How to Guide: Assign Roles to Groups/Provide access to Group Members

Step 1 – In the filter navigator type "ITSM Guided Setup"



Step 2 – Click "Foundation Data", Click "Show more"

| | Get going Get up and running with ServiceNow quickly and easily | n configuration ta | sks > | Seel empowered Feel empowered to make addition configuration changes at a later tir |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Found | Vithin Guided Setup | Skip | 1 / 7 Tas | ks completed |
| | Foundation Data | | 6 Tasks | skipped |
| % | Import users, groups, group members, companies, departments, | , and | ⊖∕ De | artmonts |
| | locations to provide access to the instance and facilitate automat | ted | 3 Loc | ations |
| | processes, such as auto-assignment of tasks. Assign roles to group provide access to all group members or assign roles to individual | users. | ∼ Co | mpanies |
| | | | ି Use | ers |
| pleted | | | ି Gro | oups |
| | | | | |
| | | | Sho | ow More |
| – Cl | ick "Assign roles" | | Skip | 1 / 7 Tasks completed 6 Tasks skipped |
| – Cl | ick "Assign roles" | partments, an | Skip d | w More 1 / 7 Tasks completed 6 Tasks skipped ∞ Departments |
| – Cl | ick "Assign roles" Soundation Data Import users, groups, group members, companies, dep locations to provide access to the instance and facilitat processes such as auto-assignment of tasks Assign point | partments, an e automated | Skip d | 1/7 Tasks completed 6 Tasks skipped Departments Locations |
| – CI | ick "Assign roles" | partments, an e automated les to groups individual us | Ship d to ers. | 1 / 7 Tasks completed 6 Tasks skipped Coppartments Locations Companies |
| – Cl %) | ick "Assign roles" Soundation Data Import users, groups, group members, companies, dep locations to provide access to the instance and facilitat processes, such as auto-assignment of tasks. Assign rol provide access to all group members or assign roles to | partments, an e automated les to groups individual us | Skip d to ers. | 1/7 Tasks completed 6 Tasks skipped ?* Departments ?* Locations ?* Companies ?* Users |
| – Cl % | ick "Assign roles" | partments, an e automated les to groups individual us | Ship d to ers. | 1 / 7 Tasks completed 6 Tasks skipped Image: Companies Im |
| - Cl | ick "Assign roles" Soundation Data Import users, groups, group members, companies, dep locations to provide access to the instance and facilitat processes, such as auto-assignment of tasks. Assign ro provide access to all group members or assign roles to | eartments, an e automated les to groups individual us | Ship d to ers. | 1 / 7 Tasks completed 6 Tasks skipped Image: Comparises Image: Companies Image: Companies |
| – Cl | ick "Assign roles" Soundation Data Import users, groups, group members, companies, dep locations to provide access to the instance and facilitat processes, such as auto-assignment of tasks. Assign rol provide access to all group members or assign roles to | partments, an e automated les to groups individual us | Ship d to ers. | 1/7 Tasks completed 6 Tasks skipped ?* Departments ?* Locations ?* Companies ?* Users ?* Groups ?* Group Members |

Step 4 – Click "Configure"

| 1 / 7 Tasks completed | Assign Roles Skip Add Notes Completed 3d ago by System Administrator | Mark as Incomplete Configure |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| 6 Tasks skipped | | |
| Sev Departments | Roles control access to features and capabilities in applications and modu them access to the functionality they require to perform their jobs. Many r | Iles. Grant your IT team members roles that give roles are provided in the base system to help you |
| Locations | get started. | |
| Companies | Roles can be applied to individual users or groups. Apply roles to groups a | nd members of those groups can then inherit |
| ି Users | them. | |
| ି Groups | | |
| Group Members ■ | | |
| Assign Roles | | |

Step 5 – Click "New", next select the group then select the role you would like to assign to that specific group. Click Submit

| ≡ Grou | PRoles New Search Group v | Search | | |
|---------------|----------------------------------|--------|-----------------|------------|
| | | | | |
| • 🕸 | Q Group | | E Role | Granted by |
| ▼ Role: ad | <u>min (3)</u> | | | |
| | (i) Help Desk | | admin | (empty) |
| | i Hardware Assets | | admin | (empty) |
| | (i) Incident Management | | admin | (empty) |
| ▼ Role: an | alytics_admin (3) | | | |
| | (i) Incident Management | | analytics admin | (empty) |
| | i Help Desk | | analytics_admin | (empty) |
| | (i) <u>Hardware Assets</u> | | analytics_admin | (empty) |
| < : | Group Role New record | | | |
| | | | | |
| | ★ Group | | Q | |
| | * Role | | Q | |
| Subm | it | | | |

Step 6 – Mark as complete

How to Guide: Populate information on CIs in your CMDB:

Step 1 - In the filter navigator type "ITSM Guided Setup"



Step 3 – Click link "CMDB Identification and Reconciliation tool"





Skip

CMDB is a repository of information about your IT infrastructure and services. It helps in effective execution of your IT service management processes by:

- Providing the capability to associate configuration items (CIs)
- to incident, problem, or change management records.
- Identifying the respective support teams.
- Identifying the service level agreements and business impact information for prioritizing and escalating.
- Identifying potential upstream or downstream impact.

Note: Before populating information on CIs in your CMDB, ensure you read to know about <u>CMDB Identification and Reconciliation tool.</u>

- 1 / 2 Tasks completed
- Using services to drive ITSM processes
- Load CI data

Step 4 – Scroll down until you see "Using the Scripted IRE"

Using the Scripted IRE

Scripted IRE is intended for cases to insert more complex data set which may include relationships. I will walk you through an example below of a source that contains a Server but requires leveraging CI references as well as creating multiple classes and adding a relationship.

Create a .csv file with the Original Data mentioned below:

| A | В | С | D | E | F |
|-----------------|---------|---------------------------------|--------------------------|--------------------|----------------|
| computer_name | OS | running_process_key_parameters | running_process_command | install_directory | tomcatwar_name |
| linux_machine | Linux | running_process_key_parameters1 | running_process_command1 | install_directory1 | TomcatWAR1 |
| windows_machine | Windows | running_process_key_parameters2 | running_process_command2 | install_directory2 | TomcatWAR2 |

Step 5 – Create a .csv file in excel of the Original data set listed under the "Using the Scripted IRE" section (NOTE: Save your excel file as a .csv file)

| • | • • • | Auto | Save 🔵 o | ۰۳ G |) B | 6 | ? ~ C | | | | | | | | | | CI fil | le (s | cripte | d IRE) | ~ |
|-------------------|-----------------------------|---------------------------------------|----------------------------|--------------|-----------|-------------------------------|-------------------------------------|------------------------------|----------------------------|----------------------------|------------------------------------|------------------------------|----------------------------|---------------------------|------------------------|----------------------|--------------------|------------------|------------|-----------|-----|
| He | ome | Insert | Draw | Pag | ge Layo | out | Formu | las | Data | Re | eview | Vie | w Ç | Tell | me | | | | | | |
| ſ | | <mark>∦</mark> ⊡⊳ | Calibri (I | Body) | ~ | , 12 | ~ A | Â | ≡ | Ξ | | ≫ ∨ | | ab c <mark>∉</mark> ∨ | G | Gener | al | | | | |
| F | Paste | | B I | <u>u</u> 🗸 | - | - 3 | <u>⊳</u> ∧ | ~ | \equiv | Ξ | Ξ | ←= → | Ξ | ₽ ~ | 5 | 5 - | % | , | ← 0 i 0 | .00 00 | |
| | | ✓ | | | | | | | | | | | | | | | | | | | I I |
| G7 | , | ↓ | √ f: | x | | | | • | | | - ' | | | | | | ,,, | | | | I |
| G7 | , | ◆ × | √ <i>f</i> : B | x | | c | ; | | | | D | | | E | | | F | | G | | н |
| 67 1 | comput | A A | √ f: B OS | rur | ning_pr | c ocess_k | : : :ey_parar | neters | runnin | g_proc | D cess_co | mmand | instal | E I_direct | tory | tomc | F | _nan | G | | H |
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| G7 1 2 3 | comput linux_m window | A er_name nachine vs_machine | B OS Linux Window | rur s rur | nning_pro | ocess_k ocess_k ocess_k | key_parar key_parar key_parar | neters neters1 neters2 | runnin runnin runnin | g_proc g_proc g_proc | D cess_co cess_co cess_co | ommand ommand1 ommand2 | instal instal instal | E I_direct I_direct | tory tory1 tory2 | tomo Tomo Tomo | F atwar atWA | _nam R1 R2 | G | | H |

Step 6 – Return back to the CMDB section of the ITSM guided setup page

Skip

Step 7 – Select "Load CI data", Select configure on step 1



1 / 2 Tasks completed



| 1 / 2 Tasks completed | Load Cl data Skip Add Notes Last visited 2h ago by System Administrator | | | | | | |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|--|--|--|--|
| Using services to drive ITSM processes | When a CMDB is o as computers, se | created from the beginning, it is common for customers to have rvers, printers, applications, and so on. These can be quickly im | lists of their more easily identified CIs, such ported into the ServiceNow CMDB to form | | | | |
| Load CI data | the starting point | | | | | | |
| | The following fiel | ds are mandatory to facilitate certain automation features with | in the ITSM processes | | | | |
| | CI Fields | Description | | | | | |
| | Name | Must exist for the CI record to be easily referenced by other pro | ocesses. | | | | |
| | Approval group | Approval group Required to drive automated approvals in the change management process. | | | | | |
| | Support group Required to drive automated assignment in the incident management process. | | | | | | |
| | Complete the fou target CMDB [cm/ | r steps in this activity to perform a bulk import from an externa db_ci] table of the instance through an import set (a temporary | l data source and populate data in the table in the instance). | | | | |
| | ✓ Step 1 | • 3kp 2 • 5kp 3 • 5kp 4 | | | | | |
| | Completed a | day ago by System Administrator | Mark as Incomplete Configure | | | | |
| | Upload data data source. | from an external data source into an import set. You can use a | CSV, XLS, or XML file as the external | | | | |

Step 8 – Select option "existing table", next select "file"

| Load Data | | |
|----------------------|--------------------------------------------------------------------------|--|
| Import set table | Create table Existing table User [imp_user] | |
| Source of the import | File Data source | |
| File | Choose File CI fil).csv | |
| Sheet number | 1 | |
| Header row | 1 | |
| | Submit | |

Step 9 – Click "Choose file" and upload the .csv file that was created in excel. Click Submit

| Load Data | |
|----------------------|--------------------------------|
| Import set table | Create table |
| Import set table | Existing table User [imp_user] |
| Source of the import | File Data source |
| File | Choose File CI fil).csv |
| Sheet number | 1 |
| Header row | 1 |
| | Submit |

Step 10 – The .csv file will show in "Import Sets"

Progress

| Name | ImportProcessor |
|-----------------|---------------------------------------------------------------------------------------------------|
| State | Complete |
| Completion code | Success |
| Message | Processed: 2, inserts 2, updates 0, errors 0, empty and ignored 0, ignored errors 0 (0:00:00.108) |

Next steps...

| Import sets | Go to the import sets for this data load | | | | | | |
|--------------------------------|------------------------------------------|------------------------------------------------------------------|--|--|--|--|--|
| Loaded data | Go to the | Go to the newly imported data inside the staging table: imp_user | | | | | |
| Create transfo | rm map | Create a transform map for the newly staged data | | | | | |
| Run Transforn | n Transf | form a loaded import set using an existing transform map | | | | | |
| Import log View the import log | | | | | | | |

Created Import Sets Search v Search ----1 to 3 of 3 Å All > Data source Import set table name = imp_user Q Short description Number State Import set table Created Data source ci file (scripted 2022-03-12 Type: File ISET0010003 Loaded User [imp_user] ire).csv Format: CSV 14:57:46 (Uploaded) ci file (scripted Type: File 2022-03-11 ISET0010002 Loaded User [imp_user] (i) <u>ire).csv</u> Format: CSV 09:57:48 (Uploaded) Import Set ISET0010003 Update Delete 000 Number ISET0010003 Created 2022-03-12 14:57:46 Asynchronous Mode Load completed 2022-03-12 14:57:46 Loaded Load run time State 0 Seconds Data source ci file (scripted ire).csv (Uploade port set table User [imp_user] t description Type: File Format: CSV

Step 11 – Click the CSV file that was imported