Prepare the SAM environment

Lab 1.1   15-20 minutes

Lab objectives

You will achieve the following objectives:

- SAM functionality has been validated
- Software Asset Manager and Software Asset Administrator can access SAM, and each have the correct access to perform their role
- Pre-loaded data has been baselined
- All required lab files have been downloaded

> **Lab Dependency:** *None*
>
> **Required Resources:** *None*

Scenario

Cloud Dimensions, Ltd. (CloudD) has recently implemented ServiceNow's Software Asset Management (SAM) product. Jet Blake, the ServiceNow administrator at CloudD, wants to validate that the updated platform is ready to go.

Once Jet has validated the platform, Rick Lemm, CloudD's software asset manager, would like access provided to both himself and his software asset administrator, Remy Dashun.

Additionally, as part of a consolidation effort at CloudD during implementation, Jet migrated data from other CloudD software asset management applications into ServiceNow Software Asset Management. Rick would like to baseline this information before performing any additional activities in SAM Professional.

Finally, to prepare for later operations, Rick wants to download all required supporting lab files.

> **Note:** *Remember from our review of personas, that Rick, as the software asset manager, is responsible for control of the day-to-day activities of the SAM process and ensuring the quality of software asset data (e.g., they may manage the SAM team, monitor compliancy, and have overall responsibility for the management of the SAM tool).*

> *Remy, as the software asset administrator, is responsible for creating and maintaining software asset information (e.g., adding software assets into SAM, serving as first point of contact for software asset requests, daily management of the SAM tool, management of physical licenses and/or software, producing SAM reports, etc.)*

Requirements Summary

User Stories

- STRY010101 – Validate SAM functionality

  As a ServiceNow administrator, I need to validate that all required Software Asset Management functionality and capabilities have been activated, so that I can begin granting access to users.

- STRY010102 – Grant user access to SAM

  As a software asset manager, I need appropriate access and privileges provided to the Software Asset Management team, so that they can effectively manage software assets in ServiceNow.

- STRY010103 – Baseline pre-loaded data

  As a software asset manager, I need to baseline pre-loaded data, so that the Software Asset Management team has an established current state.

- STRY010104 – Download supporting files

  As a software asset manager, I need to download the supporting lab files from the ServiceNow knowledgebase, so I can use them in future labs.

STRY010101 – Validate SAM functionality

Section 1 Validate plugins

Software Asset Management related plugins vary in how they can be verified. Plugins that can be activated by the ServiceNow administrator can easily be verified as they display as **Active** in the plugins list. **Plugins activated by ServiceNow need to be verified through alternate steps**.
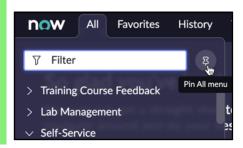
1. Log in as the System Administrator:

    -   Username: **admin**

    -   Password: **provided by the instructor**

    > **Note:** *If prompted, do not save the credentials in the browser. This can cause issues when you create user records as the browser will automatically fill fields on the user form using your credentials.*
    >
    > *If you have already saved credentials, you may need to type over the string "admin" in multiple fields to enter the correct value; simply click into the field and enter the correct information. Alternatively, open your browser preferences and delete the saved username/password for your instance.*
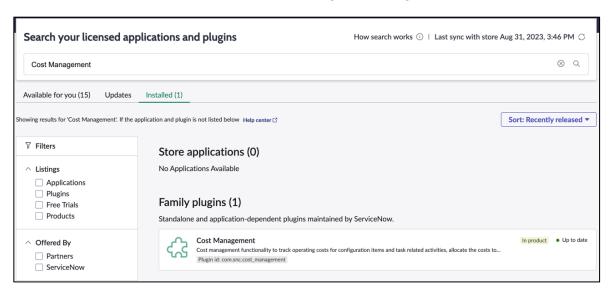   >
    > *Select the pin button under **All** to keep the Application Navigator accessible on the left of the screen.*

2. Navigate to **System Definition > Plugins**.

3. In the **Search your licensed applications and plugins** search field enter **Cost Management**.

4. Select **Installed** and validate that the Cost Management plugin is listed.

5. Validate that the following plugins are also Installed:

- **Data Certification**
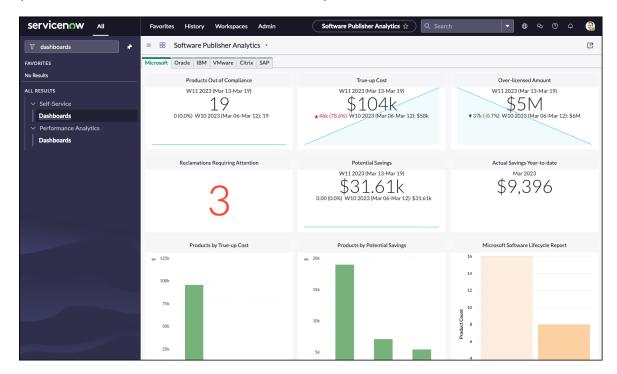- **Procurement**
- **Predictive Intelligence**

Section 2 Validate publisher packs

Publisher packs, which you will learn more about in future modules, provide publisher-specific metrics and dashboards.

1. To verify publisher pack content for subscriptions are active, as **System Administrator**, navigate to **Performance Analytics > Dashboards.**

2. Select the **All** tab and search for the dashboard **Software Publisher Analytics**.

3. Click on the dashboard where you will see the publishers that have been installed (Microsoft, Oracle, IBM, VMware, Citrix and SAP)
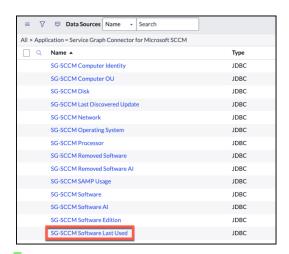
Section 3 Validate usage integration

The Microsoft SCCM integration is a one-direction import of SCCM data into the ServiceNow configuration management database (CMDB). A usage record tracks the sum of usage monthly so that software usage in the environment can be assessed.

1. As **System Administrator**, navigate to **Service Graph Connectors > SCCM > Data Sources.**

2. Validate the data source **SG-SCCM Software Last Used** is in the Data Sources list.

Name ▲	Type
SG-SCCM Computer Identity	JDBC
SG-SCCM Computer OU	JDBC
SG-SCCM Disk	JDBC
SG-SCCM Last Discovered Update	JDBC
SG-SCCM Network	JDBC
SG-SCCM Operating System	JDBC
SG-SCCM Processor	JDBC
SG-SCCM Removed Software	JDBC
SG-SCCM Removed Software AI	JDBC
SG-SCCM SAMP Usage	JDBC
SG-SCCM Software	JDBC
SG-SCCM Software AI	JDBC
SG-SCCM Software Edition	JDBC
SG-SCCM Software Last Used	JDBC

Data Sources — All > Application = Service Graph Connector for Microsoft SCCM

Note: *This data source was added with the installation of the Service Graph connector for Microsoft SCCM.*

STRY010102 – Grant user access to SAM

Section 4 Create a user account

Rick Lemm is the software asset manager for CloudD. The system administrator, Jet Blake, has validated the Software Asset Management implementation and now needs to set up Rick's user account with the appropriate roles to carry out his Software Asset Management activities.
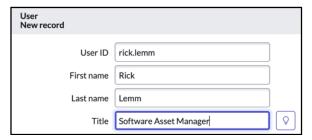
1. As **System Administrator**, navigate to **User Administration > Users**.
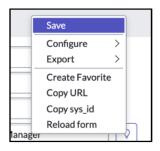
2. Click **New**.

3. Complete the User form as follows:
   - User ID: **rick.lemm**
   - First name: **Rick**
   - Last name: **Lemm**
   - Title: **Software Asset Manager**

4. Click the **Additional actions** menu on the form header and select **Save**.
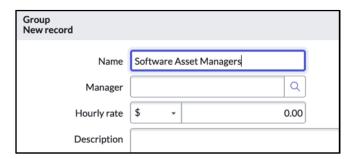
Section 5 Add user to a new group

Now that Rick has a user record, he needs the roles necessary to use the Software Asset Management product. As a best practice, roles should not be assigned directly to users; instead, roles should be assigned to groups and users assigned to these groups to receive the roles.

1. As **System Administrator**, on the user record that was just created for Rick Lemm, scroll down to the **Groups** related list and click **New**.

2. Enter **Software Asset Managers** in the **Name** field.

Group New record	
Name	Software Asset Managers
Manager	
Hourly rate	$ ▾ 0.00
Description	

3. Click the Additional actions menu on the form header and select **Save**.

> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *1.   Does Rick show on the Group Members related list? Why or why not?*
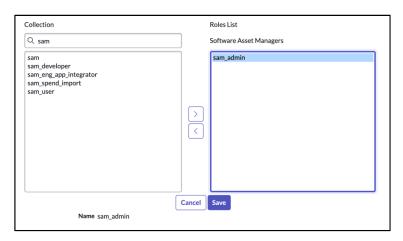
Section 6 Add roles to the group

Rick needs several roles to perform his required activities as a software asset manager.

1. As **System Administrator**, under the Roles related list on the group record that was just created for Software Asset Managers, click **Edit**.

2. Add the **sam_admin** role to the group by finding it in the Collection list and double-clicking it or clicking it and clicking the **Add** button [>] to add it to the Roles List.

3. Add these four additional roles to the Roles List:
   - **catalog_admin**
   - **knowledge_admin**
   - **report_admin**
   - **user_admin**

Note: *You should have a total of five roles in the **Roles List** when complete (including **sam_admin** from step 2 above).*

The sam_admin role provides Rick Lemm with the ability to use SAM Professional, including performing administrative activities. The catalog_admin role provides the ability to publish items to the Software catalog. The knowledge_admin role provides ability to view, create, and modify knowledgebase articles. The report_admin role provides ability to create and modify reports and widgets. The user_admin role provides ability to manage user related information.

Important: *Before granting any roles in ServiceNow, make sure the user has been adequately trained.*

4. Click **Save**.

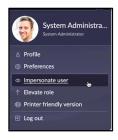**Note:** *After saving the added Roles, you may have to refresh the Roles related list to see the added Roles.*

Knowledge Check: *Refer to the Answer Guide at lab's end.*

2. *What other roles are inherited when these roles are applied?*

Verify Actions:

Section 7 Test out Rick Lemm's access.

1. Click the **User menu** pull-down and select **Impersonate User**.

2. Search for and select user name **rick.lemm**.

Note: *When Rick's view displays, you may need to click **Asset Workspace** and then **All** to pin the Application Navigator.*

3. Validate that the following products are available (in addition to others):

- **Self-Service**
- **SaaS License**
- **SAP Compliance and Optimization**
- **Configuration**
- **Service Catalog**

- **Knowledge**
- **Product Catalog**
- **Software Asset**
- **Contract**
- **Cost**
- **Procurement**
- **Reports**
- **Performance Analytics**
- **User Administration**

Challenge (Required)

Remy Dashun is a software asset administrator on Rick's team.

They do not perform many of the activities that Rick does, so needs different access. The user_admin role, added to the Software Asset Managers group, granted Rick access to administer users, groups, locations, and companies. Using what you have learned above, while logged in as **Rick Lemm**, set Remy up in a new **Software Asset Administrators** group that has only the **sam_user** role.

> **Important:** *Do not skip this challenge. Activities from completing this challenge sets up a user that will be used in future labs. If you need assistance, refer to the **Lab Challenge Verification** section at lab's end for detailed steps.*
>
> **Knowledge Check:** *Refer to the Answer Guide at lab's end.*
>
> *3. What other roles are inherited when the primary role is applied?*
>
> *4. How do they differ from Rick Lemm?*

> **Verify Actions:**

1. Impersonate **Remy Dashun**.

2. Validate that the following products are available (in addition to others):

- **Self-Service**
- **Software Asset**
- **Performance Analytics**

STRY010103 – Baseline pre-loaded data

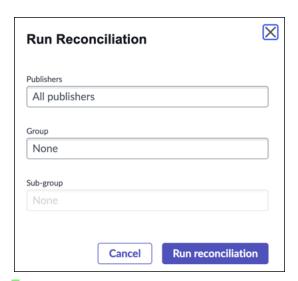# Section 8 Run software asset reconciliation job

As part of the Software Asset Management implementation, the ServiceNow administrator loaded existing data into ServiceNow. Rick Lemm, CloudD's Software Asset Manager, needs to run a software reconciliation at this point to establish a data baseline for the software asset management team.

1. Impersonate **Rick Lemm**.

2. Navigate to **Software Asset** > **Software Asset Workspace**.

   Tip: Make the Software Asset Workspace a Favorite by clicking the star next to it in the menu. This makes it easier to go straight to the Software Asset Management product without having to scroll.

   The Software Asset Workspace can also be accessed from the Workspaces menu and clicking on Software Asset Workspace.

3. Click **Run reconciliation**.

   Note: *Do not change any of the default answers on the Run Reconciliation form. Learn more about these in later modules.*
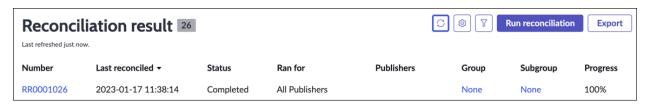
4. Click **Run reconciliation**.

Section 9 Validate reconciliation results completion

1. Still as **Rick Lemm**, from the Reconciliation result list, click **Refresh List** to display the reconciliation In Progress.

License usage

Publishers   Reconciliation   Removal candidates   Reports

Reconciliation result 25

Last refreshed 2m ago.

Number	Last reconciled ▾	Status	Ran for	Publishers	Group	Subgroup	Progress
RR0001025	2023-01-17 11:36:05	In Progress	All Publishers		None	None	0.00%
RR0001024	2023-01-16 02:00:06	Completed	All Publishers		None	None	100%

> **Tip**: Click the **Number** heading to sort the reconciliation results in descending order. This makes it easier to access the most current reconciliation run.

2. Continue clicking **Refresh List** until the latest reconciliation has a Status of **Completed**.

Reconciliation result 26

Last refreshed just now.

Number	Last reconciled ▾	Status	Ran for	Publishers	Group	Subgroup	Progress
RR0001026	2023-01-17 11:38:14	Completed	All Publishers		None	None	100%

> **Note:** Be patient. This can take several minutes to complete.

Section 10 Get supporting files and save to local drive

Finally, some of the Software Asset Management Professional Fundamentals labs use supporting files, such as spreadsheets to import data or text files for script code. Rick needs to download these files so that the asset management team has them available for future lab activities.
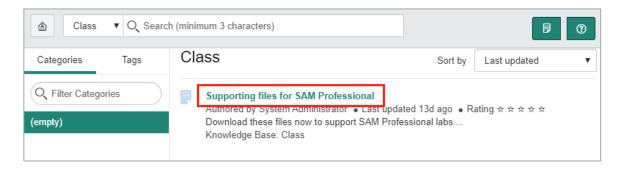
1. If not already, impersonate **Rick Lemm**.

2. Navigate to **Self-Service > Knowledge**.

3. Under **Knowledge Bases**, open the **Class** knowledge base.

4. Open the **Supporting files for SAM Professional** knowledge article by clicking on the article title.

5. Click the **2.1-entitlement_import_file.xlsx** in the manage **Attachments** section at the top of the knowledge article.

> **Note:** *The file downloads automatically to your computer in the Downloads folder. If you have any challenges with this, check the security setting on your computer.*

6. Download the remaining three files by clicking their names in the manage Attachments section at the top of the knowledge article.

- **2.2-software_installations.xlsx**

- **2.2-transform_script.txt**

- **5.2-software_usage.xlsx**

7. Save the downloaded file(s) to a simple place to access on your computer.

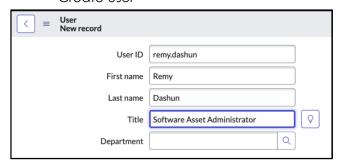| Name	Date modified	Type	Size
2.1-entitlement_import_file.xlsx	1/21/2020 3:39 PM	Microsoft Excel W...	3,316 KB
2.2-software_installations.xlsx	1/21/2020 3:40 PM	Microsoft Excel W...	12 KB
2.2-transform_script.txt	1/21/2020 3:40 PM	Text Document	1 KB
5.2-software_usage.xlsx	1/21/2020 3:41 PM	Microsoft Excel W...	25 KB

Lab Challenge Verification

This section provides screenshots of steps performed in the lab challenge.
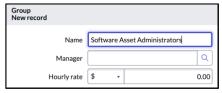
Challenge (Required):

Remy Dashun is a Software Asset Administrator on Rick's team. They do not perform many of the activities that Rick does, so needs a different role.

The user_admin role, added to the Software Asset Managers group, granted Rick access to administer users, groups, locations, and companies. Using what you have learned above, while logged in as Rick Lemm, setup Remy in a new Software Asset Administrators group that has only the sam_user role.
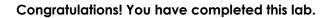
- • Create User

- • Create Group

- • Add Role to the Group

Verify Actions:

- Step #2: Verify that Remy has access to the following products:
    - **Self-Service**
    - **Software Asset**
    - **Performance Analytics**

Congratulations! You have completed this lab.

You are now ready to begin learning about the data needed to support Software Asset Management.

Knowledge Check Answer Guide

1. **Does Rick show on the Group Members related list? Why or why not?**

   - Yes
   - The user is automatically related when the group is created from the user record.

2. **What other roles are inherited when these roles are applied?**

   - flow_designer
   - catalog
   - user_criteria_admin
   - flow_operator
   - knowledge
   - report_global
   - gauge_maker
   - report_user
   - report_scheduler
   - report_group
   - report_publisher
   - cmdb_read
   - financial_mgmt_user
   - pa_viewer
   - catalog_editor
   - category_manager
   - inventory_user
   - contract_manager
   - model_manager
   - sam_user
   - asset
   - cmdb_query_builder
   - procurement_user

3. **What other roles are inherited when the primary role is applied?**

   - cmdb_read
   - report_user
   - pa_viewer

4. **How do they differ from Rick Lemm?**
   - Remy only has three additional roles added.

5. **How do Rick and Remy's views of the Application Navigator compare?**
   - Remy does not have access to:
     - Flow Designer
     - IntegrationHub
     - Service Catalog
     - Item Designer
     - Service Creator
     - Knowledge
     - Organization
     - Product Catalog
     - Asset
     - Inventory
     - Contract
     - Cost
     - Procurement
     - Contextual Search
     - User Administration

Lab takeaways

- What were the three ways to validate the different types of plugins that were activated?

- Why did you add roles to groups and not directly to users?

- Why are additional roles sometimes inherited from other roles?