the value '2000' in the table.

Notice that the segment 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 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 many accounts exist, 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 a manageable number of account codes are required, you can enter them manually using the process described here. Entering GL account codes is required only if you select 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. No financial periods are defined 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.

Period	From	To	Accounting Close Date	Actual Close Date	Closed By
2016	3/31/16 14:39:44	12/31/16 23:45:00	1/15/17 00:00:00		

8. Click **Cancel**.
9. **Optional:** Click **PMSCIBM** to select it and review the financial periods, which are 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 that are 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 configured 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**.

No external labor control accounts are 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.

No labor, tool, or inventory resource codes are 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 that is provided in the work order, asset, or location.

12. Click **Cancel**.

13. Select the **Home** icon to return to maxadmin's start center.



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 is 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.

GL Component Value	Description
000	General

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.

The screenshot shows two SAP Fiori screens. The top screen is titled 'Sites' and displays a table with one row for 'LONDON'. The 'Site' column shows 'LONDON', the 'Description' column shows 'EUROPE HQ', and the 'Active?' column has a checked checkbox, which is circled in red. The bottom screen is titled 'Addresses for Site: LONDON' and displays a table with one row for 'EUROHQ'. The 'Address' column shows 'EUROHQ', the 'Description' column shows 'European HQ', and the 'Bill To?' column has a dropdown menu with '✓' selected. Both screens have standard SAP navigation icons at the top.

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. If you want to reinforce what you learned, you can use the examples that are given for PMSCIBME to do those steps. Activating the PMSCIBMA organization is optional.

11. Select the **Home** icon to return to maxadmin's start center.

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 could have just 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.



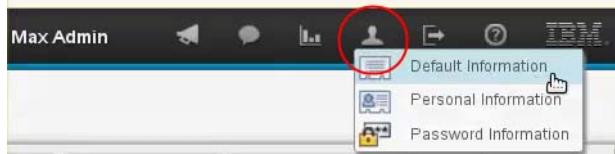
Note: The default insert site is **PMSC RTP**. This site is the default for the **maxadmin** user record. You can change this default site in the Users application or profile for individual users based on the site at which they do most of their work.



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

Creating the primary location

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



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

The screenshot shows the 'Default Information' dialog box. At the top, it displays the User as 'MAXADMIN' and 'Max Admin'. Below that, the 'Default Insert Site:' dropdown is set to 'LONDON' and is circled in red. There is also a 'EUROPE HQ' option in the dropdown. Underneath, there is a checkbox for 'Use Default Insert Site as a Display Filter?' which is checked. Below that, there are options for 'Side navigation menu:' with 'Display' and 'Hide' radio buttons, and 'Use setting from security group' which is selected. There is also a checkbox for 'Bring chat window to front when message received?' which is checked. At the bottom, there is another 'Storeroom Site for Self-Service Requisitions:' dropdown set to 'LONDON' and circled in red, along with a 'EUROPE HQ' option. There is also a 'Default Storeroom for Self-Service Requisitions:' dropdown below it.

4. 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.

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

Field	Value
Location	495Oxford
Description	Oxford St
Type	OPERATING

8. Click the **Save Location** icon.

Creating the primary system

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

The screenshot shows the Locations application interface. At the top, there is a toolbar with various icons: Find Location, search, refresh, and navigation arrows. Below the toolbar, a navigation bar includes tabs for List View, Location, Assets, History, Meters, and Specification. The List View tab is highlighted with a red circle. Underneath the navigation bar, there are three input fields: Location (495OXFORD), Description (Oxford St), and Type (OPERATING). Each field has a magnifying glass icon to its right.

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

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

Creating a child of the first location in the hierarchy

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

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

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

Creating a child of the second location in the hierarchy

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

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

32. Click **Associate Systems with Location** under **More Actions** in the navigation bar.
33. Click **New Row**.
34. Click the **Select Value** for the **System** field.
35. Click **EUROHQ**.
36. Click the **Detail Menu** for the **Parent** field.
37. Click **Select Value**.
38. Click **2NDFLOOR** for the **Parent** and click **OK**.

Viewing the Drilldown section

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

The screenshot shows the 'Drilldown' interface. At the top, there's a message: 'Select ☐ to show children. Select ☑ to hide children. Select ⌂ to return location / asset.' Below this are tabs for 'Locations' (selected) and 'Assets'. On the left, there are fields for 'Location' (495OXFORD), 'Asset in Location' (empty), 'Status' (OPERATING), and 'Site' (LONDON). A note says 'No assets found at this location.' On the right, there's a tree view of systems. A red box highlights the expanded node '495OXFORD:Oxford St.', which shows three children: '2NDFLOOR:2nd Floor IT Support' and '2NDINVDATA:2nd Floor Investments Data Center'.

43. Click **Cancel**.
44. Click **Profile > Default Information** in the upper right corner.
45. Change the **Default Insert Site** and **Storeroom Site** to **PMSCRTTP**.
46. Set the **Default Storeroom for Self-Service Requisitions** to **ITHARDWARE**.
47. 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 that do 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. The top-level class has 11 child records 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**.

Classification	Classification Desc	Organization
ASSET.GENERIC_COMPUTERSYSTEM	Generic Computer System for Asset	
VIRTUAL RESOURCES	Virtual Resource	
NETWORK DEVICE	Network Device	
COMPUTER SYSTEM	Computer System	
PRINTERS	Select Value	

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

The screenshot shows the SAP Fiori interface for managing classifications. The 'Classifications' tab is selected. In the 'Classification' field, 'DESKTOP COMPUTER' is entered and highlighted with a red oval. Below it, the 'Classification Path' shows 'IT \ COMPUTER SYSTEM \ DESKTOP COMP'. The 'Parent Classification' field contains 'IT \ COMPUTER SYSTEM'. To the right, there are sections for 'Organization', 'Site', 'Is Global?' (checked), 'Customer', 'Associate Customers With Children?' (checked), and 'Associate Customers With Attributes?' (checked). At the bottom left, there is a note icon.

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 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.

The screenshot shows the SAP Fiori interface for managing classifications. The 'Classifications' tab is selected. In the 'Classification' field, 'DESKTOP COMPUTER' is entered. The 'Classification Path' shows 'IT \ COMPUTER SYSTEM \ DESKTOP COMP'. The 'Parent Classification' field contains 'IT \ COMPUTER SYSTEM'. A context menu is open over this field, with the 'Move Up Hierarchy' option highlighted. Other options in the menu are 'Select Parent Classification' and 'Clear Parent Classification'. The 'Use Classification?' checkbox is checked. At the bottom left, there is a note icon.

You want to add a 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.

The screenshot shows the 'Details' dialog box with the following fields:

- *Attribute:** VENDOR
- Data Type:** ALN
- Domain:** (empty)
- Table Attribute:** (empty)
- Lookup Name:** (empty)
- Section:** (empty)
- Unit of Measure:** (empty)
- Description Prefix:** (empty)
- Inherited from:** (empty)

A red oval highlights the **Apply Down Hierarchy?** checkbox, which is checked.



Note: **Apply Down Hierarchy** is helpful when you are creating a large classification manually. It applies the attributes that are created for the parent to all the attributes of the child so that 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.
20. Select the **Home** icon to return to maxadmin's start center.

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 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.

Cron Task Instance Name	Schedule	Run as User	Active?	Keep History?
SEQQIN	30s,*,*,*,*	MAXADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SEQQOUT	30s,*,*,*,*	MAXADMIN	<input type="checkbox"/>	<input type="checkbox"/>

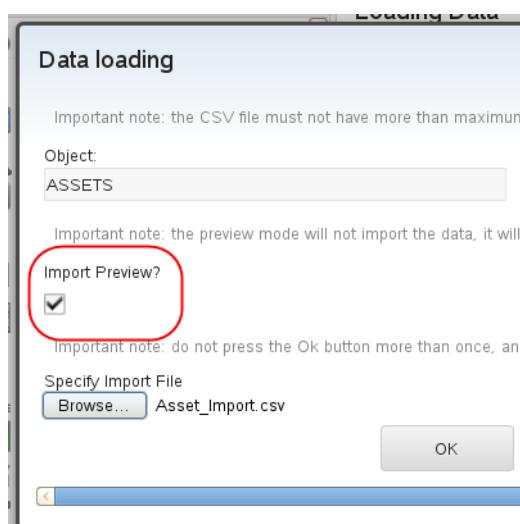
Note: The SEQQIN cron task instance must be active to process the data that you loaded with the Quick Configuration tool.

5. Select the **Home** icon to return to maxadmin's start center.
6. Minimize the browser window.

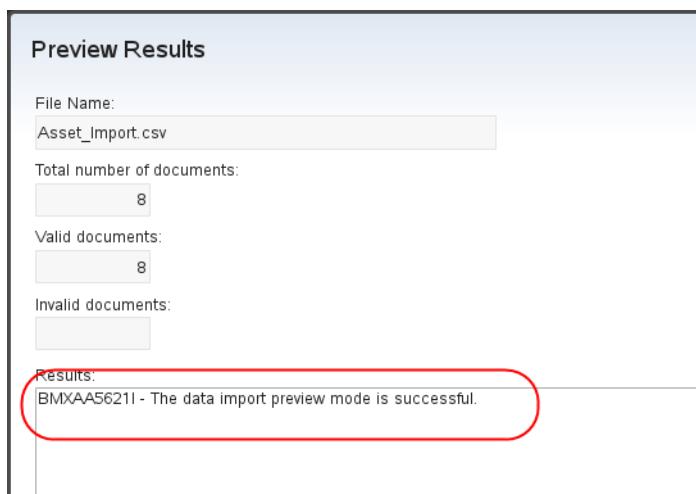
Importing assets

7. Open a file browser and change directory to **C:\labfiles\foundation**.
8. Double-click the **Asset_Import.csv** file to open it.
9. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.

10. Maximize browser window.
11. Click **System Configuration > Platform Configuration > Quick Configuration** in the left navigation bar
12. Click the **Data Loading** tab.
13. Select **ASSETS** to select it for the Object and click **Load data**.
14. Click **Browse** and change to the **C:\labfiles\foundation** directory.
15. Select the **Asset_Import.csv** file and click **Open**.
16. Verify that the **Import Preview** option is selected and click **OK**.



17. Review the **Preview Results**. Eight records should be processed with no errors.



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



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



Important: Occasionally, the data loading operation does not recognize that the “Import Preview” option is cleared. If you perform the following steps and the data does not load, but rather you see a message saying the preview has been successful, as in the previous steps, you might need to exit the browser and run the Stop IBM Control Desk and Start IBM Control Desk batch files from the Windows desktop. Remember to wait 5 - 8 minutes after the Start IBM Control Desk file completes before attempting to log in again. At that point, select **System Configuration > Platform Configuration > Quick Configuration** again. You do not need to perform the preview option again. Clear the preview option and load the csv file.

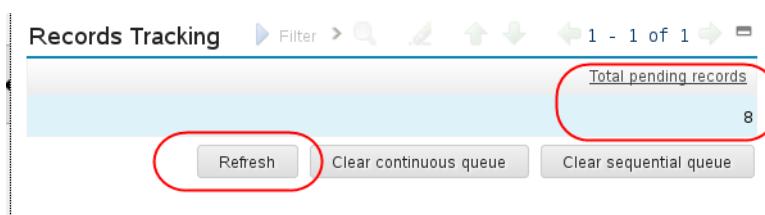
19. Click **Load data** again.

20. Browse and select the **Asset_Import.csv** file again.

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

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

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



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

25. Click **Assets > Assets** in the left navigation bar.

26. Type **ITAM6** in the **Asset** filter field and press Enter to search for assets that begin with ITAM6.

27. Verify that **ITAM6006 - ITAM6010** are in the list. These assets were in the **Asset_Import.csv** file.

28. Minimize the browser.

Importing CIs

29. Open a file browser and change directory to **C:\labfiles\foundation**.

30. Double-click the **CI_Import.csv** file to open it.

31. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.

32. Return to maxadmin's **Start Center**.

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

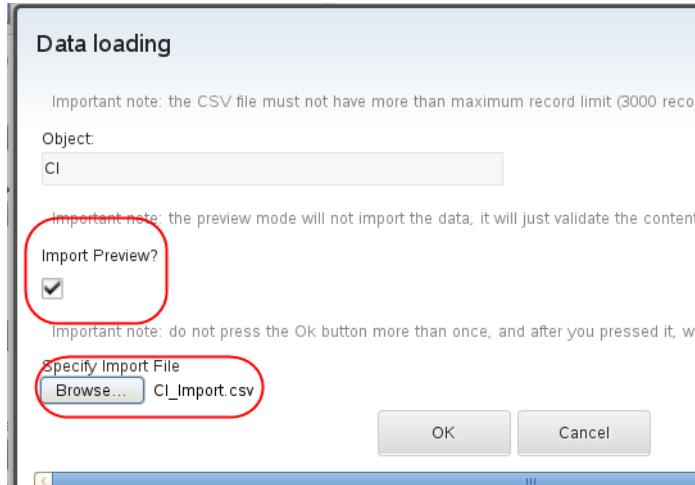
34. Click the **Data Loading** tab.

35. Select **CI** for the **Object** to select it and click **Load data**.

36. Click **Browse** and change to the **C:\labfiles\foundation** directory.

37. Select the **CI_Import.csv** file and click **Open**.

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



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

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



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

41. Click **Load data** again.

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

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

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

45. Verify that three records are pending in the queue.

46. Click **Refresh** until the total pending records is **0**.
47. Click **IT Infrastructure > Configuration Items** in the navigation bar.
48. Type **hostname** in the **Configuration Item Name** filter field and press **Enter** to search for CIs that begin with *hostname*.
49. 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.
50. Select the **Home** icon to return to maxadmin's start center.
51. Minimize Firefox.

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.



Important: During the importing of users, IBM Control Desk sends each imported user email containing the account password. If the email server (in this case `itracmail.tiv.ibm.com`) is not turned on and loaded, the import fails. Before proceeding, turn on the virtual machine `itracmail.tiv.ibm.com`

52. See **Important** Note above. Turn on the mail server in your environment.
53. Click **System Configuration > Migration > Object Structures** in the left navigation bar.
54. Enter **MXPERUSER** in the Object Structure field and press **Enter**. Click the MXPERUSER object to select it.
55. Click **Inbound Setting Restrictions** in **More Actions**.

56. Click **MAXUSER** to select it. Locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.

Field	Restricted?
EMAILPSWD	<input checked="" type="checkbox"/>
FORCEEXPIRATION	<input checked="" type="checkbox"/>
INACTIVESITES	<input checked="" type="checkbox"/>
MAXUSERID	<input checked="" type="checkbox"/>
PASSWORD	<input checked="" type="checkbox"/>
PASSWORDCHECK	<input checked="" type="checkbox"/>
PASSWORDINPUT	<input checked="" type="checkbox"/>
PWEXPIRATION	<input checked="" type="checkbox"/>

57. 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.

Field	Restricted?	Override?
EMAILPSWD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FORCEEXPIRATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INACTIVESITES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MAXUSERID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PASSWORD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PASSWORDCHECK	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PASSWORDINPUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PWEXPIRATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>

58. Click **OK** to save the record.
59. Select the **Home** icon to return to maxadmin's start center.
60. Minimize the browser.
61. Open a file browser and change directory to **C:\labfiles\foundation**.

62. Double-click the **User_Import.csv** file to open it.
63. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.
64. Restore your browser session.
65. Click **System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.
66. Click the **Data Loading** tab.
67. Select **PERSON USER** for the **Object** to select it and click **Load data**.
68. Click **Browse** and change to the **C:\labfiles\foundation** directory.
69. Select the **User_Import.csv** file and click **Open**.
70. Verify that the **Import Preview** option is selected and click **OK**.
71. Review the preview results. There should be three records that are processed and no errors.
72. Click **OK** to close the preview results.



Note: You must ensure that no errors exist before you perform the actual import.

73. Click **Load data** again.
74. Browse and select the **User_Import.csv** file again.
75. Clear the **Import Preview** option and click **OK** to perform the import.
76. Click **OK** to close the `inbound transaction has been processed` message.
77. Verify that three records are pending in the queue.
78. Click **Refresh** until the total pending records is **0**.
79. Click **Security > Users** in the navigation bar.
80. Type **cjenkins** in the **User** filter field and press Enter to search for Clara Jenkins, who was a user in the import file.
81. Verify that Clara has been added.
82. Repeat the previous two steps for **jfraser** (Jamie Fraser) and **kthomas** (Kevin Thomas).

Reverting the password security settings

83. Click **System Configuration > Migration > Object Structures** in the left navigation bar.

84. Enter **MXPERUSER** in the **Object Structure** field and press Enter. Click the MXPERUSER object to open it.
85. Click **Inbound Setting Restrictions** in **More Actions**.
86. Click **MAXUSER** to select it. Scroll forward to locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.

Inbound Setting Restrictions For MBO MAXUSER			
	Field	Restricted?	Override?
▶	FAILEDLOGINS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶	DEFSTOREROOM	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFSITE	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFAULTREPFACTSITEID	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFAULTREPFACT	<input type="checkbox"/>	<input type="checkbox"/>
▶	DATABASEUSERID	<input type="checkbox"/>	<input type="checkbox"/>
▶	PASSWORDINPUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶	PASSWORDCHECK	<input type="checkbox"/>	<input checked="" type="checkbox"/>

87. Select the **Restricted check** box on both attributes and clear the **Override check** box on both attributes.
88. Click **OK** to save the record.
89. Log out of IBM Control Desk.
90. Log back in to IBM Control Desk.
91. Go to **System Configuration > Migration > Object Structures** in the navigation bar to select it.
92. Click **Inbound Setting Restrictions** in the **More Actions** menu.
93. Click **MAXUSER** to select it, locate the **PasswordCheck** and **PasswordInput** attributes.
94. Ensure that the check marks are back in the **Restricted Column** for each attribute. If they are there, continue your work. If the two attributes do not have check marks in the **Restricted Column**, notify your instructor and get it corrected before continuing with the exercises.
95. Log out of the console.

Unit 3 Basic configuration exercises

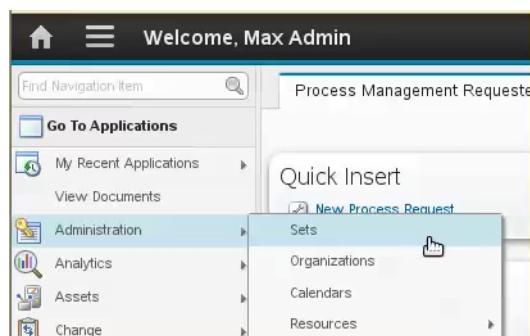
The exercises for this unit demonstrate how to perform the basic configuration steps. You follow a sample scenario to configure IT foundation data. In the classroom lab image, a sample configuration is configured for an enterprise called PMSCIBM. This organization is headquartered in the US. In the scenario,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

The scenario for this unit is stand-alone. 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**.

- Enter the following information to define the item set.

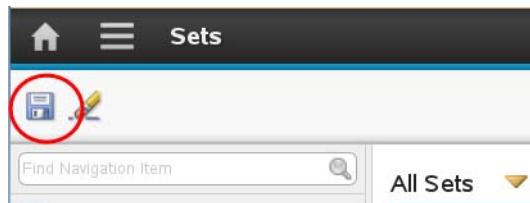
Field	Value
Set	PMSCS2
Set Description	Item set 2
Type	ITEM
Default Item Status	PENDING

- Click **New Row**.
- 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 are previously entered. On a new system with no demonstration data, you would have to enter at least one currency code before creating and activating your organization. In this exercise, you review the currency codes that were previously configured.



Note: Currency codes are created at the enterprise level and therefore are 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, you do not have to create a currency. If you want to create a currency, you click **New Row** and enter the currency code.

3. Click the home icon to return to maxadmin's start center.

Exercise 3 Creating an organization and site with 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**, and **Org Description**. 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 by using the Organization applications. The next exercise demonstrates how to create an organization from the Organization application.

- To get more information on a property, select the property value textbox and press the **ALT+F1** keys

Properties for Configuring Organization and Site

Org ID: sda.org.orgid	*	PMSCIBME	Organization Name
Org Description: sda.org.orgdescription		PMSCIBM Inc. Europe	Organization Description
Site ID: sda.org.siteid	*	LONDON	Site Identifier
Site Description: sda.org.sitedesc		EUROPE HQ	Site Description
Base Currency: sda.org.basecurrency	*	GBP >	Base Currency
Set ID: sda.org.setid	*	PMSCS2	Item Set Identifier
Company Set ID: sda.org.compsetid	*	PMSCCS2	Company Set Identifier
GL Account: sda.org.clearingacct		GLACCT	Clearing Account

Submit

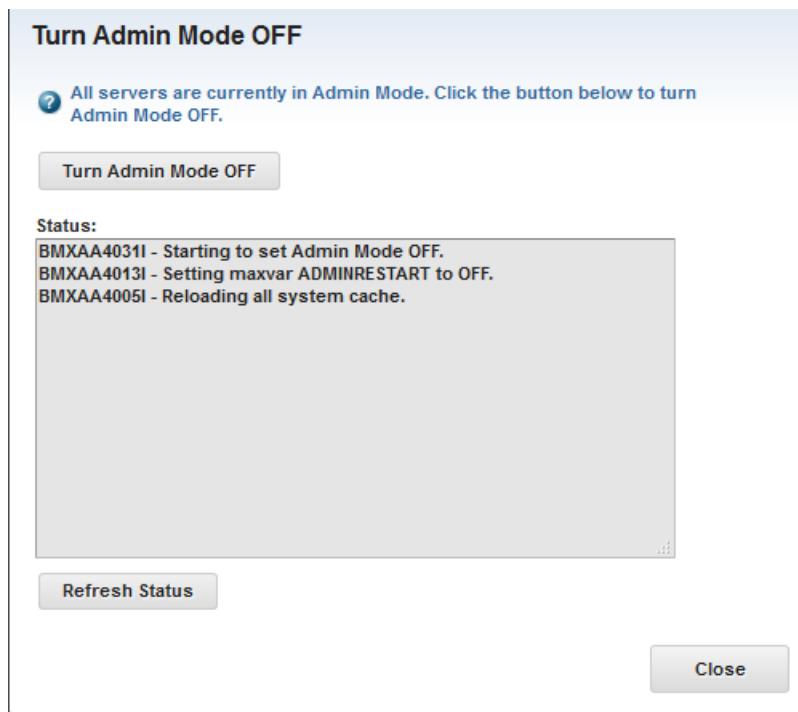
- Click Submit.**
- Click Yes** to continue past the warning to back up the database.
- Wait for the creation process to complete.
- Click OK** to continue past the organization has been successfully configured message.



Note: The Quick Configuration tool puts the server in Admin Mode when it runs. It is designed to allow the admin user to perform database tasks without shutting down the application server. However, in the current software version and the current virtual image, this mode is not turned off after the Quick Configuration tool runs, and, the database configuration tool does not successfully return control to the user when it is used to turn off Admin Mode. It is still necessary to use the database configuration tool to turn off admin mode off, however, stopping and starting the image is required to complete the process. In the next step, you verify whether or not Admin Mode is turned off. If it is not, which is likely, you turn it off. If you do not turn off Admin Mode, non-admin users cannot log in to the console.

- Click System Configuration > Platform Configuration > Database Configuration** in the navigation bar.
- Click Manage Admin Mode** under **More Actions** in the navigation bar.
- If you see the message that **All servers are currently in Admin Mode**, click **Turn Admin Mode Off**. If you do not see this message, skip to [Step 21](#) on page 3- 8.

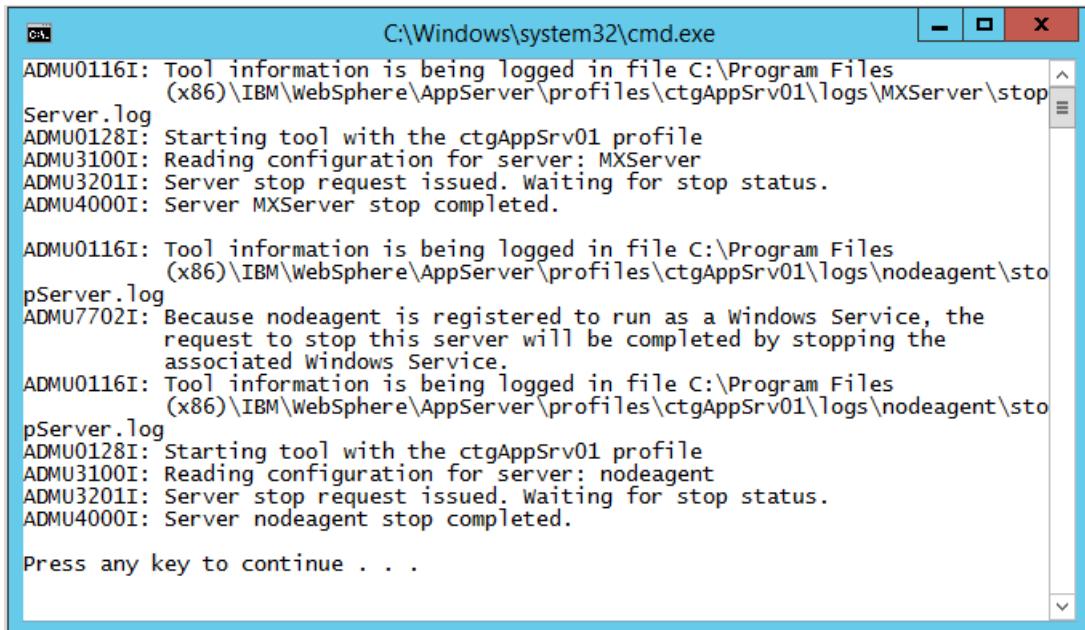
10. Click **OK** to close the system message indicating that **Starting to set Administration Mode is off** for this server.



11. Review the status messages.
12. Wait approximately 5 minutes.
13. Click the **Refresh Status** button. If the status has not changed, continue with the next step. If the Status window indicates Admin Mode has been turned off, go to [Step 21](#) on page 3- 8.
14. Click **Close** to close the **Turn off Admin Mode** window.
15. Log out of the console and minimize the browser.

16. Double-click the desktop icon named Stop IBM Control Desk.

A command window is displayed. When the application server is stopped, you see a screen similar to the one shown here:



```
C:\Windows\system32\cmd.exe
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\MXServer\stop
Server.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: MXServer
ADMU3201I: Server stop request issued. Waiting for stop status.
ADMU4000I: Server MXServer stop completed.

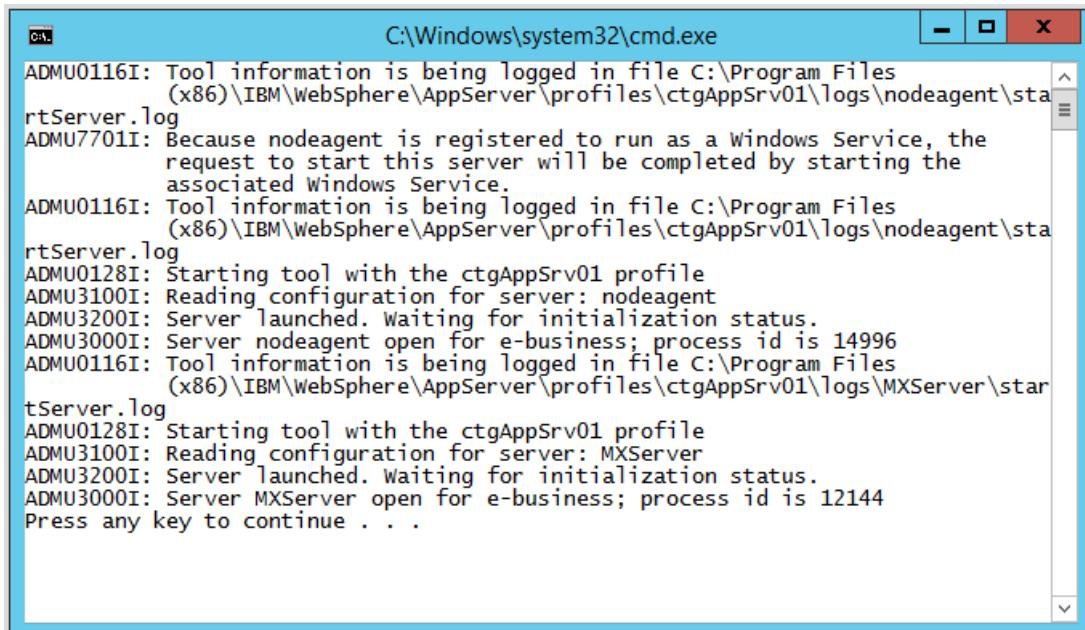
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sto
pServer.log
ADMU7702I: Because nodeagent is registered to run as a Windows Service, the
request to stop this server will be completed by stopping the
associated Windows Service.
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sto
pServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: nodeagent
ADMU3201I: Server stop request issued. Waiting for stop status.
ADMU4000I: Server nodeagent stop completed.

Press any key to continue . . .
```

17. Press the **ENTER key to close the command window.**

18. Double-click the desktop icon named Start IBM Control Desk.

A command window is displayed. When the application server is started, you see a screen similar to the one shown:



```
C:\Windows\system32\cmd.exe
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU7701I: Because nodeagent is registered to run as a Windows Service, the
request to start this server will be completed by starting the
associated Windows Service.
ADMU0116I: Tool information is being logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\nodeagent\sta
rtServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: nodeagent
ADMU3200I: Server launched. Waiting for initialization status.
ADMU3000I: Server nodeagent open for e-business; process id is 14996
ADMU0116I: Tool information is being Logged in file C:\Program Files
(x86)\IBM\WebSphere\AppServer\profiles\ctgAppSrv01\logs\MXServer\star
tServer.log
ADMU0128I: Starting tool with the ctgAppSrv01 profile
ADMU3100I: Reading configuration for server: MXServer
ADMU3200I: Server Launched. Waiting for initialization status.
ADMU3000I: Server MXServer open for e-business; process id is 12144
Press any key to continue . . .
```

19. Press the **Enter** key then wait approximately 5 - 8 minutes while the server completes the startup process.
20. Log in as **maxadmin** with the password **object00**
21. Click **Administration > Organizations** in the navigation bar.
22. Press Enter to retrieve a list of all organizations.
23. Open the **PMSCIBME** organization.
24. 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.
25. 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.
26. Click **New Row**.
27. 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

28. Click the **Save Organization** icon.
29. Click the **Sites** tab.
30. 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**.

31. Click the **Select Value** icon next to the **Address** field.
32. Click **EUROHQ**. The default address for the London site is now 1969 Camden Rd. You can use this address for financial transactions.

33. Click the **Save Organization** icon.

34. 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_site_s/c_organization_settings.html

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

36. 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.

37. Click **Cancel** to close the system settings.
38. Click **Delete Organization** under **More Actions** in the left navigation bar.
39. Review the system message. To ensure database integrity, you cannot delete organizations after sites are associated with the organization. Also, you cannot delete sites.
40. 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 Service Provider Edition of IBM Control Desk is installed in the class image. 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
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.

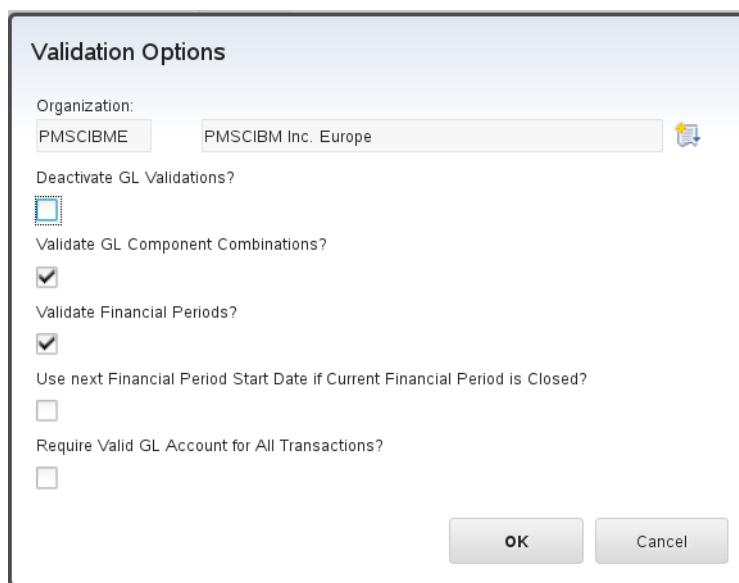
Field	Value
Site	SINGAPOR
Description	ASIA HQ

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.
15. Click the **Home** icon to return to maxadmin's start center.

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 no charts of accounts exist 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. After about 10 seconds, the screen will update. 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 the system does no validation for the accounts or financial periods. If you are interfacing with an external system, or if you want to report on GL accounts in the system, do not select this option.

5. Click **Cancel** to keep the defaults as they were.
6. Click **PMSCIBM**. Notice that one GL account is 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, you do not want to deactivate this option if you are sending transactions to an external accounting system.
8. Click **Cancel** to keep the settings as they were.
9. Click the **Home** icon to return to maxadmin's start center.

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 that are 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.

Component	Length	Type	Required?	Screen Delimiter
COST CENTE	4	INTEGER	<input checked="" type="checkbox"/>	-
ACTIVITY	3	ALN	<input checked="" type="checkbox"/>	-
RESOURCE	3	ALN	<input checked="" type="checkbox"/>	-

New Row OK Cancel

Note: When configuring the GL formats, review any requirements that your external accounting systems have for format and segments. In this case, four segments of varying types and lengths exist. Three of the four 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**.
4. Click the **Home** icon to return to maxadmin's start center.

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 more components exist than you want to enter manually, 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 a manageable number of components need to be entered, you can use the manual process described.

11. **Optional:** Select **PMSCIBM** and review the GL components that are 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 that is 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**.

The screenshot shows two windows side-by-side. The top window is titled 'Organizations' and lists three organizations: PMSCIBM, PMSCIBME, and PMSCIBMA. The PMSCIBME row is selected. The bottom window is titled 'GL Accounts for PMSCIBME' and shows a table with columns for GL Account, Description, Active Date, and Expiration Date. A red circle highlights the window title 'GL Accounts for 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 is defined. In a production environment, you would typically have several values that are defined.
5. Click the **2000** to select this value as the COST CENTER segment for the GL account.

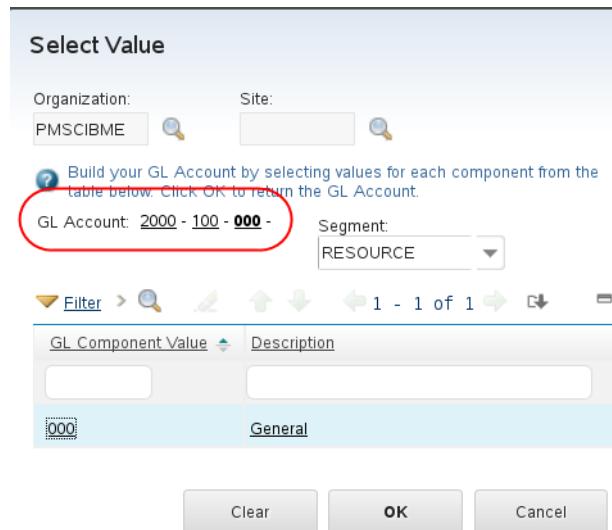
The screenshot shows the 'Select Value' dialog box. It has fields for Organization (PMSCIBME) and Site. Below is a note: 'Build your GL Account by selecting values for each component from the table below. Click OK to return the GL Account.' The GL Account field shows '???? - ??? - ??? -'. The Segment dropdown is set to 'COST CENTER'. The bottom table shows 'GL Component Value' and 'Description' with a single row containing '2000' and 'Administration'. A red circle highlights the value '2000' in the table.

Notice that the segment 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 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 many accounts exist, 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 a manageable number of account codes are required, you can enter them manually using the process described here. Entering GL account codes is required only if you select 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. No financial periods are defined 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.

The screenshot shows the 'Financial Periods' window. At the top, there is a search bar with 'PMSCIBM Inc. Europe' and a 'New Row' button. Below the search bar is a table header with columns: Period, From, To, Accounting Close Date, Actual Close Date, and Closed By. A single row is visible in the table, representing the financial period created in step 5. The 'From' field shows '3/31/16 14:39:44', the 'To' field shows '12/31/16 23:45:00', and the 'Accounting Close Date' field shows '1/15/17 00:00:00'. At the bottom of the window are 'OK' and 'Cancel' buttons.

8. Click **Cancel**.
9. **Optional:** Click **PMSCIBM** to select it and review the financial periods, which are 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 that are 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 configured 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**.

No external labor control accounts are 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.

No labor, tool, or inventory resource codes are 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 that is provided in the work order, asset, or location.

12. Click **Cancel**.

13. Select the **Home** icon to return to maxadmin's start center.



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 is 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.

GL Component Value	Description
000	General

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.

The screenshot shows two SAP Fiori screens. The top screen is titled 'Sites' and displays a table with one row for 'LONDON'. The 'Site' column shows 'LONDON', the 'Description' column shows 'EUROPE HQ', and the 'Active?' column has a checked checkbox, which is circled in red. The bottom screen is titled 'Addresses for Site: LONDON' and displays a table with one row for 'EUROHQ'. The 'Address' column shows 'EUROHQ', the 'Description' column shows 'European HQ', and the 'Bill To?' column has a dropdown menu with '✓' selected. Both screens have standard SAP navigation icons at the top.

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. If you want to reinforce what you learned, you can use the examples that are given for PMSCIBME to do those steps. Activating the PMSCIBMA organization is optional.

11. Select the **Home** icon to return to maxadmin's start center.

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 could have just 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.



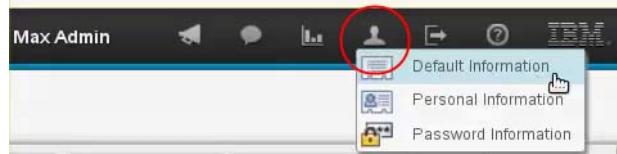
Note: The default insert site is **PMSC RTP**. This site is the default for the **maxadmin** user record. You can change this default site in the Users application or profile for individual users based on the site at which they do most of their work.



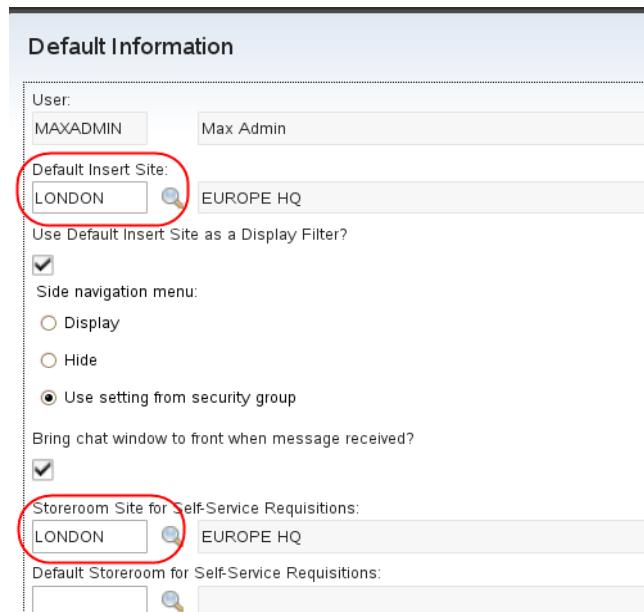
Note: The holding location is used for materials that are received but are waiting for inspection or serialization.

Creating the primary location

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



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



4. 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.

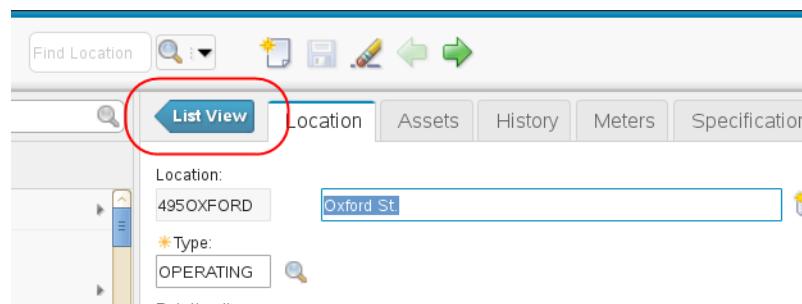
5. Verify that you are still in the Locations application. If not, click **Assets > Locations** in the navigation bar.
6. Click the **New Location** icon.
7. Enter the following information.

Field	Value
Location	495Oxford
Description	Oxford St
Type	OPERATING

8. Click the **Save Location** icon.

Creating the primary system

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



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

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

Creating a child of the first location in the hierarchy

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

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

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

Creating a child of the second location in the hierarchy

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

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

32. Click **Associate Systems with Location** under **More Actions** in the navigation bar.
33. Click **New Row**.
34. Click the **Select Value** for the **System** field.
35. Click **EUROHQ**.
36. Click the **Detail Menu** for the **Parent** field.
37. Click **Select Value**.
38. Click **2NDFLOOR** for the **Parent** and click **OK**.

Viewing the Drilldown section

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

The screenshot shows the 'Drilldown' interface. At the top, there's a message: 'Select ☐ to show children. Select ☑ to hide children. Select ⌂ to return location / asset.' Below this are tabs for 'Locations' (selected) and 'Assets'. The 'Location' section shows '495OXFORD' selected, 'Oxford St.' as the child location, 'Status: OPERATING', and 'Site: LONDON'. The 'Asset in Location' section shows 'No assets found at this location.' On the left, a 'System' dropdown is set to 'EUROHQ'. A red box highlights a list of systems under '495OXFORD:Oxford St.', which includes '2NDFLOOR:2nd Floor IT Support' and '2NDINVDATA:2nd Floor Investments Data Center'.

43. Click **Cancel**.
44. Click **Profile > Default Information** in the upper right corner.
45. Change the **Default Insert Site** and **Storeroom Site** to **PMSCRTTP**.
46. Set the **Default Storeroom for Self-Service Requisitions** to **ITHARDWARE**.
47. 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 that do 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. The top-level class has 11 child records 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**.

The screenshot shows the 'Classifications' screen in a software application. The 'Classification' field contains 'DESKTOP COMPUTER', which is circled in red. The 'Classification Path' field shows 'IT \ COMPUTER SYSTEM \ DESKTOP COMP'. The 'Parent Classification' field shows 'IT \ COMPUTER SYSTEM'. There are several other fields and checkboxes on the right side of the screen, such as 'Organization', 'Site', 'Is Global?', 'Customer', 'Associate Customers With Children?', and 'Associate Customers With Attributes?'. A note icon is visible on the left.

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 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.

The screenshot shows the 'Classifications' screen again. The 'Classification' field contains 'DESKTOP COMPUTER'. The 'Parent Classification' field contains 'IT \ COMPUTER SYSTEM', which is circled in red. A context menu is open over the 'Parent Classification' field, with the 'Move Up Hierarchy' option highlighted. Other options in the menu include 'Select Parent Classification' and 'Clear Parent Classification'.

You want to add a 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.

The screenshot shows the 'Details' dialog box with the following fields:

- *Attribute:** VENDOR
- Data Type:** ALN
- Domain:** (empty)
- Table Attribute:** (empty)
- Lookup Name:** (empty)
- Section:** (empty)
- Unit of Measure:** (empty)
- Description Prefix:** (empty)
- Inherited from:** (empty)

A red oval highlights the **Apply Down Hierarchy?** checkbox, which is checked.



Note: **Apply Down Hierarchy** is helpful when you are creating a large classification manually. It applies the attributes that are created for the parent to all the attributes of the child so that 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.
20. Select the **Home** icon to return to maxadmin's start center.

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 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.

Cron Task Instance Name	Schedule	Run as User	Active?	Keep History?
SEQQIN	30s,*,*,*,*	MAXADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SEQQOUT	30s,*,*,*,*	MAXADMIN	<input type="checkbox"/>	<input type="checkbox"/>

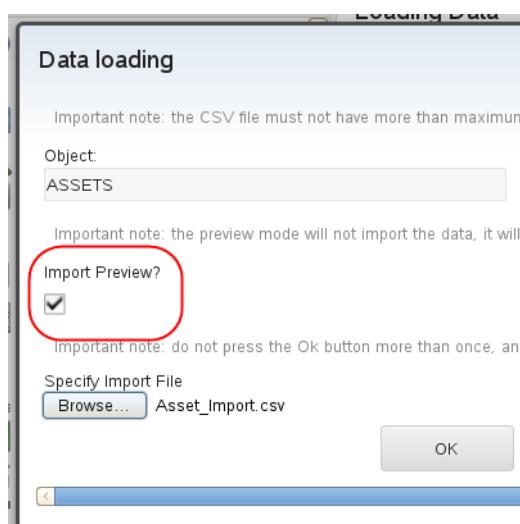
Note: The SEQQIN cron task instance must be active to process the data that you loaded with the Quick Configuration tool.

5. Select the **Home** icon to return to maxadmin's start center.
6. Minimize the browser window.

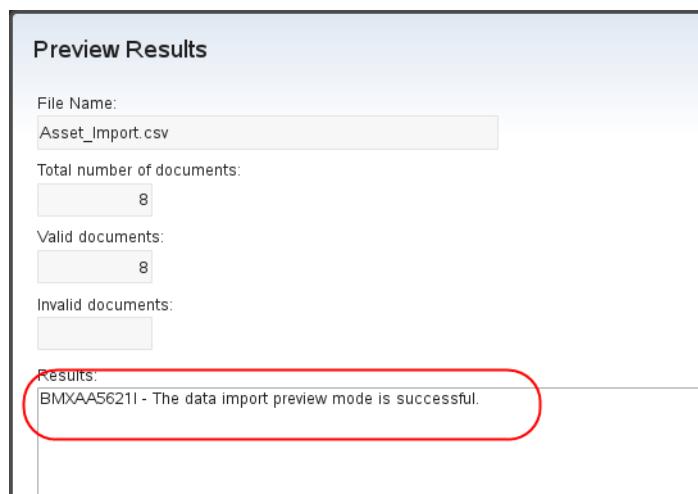
Importing assets

7. Open a file browser and change directory to **C:\labfiles\foundation**.
8. Double-click the **Asset_Import.csv** file to open it.
9. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.

10. Maximize browser window.
11. Click **System Configuration > Platform Configuration > Quick Configuration** in the left navigation bar
12. Click the **Data Loading** tab.
13. Select **ASSETS** to select it for the Object and click **Load data**.
14. Click **Browse** and change to the **C:\labfiles\foundation** directory.
15. Select the **Asset_Import.csv** file and click **Open**.
16. Verify that the **Import Preview** option is selected and click **OK**.



17. Review the **Preview Results**. Eight records should be processed with no errors.



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



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



Important: Occasionally, the data loading operation does not recognize that the “Import Preview” option is cleared. If you perform the following steps and the data does not load, but rather you see a message saying the preview has been successful, as in the previous steps, you might need to exit the browser and run the Stop IBM Control Desk and Start IBM Control Desk batch files from the Windows desktop. Remember to wait 5 - 8 minutes after the Start IBM Control Desk file completes before attempting to log in again. At that point, select **System Configuration > Platform Configuration > Quick Configuration** again. You do not need to perform the preview option again. Clear the preview option and load the csv file.

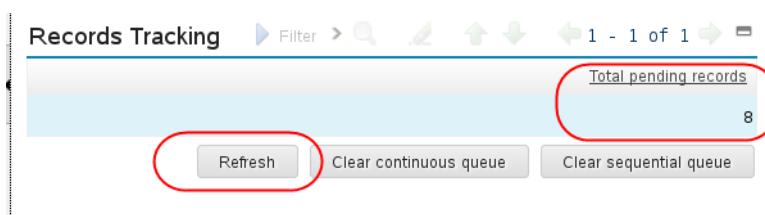
19. Click **Load data** again.

20. Browse and select the **Asset_Import.csv** file again.

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

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

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



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

25. Click **Assets > Assets** in the left navigation bar.

26. Type **ITAM6** in the **Asset** filter field and press Enter to search for assets that begin with ITAM6.

27. Verify that **ITAM6006 - ITAM6010** are in the list. These assets were in the **Asset_Import.csv** file.

28. Minimize the browser.

Importing CIs

29. Open a file browser and change directory to **C:\labfiles\foundation**.

30. Double-click the **CI_Import.csv** file to open it.

31. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.

32. Return to maxadmin's **Start Center**.

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

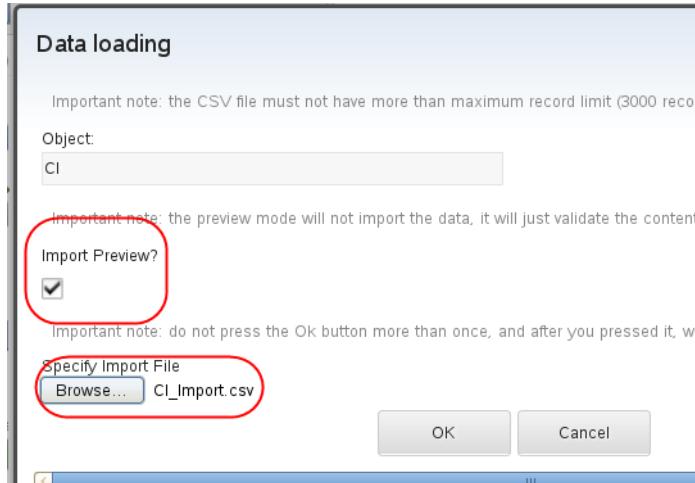
34. Click the **Data Loading** tab.

35. Select **CI** for the **Object** to select it and click **Load data**.

36. Click **Browse** and change to the **C:\labfiles\foundation** directory.

37. Select the **CI_Import.csv** file and click **Open**.

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



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

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



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

41. Click **Load data** again.

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

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

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

45. Verify that three records are pending in the queue.

46. Click **Refresh** until the total pending records is **0**.
47. Click **IT Infrastructure > Configuration Items** in the navigation bar.
48. Type **hostname** in the **Configuration Item Name** filter field and press **Enter** to search for CIs that begin with *hostname*.
49. 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.
50. Select the **Home** icon to return to maxadmin's start center.
51. Minimize Firefox.

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.



Important: During the importing of users, IBM Control Desk sends each imported user email containing the account password. If the email server (in this case `itracmail.tiv.ibm.com`) is not turned on and loaded, the import fails. Before proceeding, turn on the virtual machine `itracmail.tiv.ibm.com`

52. See **Important** Note above. Turn on the mail server in your environment.
53. Click **System Configuration > Migration > Object Structures** in the left navigation bar.
54. Enter **MXPERUSER** in the Object Structure field and press **Enter**. Click the MXPERUSER object to select it.
55. Click **Inbound Setting Restrictions** in **More Actions**.

56. Click **MAXUSER** to select it. Locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.

Field	Restricted?
EMAILPSWD	<input checked="" type="checkbox"/>
FORCEEXPIRATION	<input checked="" type="checkbox"/>
INACTIVESITES	<input checked="" type="checkbox"/>
MAXUSERID	<input checked="" type="checkbox"/>
PASSWORD	<input checked="" type="checkbox"/>
PASSWORDCHECK	<input checked="" type="checkbox"/>
PASSWORDINPUT	<input checked="" type="checkbox"/>
PWEXPIRATION	<input checked="" type="checkbox"/>

57. 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.

Field	Restricted?	Override?
EMAILPSWD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FORCEEXPIRATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INACTIVESITES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MAXUSERID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PASSWORD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PASSWORDCHECK	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PASSWORDINPUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PWEXPIRATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>

58. Click **OK** to save the record.
59. Select the **Home** icon to return to maxadmin's start center.
60. Minimize the browser.
61. Open a file browser and change directory to **C:\labfiles\foundation**.

62. Double-click the **User_Import.csv** file to open it.
63. Review the contents of the file by using a text editor. If you open the file, close it when you are finished reading it.
64. Restore your browser session.
65. Click **System Configuration > Platform Configuration > Quick Configuration** in the navigation bar.
66. Click the **Data Loading** tab.
67. Select **PERSON USER** for the **Object** to select it and click **Load data**.
68. Click **Browse** and change to the **C:\labfiles\foundation** directory.
69. Select the **User_Import.csv** file and click **Open**.
70. Verify that the **Import Preview** option is selected and click **OK**.
71. Review the preview results. There should be three records that are processed and no errors.
72. Click **OK** to close the preview results.



Note: You must ensure that no errors exist before you perform the actual import.

73. Click **Load data** again.
74. Browse and select the **User_Import.csv** file again.
75. Clear the **Import Preview** option and click **OK** to perform the import.
76. Click **OK** to close the `inbound transaction has been processed` message.
77. Verify that three records are pending in the queue.
78. Click **Refresh** until the total pending records is **0**.
79. Click **Security > Users** in the navigation bar.
80. Type **cjenkins** in the **User** filter field and press Enter to search for Clara Jenkins, who was a user in the import file.
81. Verify that Clara has been added.
82. Repeat the previous two steps for **jfraser** (Jamie Fraser) and **kthomas** (Kevin Thomas).

Reverting the password security settings

83. Click **System Configuration > Migration > Object Structures** in the left navigation bar.

84. Enter **MXPERUSER** in the **Object Structure** field and press Enter. Click the MXPERUSER object to open it.
85. Click **Inbound Setting Restrictions** in **More Actions**.
86. Click **MAXUSER** to select it. Scroll forward to locate the **PASSWORDCHECK** and **PASSWORDINPUT** attributes.

Inbound Setting Restrictions For MBO MAXUSER			
	Field	Restricted?	Override?
▶	FAILEDLOGINS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶	DEFSTOREROOM	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFSITE	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFAULTREPFACTSITEID	<input type="checkbox"/>	<input type="checkbox"/>
▶	DEFAULTREPFACT	<input type="checkbox"/>	<input type="checkbox"/>
▶	DATABASEUSERID	<input type="checkbox"/>	<input type="checkbox"/>
▶	PASSWORDINPUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶	PASSWORDCHECK	<input type="checkbox"/>	<input checked="" type="checkbox"/>

87. Select the **Restricted check** box on both attributes and clear the **Override check** box on both attributes.
88. Click **OK** to save the record.
89. Log out of IBM Control Desk.
90. Log back in to IBM Control Desk.
91. Go to **System Configuration > Migration > Object Structures** in the navigation bar to select it.
92. Click **Inbound Setting Restrictions** in the **More Actions** menu.
93. Click **MAXUSER** to select it, locate the **PasswordCheck** and **PasswordInput** attributes.
94. Ensure that the check marks are back in the **Restricted Column** for each attribute. If they are there, continue your work. If the two attributes do not have check marks in the **Restricted Column**, notify your instructor and get it corrected before continuing with the exercises.
95. Log out of the console.

Unit 4 Service request management exercises

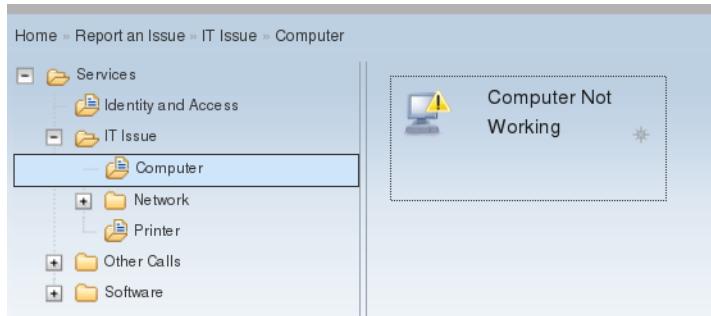
The exercises for this unit demonstrate some of the basic features of Service Request Management. First, you log in as a user to report an issue. Then, you log in as a Service Desk Analyst to manage the service request. Finally, you will log in as an Incident Analyst to manage an incident.

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 close the message.

11. Click the most recent **Computer not working** service request in the My Request pod.



12. Review the request.

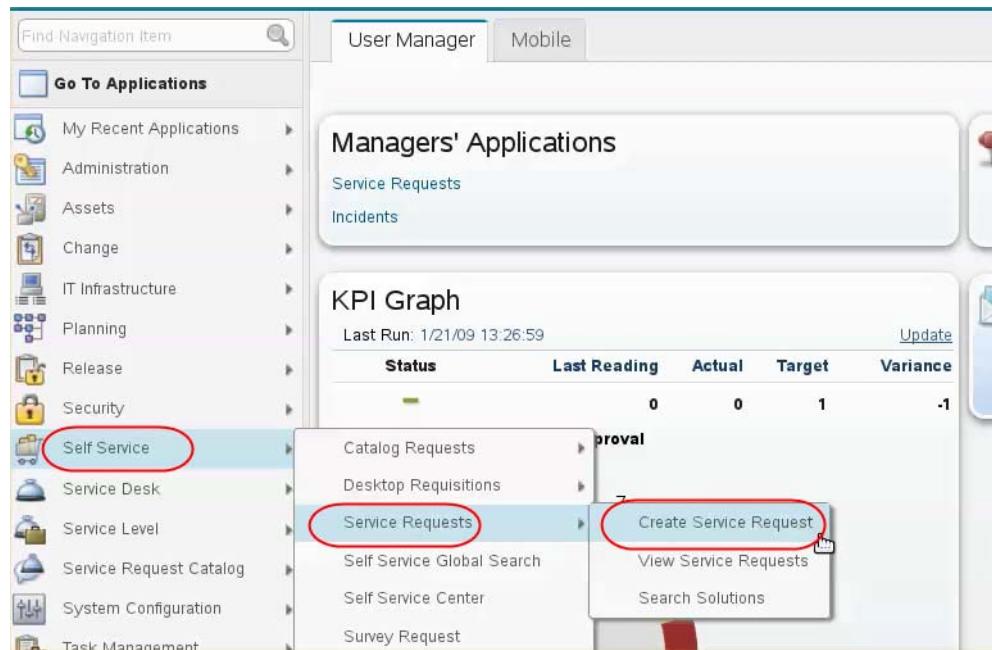
13. Click **OK** to close the view.

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.

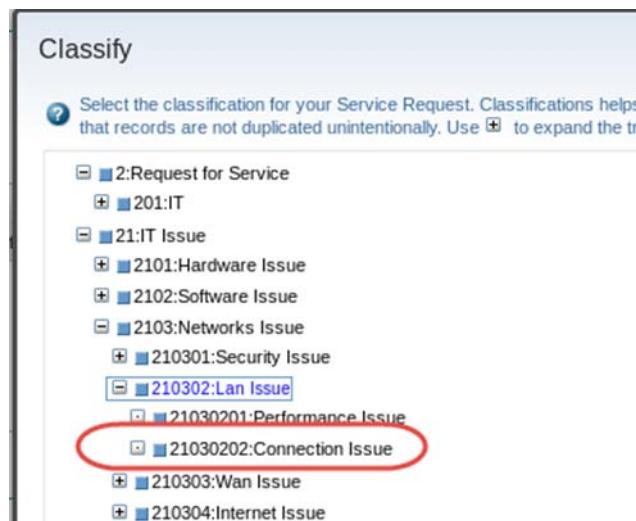


17. Enter the following information in the service request.

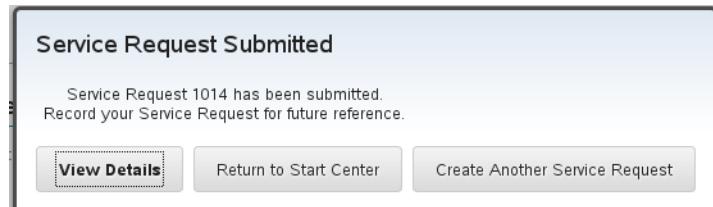
Field	Value
Reported priority	1
Summary	Network password not working
Details	When I try to log on to the network, I keep getting a password is incorrect error.

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 Desk Analysts typically manage service requests. 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.

Select the **Service Desk Analyst** Start Center from the tabs at the top of the screen.

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

The screenshot shows the Service Desk Analyst Start Center. At the top, there is a header bar with various icons. Below it, there are two main sections:

- My Work**: A table showing five service requests. The columns are: Record, Class, Priority, Description, Reported Date, and Status. The data is as follows:

Record	Class	Priority	Description	Reported Date	Status
1003	INCIDENT	2	Cannot connect to email server	3/30/16 16:14:53	QUEUED
1006	INCIDENT	3	Slow network performance	3/30/16 16:16:19	QUEUED
1010	SR	2	Computer Not Working	4/4/16 15:38:31	QUEUED
1015	SR	2	Computer Not Working	4/4/16 16:10:06	QUEUED
1017	SR	2	Phone Not Working	4/4/16 16:15:11	QUEUED
- Service Desk Group Queue**: A table showing three service requests. The columns are: Service Request, Class, Summary, Status, and Creation Date. The data is as follows:

Service Request	Class	Summary	Status	Creation Date
1014	SR	Network password not working	NEW	4/4/16 15:52:48
1016	SR	Report a Smartphone Issue	NEW	4/4/16 16:11:26
1018	SR	network	NEW	4/4/16 16:20:34

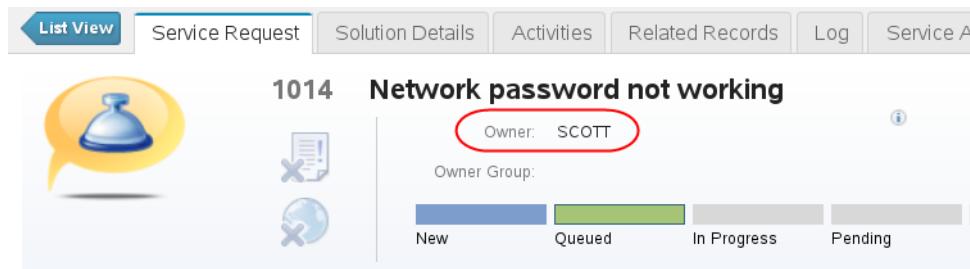
3. Find and open the service request that **fred** entered in [Unit 4, Exercise 1](#) on page 1.



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 For Solutions**.
12. Enter **password** in the **Search Terms** field and click **Search** to narrow down the search results. *Corporate network account password reset* is the result of the search.
13. 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.
14. Click **Use Solution** to apply this solution to the service request.
15. Click the **Solution Details** tab to verify that the solution was applied.

The screenshot shows the "Solution Details" tab selected. A tooltip above the form area states: "You can apply a solution to the Incident, and set a status as to how this applied solution performed for this ticket. Solution table. [More information](#)". The form includes fields for Service Request (1014, Network password not working), Site (empty), Self-Service Access? (checked), Solution (SPOC1025, Corporate network account password reset), Solution Status (CONSIDER, empty), and Symptom (a toolbar with various icons). A status bar at the bottom shows "New", "Queued", "In Progress", and "Pending".

16. Click the **Log** tab.

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

Details

Record: 1014

Class: SR

Created By: SCOTT

Date: 4/4/16 17:06:12

Type: WORK

Viewable?

Summary: Called Fred and walked him through the process

Details: Called Fred and explained the process to reset a network password and he confirmed it worked.

Font: Size: Format: None

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

20. Sign out of the console.

Opening an incident

21. Log in to the console as **sdagent** with the password **object00**. Sdagent is a Level 1 support specialist.
22. Click the **Service Desk Analyst** Start Center tab.

23. Find and open the service request that Bob entered in [Unit 4, Exercise 1](#) on page 1 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.

The screenshot shows the Service Desk Agent interface. At the top, there is a header bar with a mail icon and the text "Inbox / Assignments". Below this, a message says "No Assignments found for Service Desk Agent". Underneath, there is a section titled "My Work" with a red oval highlighting it. This section includes a table with one row of data:

Record	Class	Priority	Description	Reported Date	Status
1010	SR	2	Computer Not Working	4/4/16 15:38:31	QUEUED

Below the table, there is a link "Set Chart Options" and a status indicator "1 - 1 of 1". At the bottom of the interface, there is another section titled "Service Desk Group Queue" with its own set of filters and icons.

24. Click **Common Actions > Take Ownership**.
25. Review the service request information.
26. Click **Common Actions > Change Status** and set the status to **In Progress**.
27. Click **Common Actions > Search For Solutions**.
28. Enter **blue screen** in the **Search Terms** field and click **Search**. No results are returned.
29. Enter **nvlddmkm.sys** in the **Search Terms** field and click **Search**. No results are returned.
30. 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 that are taken so far.
31. Click **New Row** in the **Work Logs** section.
32. Enter the following information to complete the log entry.

Field	Value
Summary	Searched for solution
Details	Tried to find a solution by using Search Solutions and Global Search. No match was found.
Type	WORK
Viewable	Selected

33. Click the **Save Service Request** icon.
34. Click **Common Actions > Create Incident**.

35. Click the **Related Records** tab.

36. Click the **Detail Menu** for the incident and select **Go To Incidents**.

The screenshot shows the 'Related Tickets' section of a service request. A context menu is open over an incident record with the key '1009'. The menu items are 'Select Value', 'Classification', and 'Attributes'. Below the menu, there is a 'Go To' button followed by a dropdown menu with options: 'Incidents' (which is selected and highlighted with a red box) and 'Incidents (SP)'. The 'Incidents' option has a hand cursor icon indicating it is clickable.

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

38. 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.

The screenshot shows the 'Select Owner' dialog and the 'Persons' list. In the 'Select Owner' dialog, the 'Persons' tab is selected. The 'Person Group' field contains the value 'nancy', which is highlighted with a red box and has a 'Clear field' button next to it. The 'Persons' list below shows a grid of users. One user, 'NANCY' from the 'PMCHGANA' group, is circled with a red box. The 'nancy' search term is also highlighted in the 'Name' column of this row.

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

39. Click **Return** in the upper right corner to go back to the service request.

40. 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.

The screenshot shows the IBM Service Request Management interface with three main sections:

- My Late Work:** Displays a message "No Data Found."
- My Open Work:** A table showing service requests. One row is highlighted with a red circle:

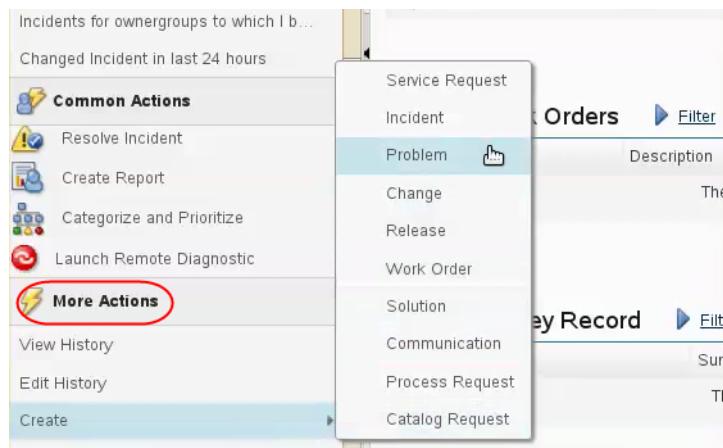
Summary	Internal Priority	Status	Owner	Owner Group	Target Start	Target Finish	Incident
Computer Not Working 2	QUEUED	NANCY	PMCHGANA				1009

Below the table are links for "Set Chart Options" and "1 - 1 of".
- Group Work Queue:** Displays a message "No Data Found."

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, no technicians are 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. _____

A screenshot of a 'Related Tickets' view. At the top, there are input fields for 'Incident' (1009) and 'Description' (Computer Not Working). To the right are fields for 'Originating Record' (1010), 'Status' (INPROG), 'Originating Record Class' (SR), and 'Site' (empty). Below this is a table titled 'Related Tickets' with columns: 'Related Record Key', 'Description', 'Class', 'Status', and 'Relationship'. It shows two rows: Row 1010 (Computer Not Working, SR, INPROG, ORIGINATOR) and Row 1011 (Computer Not Working, PROBLEM, QUEUED, FOLLOWUP). The row for ticket 1011 is circled in red.

Related Record Key	Description	Class	Status	Relationship
1010	Computer Not Working	SR	INPROG	ORIGINATOR
1011	Computer Not Working	PROBLEM	QUEUED	FOLLOWUP

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 back to work 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 that was 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.

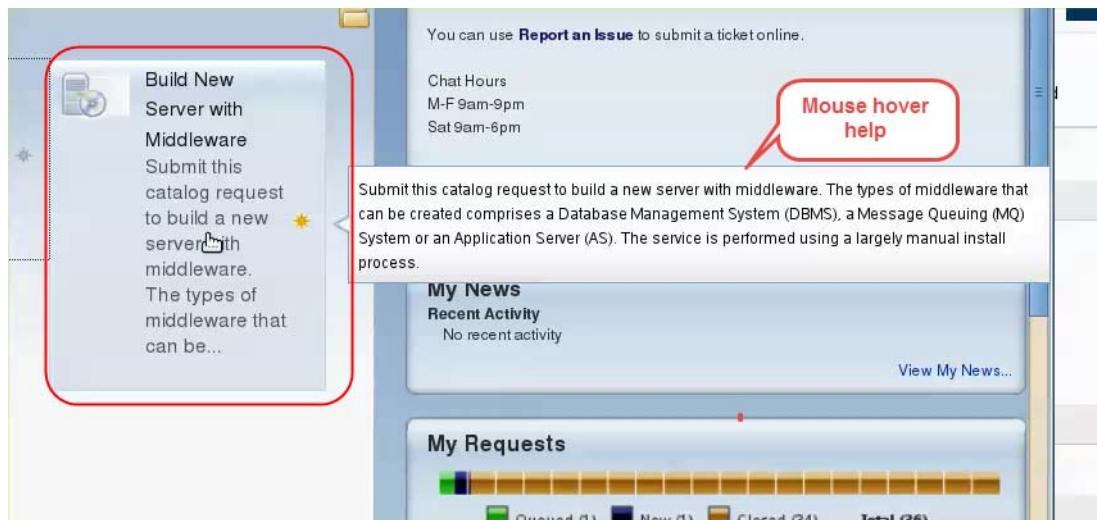
Field	Value
Summary	Updated video driver
Details	Updated the video driver and increased the video resolution. Laptop no longer crashes. I documented the solution.
Type	WORK
Viewable	Selected

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 that Bob entered 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.

*Host Name:

*IP Address:

*Operating System:
 

Network Zone:

Expected Release Date:
 

User IDs and Access Requirements:

Project Name:

Project Contact:

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.

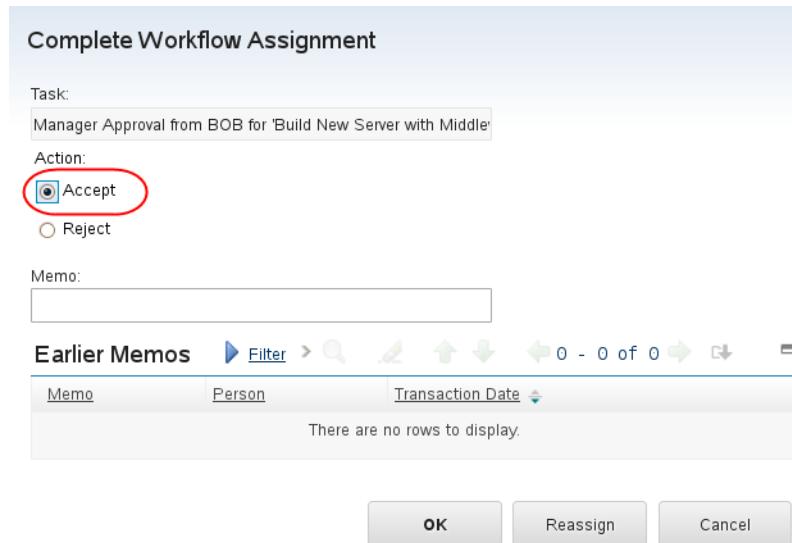
Approving a service request

The Service Catalog offering has a workflow that is 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. If the Workflow Help reopens, close it. 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**.



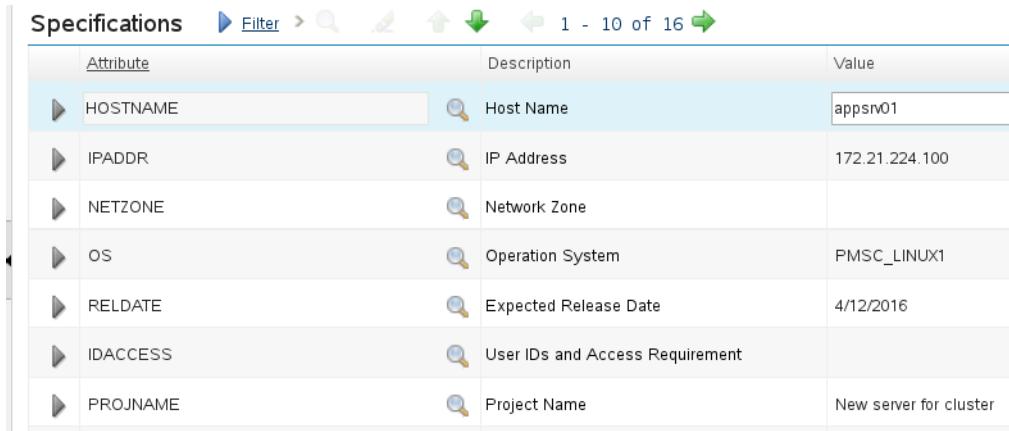
16. Click the Start Center icon to return to the User Manager start center. You no longer see the request from Bob in the Inbox. Workflow has routed it to the next person for action.
17. Sign out of the console.

Approving an activity

After management approves the request, 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.

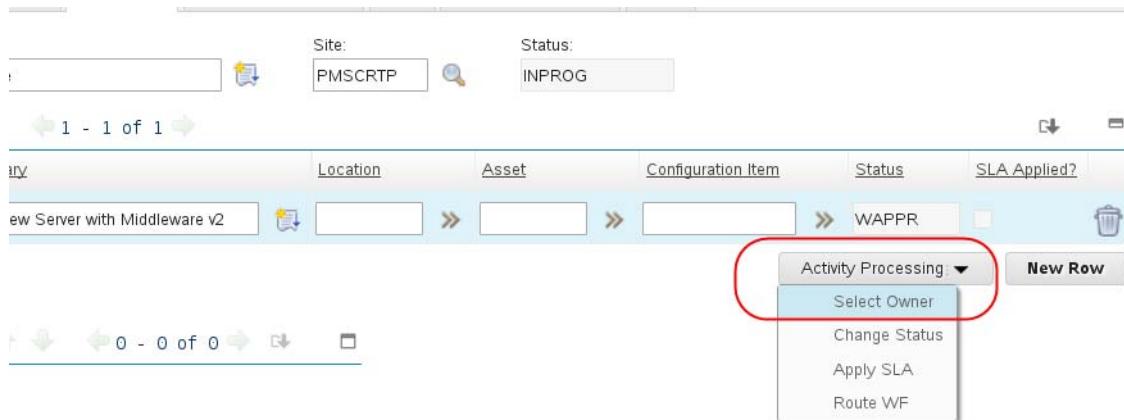
18. Log in to the console as **nancy** with the password **object00**.
19. Nancy is a member of several security groups and has multiple Start Centers. Click the **Operations Specialist** Start Center tab.

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 that Bob defined are copied to the Specifications section.



Attribute	Description	Value
HOSTNAME	Host Name	appsv01
IPADDR	IP Address	172.21.224.100
NETZONE	Network Zone	
OS	Operation System	PMSC_LINUX1
RELDATE	Expected Release Date	4/12/2016
IDACCESS	User IDs and Access Requirement	
PROJNAME	Project Name	New server for cluster

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 by 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 Tasks** to view the planned tasks for this activity.

30. Click the **Plans** tab and review the planned tasks for the activity. Notice there are more tasks than fit on a single screen. You use the forward arrow to see the next screen of tasks.
31. Make a note of the number that has been assigned to the **Activity**. This number is helpful when you are viewing the **Work Orders** and **Tasks** on Nancy's Start Center.

The screenshot shows the 'Plans' tab selected in the top navigation bar. The main area displays activity details: Activity ID 1531, Job Plan Revision Number 2, Job Plan PMSC_0021B, Supervisor APPR, Lead PMSCRTP, Site PMSCRTP, and Person Group. Below this is a table titled 'Tasks for Activity 1531' showing seven tasks:

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

A red circle highlights the 'Plans' tab in the top bar, and another red circle highlights the page number '1 - 6 of 7' at the bottom of the table.

Assigning task owners

The job plan that is 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.

32. Click the **Detail Menu** icon for the **Owner** of the first task and click **Select Value**.
33. Find and click **Nancy** to make her the owner of the task.
34. 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

35. Click the **Details Menu** icon for the **Owner** of the fifth task, Task 50 Create Change Record for Server Deployment, and click **Select Value**.
36. Find and click **Schroeder** to make him the owner of the task.
37. 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.

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



Task	Summary	Estimated Duration	Route	Route Stop	Status	Owner
70	Validate Server Deployment and Close S	0:15			WAPPR	LUCY

39. 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 approve them manually. In the following steps, you approve the first few tasks that Nancy is assigned. Task 40 must be approved for a subsequent exercise that demonstrates how license reservations work.

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

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	
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	SCHROEDEF
60	Deploy Server	0:15			WAPPR	NANCY

41. Set the status to **Approved**.

42. 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

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

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.

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

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

Managing work orders

The process that is 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.

45. Click the **Start Center** icon to return to the Operations Specialist start center.
46. Find the Work Order Status and My Tasks portlets and review the work orders and tasks that are assigned to Nancy. The overall activity **Work Order** has the same number you wrote down in step 31.
- 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.

My Tasks

Work Order	Description	Priority	Status	Owner	Owner Group	Target Start	Target Finish
1532	Install OS & Standard Applications		INPRG	NANCY			
1533	Configure SAN LUNs		APPR	NANCY			
1534	Install & Configure Database		APPR	NANCY			
1535	Install & Configure WAS		APPR	NANCY			

Work Order Status

Work Order	Summary	Status
1531	Build New Server with Middleware v2	INPRG
1532	Install OS & Standard Applications	INPRG
1533	Configure SAN LUNs	APPR

47. Open the **Install OS & Standard Applications** task in the My Task portlet.
48. Review the task.
- 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.
49. Click **Common Actions > Complete Activity**. Verify that the new status is Completed and click **OK**.
- This action completes the work order only 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.
50. Click the **Start Center** icon to return to the Operations Specialist Start Center.
51. 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.

Work Order	Description	Status	Owner
1533	Configure SAN LUNs	INPRG	NANCY
1534	Install & Configure Database	APPR	NANCY
1535	Install & Configure WAS	APPR	NANCY

Work Order	Summary	Status
1531	Build New Server with Middleware v2	INPRG
1532	Install OS & Standard Applications	COMP
1533	Configure SAN LUNs	INPRG
1534	Install & Configure Database	APPR
1535	Install & Configure WAS	APPR

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

Now Nancy would configure the SAN LUNs for this project.

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

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

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

Now Nancy would install and configure the database 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. Review the Work Order Status and My Tasks portlets.

Work Order	Description	Status	Owner
1535	Install & Configure WAS	INPRG	NANCY

Work Order	Summary	Status
1531	Build New Server with Middleware v2	INPRG
1532	Install OS & Standard Applications	COMP
1533	Configure SAN LUNs	COMP
1534	Install & Configure Database	COMP
1535	Install & Configure WAS	INPRG
1537	Deploy Server	WAPPR

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.

59. 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.

The screenshot shows the Asset Manager Start Center with five portlets:

- Quick Insert**: Contains links for "New Service Request", "New Purchase Requisition", and "New Work Order".
- Bulletin Board**: Shows a message: "There are currently no bulletin".
- Favorite Applications**: Lists "Assets", "Inventory", "Purchase Orders", "Purchase Requisitions", and "Receiving".
- Open SR for Asset Mgr**: Shows a message: "No Data F".
- Open Work Orders for Asset Mgr**: Shows a message: "No Data F".
- WAPPR PR requests**: Shows a message: "No Data Found."

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.

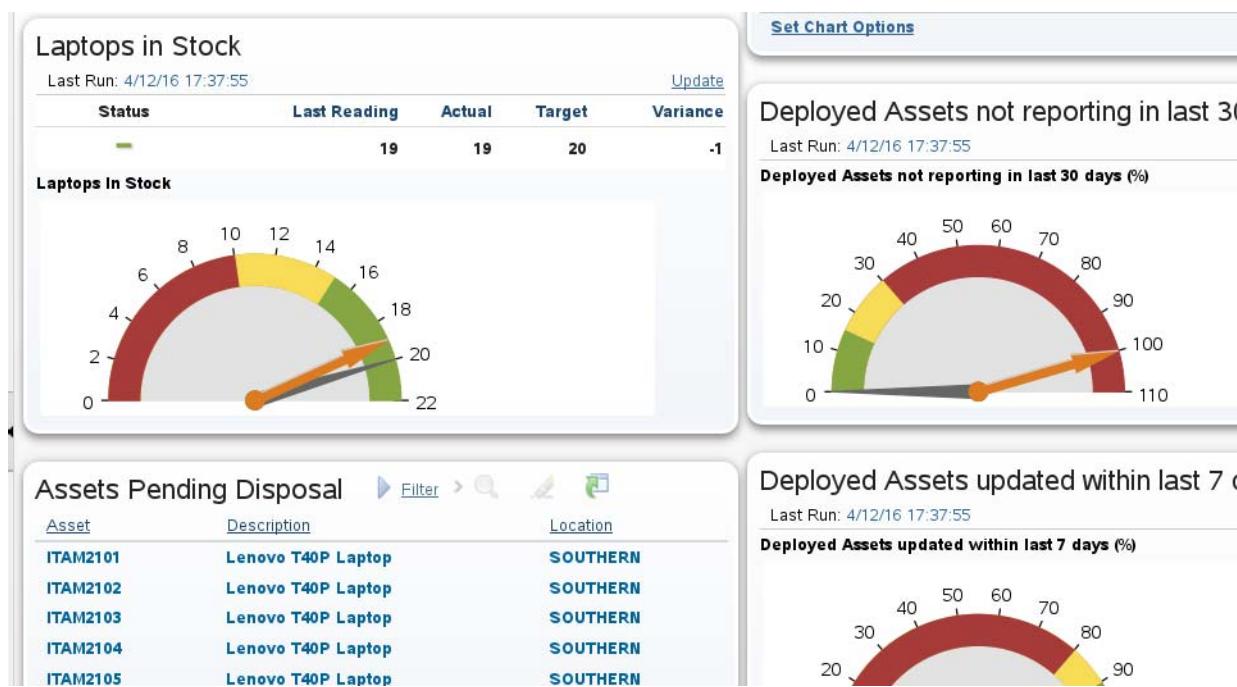
Inventory administrator

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.

The screenshot shows the Inventory Administrator Start Center with one portlet:

- Favorite Applications**: Lists "Inventory", "Storerooms", "Item Master", "Assets", "Purchase Orders", "Purchase Requisitions", and "Work Order Tracking".

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 (ITAMSAM).
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.

The Start Center displays four portlets:

- Quick Insert**: Contains links for "New Requisition" and "New Service Request".
- Bulletin Board**: Shows a megaphone icon and search/filter buttons. Message: "There are currently no bulletin board messages."
- Work Applications**: Contains links for "Receiving" and "Purchase Orders".
- PO's waiting Receipt**: A table listing purchase orders with their descriptions and suppliers:

PQ	Description	Cor
PO1083	replenish stock	IBM
PO1095	order fulfillment for Wo 1248	IBM
TUSC1079	Replenish Stock	IBM
PO1078	Purchase Order for T60	LEN
PO1080	Request for IBM Servers 8303, 8142, and 9133	IBM

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.

The Start Center displays five portlets:

- Quick Insert**: Contains links for "New Self Service Requisition", "New Service Request", "New Purchase Requisition", and "New Purchase Order".
- Bulletin Board**: Shows a megaphone icon and search/filter buttons. Message: "There are currently no bulletin board messages."
- Procurement Applications**: Contains links for "Purchase Orders" and "Purchase Requisitions".
- Personal Requests**: Contains links for "View Requisition", "View Drafts", and "View Service Requests".
- Approved Purchase Requests**: A table showing no data found.
- Approved Purchase Orders (in PO App)**: A table listing approved purchase orders with their descriptions:

PQ	Description
PO1079	hardware request
PO1083	replenish stock
PO1095	order fulfillment for Wo 1248

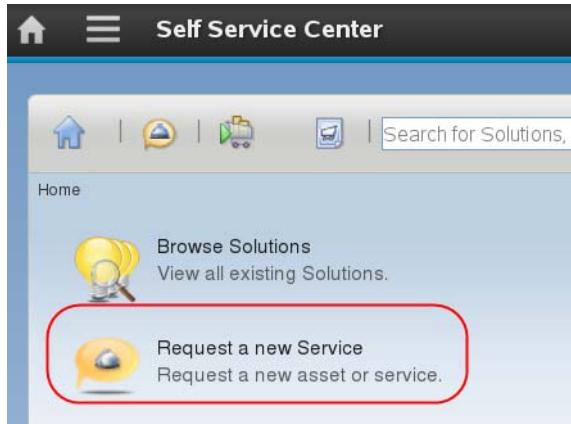
25. Review the Procurement Applications portlet. These applications are commonly used by someone responsible for managing procurement.
26. Sign out of the console.

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.

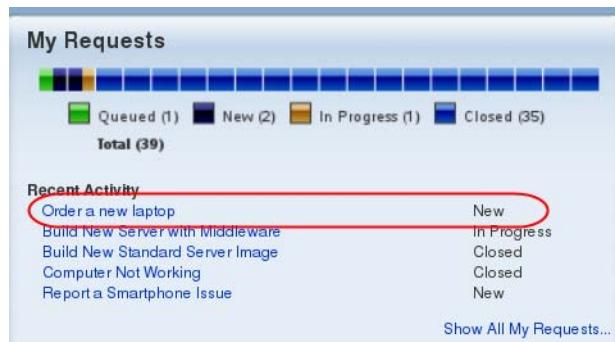


3. Click the **New Asset Request** offering to enter the request details.
4. Enter **Starting a new role and "I need a more powerful notebook to perform my job tasks"** for the **Details**.
5. Set the priority to **1**.

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.

Item	Description	Storeroom	Current Balance	Commodity Gro
ITAMT61	Lenovo Thinkpad T61	ITHARDWARE	7.00	43211500
ITAMM57P	Lenovo ThinkCentre M57p Desktop	ITHARDWARE	7.00	43211500
ITAMX61T	Lenovo X61 Thinkpad Tablet	ITHARDWARE	10.00	
ITAMCISCO PHONE		ITHARDWARE	0.00	43211800
ITAMMONITOR	computer display	ITHARDWARE	0.00	
ITAMT40P	Lenovo Thinkpad T40P	ITHARDWARE	2.00	43211500
ITAMT60	Lenovo Thinkpad T60	ITHARDWARE	0.00	

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**.

Complete Workflow Assignment

Task:

Action:
 Fulfill from Inventory
 Fulfill via PR for New Assets

Memo:

Earlier Memos 0 - 0 of 0

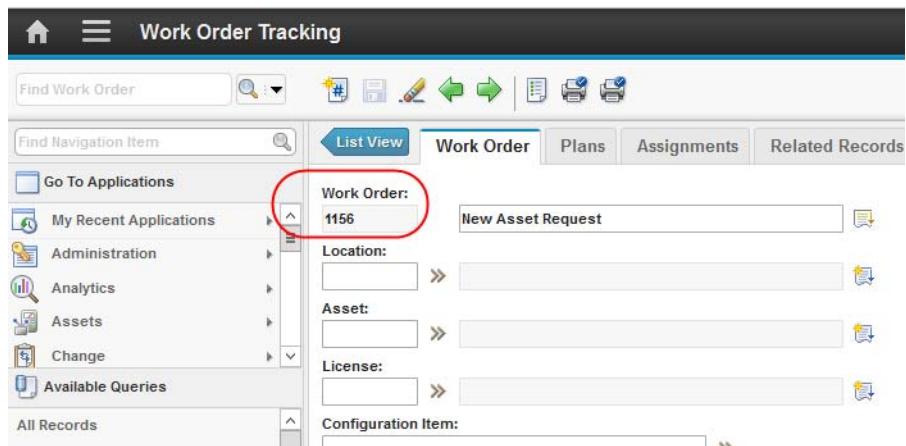
Memo	Person	Transaction Date
There are no rows to display.		

OK **Reassign** **Cancel**

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.

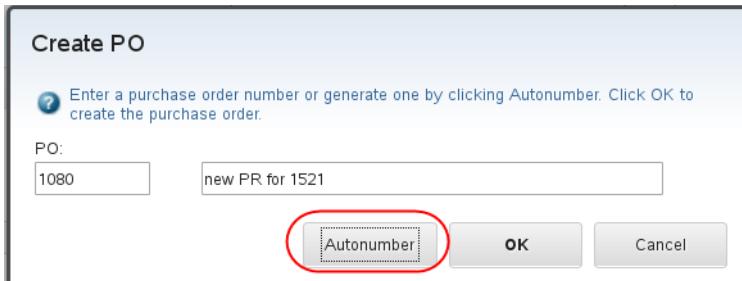
Notice that the status of the Purchase Requisition is APPR (Approved). The workflow automatically approves the purchase request when it is less than \$100,000.

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.

Approved Purchase Orders (in PO App)		
PO	Description	Company
PO1089	New Adobe Acrobat Licenses for Technical Writers	COMPDEPOT
1080	new PR for 1521	
Set Chart Options « Previous Page 11 - 12 of 12		

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.

Vendor

Company:	<input type="text" value="IBM"/>  IBM 
Address:	<input type="text" value="1 New Orchard Rd"/>
City:	<input type="text" value="Armonk"/>
State/Province:	<input type="text" value="NY"/>
ZIP/Postal Code:	<input type="text" value="10504"/>
Contact:	<input type="text" value="Sara Patterson"/> 

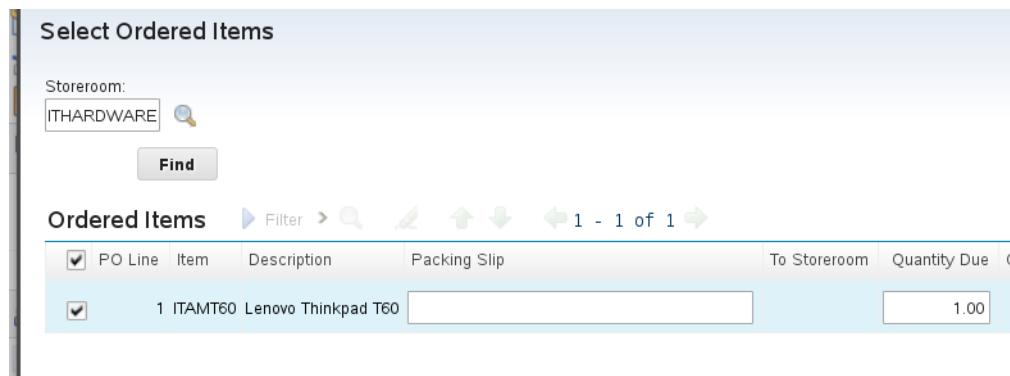
54. Click the **PO Lines** tab.
55. Click the **View Details** icon for the PO line to expand the details.
56. Review the details of the PO lines.
57. Click **Common Actions > Approve Purchase Order**. Confirm that the new status is Approved and click **OK**.
58. Sign out of the console.

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.

Quantity	Order Unit	Type	Insp. Status	License Required?
1.00	EACH	RECEIPT	WINSP	A

Select Receipts to Void Select Items for Return Select Rotating Assets for Return Select

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.



Important: After you autonumber the asset number **DO NOT** click **OK**.

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).

Material Receipts		Service Receipts	
new PR for 1521		Site: PMSCRTP	PO Status: APPR
IBM		Pretax Total: 1,500.00	Receipts: COMPLETE
		Received Cost: 1,500.00	Ordered Date: 4/14/16 16:34:44

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.

Item	Description	Storeroom	Current Balance	Commodity Group	Rotating?
ITAMT61	Lenovo Thinkpad T61	ITHARDWARE	7.00	43211500	<input checked="" type="checkbox"/>
ITAMM57P	Lenovo ThinkCentre M57p Desktop	ITHARDWARE	7.00	43211500	<input checked="" type="checkbox"/>
ITAMX61T	Lenovo X61 Thinkpad Tablet	ITHARDWARE	10.00		<input checked="" type="checkbox"/>
ITAMCISCO PHONE		ITHARDWARE	0.00	43211800	<input checked="" type="checkbox"/>
ITAMMONITOR	computer display	ITHARDWARE	0.00		<input checked="" type="checkbox"/>
ITAMT40P	Lenovo Thinkpad T40P	ITHARDWARE	2.00	43211500	<input checked="" type="checkbox"/>
ITAMT60	Lenovo Thinkpad T60	ITHARDWARE	1.00		<input checked="" type="checkbox"/>

Select Records

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.

Quantity:	1.00	Requisition:	<input type="button" value="»"/>
*Transaction Type:	ISSUE	Requisition Line:	<input type="button" value="»"/>
Issue Unit:	EACH	Location:	<input type="button" value="»"/>
*Rotating Asset:	2080	GL Debit Account:	<input type="button" value="»"/>
Unit Cost:	1,500.00	GL Credit Account:	<input type="button" value="»"/>
Line Cost:	1,500.00	*Entered By:	ELMO
More Options... <input type="button" value="»"/>			

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.

Activity	Summary	Status
WO1370	Issue Std Desktop from Inventory to Work Order	INPRG
WO1373	Issue Std Laptop from Inventory to Work Order	INPRG
WO1427	Issue Cisco 6500 from Inventory to Work Order	INPRG
TUSC1195	Issue Asset from Inventory to Work Order	APPR
1158	Issue Asset from Inventory to Work Order	INPRG

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.

Select Value				
Filter > <input type="button" value="🔍"/> <input type="button" value="✍"/> <input type="button" value="↑"/> <input type="button" value="↓"/> 1 - 4 of 4 <input type="button" value="➡"/>				
Asset	Description	Location	Site	P
2080	Lenovo Thinkpad T60	SOUTHERN	PMSC RTP	
ITAM2080	Lenovo X61 Thinkpad Tablet	IT HARDWARE	PMSC RTP	
PULSE2080			PMSC RTP	
TUSC2080	Lenovo ThinkCentre M57p Desktop	IT HARDWARE	PMSC RTP	

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**. Then, click **OK**.
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.

Open Activities or Tasks for Asset Mgr		
Activity	Summary	Status
WO1361	Build, Image and Deliver Linux P510 Server	INPRG
WO1364	Build, Image and Deliver X86 Win Server	INPRG
1159	Build, Image and Deliver New Asset	INPRG

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.

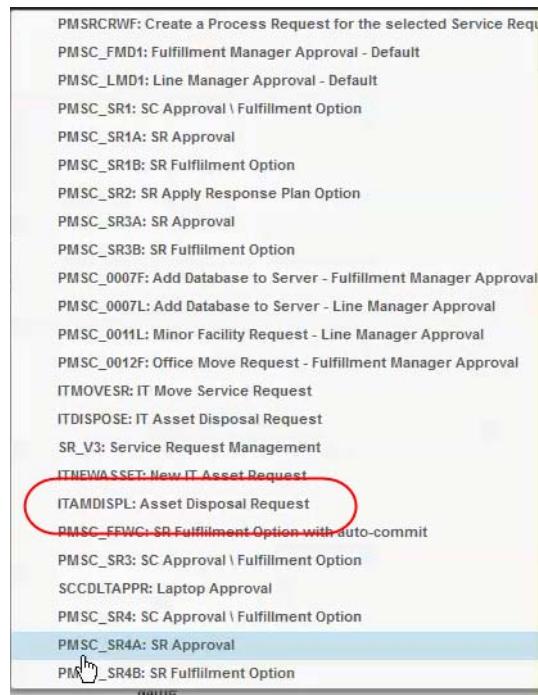
Field	Value
What is the employee name	Bob
What is the new/updated location	Salvage
What is the effective date of the update	Today's date

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.

Tasks for Work Order 1160						
	Sequence	Task	Summary	Estimated Duration	Status	C
	10	10	Remove / Reassign Software from Asset	1:00	WAPPR	
	20	20	Prepare Hardware for Disposal	1:00	WAPPR	
	30	30	Update Asset Record(s) with Disposal D	1:00	WAPPR	

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.

Person	Name	Primary?	Custodian?	User?	
BOB	Bob Enduser	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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

The screenshot shows a form titled "End of Life". It contains the following fields:

- Type of Disposal: Donated
- Date Disposed: 6/27/16
- Recipient: COMPUTERS
- Charge: (empty)
- Price/Value: 100.00
- Disposal Request ID: (empty)

49. Click **Common Actions > Change Status** and set the status to **Disposed**. Then, click **OK**.

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.

The screenshot shows a software interface titled 'Allocations'. At the top, there is a horizontal menu bar with tabs: 'Locations', 'Computer Assets', 'Partition Assets' (which is highlighted with a red circle), 'Application Users', 'GL Accounts', and 'Others'. Below this is a toolbar with buttons for 'Partitions', 'Filter', search, and other navigation functions. The main area is titled 'Partitions' and displays a table with columns: 'Partition Asset', 'Description', 'Primary Customer', and 'Capacity'. A message at the top of the table says 'There are no rows to display.' At the bottom of the interface are two buttons: 'Select Partition Assets' and 'New Row'.

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.

The screenshot shows the 'Scope' configuration page with the following settings:

Scope: ENTERPRISE	Start Date: 5/11/12	Capacity Unit: VALUNITS
License Term: INSTALLED	Terminate Date: (calendar icon)	Capacity: 700
Is Sub-Capacity? (checkbox)	Is Perpetual? (checkbox)	Allocated Capacity: 140.00 (highlighted with a red oval)
License Charge Period: DAILY	Core Multiplier Group: (button)	Reserved Capacity: 0.00
		Available Capacity: 560.00 (highlighted with a red oval)

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 with a status of "INPRG" in the WorkOrder Status portlet. You might need to scroll through to the end of the Work Order list to locate the correct one.
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**. (You might need to scroll down to see the additional assets.)
23. Click **OK** to allocate the license.
24. Click the **Complete WorkOrder** icon and set the status to **Completed**.

25. Click **OK** to close the message.
26. Sign out of the console.
27. Log in to the console as **ling** with the password **object00**.
28. Click the **ITAMSAM** Start Center tab.
29. Click **Licenses** in the Software Management Applications portlet.
30. Press Enter to view a list of all licenses.
31. Open the **ITAM1008** license.
32. 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 is deployed (discovered capacity). This exercise demonstrates how to run audit reports.

1. Click **List View** 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**.

The screenshot shows a software interface titled 'Reports'. At the top, there's a message: 'Select a report from the list, or click Create Report to create an ad hoc report.' Below this are two tabs: 'On Demand Reports' (which is selected) and 'Scheduling Status'. Under 'On Demand Reports', there's a search bar with the text 'pvu'. Below the search bar, a table lists two reports: 'PVU Based Audit' and 'PVU Sub Capacity Based Audit'. At the bottom right of the window are two buttons: 'Create Report' and 'Cancel'.

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.

Customer:				
Associated Product	Total License Capacity	Discovered Capacity	Variance	
IBM WebSphere Application Server Network Deployment	700	840	-140	
IBM WebSphere MQ	1500	2340	-840	
IBM DB2 Workgroup Server Edition CPU Option	1000	200	800	

Number of Products: 3

6/27/16 14:26:44

1 / 1

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 CIs*. 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 must 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:

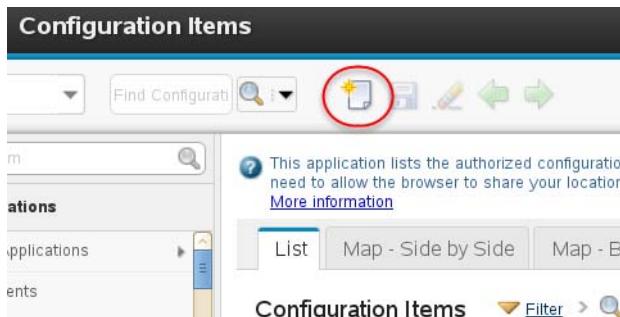
- By importing
- Manually in the Configuration Item application
- By promoting an actual CI

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.

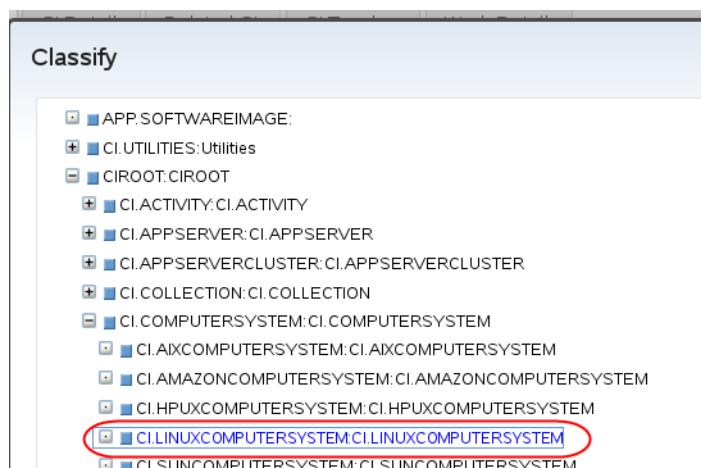
1. Log in to the console as **lucy** with the password **object00**. Lucy is a Change Owner.
2. Click **IT Infrastructure > Configuration Items** in the navigation bar.
3. Click the **New CI** icon.



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:CI.COMPUTERSYSTEM** 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.

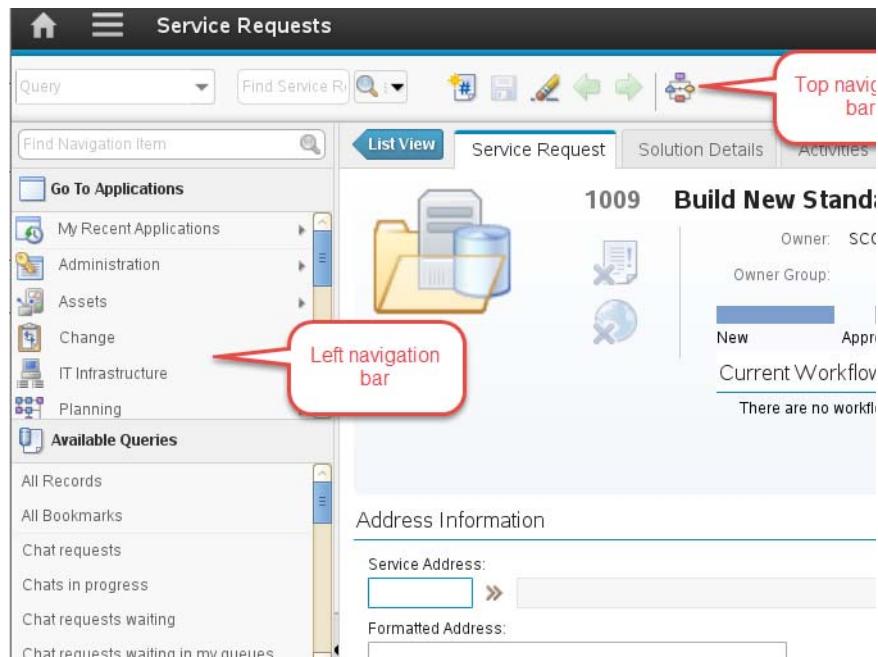
1. Click the home icon to return to the Change Owner start center.
2. Click **IT Infrastructure > Actual Configuration Items** in the navigation bar.
3. Enter **appsrv02** in the **Name** filter and press **Enter**.
4. Open the first **APPSRV02.EU.TIDE.IBM.COM** actual CI with a classification of **SYS.LINUX.LINUXUNITARYCOMPUTERSYSTEM**.

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.

Actual Configuration Item Number:	<input type="text" value="APPSRV02.EU.TIDE.IBM.COM~20003"/>
Actual Configuration Item Name:	<input type="text" value="APPSRV02.EU.TIDE.IBM.COM"/>
Classification:	<input type="text" value="ACTUALCIROOTCLASS \ SYS.LINUX.LINUXUNITARYCOMPL"/>
Top Level?	<input checked="" type="checkbox"/>
Configuration Item Number:	<input type="text" value="APPSRV02.EU.TIDE.IBM.COM~20003"/> 
Configuration Item Name:	<input type="text" value="APPSRV02.EU.TIDE.IBM.COM"/>
Primary Customer:	<input type="text"/> 

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.

My Work		Filter >	
Activity	Summary	Parent	Scheduled Start
1169	Create Change Record for Server Deployment	1164	
Set Chart Options			

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.

Primary Target

The target that is the main focus of this Change Request

Configuration Item:
APPSRV01.EU.TIDE.IBM.COM

Configuration Item Name:
APPSRV01.EU.TIDE.IBM.COM

CI Business Impact:

Outage:

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.

Select Owner

Persons Person Groups

Person Groups Filter 1 - 1 of 1

Person Group	Description
pmchgown	
PMCHGOWN	Change Owners

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.

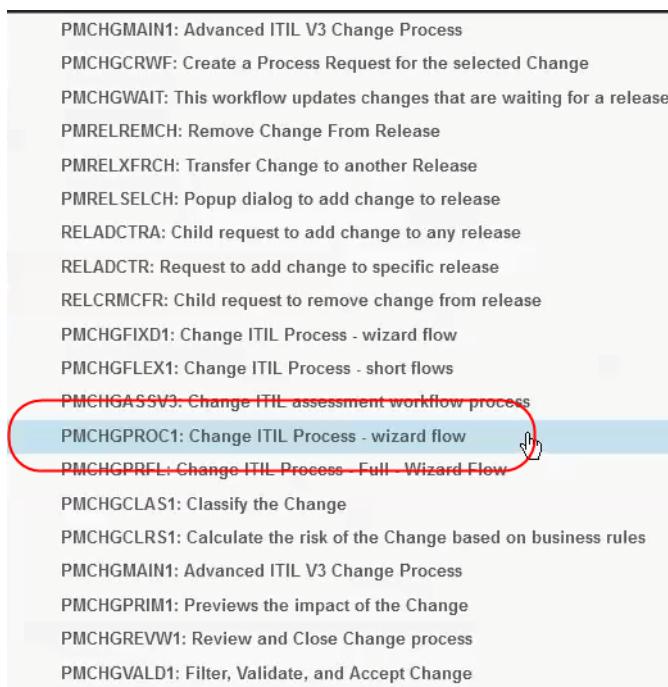
Schedule Dates

Target Start:	Scheduled Start: 6/28/16 11:22:12	Actual Si
Target Finish:	Scheduled Finish: 6/28/2016 12:00:00	Actual Fi
Start No Earlier Than:	Scheduler Project:	* Estima
Finish No Later Than:		Time Rei

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**, and press OK.
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.

The screenshot shows a portlet titled "Inbox / Assignments". It displays a single assignment row with the following columns:

Description	Due Date	Priority
Next Assignment Due: 6/28/16 11:26:32 Assess Normal Change 1174	6/28/16 11:26:32	

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.

The screenshot shows the "Technical Assessments" tab. It displays one assessment entry with the following fields:

Assessment Type	Impact	Results	Implementation Notes
Application			

The screenshot shows the "Business Assessments" tab. It displays one assessment entry with the following fields:

Assessment Type	Impact	Results	Cost
Operational			

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.

- Click the **Change** tab, and click the **Assess Normal Change** link in the **Current Work Items** section.

1174 Create Change Record for Server Deployment

Owner: PMCHGOWN Change Type:

Owner Group: PMCHGOWN Authorization Decision:

Accept & Categorize Assess Schedule Authorize Implement

Current Work Items

Assess Normal Change 1174

- 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.

- Sign out of the console.

Authorizing a change

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

Description	DUEDATE	startcntr/inbxroute
Next Assignment Due: 6/28/16 11:33:08		Refres
Manager Approval from BOB for 'Firewa	12:52:43	
Manager Approval from BOB for 'Request PC'	11:13:31:41	
Manager Approval for New Asset Request	5/11/12 20:23:32	
Authorize Normal Change 1174	6/28/16 11:33:08	

1 - 4 of

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

Notice that the Status of the change is now IMPL.

- 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 Work Items** 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 **Implement 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. Select the **Change** tab again to return to the change application.
40. Click the **Normal Change In Progress** link in the **Current Work Items** section.
41. Select **All change tasks have been executed, set change to Completed status**, and click **OK**.
42. Sign out of the console.

Verifying the change

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

Inbox / Assignments		
<u>Description</u>	<u>Due Date</u>	<u>Priority</u>
Next Assignment Due: 6/28/16 11:50:28		
Review Normal Change 1174	6/28/16 11:50:28	

45. Click **OK** to close the Workflow help.
46. Click the **Schedule** tab and verify that all tasks are completed.
47. Click the **Change** tab and click the **Review Normal Change** link in the **Current Work Items** section.
48. Select **The change was successfully implemented and satisfies all stakeholder requirements** and click **OK**.
Notice that the status of the change is now CLOSED.
49. Click the **Start Center** icon to return to the Change Owner Start Center.
50. Find and open the **Validate Server Deployment and Close SR** task in the **My Work** portlet.

My Work		
<u>Activity</u>	<u>Summary</u>	<u>Parent</u>
1171	Validate Server Deployment and Close SR	1164
Set Chart Options		

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

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

The screenshot shows a configuration form with the following fields:

- Classification: [Text Box]
- Class Description: [Text Box]
- Launch Entry Name: [Text Box]
- Parent Process: [Text Box] (highlighted by a red arrow)
- Response Plan: [Text Box] (highlighted by a red arrow)
- Customer Charge Account: [Text Box]

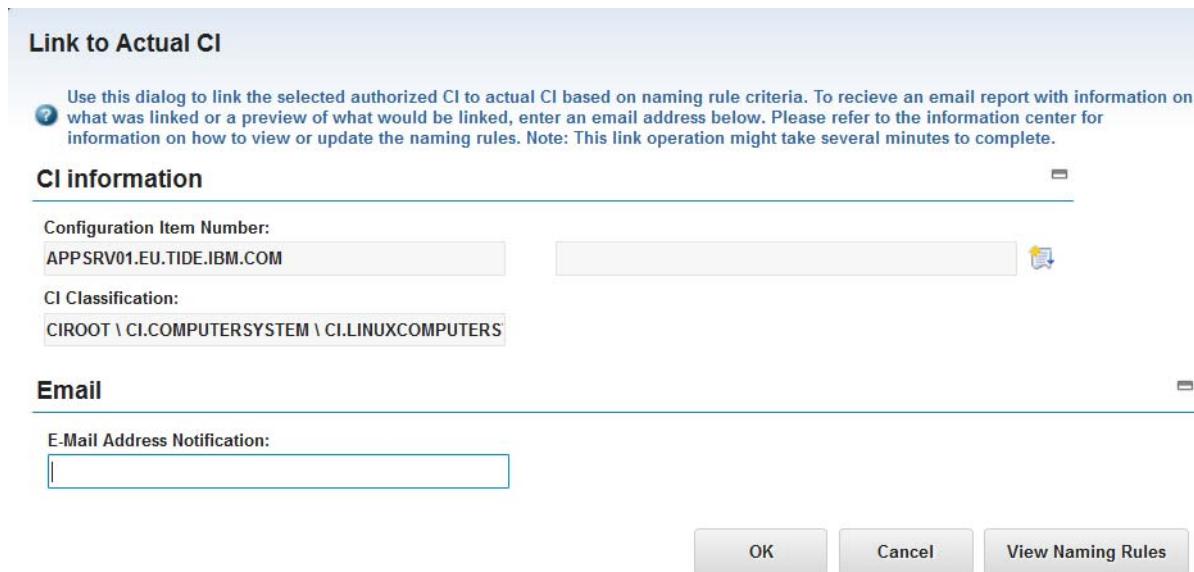
A red callout bubble labeled "Parent Process" is positioned over the "Parent Process" field. Below the form, there is a section titled "Address Information".

52. Type "INPRG" in the **Status** field and press enter.
53. Locate and select the **Build New Server with Middleware V2** activity from the original work order (Unit 4, Exercise 5, Step 31).
54. Click the **Related Records** tab.
55. Click the **Detail Menu** for the originating record and click **Go To Service Requests**.
56. Click the **Change Status** icon and set the status to **Closed**. The service request that Bob entered is now complete.
57. Click **Return** to return to the Build New Server with Middleware v2 task.
58. Click **Return** to return to the Validate Server Deployment and Close SR task.
59. Click the **Complete Activity** icon and set the status to **Closed**, and click OK.
60. Click the Start Center icon to return to the Change Owner start center.
61. 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 that 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 the previous exercise. 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.

The screenshot shows the 'Specifications' tab of the CI Details page. A tooltip says: 'Use this tab to view and edit the attributes for the CI.' Below it is a table with columns: Attribute, Authorized Value, and Discovered Variance. The table rows are:

Attribute	Authorized Value	Discovered Variance
COMPUTERSYSTEM_ARCHITECTURE	i686	
COMPUTERSYSTEM_CPUSPEED	2,665,000,000.0	
COMPUTERSYSTEM_CPUTYPE	Intel(R) Xeon(R)	
COMPUTERSYSTEM_FQDN	appsrv01.eu.tide.ibm.com	
COMPUTERSYSTEM_MANAGEDSYST	APPSRV01.EU.TIDE.IBM.COM	

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.

11. Remain logged in to the console as Lucy.

Exercise 6 Synchronizing authorized CIs and actual CIs

After you establish 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 Actions** 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.

Synchronization options	
Existing Configuration Items	New Configuration
<input checked="" type="checkbox"/> Copy Attributes?	<input type="checkbox"/> Create Related Configuration Items?
<input type="checkbox"/> Overwrite Existing Attributes?	<input checked="" type="checkbox"/> Copy Attributes?
<input type="checkbox"/>	<input checked="" type="checkbox"/>
Synchronize the Attribute Values of Related Configuration Items?	
<input checked="" type="checkbox"/>	
Create New Relationships Between Existing Configuration Items?	
<input checked="" type="checkbox"/>	

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 affect 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.

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

The screenshot shows the 'Reports' interface with the 'On Demand Reports' tab selected. A search bar at the top contains the text 'assets linked to cис'. Below the search bar, a list of reports is shown, with 'Assets Linked to CIs' highlighted by a red oval.

- Click **Submit** to run the report.
- Review the report. A few assets and CIs are already linked in the demonstration data.

Asset IT\COMPUTER SYSTEM\ DISTRIBUTED Classification: 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 CCIAAssetCISerialNum
PULSE2077		CS1.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAAssetCISerialNum
PULSE2081		CS2.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAAssetCISerialNum
PULSE2078		CS3.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAAssetCISerialNum
PULSE2080		CS4.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAAssetCISerialNum

Number of Records: 5

- Close the report.
- Click **Cancel** to close the report list.
- Click **Administration > Reconciliation > Reconciliation Tasks** in the navigation bar.
- Press Enter to view a list of reconciliation tasks.
- Open the **CCILinkAssetsAndCIs** reconciliation task.
- Set the schedule to every **5 minutes**.

The screenshot shows the 'Set Schedule' dialog. It has a section titled 'Select Schedule or Time Interval' with the instruction 'Select a date interval and then Preview to see the dates.' Below this are three radio button options: 'Every [] second(s)', 'Every [] minute(s)', and 'Every [] hour(s), on minute []'. The 'Every [] minute(s)' option is selected, with '5' entered in the input field, and it is circled with a red oval. To the right of the input fields, there is a 'Date' field showing the values '6/29/16 6:30/ 7/1/1'.

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.

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 CCIAAssetCISerialNum
ITAM4011	IBM 9133 Server	HOSTNAME50.EXAMPLE.COM	Education Test Server	MAXADMIN 6/13/12 3:33:54 AM	Reconciliation CCIAAssetCISerialNum
ITAM4012	IBM 8142 Server	HOSTNAME60.EXAMPLE.COM	Education Production Server	MAXADMIN 6/13/12 3:33:54 AM	Reconciliation CCIAAssetCISerialNum

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 CCIAAssetCISerialNum
PULSE2077		CS1.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAAssetCISerialNum
PULSE2081		CS2.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAAssetCISerialNum
PULSE2078		CS3.IBM.COM		MAXADMIN 2/29/12 6:55:34 AM	Reconciliation CCIAAssetCISerialNum
PULSE2080		CS4.IBM.COM		MAXADMIN 2/29/12 6:55:35 AM	Reconciliation CCIAAssetCISerialNum

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.

View Record List > ITAM4010

Asset	Spare Parts	IT Details	Meters	Specifications	Relationships	Work	Topology
?							
You can view or enter information about IT assets. IT assets are assets that are classified under the IT hierarchy w...							
Asset:	ITAM4010			IBM 8303 Server			
Status:	ACTIVE			Site:	PMSCRTP		
Configuration Item:	HOSTNAME4.EXAMPLE.COM			>>			
Configuration Item Name:	HOSTNAME4.EXAMPLE.COM			Education Development Server			

27. Sign out of the console.



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