|  |  |  |
| --- | --- | --- |
| **Capstone Project -  Challenge Format** |  | Lab |
| 9.1 |
|  | 120-150m |
|  |

Capstone Tasks Overview

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

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

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

To successfully complete the Capstone Project, you will need the ServiceNow Administration Fundamentals Course Materials.zip file you downloaded in Lab 1.1. Once extracted, you will find relevant task files, as well as the Step-by-Step Solution guides for every task.

Task 1: Update Incident Management

Modify the Incident form so that it can support a new process for troubleshooting technical issues reported by Strawberry sFone users.

1. Modify the Incident Form
2. Create a new field and add it to the Default view of the Incident form with the following properties:

* Name: **sFone Model**
* Type: **String**
* Field length: **Small (40)**

1. Configure the Default View and place the **sFone Model** field beneath the **Configuration item** field.
2. Create a Non-P1 sFone Incident using the following information:

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

1. Modify the **Category** field on the Incident form to include a new **sFone Model** as a new choice.

TASK VERIFICATION

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

Graphical user interface, application, table

Description automatically generated

Task 2: User Administration

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

1. Manage Users, Groups, and Roles
2. Under the existing **Service Desk** group, create a new child group called **Strawberry Support** that includes the **itil** role and has Fred Luddy as the group manager.
3. **Create or add** the existing users to the group:

* Beth Anglin
* Bud Richman
* David Loo
* Kara Prince
* Waldo Edberg

1. Select **Fred Luddy** as the **Manager** under Kara Prince’s user record.

TASK VERIFICATION

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

Graphical user interface, text, application

Description automatically generated Graphical user interface, text, application, email

Description automatically generated

Task 3: Automate Service Catalog Item Fulfillment

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

Configure your developer instance to accomplish the following:

1. Import a Service Catalog Item
2. Import an Update Set (cd\_sfone\_catalog\_item.xml) containing the sFone Service Catalog item into the instance. Remember to retrieve, preview, and then commit!
3. Create a New Flow Designer Flow
4. Develop an automated process named **Strawberry Workflow** to fulfill Strawberry sFone Service Catalog requests. It should feature the following activities in this particular sequence:

* Approval by the requester’s manager:

1. The **Approved** path marks the requested item as approved with an **Approval Action**.
2. The **Rejected** path marks the requested item as rejected, sends a rejection email to the requester, and then ends the workflow.

* Definition of the Approved path (three Catalog Tasks):
  + 1. Catalog Task 1details the steps for **ordering** the Strawberry sFone item and is assigned to the **Procurement** group.
    2. Catalog Task 2 details the steps for **configuring** the Strawberry sFone and is assigned to the **Software** group.
    3. Catalog Task 3details the steps for **delivering** the Strawberry sFone and is also assigned to the **Service Desk** group.

1. Upon completion of all three catalog tasks, mark the requested item complete.

TASK VERIFICATION

1. Test the Flow – Order a Strawberry sFone

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

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

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

1. Navigate to **All >** **Service Catalog** > **Open Records** > **Tasks**.
2. Open the task with the short description, **Order the Strawberry sFone**.
3. Select **Close Task**.
4. From the List Controls Menu, select **Refresh List** (or refresh your browser).
5. Open the task with the short description, **Configure the Strawberry sFone**.
6. Select **Close Task** and **Refresh** the list.
7. Open the task with the short description, **Deliver Strawberry sFone**.
8. Select **Close Task**.
9. Review Flow Execution
10. Navigate to **All > Process Automation > Flow Designer**.
11. Select **Executions**.
12. Open the **Strawberry Workflow execution**.

Review the status of the workflow (Completed) and the State of each step. Is it what you expect? If not, troubleshoot and work through the Lab Verification steps again.

Graphical user interface, application

Description automatically generated

Task 4: Update Knowledge Base

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

* + 1. The publishing and retirement processes for a knowledge article are controlled by workflows defined for the knowledge base that the article belongs to. You will enable automatic publishing for the IT Knowledge Base.

1. Enable Automatic Publish
   * + 1. Adjust the settings for the IT Knowledge Base to allow for Knowledge Base articles to instantly publish upon submission – using a publish workflow to bypass any review period.
2. Create a New IT Knowledge Base Category
3. Add a new sFone category to the IT knowledge base.
4. Create the Requester Article

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

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

**To request an sFone, navigate to All > Self-Service > Service Catalog. Then, select the Mobile category and locate the Strawberry sFone item. You may also use the Service Catalog search field to locate the item.  
  
Select the Strawberry sFone item name to open the ordering screen where you can customize your request. Once satisfied, click Order Now**.

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

* Short description: **Supporting sFone Service Catalog Requests**
* Text:

**If the requester has a question about requesting an sFone, redirect them to the Knowledge Base article: *Requesting an sFone from the Service Catalog*.  
  
If the requester has placed an order and would like to know about their request, direct them to Employee Center. From Employee Center, they can select My Requests to review the status.**

TASK VERIFICATION

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

Graphical user interface, application, Teams

Description automatically generated

Task 5: Enhance Task Assignment and Communication

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

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

1. Enable Auto-Assignment using Services and Service Offerings
2. Define a Service and Service Offering with the following details:

Service:

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

Service Offering:

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

1. Create an sFone Priority 1 Incident Notification
2. Create an email notification containing details about newly opened Priority 1 incidents that have **sFone** as the category. This notification should go to the **Strawberry Support** group only when a new Priority 1 sFone incident is created or updated and the Assignment group is Strawberry Support. Utilize the following information to create the notification:

* Name: **P1 sFone Incident**
* Table: **Incident [incident]**
* Subject: **A new P1 sFone Incident has opened: ${number}**
* The **Message HTML** textshould contain a collection of dynamic information listing:
  + when the incident was opened
  + who opened the incident
  + the description of the incident

1. Verify the email is sending to the Strawberry Support group by creating or updating a new Priority 1 sFone incident, which should be auto-assigned to the Strawberry Support group. Check the System Outbox to ensure the notification was sent.

TASK VERIFICATION

Graphical user interface, application

Description automatically generated

**Note:** Your incident number may be different than shown.

Task 6: Schedule a Report

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

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

* Name: **Active sFone Incidents by Priority**
* Source type: **Table**
* Table: **Incident [incident]**
* Type: **Pie**
* Group by: **Priority**

1. Schedule the Report
2. Schedule the Report to run weekly, every Monday at 8:30am, and sent to the Strawberry Support group.
3. Add the following schedule details which will appear within the email containing a copy of the report:

* Subject: **Current sFone Active Incidents Count**
* Introductory message:

**Please find included the current count of all active sFone incidents grouped by priority. This information will be discussed during the team’s incident review meeting today at 9:00am.**

TASK VERIFICATION

Chart, pie chart

Description automatically generated