System Center 2012 R2 Lab 4: IT Service Management

Hands-On Lab | Step-by-Step Guide

For the VMs use the following credentials:

- Username: **Contoso\Administrator**
- Password: **Passw0rd!**

Version: 1.5.5

Last updated: March 28, 2014

Please share any feedback with the IT Camps Planning Team:
ITCampPlan@Microsoft.com

4 - IT Service Management

90   minutes optional (1:30 total)

1.   SCSM: IT Service Management Components (15 mins)

2.   SCSM: Manage Service Levels (25 mins)

3.   SCSM: Manage Incidents (25 mins)

4.   SCSM: Manage Change Requests (25 mins)

4.1 - SCSM: IT Service Management Components

4.1.1 - SCSM: Introduction to Service Manager

In this exercise, the Service Manager console is used to browse the Administration, Library, Work Items, and Configuration Items workspaces. Service Manager is used for both IT Service Management (ITSM) and self-service capabilities.

**Estimated time to complete: 15 minutes**


*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.


2. Navigate to the **Administration** workspace. The **Administration** workspace is used to configure and manage administrative items and settings, such as connectors, management packs, notifications, Self-Service Portal settings, security, service-level management, general settings, and workflow settings.
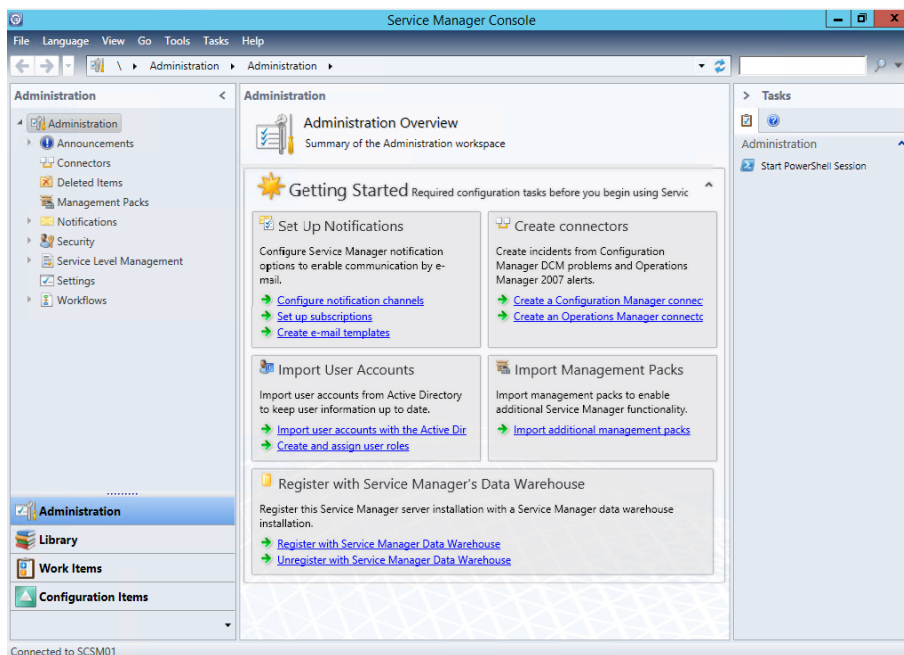
3. Expand **Notifications** and select **Templates**.   New Email Notifications can be created here and existing templates can be reviewed.
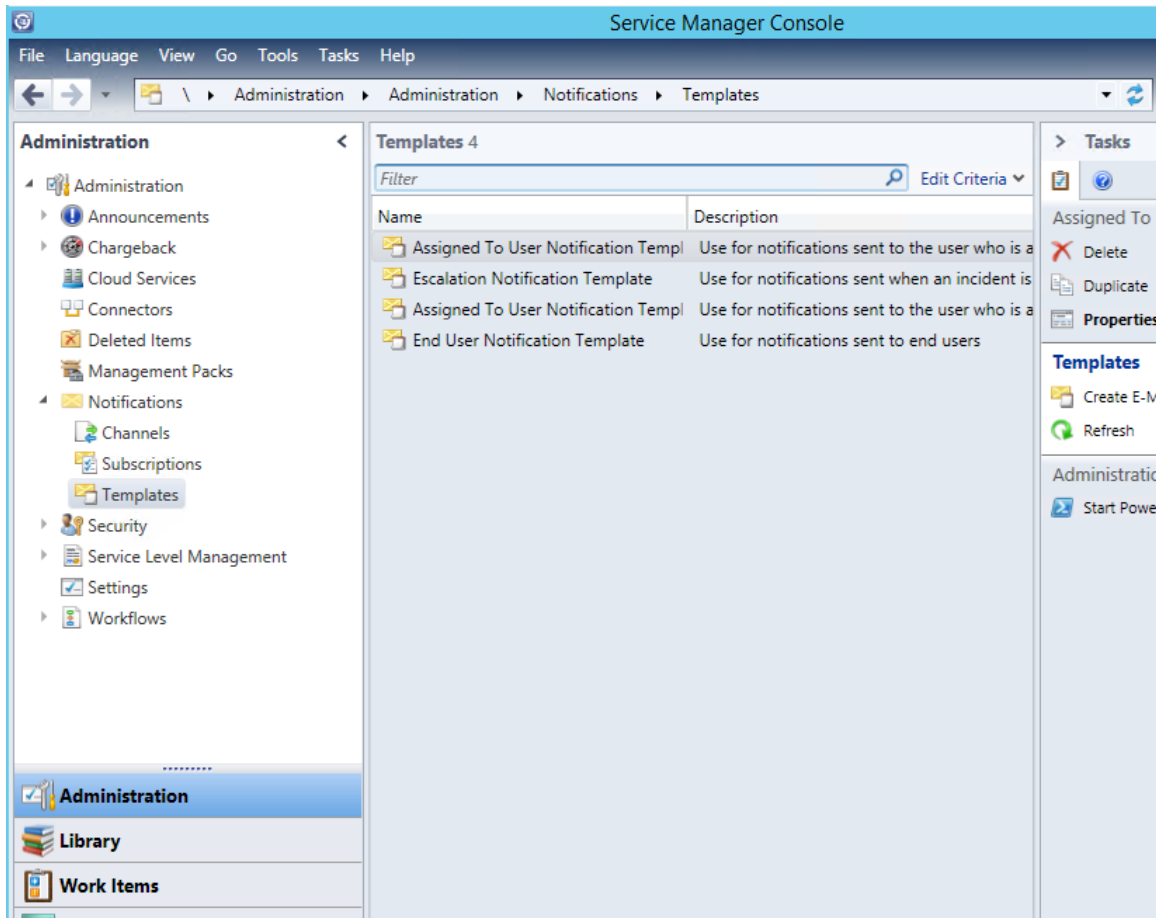

4. Click **Connectors**. Connectors are used to import data as configuration items from Active Directory Domain Services (AD DS), System Center Configuration Manager, System Center 2012 - Orchestrator, System Center 2012 – Virtual Machine Manager (VMM), and System Center Operations Manager.

5. Expand **Security** and click **User Roles**. In System Center 2012 – Service Manager, the security rights that allow users to access or update information are defined in a user role profile. A user role profile is a named collection of access rights, and it usually corresponds to an employee's business responsibilities. Each user role profile controls access to such artifacts as knowledge articles, work items (incidents, change requests), authoring, administration, and other credentials.

6. Click **Settings**. Here various settings relating to services can be set.
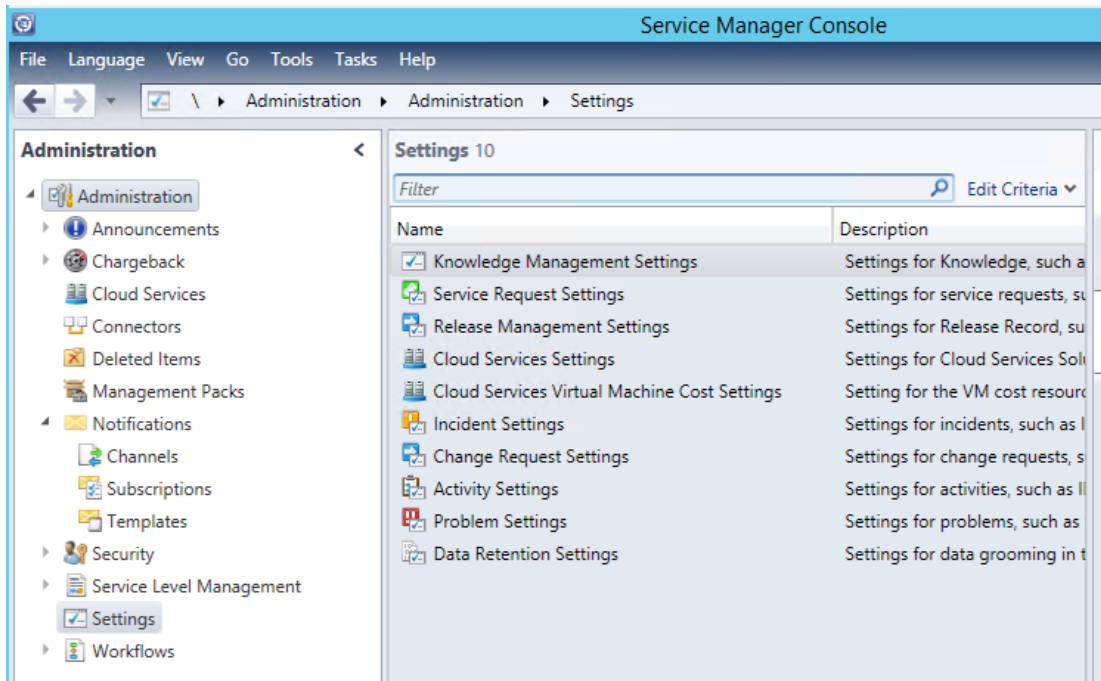
7. Expand **Workflows** and click **Status.** A workflow is a sequence of activities that automate a business process. The status node shows all the Workflows in the environment and their status.

8. Select the **Library** workspace. The **Library** pane allows the user to configure and manage library items, such as catalog groups, knowledge articles, lists, work item queues, runbooks, service catalog offerings, console tasks, and templates.
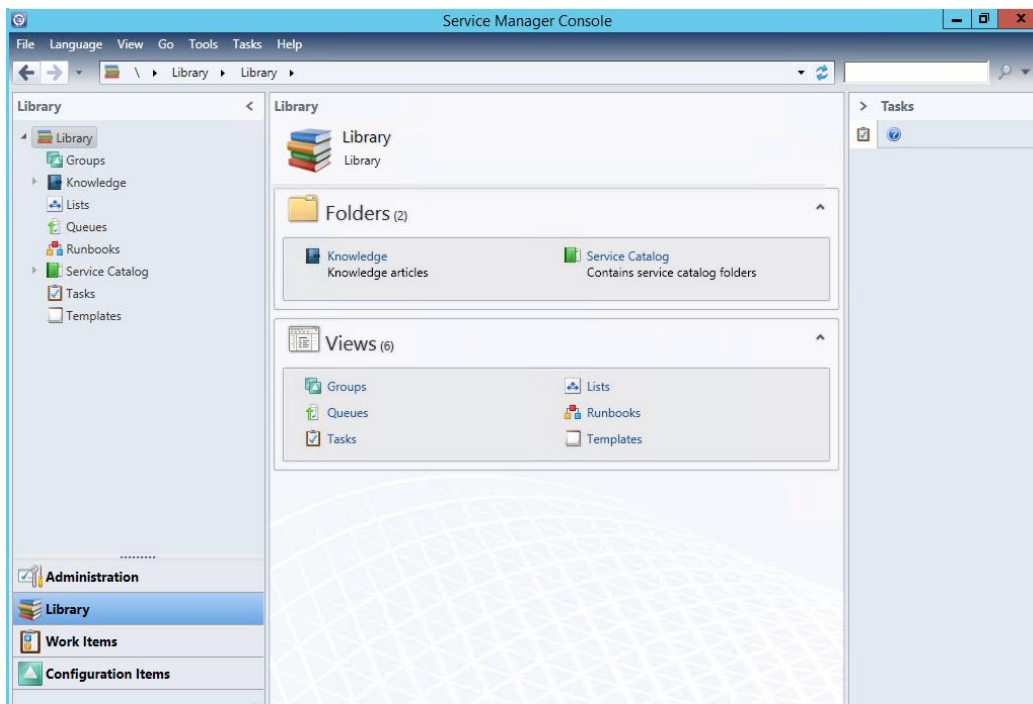
9. Select **Lists**. This node should be used to manage lists.
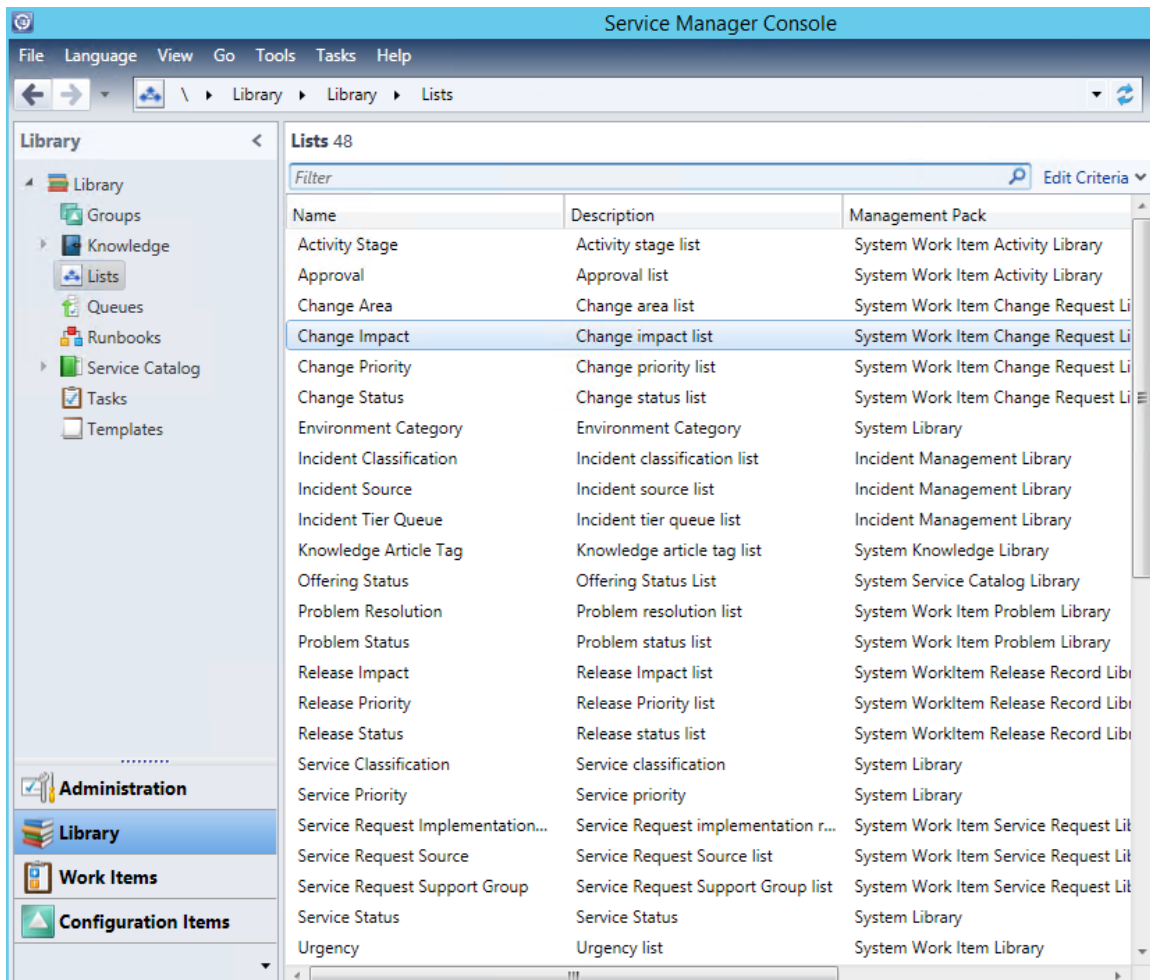
10. Click **Runbooks**. **Runbooks** contain the instructions for an automated task or process. The individual steps throughout a runbook are called activities. Within the Runbook, additional controls provide information and instructions to control the sequence of activities in the Runbook.

11. Expand **Service Catalog** then expand **Request Offerings** and click **All Request Offerings**. Request offerings are catalog items that describe the item, assistance, or action that is available to end users in the service catalog in System Center 2012 – Service Manager. Request offerings are normally placed in logical groups of service offerings. Both service offerings and their request offerings are available to Self-Service Portal users when the status of the offerings is set to Published and if end users have been assigned a corresponding Service Manager user role. Only users who have been assigned a user role associated with a catalog group that contains catalog items can use the Self-Service Portal to access the service catalog.

12. Expand **Service Offerings** and click **All Service Offerings**. Service offerings are logical groups of request offerings. For a service offering to appear in the Self-Service Portal, each service offering must have at least one request offering added to it. After a service offering and a request offering are published, it is a straightforward process to associate them as a collection.

13. Select the **Work Items** workspace to open the Work Items pane. The Work Items workspace will be used for creating and managing work items, such as activities, change requests, incidents, problem records, release records and service requests.
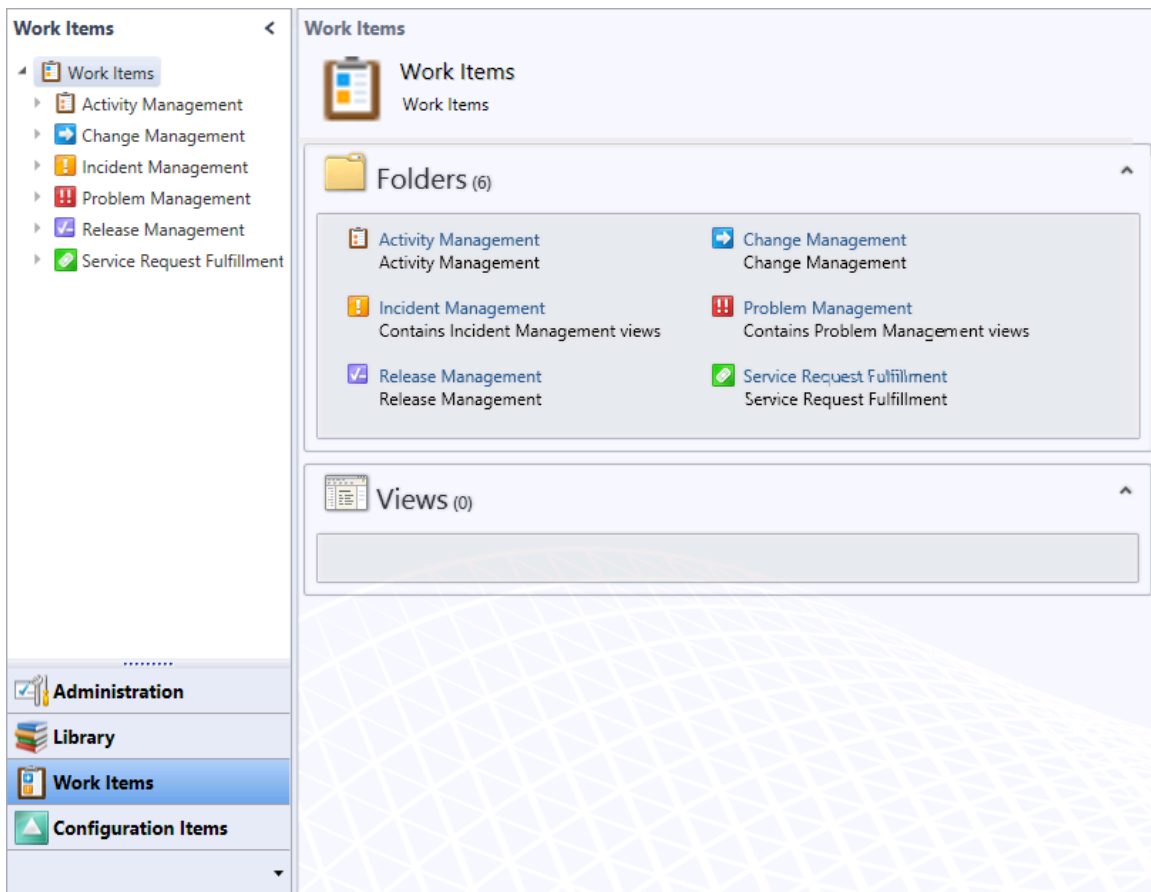

14. Click **Activity Management**. This node is used to approve a review activity, complete or fail a manual activity and skip a failed activity.

15. Click **Change Management**. This node is used to create a new change request, add related items to a change request, add Manual activities to a change request, edit a change request, unblock a failed change request and close a change request.

16. Click **Incident Management**. This node is used to create a parent incident from an incident form, link an open incident to a parent incident, resolve a parent incident, reactivate a resolved parent incident, view a parent incident from a child incident, link a new incident to a parent incident, manually create a new incident, change an existing incident, contact a user from an incident form, create an incident view and personalize it and resolve and close an incident.
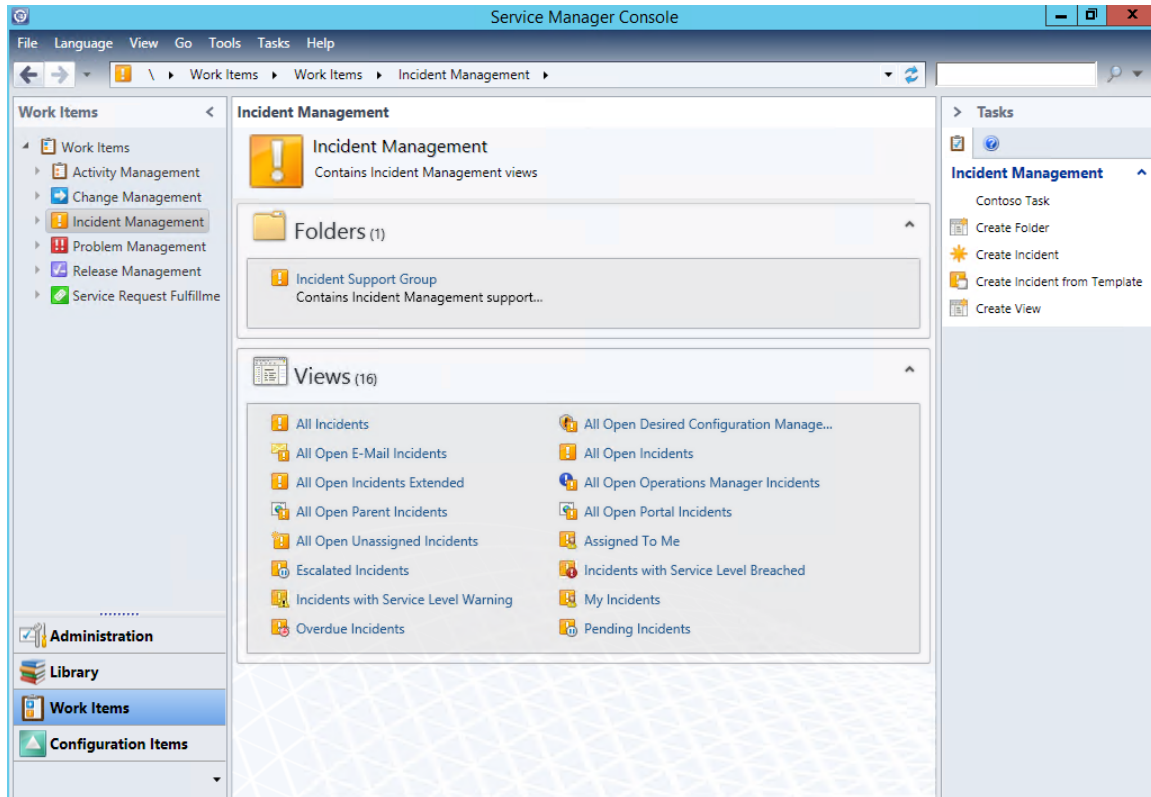
17. Click **Problem Management**. This node is used to create and edit problem records, resolve problem records and related incidents automatically and link an incident or change request to a problem record.

18. Click **Release Management**. This node is used to create a release record, promote a release record to a parent release record, demote a parent release record to a child release record, link a child release record to the current release record, unlink a child release record from the current release record, create a build configuration item, create an environment configuration item, add release package information to a release record, chose changes to deploy, plan release activities, skip a failed activity and determine status and progress for a change request in the release record.

19. Click **Service Request Fulfillment**. This node shows services requests submitted through the Service Manager Self-Service Portal (SMPortal). It can manage service requests, create a service request using the Service Manager console, approve and complete a service request using activities, cancel a service request, close a service request and view service request details.

20. From the Navigation pane, click **Configuration Items**.

21. The **Configuration Items** pane allows the user to create and manage configurations items, such as builds, business services, computers, build environments, printers, software, software updates, and Service Manager users.
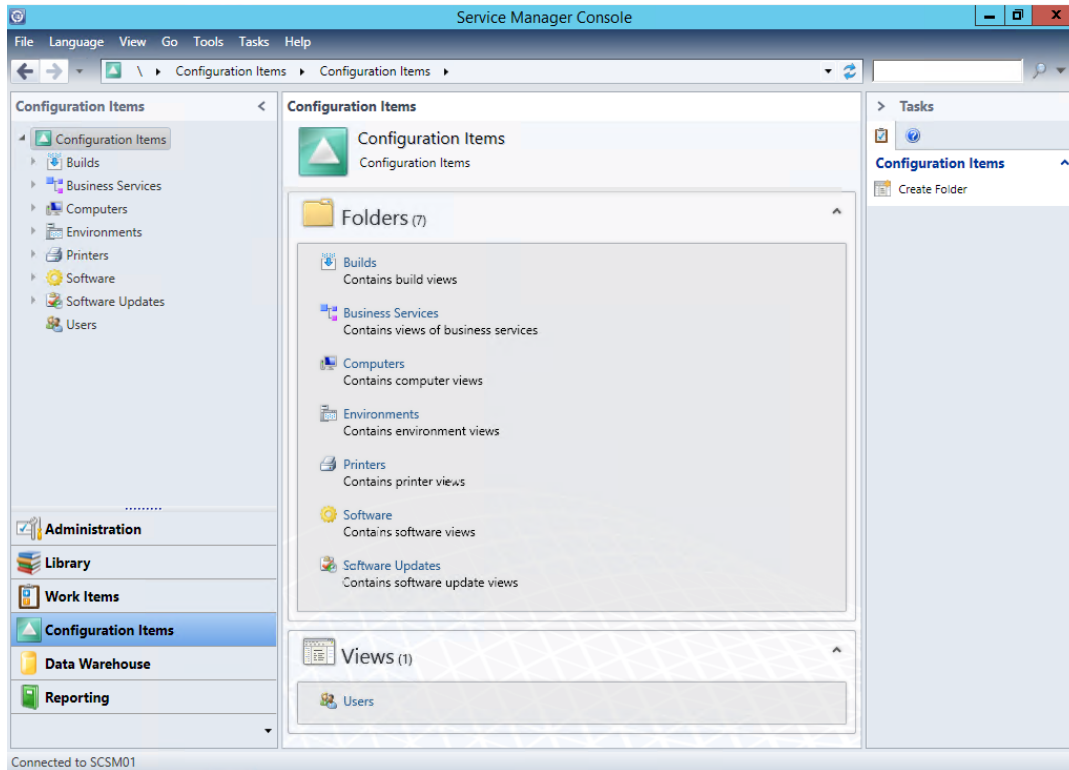
22. Click **Computers**. In this node of the Configuration Items workspace, user can perform tasks that are common to all configuration items.

23. Expand **Computers** and select **All Windows Computers**. This node is used to inventory all machines in the environment.

SCSM02

*Perform the following on **SCSM02***

24. From **SCSM02**, open the **Service Manager Portal** by selecting the **Internet Explorer** icon from the taskbar.

25. If the site does not open, browse to http://SCSM02:81/SMPortal/SitePages/Service%Catalog.aspx. One or two prompts may appear. Log in with a username of **contoso\Developer** and a password of **Passw0rd!**
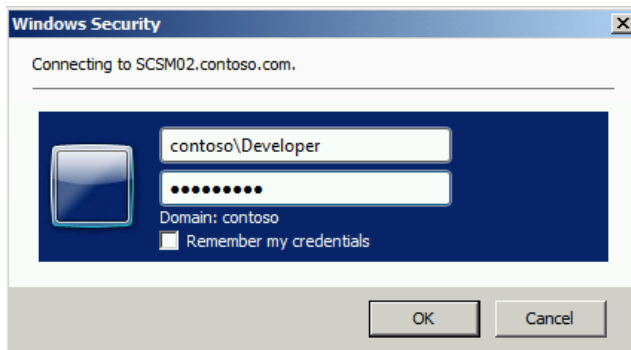
26. Note that the site may already be open. If so, look on the Home page, in the upper right corner, to ensure that it is logged in as contoso\Developer. If not, log out and log back in using the correct credentials.

27. While on the Home menu click **List view** to display customized IT service offerings that have been published by the IT Department.
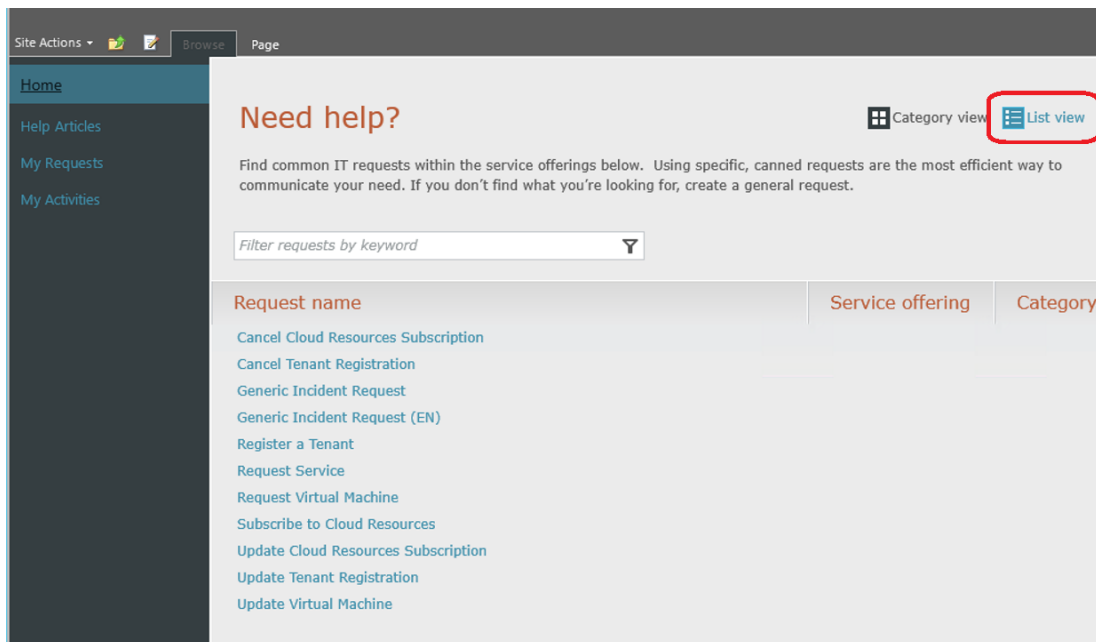
28. From the menu on the left, click **Help Articles**. This page would display any articles published by the IT department. In this lab, this page is blank.

29. From the menu on the left, click **My Requests**. This page would display any requests previously made by this user. In this lab, this page is currently blank.

30. From the menu on the left, click **My Activities**. This page would display any actions and tasks that the user needs to perform. In tis lab, this page is currently blank.

4.2 - SCSM: Manage Service Levels

4.2.1 - SCSM: Create a Group & Queue

In this exercise, the Service Manager console is used to create a group and queue. In Service Manager a group is used as a container of similar objects, such as SQL Servers. A queue is used to dynamic group similar work items that meet a specific criteria. In this exercise incidents related to SQL Server will be placed in the same queue.

Note: Some items in the Service Manager console may not display correctly when it is maximized and running in a virtual machine. If any display issues are encountered, resize the Service Manager console so that it is not maximized.
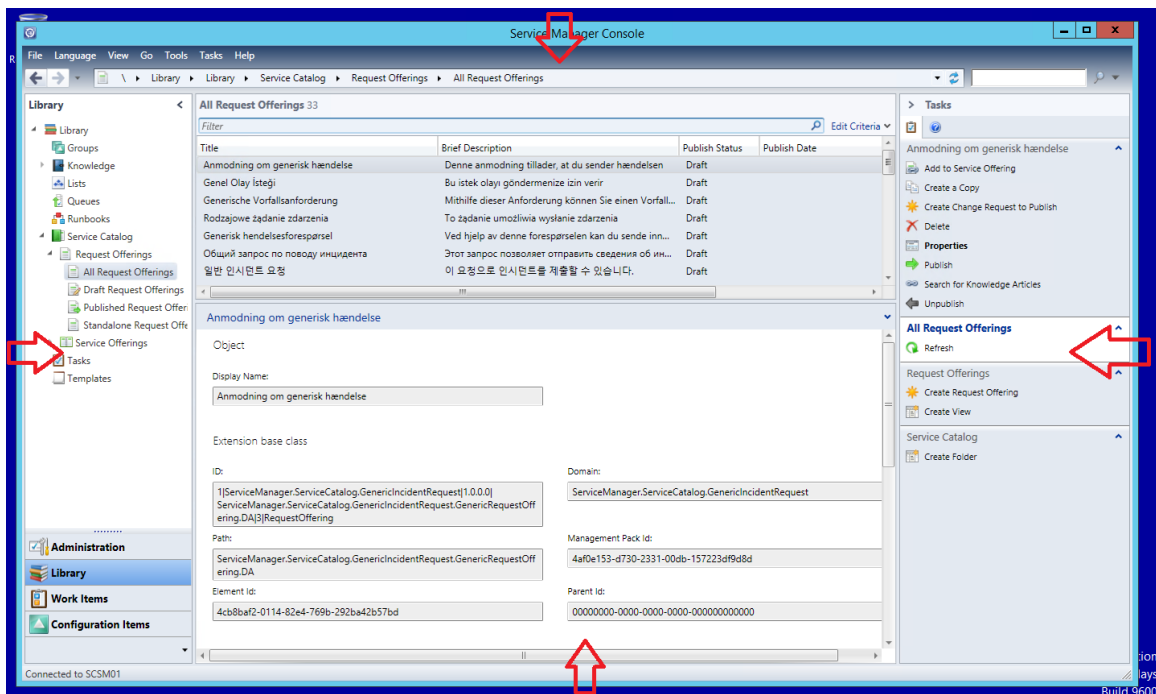
Estimated time to complete: 10 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Library** workspace.
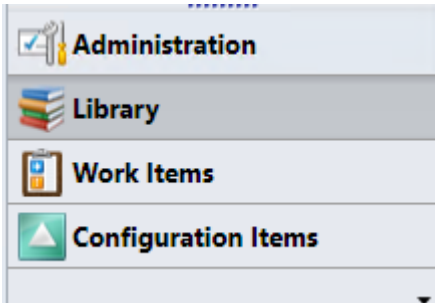
3. Expand **Library** and select **Groups**.
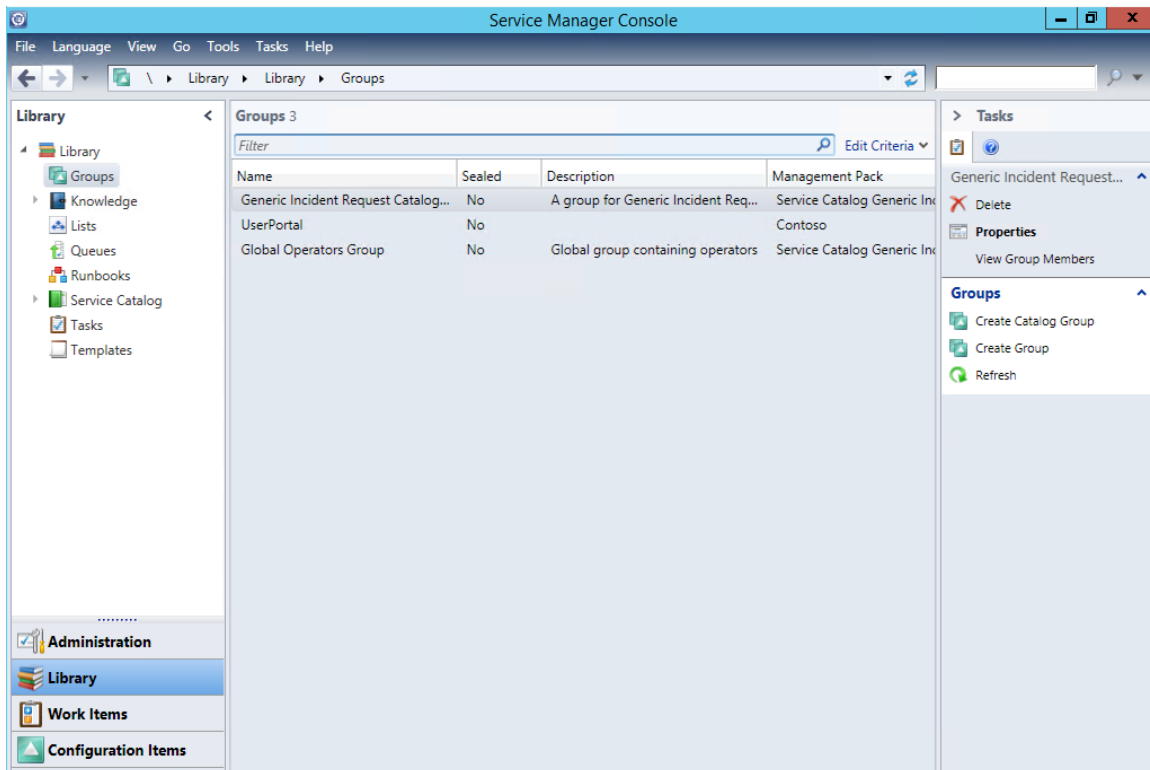
4. On the **Task** bar on the right, select **Create Group**.

5. When the **Create Configuration items Group** wizard appears, click **Next**.

6. Enter the following then click **Next**:

11. Under **Included Members**, click **Add**.

12. When the **Select objects** dialog opens, from the dropdown, select **Windows Computer**.

13. Select **all** of the computers **except DC01.contoso.com** (only select computers starting with SC) and click **Add** and click **OK**.
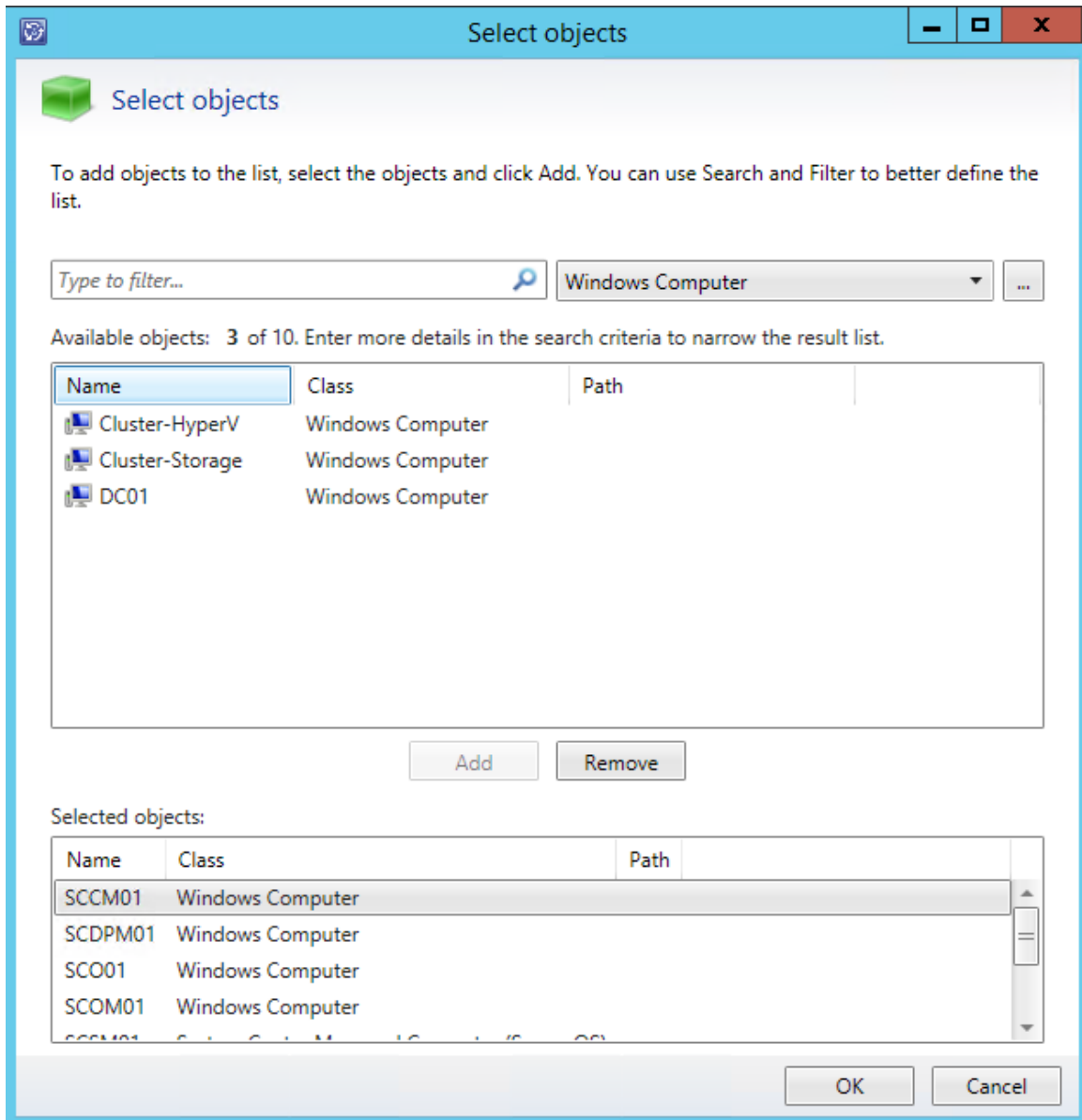
14. On the **Included Members** page, click **Next**.

15. On the Dynamic Members page, select the **ellipses** (…) and in the filter, type **Windows Server** then select **Windows Server** and click **OK**.

16. Return to the Dynamic Members page. Under **Available Properties** select **Display Name**. Click **Add**.

17. Under **Criteria** where it says **Display Name**, select the dropdown that says **Contains**. Select **starts with.**

18. In the dialog box to the right, which is surrounded with a red border, enter the characters **SC**. This means that all new Windows Server computers which are added that have a name which begins with SC are for System Center, will be added to this group because they contain a SQL server.
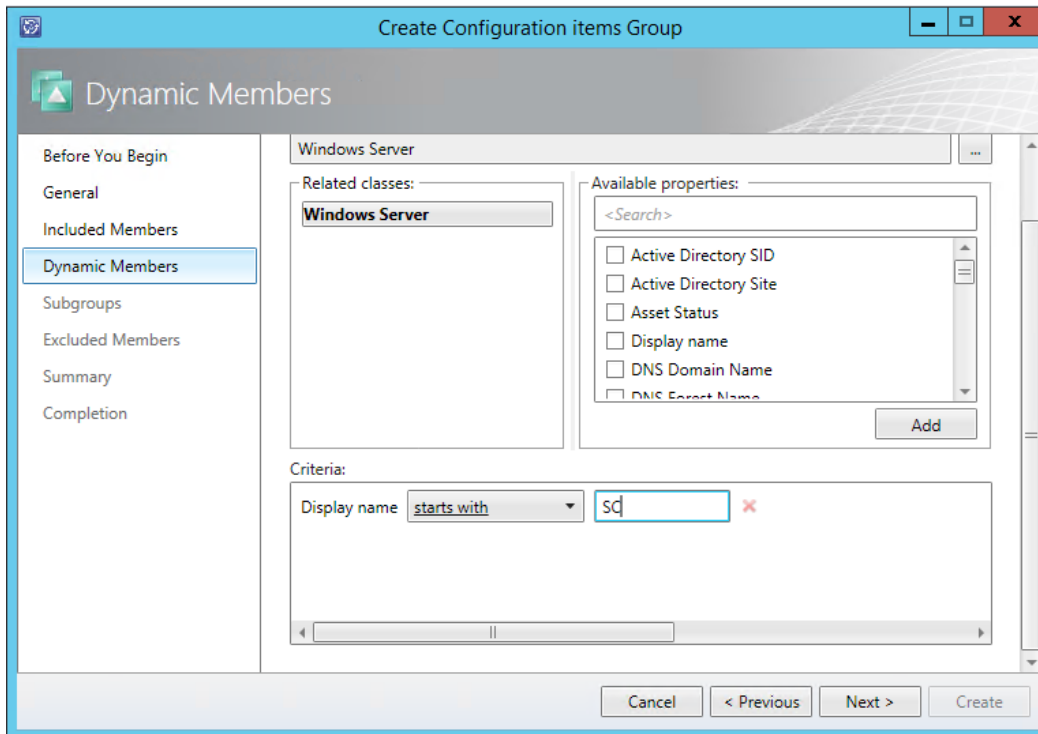
19. Click **Next**.

20. On the **Subgroups** page, click **Next**.

21. On **Excluded Members**, click **Next**.

22. On the **Summary** tab, ensure that all of the items match the screenshot below and click **Create**.
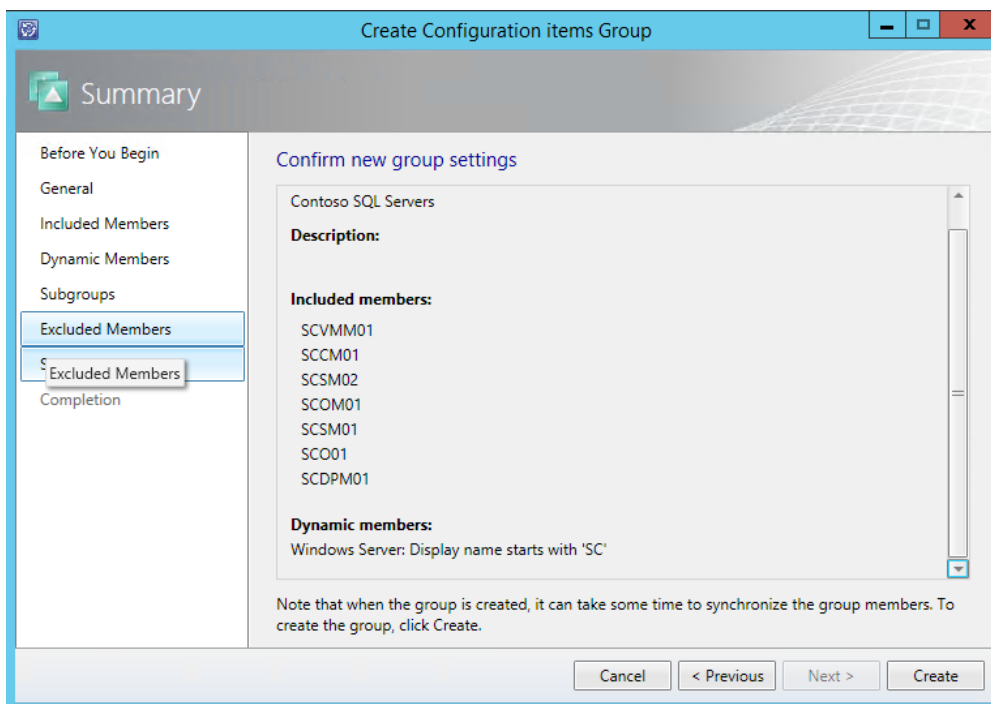
23. On the Confirmation page click **Close**.

24. Wait for the groups page to reload and note the newly created group for **Contoso SQL Servers**.
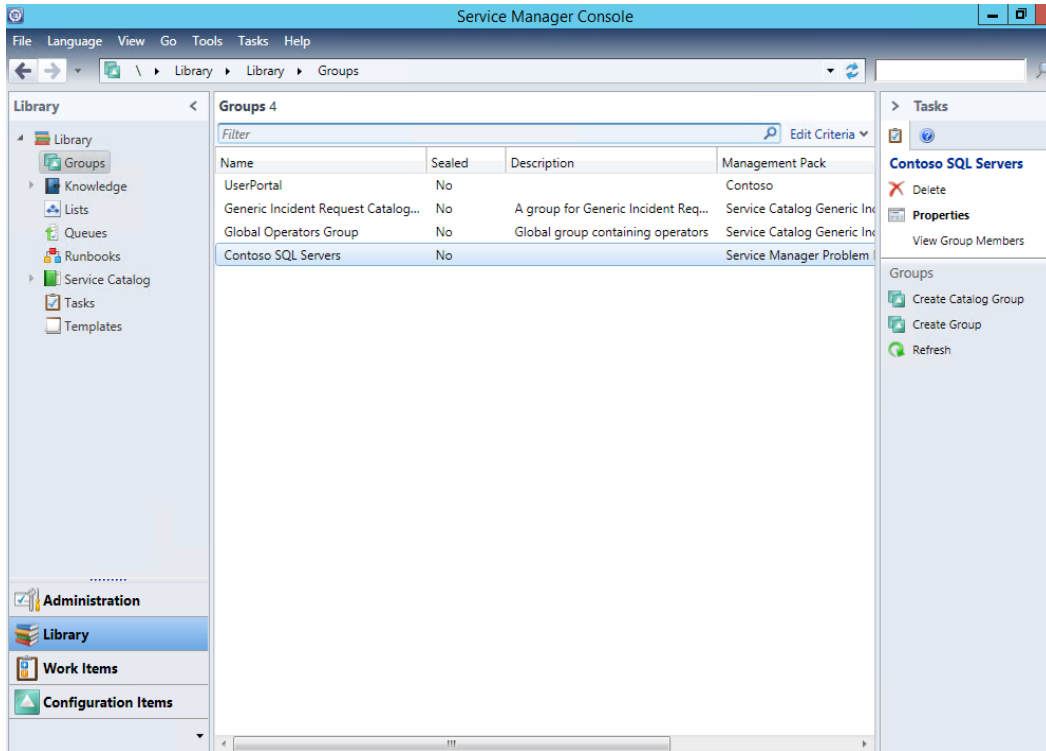
25. From the left navigation page, select **Library > Queues**.

26. From the Tasks pane select **Create Queue**.
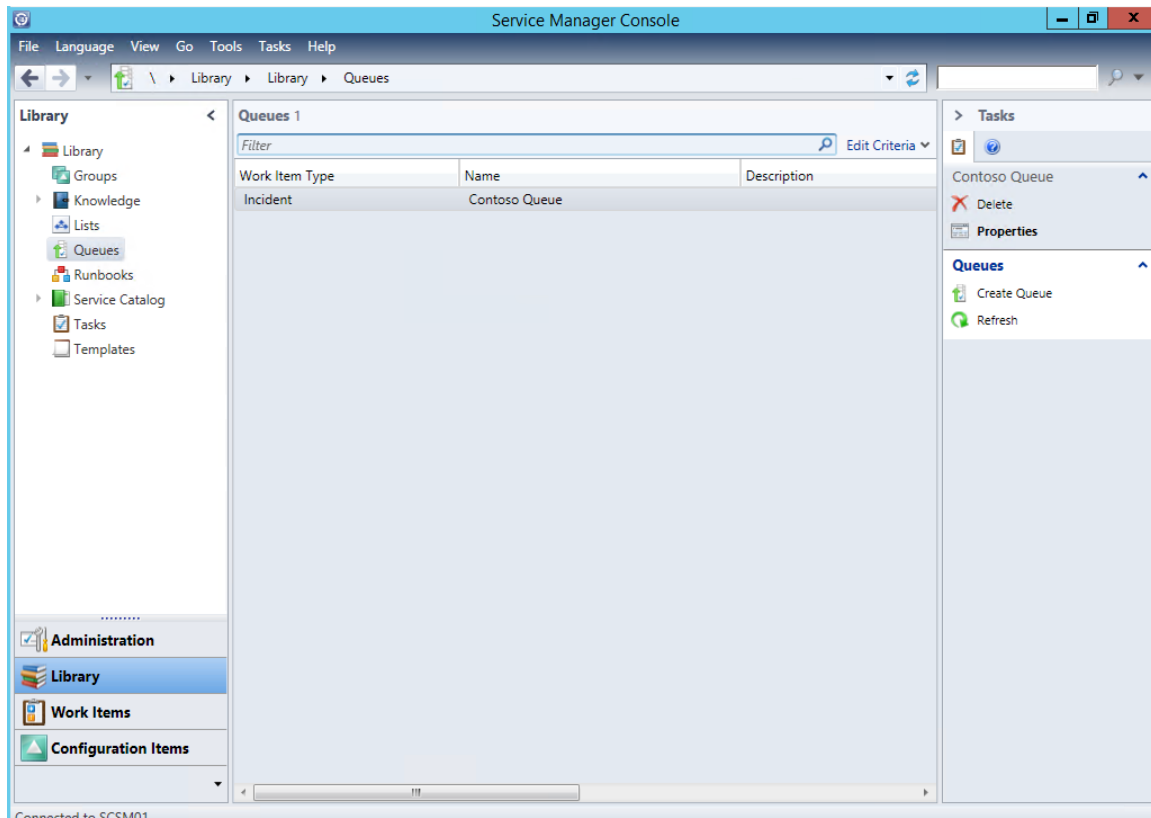
27. On the **Create a Queue** wizard on the **Before You Begin** screen click **Next**.

28. From the **General** tab, under **Queue name** enter: **SQL Server Items**.

29. Under **Description**, enter **All Items and tasks related to SQL server**.

30. Under **Work Item** type select the **ellipsis (…)**

31. On the **Select a class** page, select **Problem** and click **OK**.

32. On the management pack dropdown select **Service Manager Problem Management Configuration Library**.
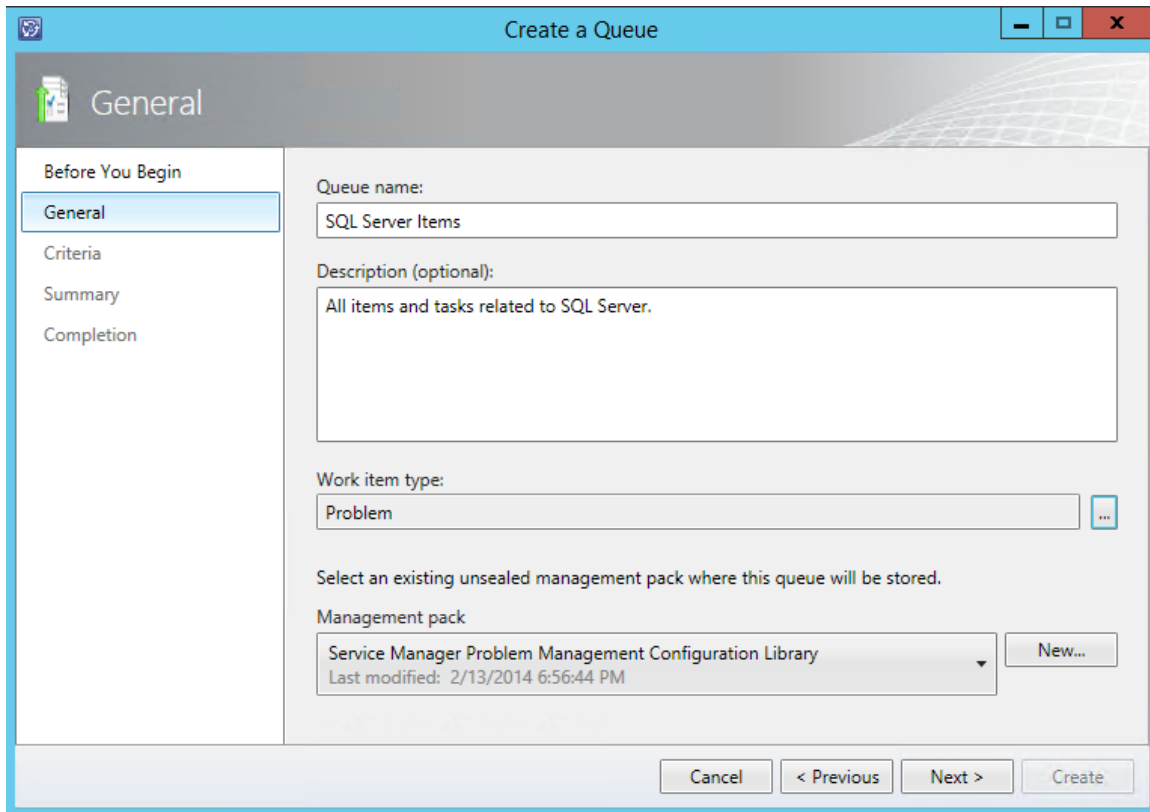
33. Click **Next**.

34. On the **Criteria** tab, under **Available properties**, select **Description** and click **Add**.

35. Under **Criteria** where it says **[Work Item] Description contains** in the box with the red border enter **SQL**.

36. *Note: this will ensure that any issues that include the terms "SQL" will get flagged and included in this queue so that the SQL Administrator can more easily find issues related to the components that they manage.*
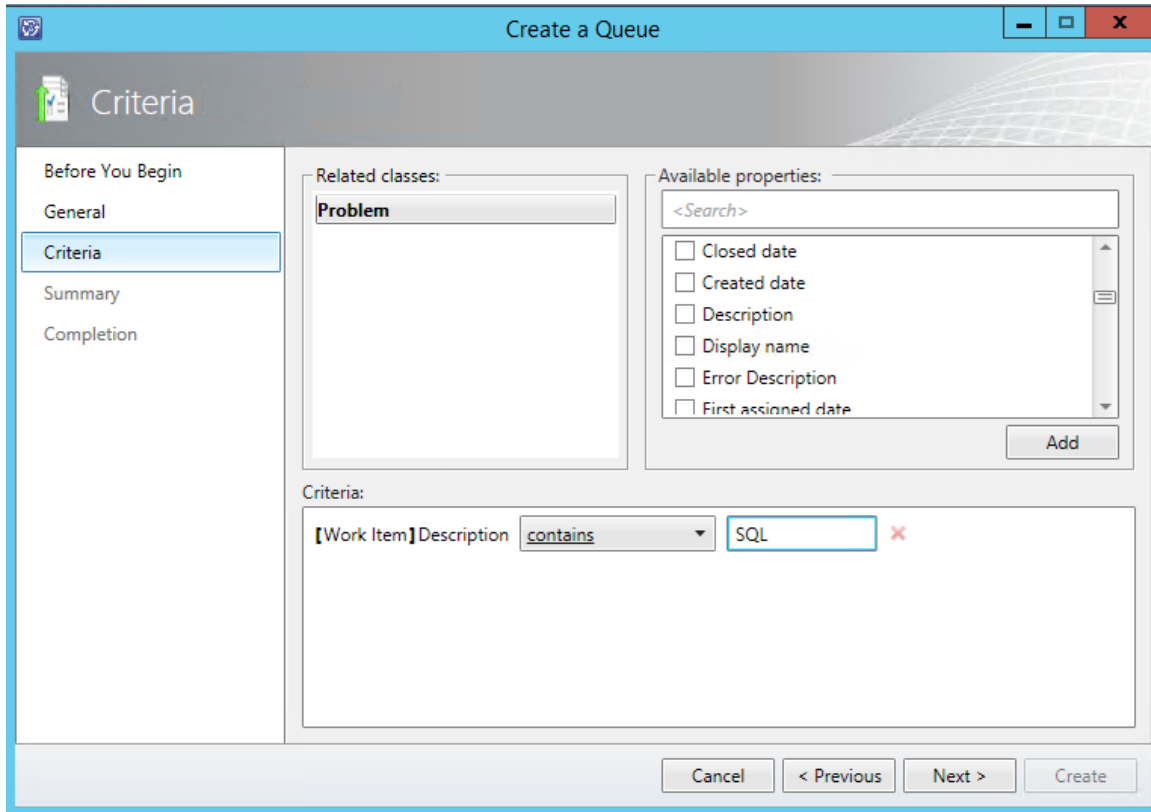
37. Click **Next**.

38. On the **Summary** screen review the settings and click **Create**.

39. On the **Completion** screen click **Close**.

40. On the **Library** workspace remain on the **Queues** page and wait for it to refresh. The **SQL Server Items** in the queue is now visible.

4.2.2 - SCSM: Create a Calendar & Metric

In this exercise, the Service Manager console is used to create a calendar and metric. In Service Manager a calendar is used to define work days, hours and holidays to create a work schedule for IT to resolve incidents and fulfill service requests. A metric is used to define time metrics against a calendar item, corresponding to a service level objective. A time metric is the measurement between start and end dates.

Estimated time to complete: 5 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.


2. Navigate to the **Administration** workspace.
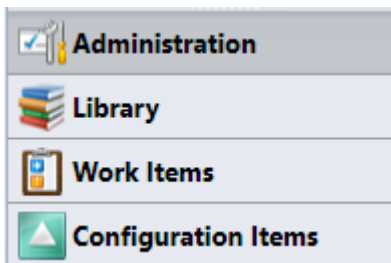
3. Expand **Administration > Service Level Management**. Select the **Calendar** node.
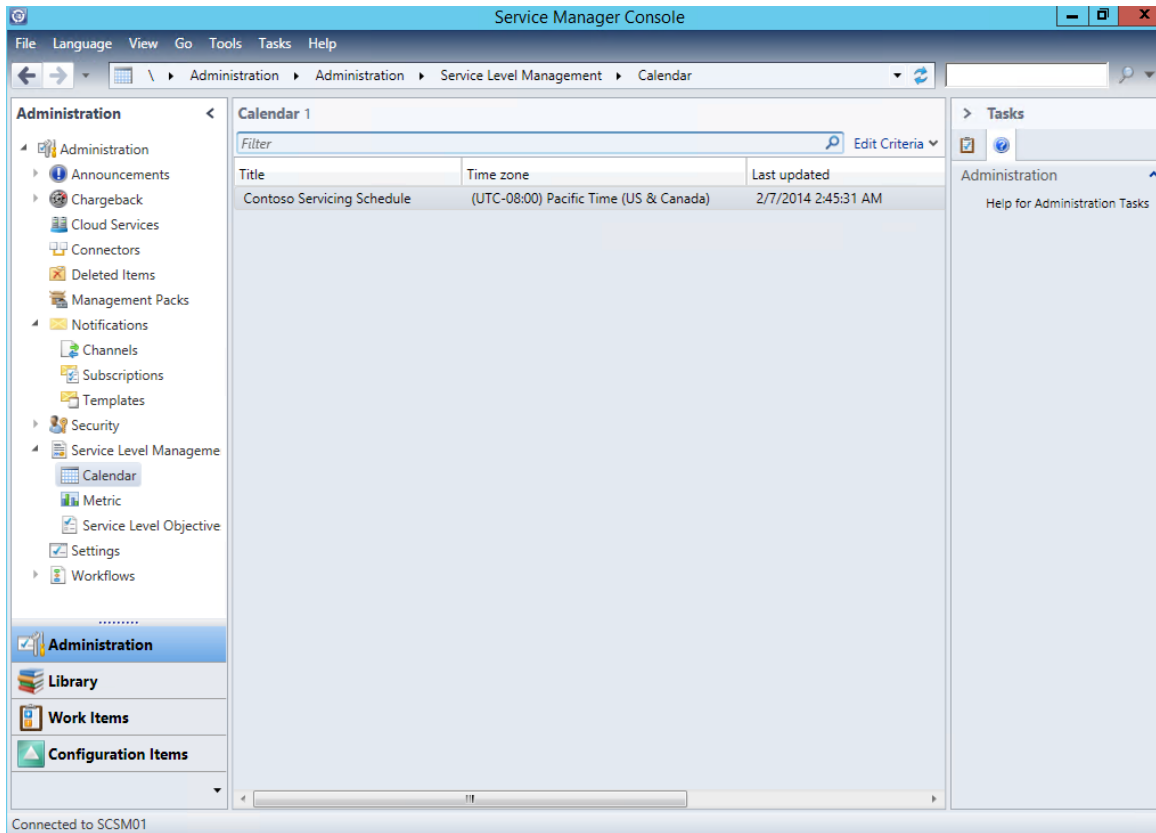
4. From the Tasks pane select **Create Calendar**.

5. Under **Title** enter **SQL Admin Schedule**.

6. Under **Working days and hours**, next to **Work Day** select: **Monday/Tuesday/Wednesday**.

7. Under **Start time** enter **8:00AM** and under **End time** enter **6:00PM**.
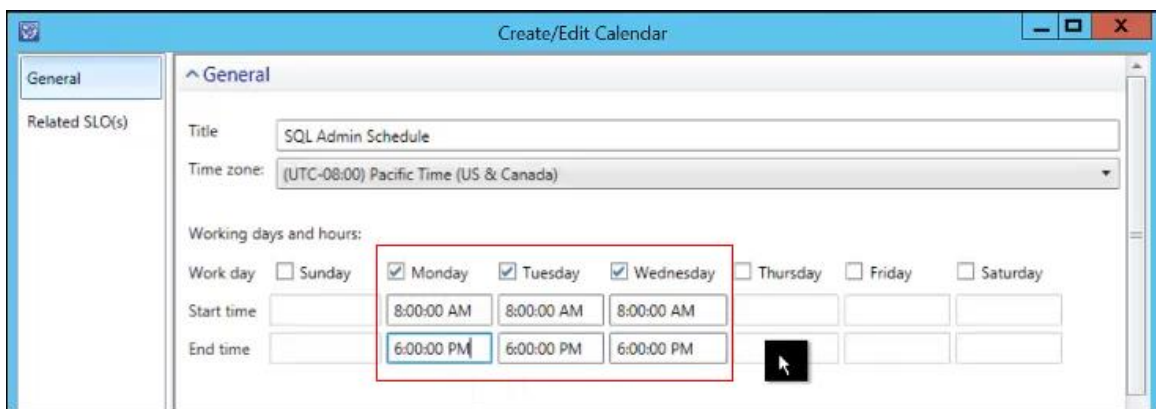
8. Under **Holidays** click **Add**.

9. Under **Name** enter **New Year's Day**.

10. Under **Date** select **January 1st** of the next year and click **OK**.
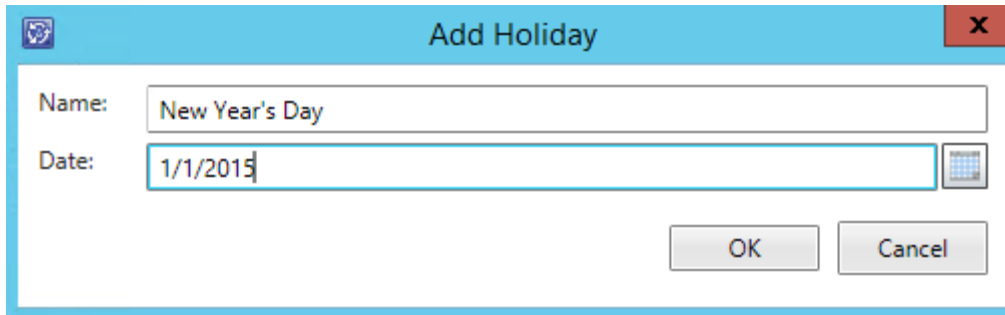
11. Click **OK** to close the calendar object.

12. Once it's closed return to the **Calendar** view and note that the new calendar object has been created which is the work schedule of the SQL Administrator: **SQL Admin Schedule**.
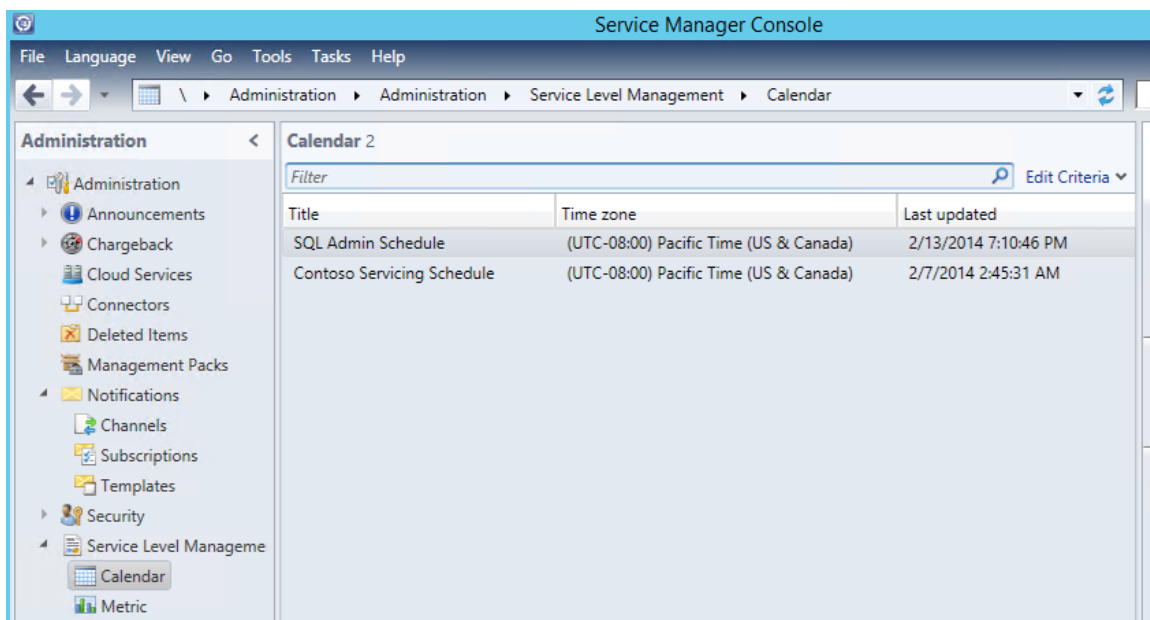
13. Navigate to **Administration** > **Service Level Management** > **Metric**.
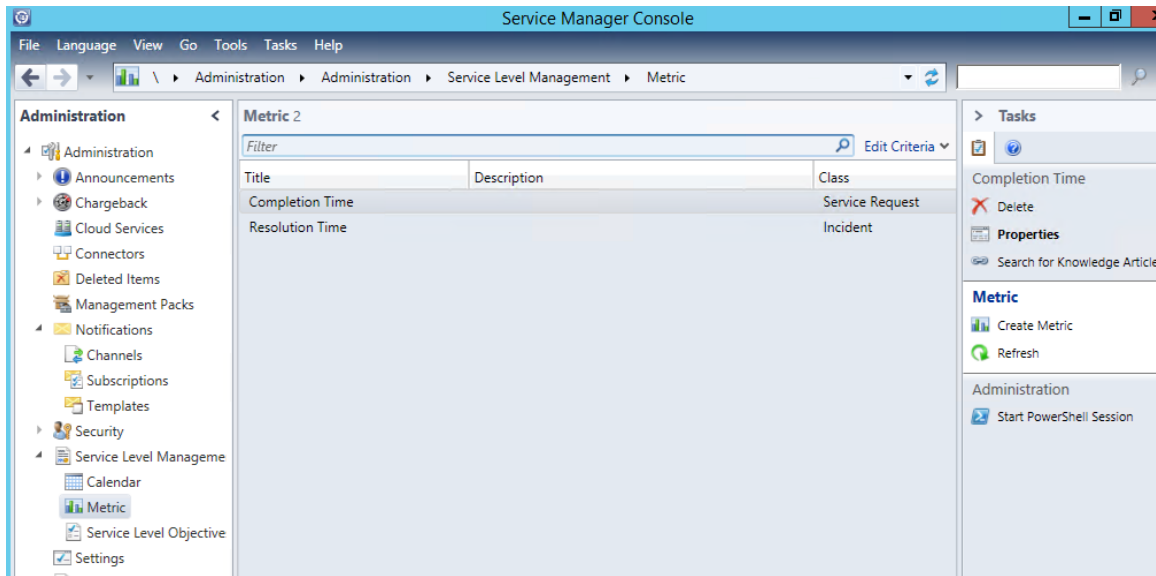
14. On the **Tasks** pane select **Create Metric**.

15. In the **Title** add **SQL Time to Resolution.**

16. Under **Description** enter **Total time to resolve SQL-related issues.**

17. Under **Class** select **Browse**.

18. Select **Problem** and click **OK**.

19. Under **Start date** select **Actual start date** and under **End date** select **Actual end date**. Click **OK**.

20. Return to the **Metric** view and note **SQL Time to Resolution** is now visible.

4.2.3 - SCSM: Create a Service Level Objective

In this exercise, the Service Manager console is used to create a service level objective. This creates relationships between a queue and a service level, and defines the relationship between a calendar item and a time metric. This provides IT with time-based goal to complete the task and meet the service level objective.

Estimated time to complete: 10 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Administration** workspace.
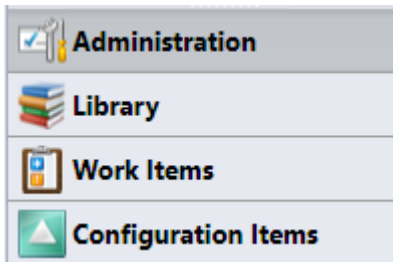
3. Navigate to **Administration** > **Service Level Management** > **Service Level Objectives**.
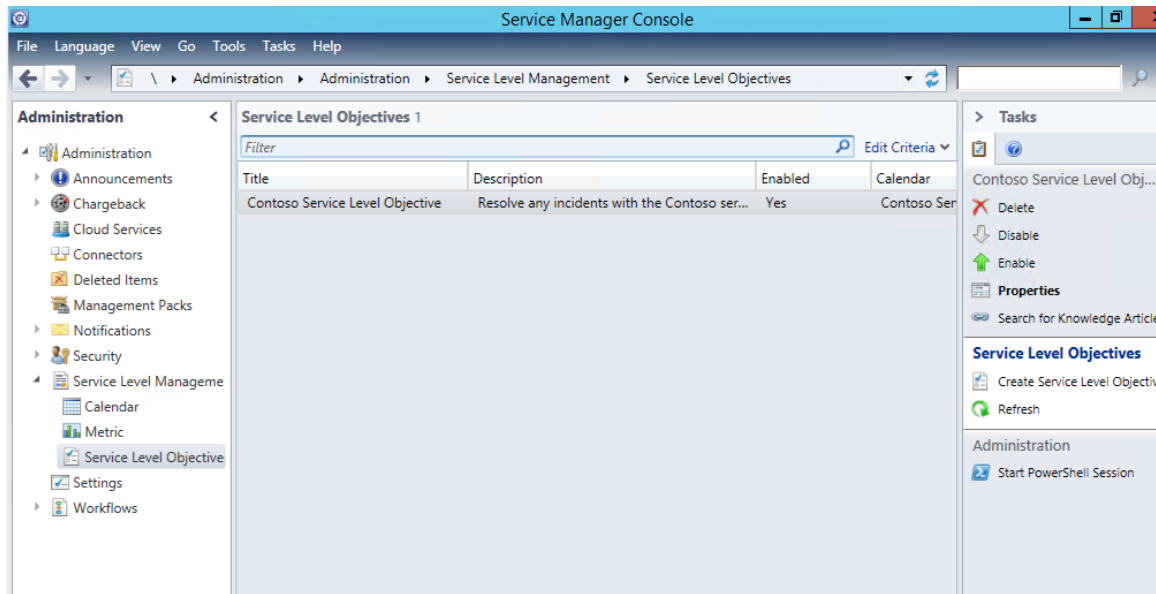
4. From the **Tasks** pane select **Create Service Level Objective**.

5. On the **Before You Begin s**creen review the information and click **Next**.

6. In the **Title** enter **SQL Server Resolution SLA**.

7. Under Description enter **Service goal to resolve all SQL server issues**.

8. Under **Class** select **Problem**. Click **OK**.

9. Under **Management pack** ensure that **Service Manager Problem Management Configuration Library** is selected.

10. Ensure that the **Enabled** check box is selected and click **Next**.
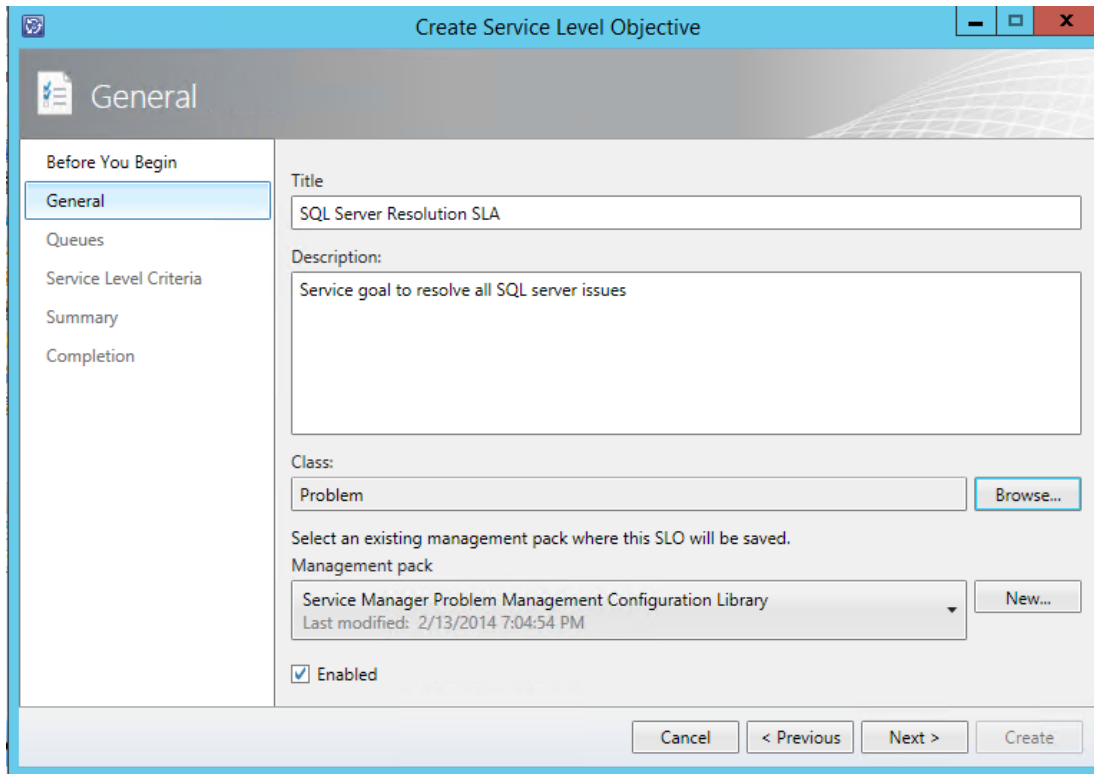
11. On the **Queues** page select **SQL Server Items**.
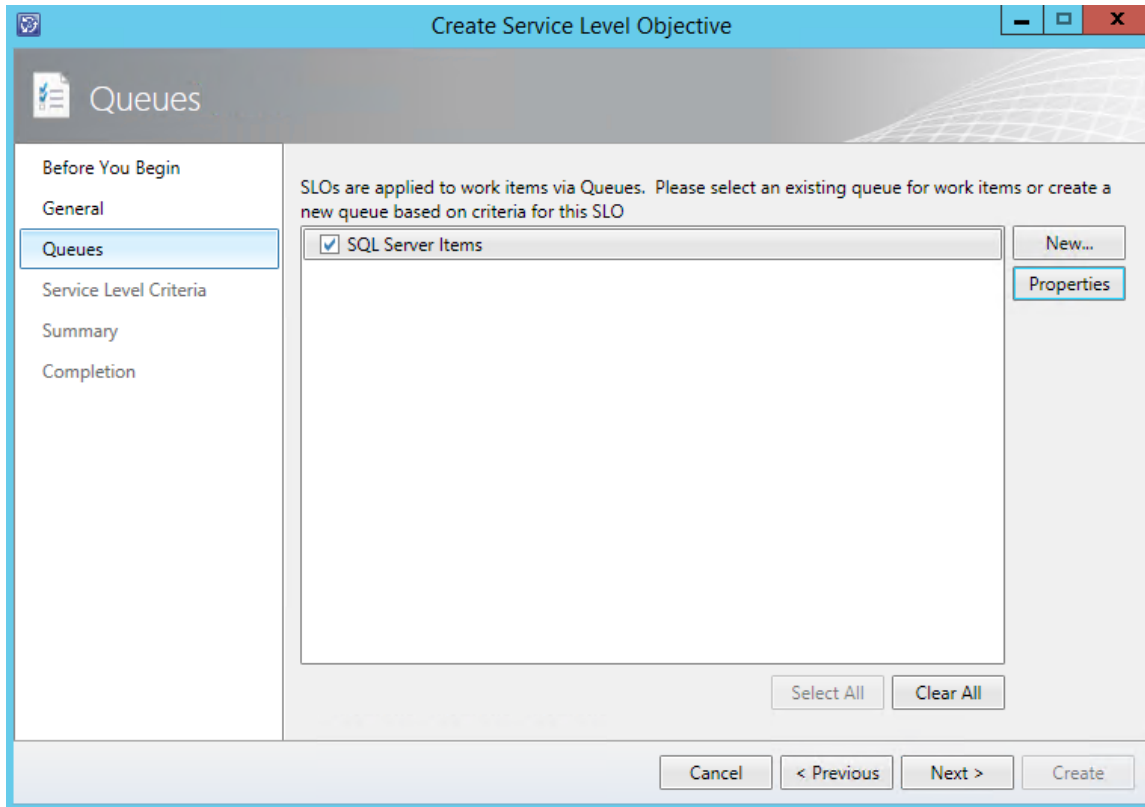
12. Click **Properties**.

13. Review the information and click **OK**.

14. Click **Next**.

15. On the **Service Level Criteria** page, under **Calendar** select **SQL Admin Schedule**.

16. Under **Metric** ensure that **SQL Time to Resolution** is selected.

17. Under **Warning Threshold** change the time to **12 hours**. Click **Next**.

18. On the **Summary** screen, review the settings and click **Create**.

19. On the **Completion** screen click **Close**.

20. In the **Service Level Objectives** view note the newly created service level objective. Select it and from the **Tasks** pane click **Enable**.
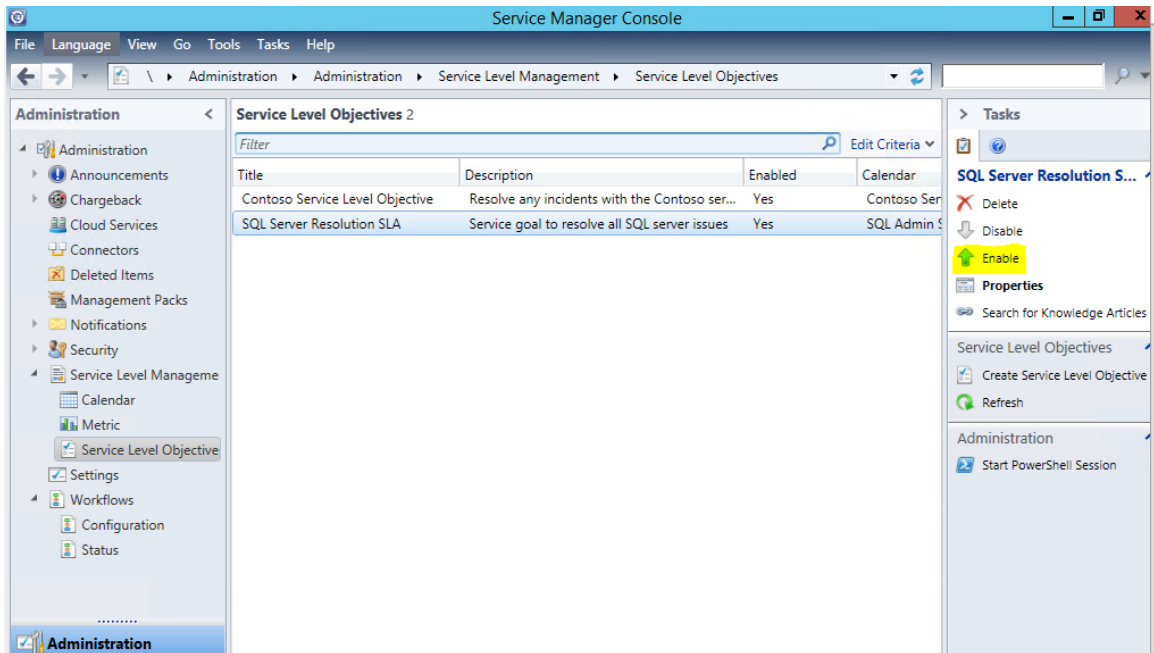
21. Navigate to the **Work Items** workspace and click and expand **Problem Management**.

22. From the **Tasks** pane select **Create View**.

23. In the **Create View** wizard under **Name** enter: **SQL Server Problems**.

24. Under **Management pack** ensure that **Service Manager Problem Management Configuration Library** is selected.
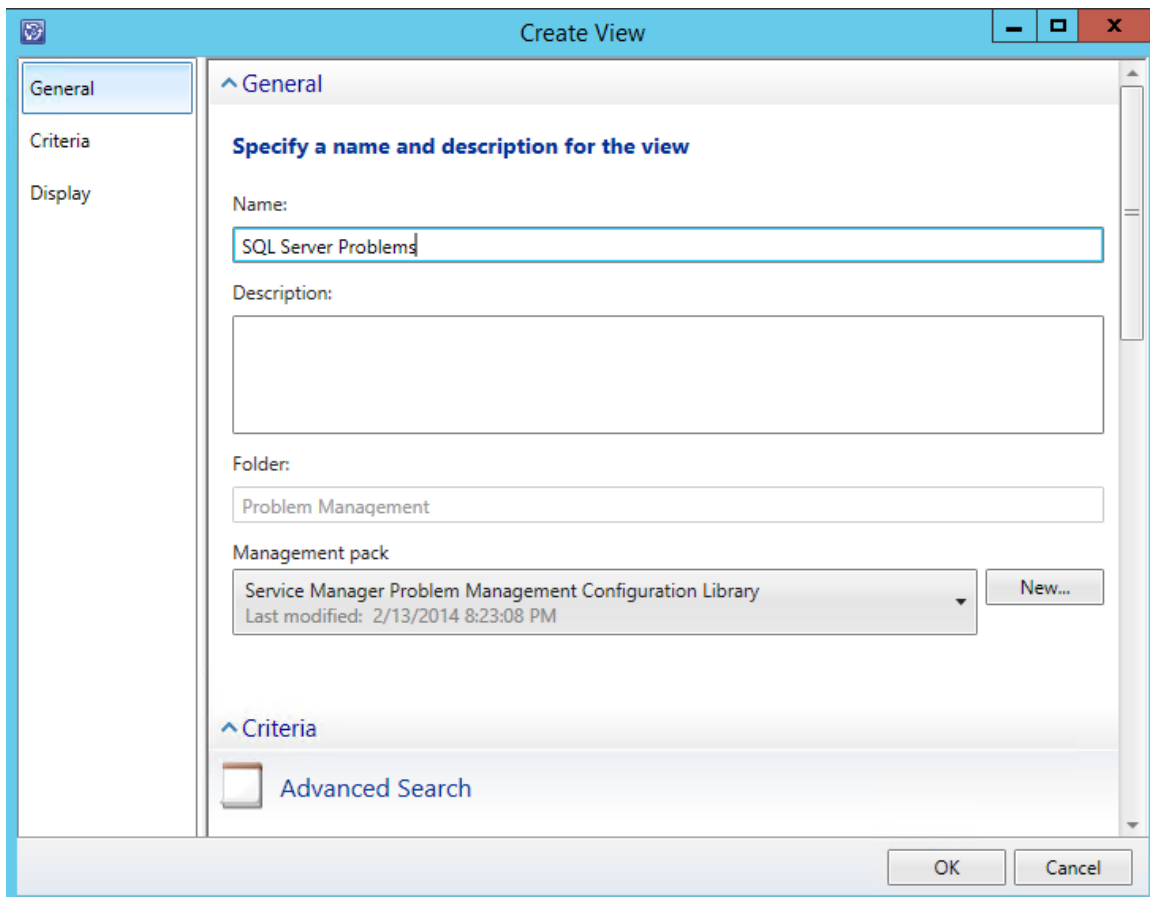
25. Scroll down and under **Criteria** under **Advanced Search** under **Search for objects of a specific class:** click the **Browse** button.

26. In the upper-right drop-down that says **Frequently used basic classes,** change that to **All basic classes.**

27. In the **Type to filter** box, enter **SQL** and click the search icon. Select **Contoso SQL Servers** and click **OK.**
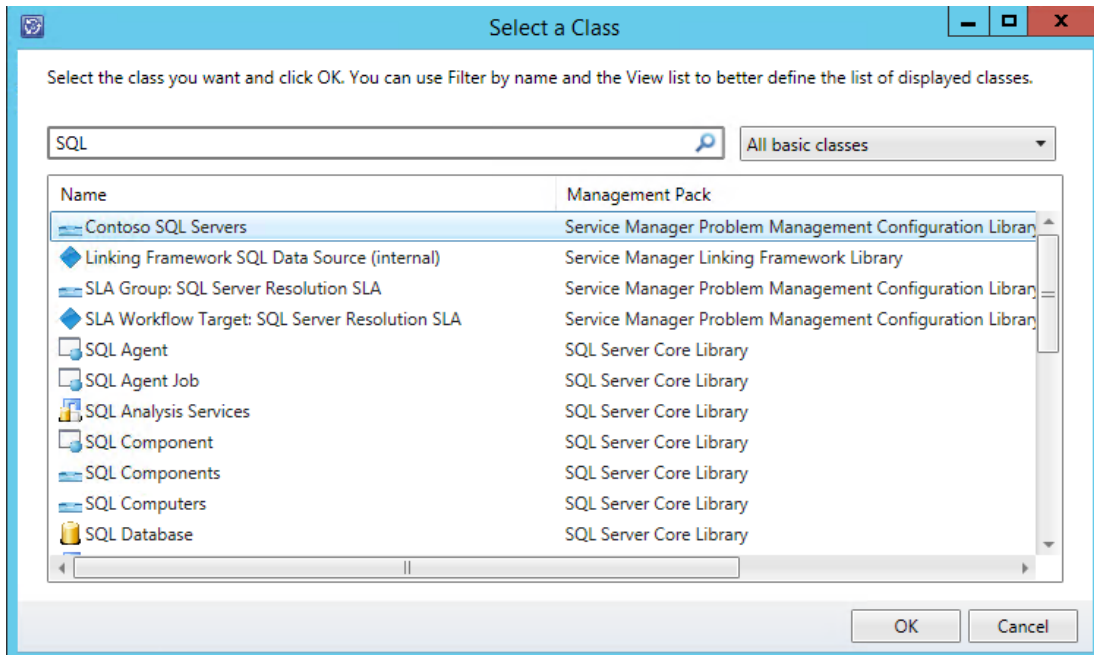
28. Scroll down to **Display.** Under **Display** select **Display Name, Full Name, Name, Notes, Object Status.**
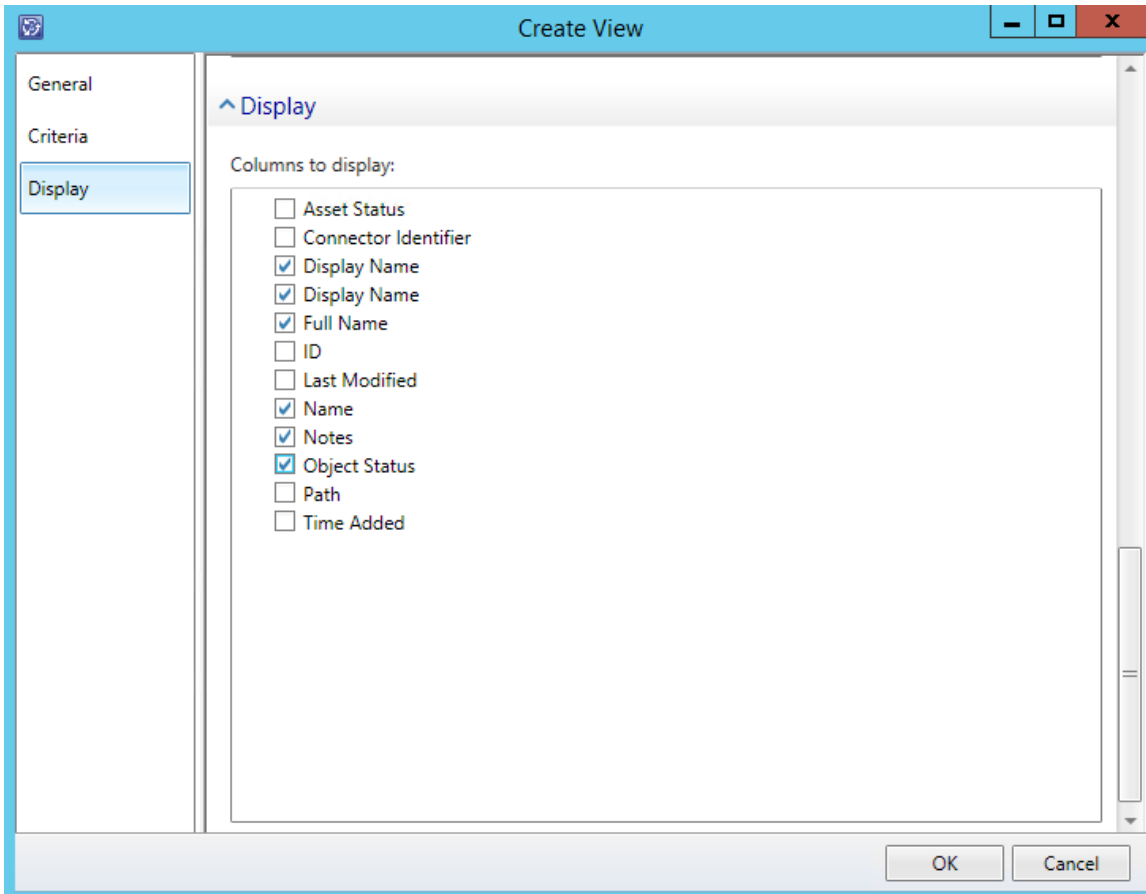
29. Click **OK.**

30. Once the dialog box closes, under the **Work Items** > **Problem Managemen**t view, a new view will appear for **SQL Server Problems**.
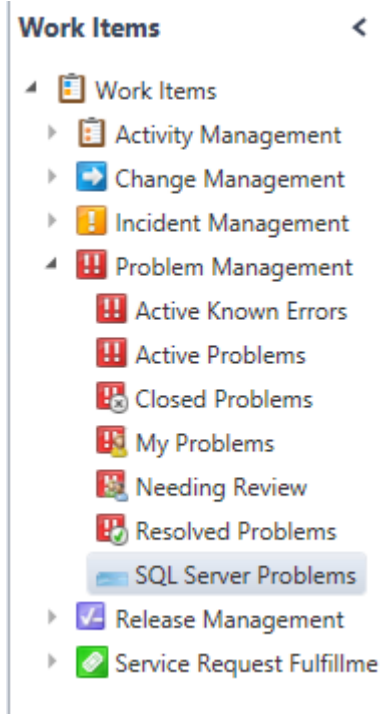
31. Select **SQL Server Problems** and note that the group of **Contoso SQL Servers** appears. This has connected the **SQL Server Problems** to **Possible SQL Servers**.
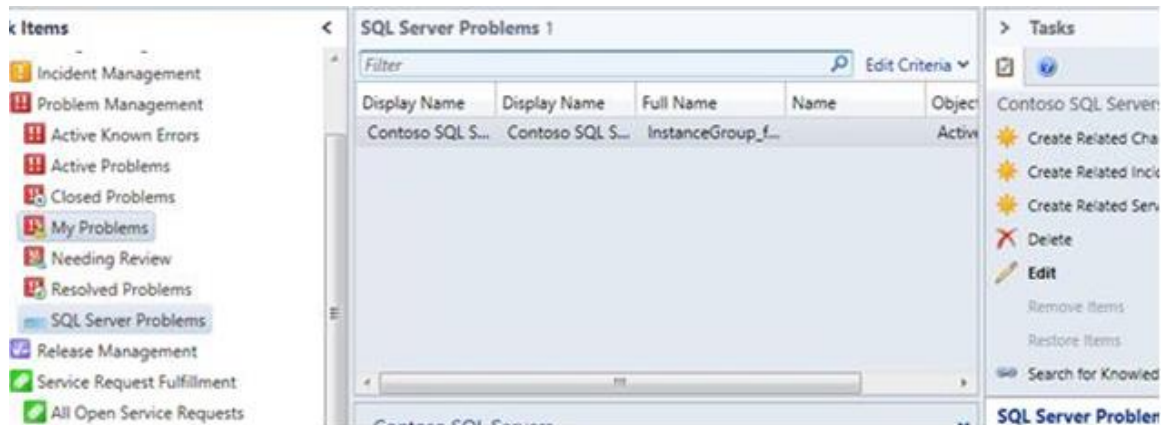
4.3 - SCSM: Manage Incidents

4.3.1 - SCSM: Create an Incident

In this exercise, the Service Manager Portal is used to create an activity request as a self-service user. The IT Infrastructure Library (ITIL) defines an "incident" as "an unplanned interruption to an IT service or reduction in the quality of an IT service. Failure of a configuration item that has not yet affected service is also an incident - for example, failure of one disk from a mirror set." (http://www.itil.org/custom/glossaren/**)**

Note: Some items in the Service Manager console may not display correctly when it is maximized and running in a virtual machine. If any display issues are encountered, resize the Service Manager console so that it is not maximized.

Estimated time to complete: 5 minutes

SCSM02

*Perform the following on **SCSM02***

1. From **SCSM02**, open the **Service Manager Portal** by selecting the **Internet Explorer** icon from the taskbar.

2. If the site does not open, browse to http://SCSM02:81/SMPortal/SitePages/Service%Catalog.aspx. One or two prompts may appear. Log in with a username of **contoso\Developer** and a password of **Passw0rd**

3. The site may already be open. If so, look on the Home page, in the upper right corner, to ensure that it is logged in as contoso\Developer. If not, log out and log back in using the correct credentials.

4. Wait for the Server Manager Portal to load. This will take a minute to complete.

5. From the upper right corner, click the list view button.
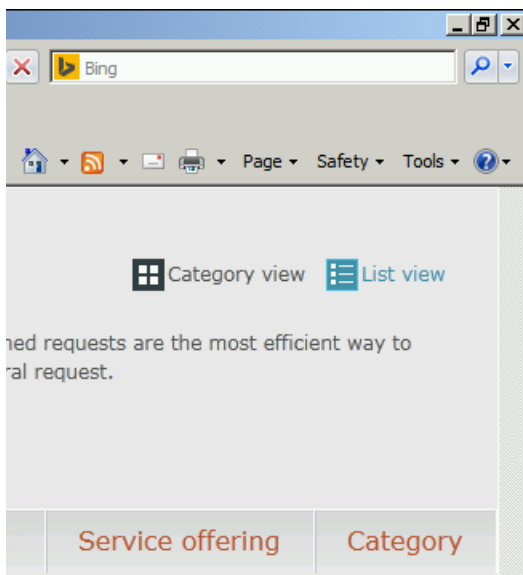
6. Under **Request name** select **Generic Incident Request**.

7. In the upper right corner of the **Generic Incident Request** page click the **Go to request** button.
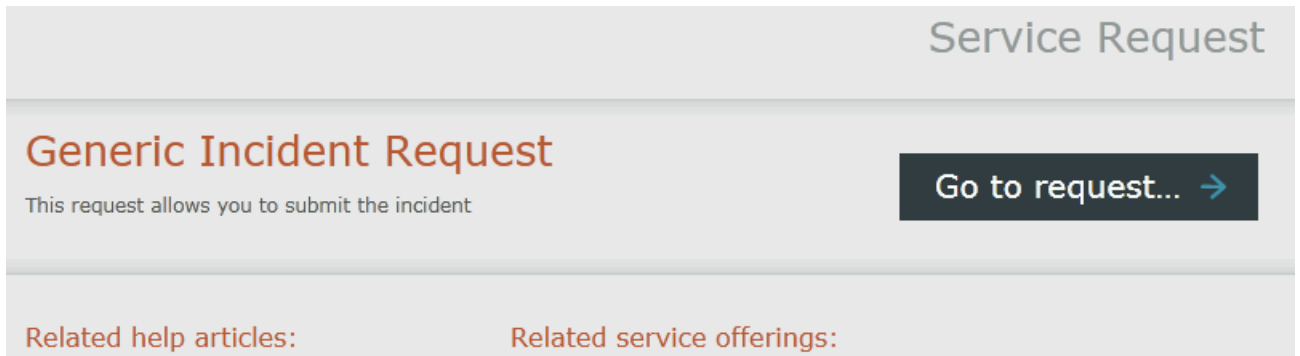
8. On the **Generic Incident Request** page in the **Please enter the title for the issue** text box enter: **SQL Server performance issue**.

9. In the **Please describe the symptoms of the issue in details** text box enter: **Contoso SQL Server running slowly, please investigate.**

10. In the **Please select a category of the** issue drop down select: **Enterprise Application Problems**.

11. In the **How urgent is the issue** drop down select **Medium.**

12. In the **Please enter alternate contact information if needed** text box enter: **Developer@contoso.com**

Generic Incident Request

Please fill in the form below to submit your request

Please enter the title for the issue

SQL Server performance issue

Please describe the symptoms of the issue in details

Contoso SQL Server running slowly, please investigate

Please select a category of the issue

Enterprise Application Problems ▾

How urgent is the issue

Medium ▾

Please enter alternate contact information if needed

Developer@contoso.com

13. Scroll down to the bottom of the form using the inner grey scroll bar and click **Next**.

14. If the bottom of the window is not visible, try resizing the view or zooming out (Ctrl -)

← Back   Next →   Cancel ✕

15. On the **Generic Incident Request review and summary page**, review that the information is correct and click **Submit**.

16. On the **confirmation** screen you will see that the request has been submitted and there will also be an incident request that has been created in service manager. **Note the number after IR**. In the screenshot below the ID is IR48 .

17. Click **View my requests.**

18. Once the **My Request** page loads, note under **SQL Server performance issue** the status of the request is **Active**.

4.3.2 - SCSM: Review an Incident

In this exercise, the Service Manager console is used to create an activity request. The IT Infrastructure Library (ITIL) defines an "activity" as "a set of actions designed to achieve a particular result. Activities are usually defined as part of processes or plans, and are documented in procedures." (http://www.itil.org/custom/glossaren/**)**


Estimated time to complete: 5 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Work Items** workspace.
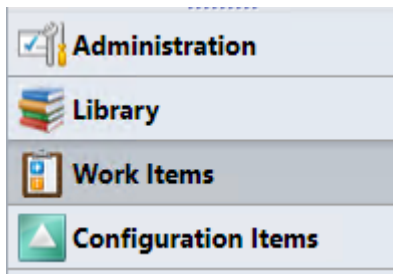
3. From the **Work Items** workspace expand **Incident Management** and select **All Open Incidents.**
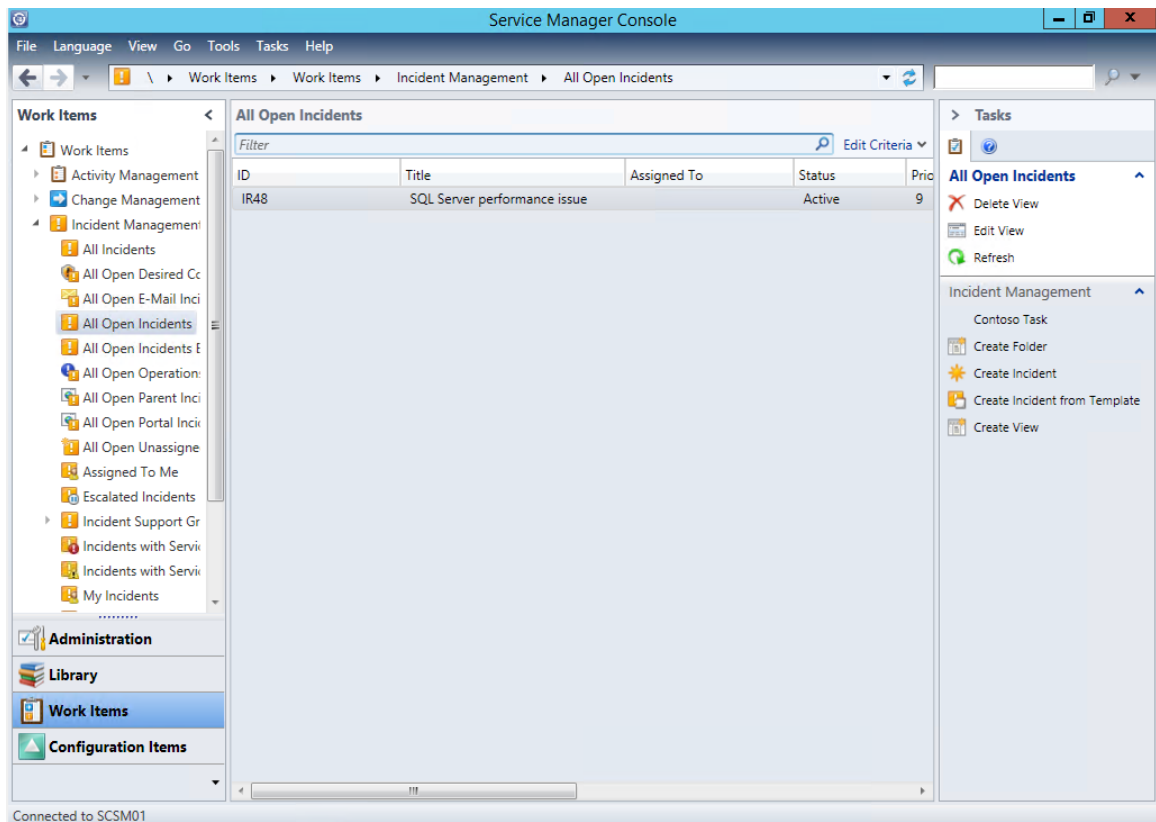
4. **Select** the incident request that was created in the previous exercise. It should match the ID number that was noted earlier. In this example it is **ID IR48**.

5. Under tasks click **Edit** to open the request.

6. Review the settings on the general tab. For **Support group** select the drop down and click **Tier 2**.

7. For **Assigned to** select the **ellipses** (…) button.

8. On the Select users dialog under username select **Tier2** and click **OK**.
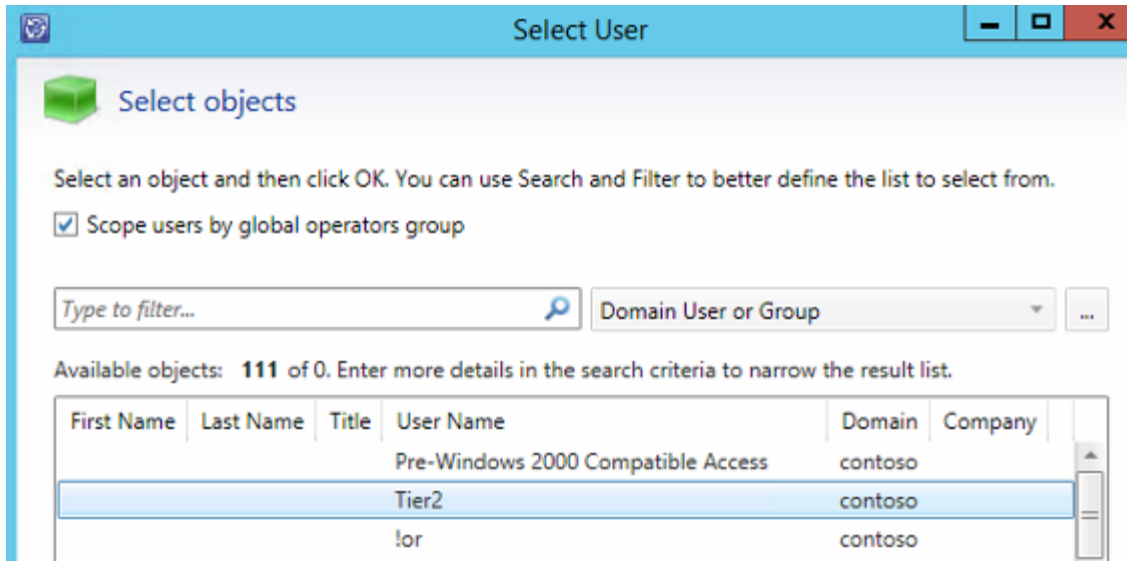
9. Under **Primary owner** select the **ellipses** button.

10. On the Select users dialog under **User Name** select **Administrator** and click **OK**.
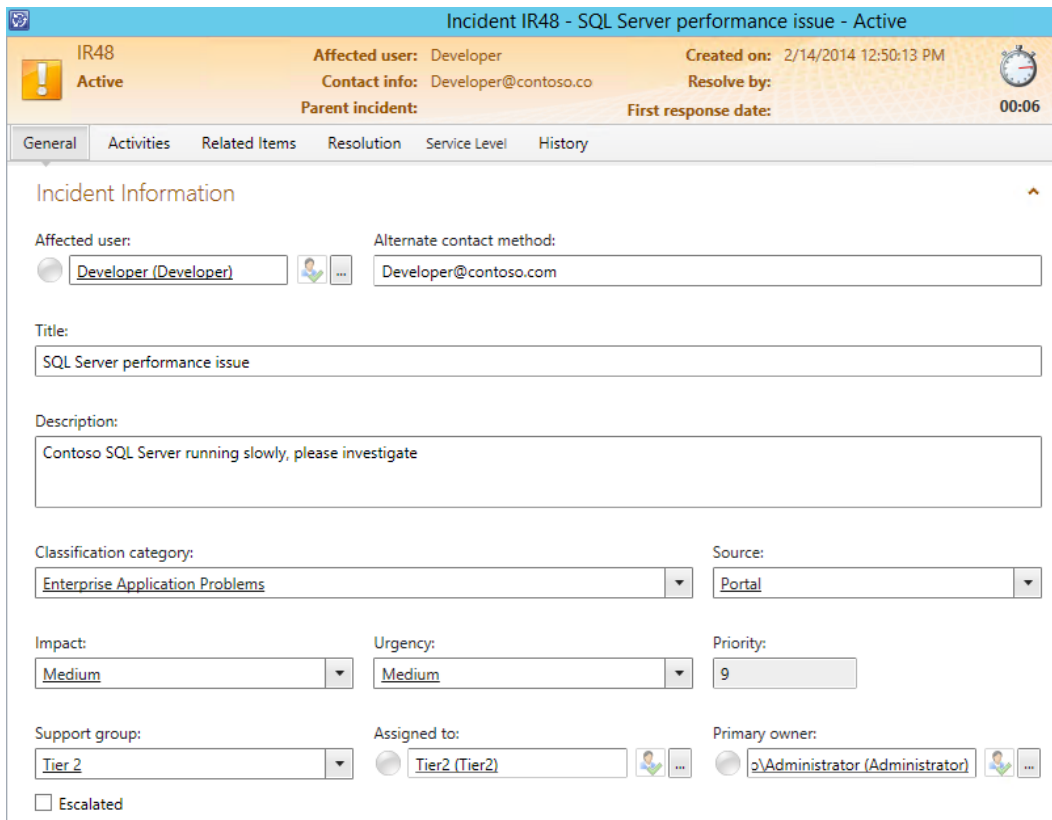
11. Under Affected Services click **Add…** and select **Operations Manager Management Group** and click **Add** then click **OK**.

12. Under Affected Items click **Add…** then select **DC01.contoso.com,** click **Add** and then select **SCOM01** and click **Add**. Click **OK**.

13. Click **Apply**.

14. Select the **Resolution** tab from the top menu.

15. In the right column under **Tasks** click **Assign** then select **Assign to Me**.

16. Under Time Worked adjust the **hours** to **1** hour and click **Add**.

17. Click **Apply** then click **OK**.

18. On the **Work Items** workspace navigate to **Incident Management | Assigned To Me**. The incident should now appear in the center display pane.

19. In the right column under Tasks select **Request User Input**.
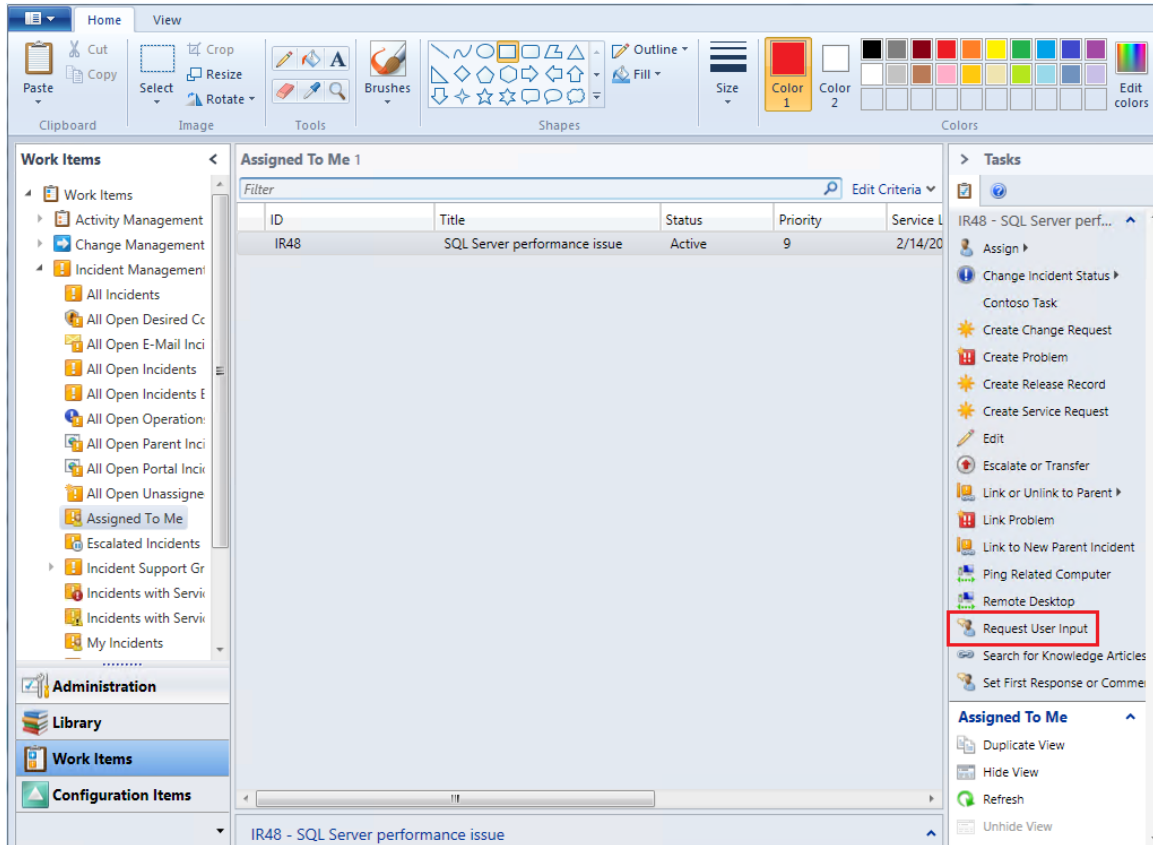
20. On the **Request User Input** dialog under **Message** type **The SQL Server is slow because it running out of free capacity. Please confirm SQL Server can be taken offline at 18:00 tonight.** Click **OK**.

Request User Input

Enter a message to request information from the affected user for this incident.

Message:

The SQL Server is slow because it running out of free capacity. Please confirm SQL Server can be taken offline at 18:00 tonight.

3872 characters remaining.

OK   Cancel

4.3.3 - SCSM: Provide Incident Information

In this exercise, the self-service user enters more information about the incident. After reviewing the information, the administrator acknowledges the resolution and updates the incident.

Estimated time to complete: 5 minutes


SCSM02

*Perform the following on **SCSM02***

1. From **SCSM02**, open the **Service Manager Portal** by selecting the **Internet Explorer** icon from the taskbar.

2. If the site does not open, browse to http://SCSM02:81/SMPortal/SitePages/Service%Catalog.aspx. One or two prompts may appear. Log in with a username of **contoso\Developer** and a password of **Passw0rd!**

3. The site may already be open. If so, look on the Home page, in the upper right corner, to ensure that it is logged in as contoso\Developer. If not, log out and log back in using the correct credentials.
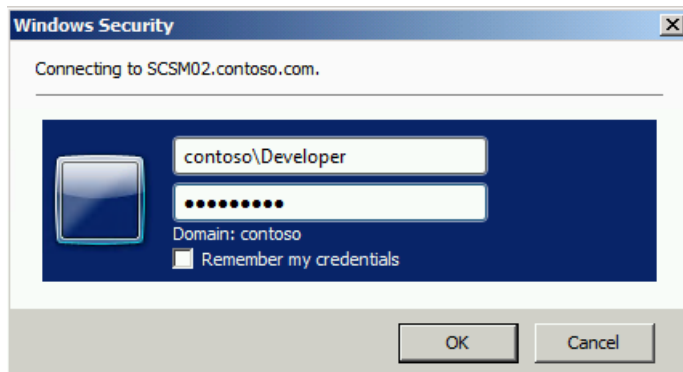
4. From the menu on the left select **My Requests** then select **SQL Server performance issue**. If the data does not appear wait a minute, then click refresh.

5. Under **Request action log** expand the logs, notice the comment by **contoso\Administrator** and note the comment.

6. On the **User Inpu**t text box enter **Yes, the SQL Server can be taken offline.** then select **Update request.**

SCSM01

*Perform the following on SCSM01*

7. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

8. Navigate to the **Work Items** workspace

9. Expand **Incident Management** and select **Assigned To Me.**

10. **Select** the Incident and click **Edit** from the Tasks pane on the right.

11. Scroll to the bottom of **General** tab, under **Log entry** expand **Analyst Comment** and note the text.

12. On the right side under **Tasks** select **Change Incident Status** then select **Resolve**.
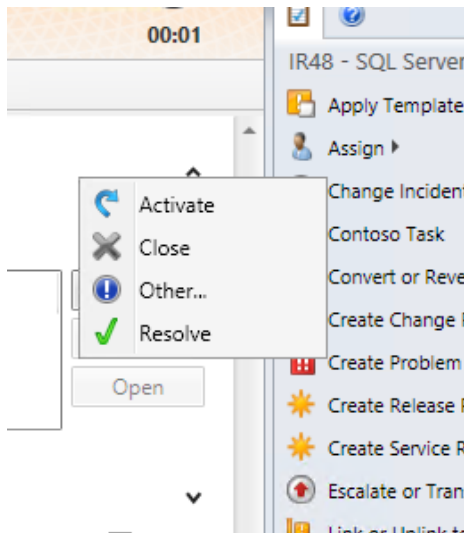
13. On the **Resolve incident** window, under **Resolution Category** select **Fixed by analyst** from the dropdown.

14. Under comments enter **Adding a new disk.** Click **OK**.
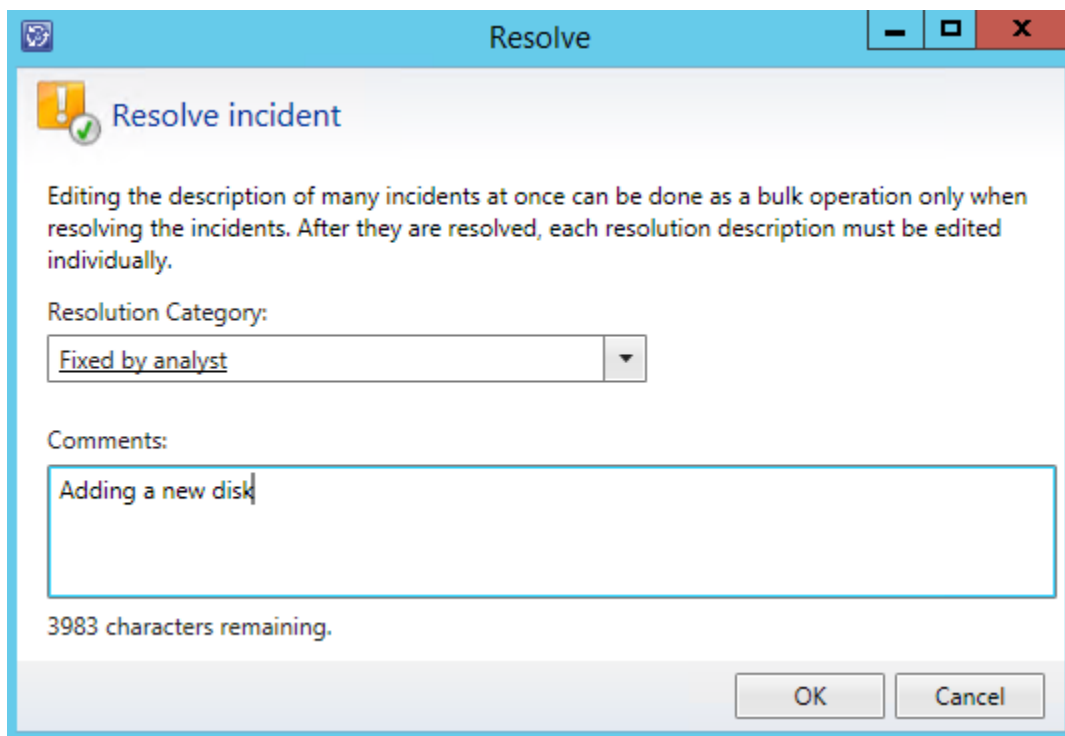
15. Click **OK**.

SCSM02

*Perform the following on **SCSM02***

16. From **SCSM02**, open the **Service Manager Portal** by selecting the **Internet Explorer** icon from the taskbar.

17. Select the **My Requests** tab to refresh the request. If the data does not appear, wait a moment and click refresh.

18. Notice that under SQL Server performance issue the status has been changed to Resolved.
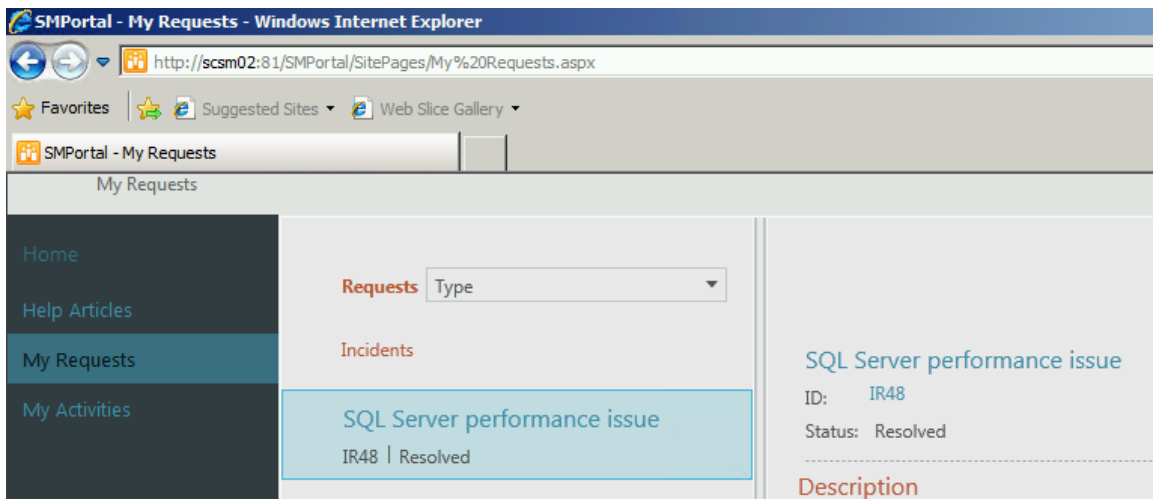
4.3.4 - SCSM: Manage a Problem

In this exercise, the Service Manager console is used to create a problem in Service Manager's database so that these incidents can be tracked over time. The IT Infrastructure Library (ITIL) defines a "problem" as "a cause of one or more incidents. The cause is not usually known at the time a problem record is created, and the problem management process is responsible for further investigation." (http://www.itil.org/custom/glossaren/**)**

Estimated time to complete: 10 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Work Items** workspace.
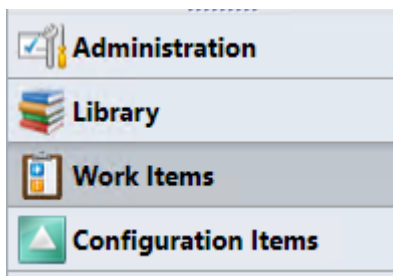
3. Expand **Problem Management,** then right-click **Problem Management** and select, **Create Problem**.
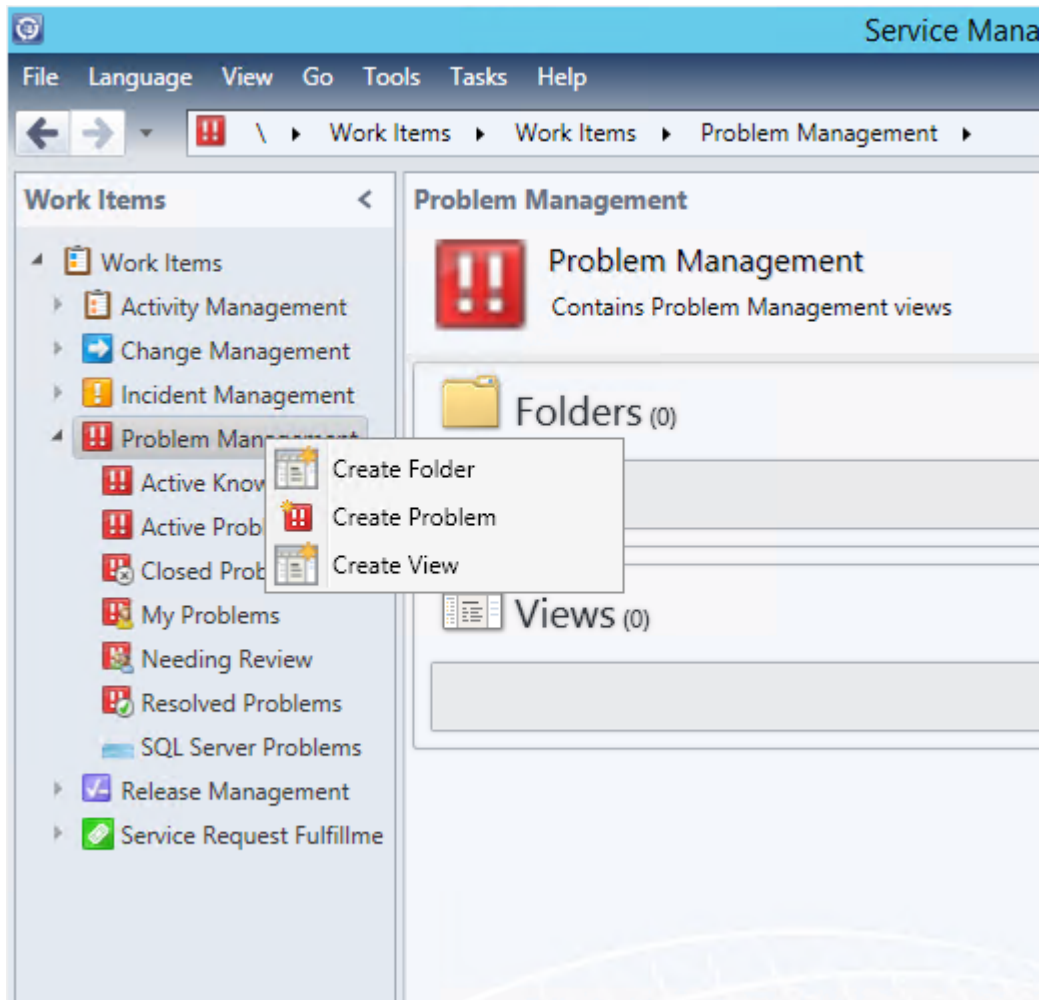
4. Once the new problem wizard pops up, enter the following information:

Title:	**SQL Server Disk Slow**
Description:	**SQL Server Disk is running out of space and performing slowly**
Assigned to:	**Tier 3**
Source:	**Customer Request**
Category:	**Storage**
Impact:	**High**
Urgency:	**Medium**

5. Under **Affected Services**, click **Add** and ensure **Service** is selected in the filter drop down and select **Operations Manager Management Group** then click **Add** then **OK**.
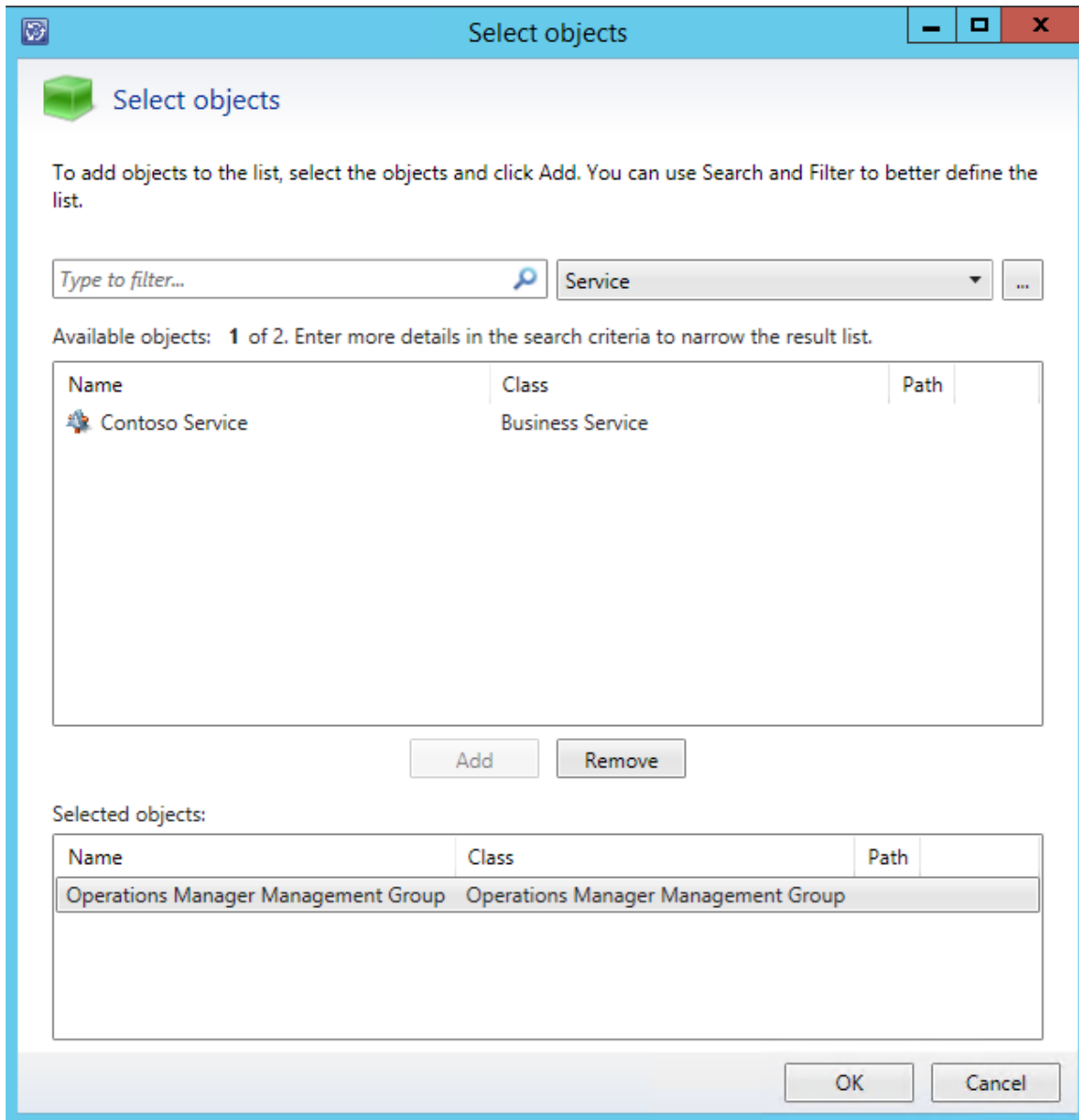
6. Under **Affected Items**, click **Add** and select **SCOM01** then click **Add** then **OK**.

7. Under **Action Log**, under **Comment** type: **Must suspend Operations Manager monitoring of disk during update**, then click **Add** and **Apply**.
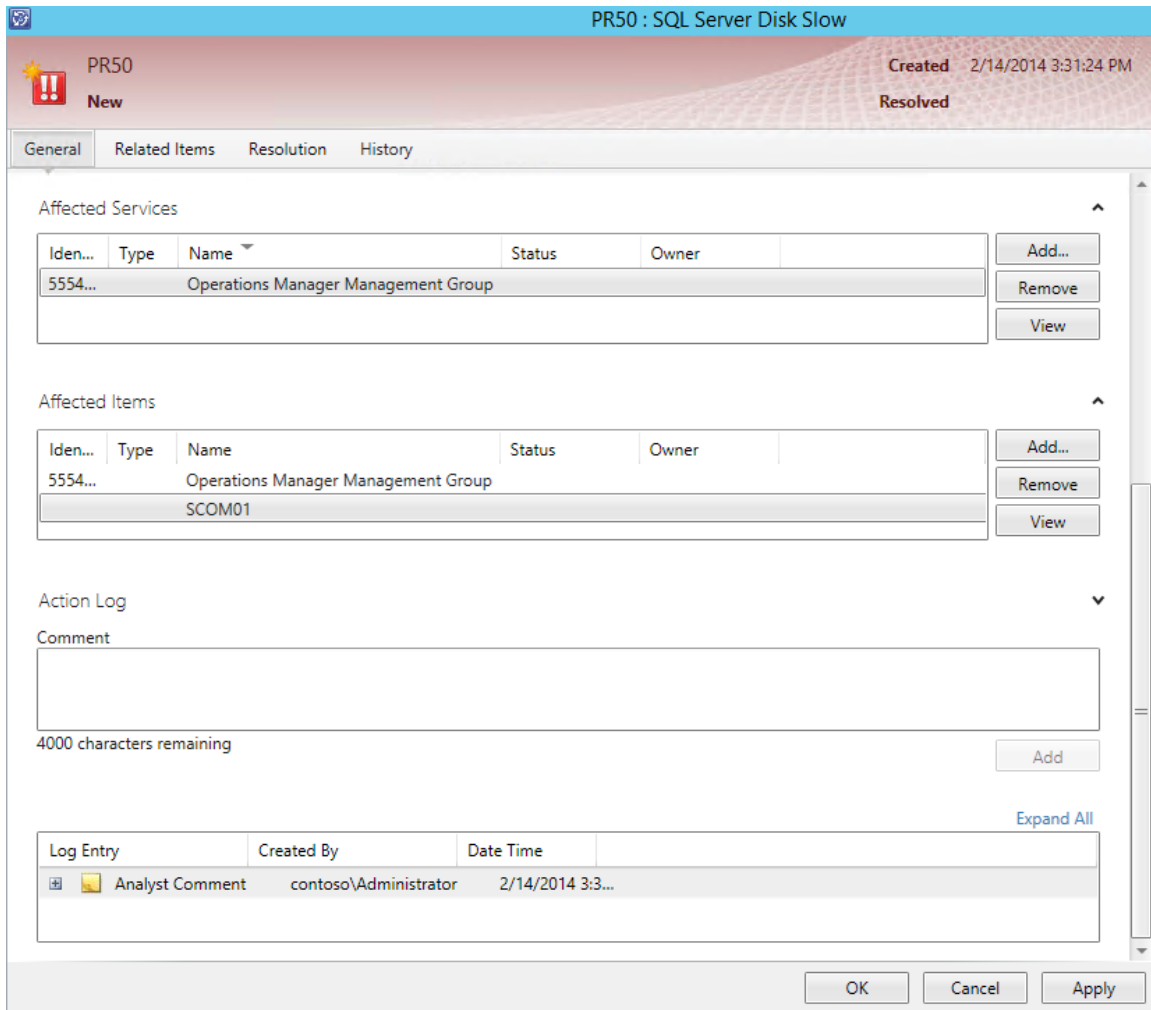
8. Under Log Entry, expand the **plus** symbols and note the information.
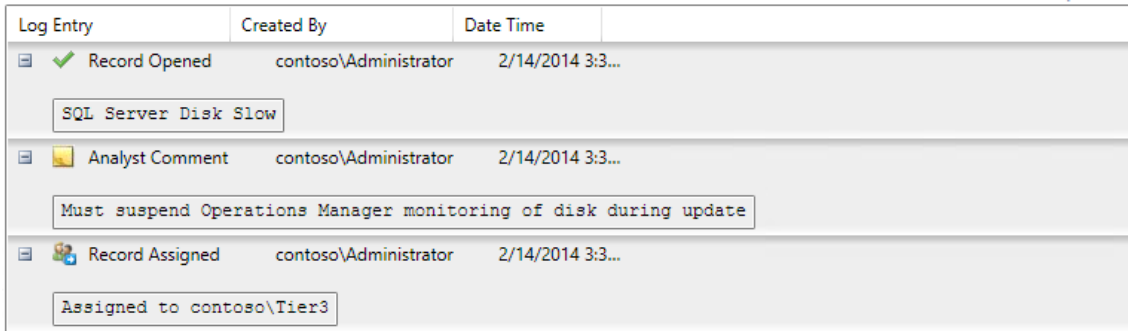
9. Select the **Related Items** tab from the top menu.

10. Under **Work Items** select **Add**.

11. Select the incident request which was created in the previous exercise then click **Add** then **OK**.
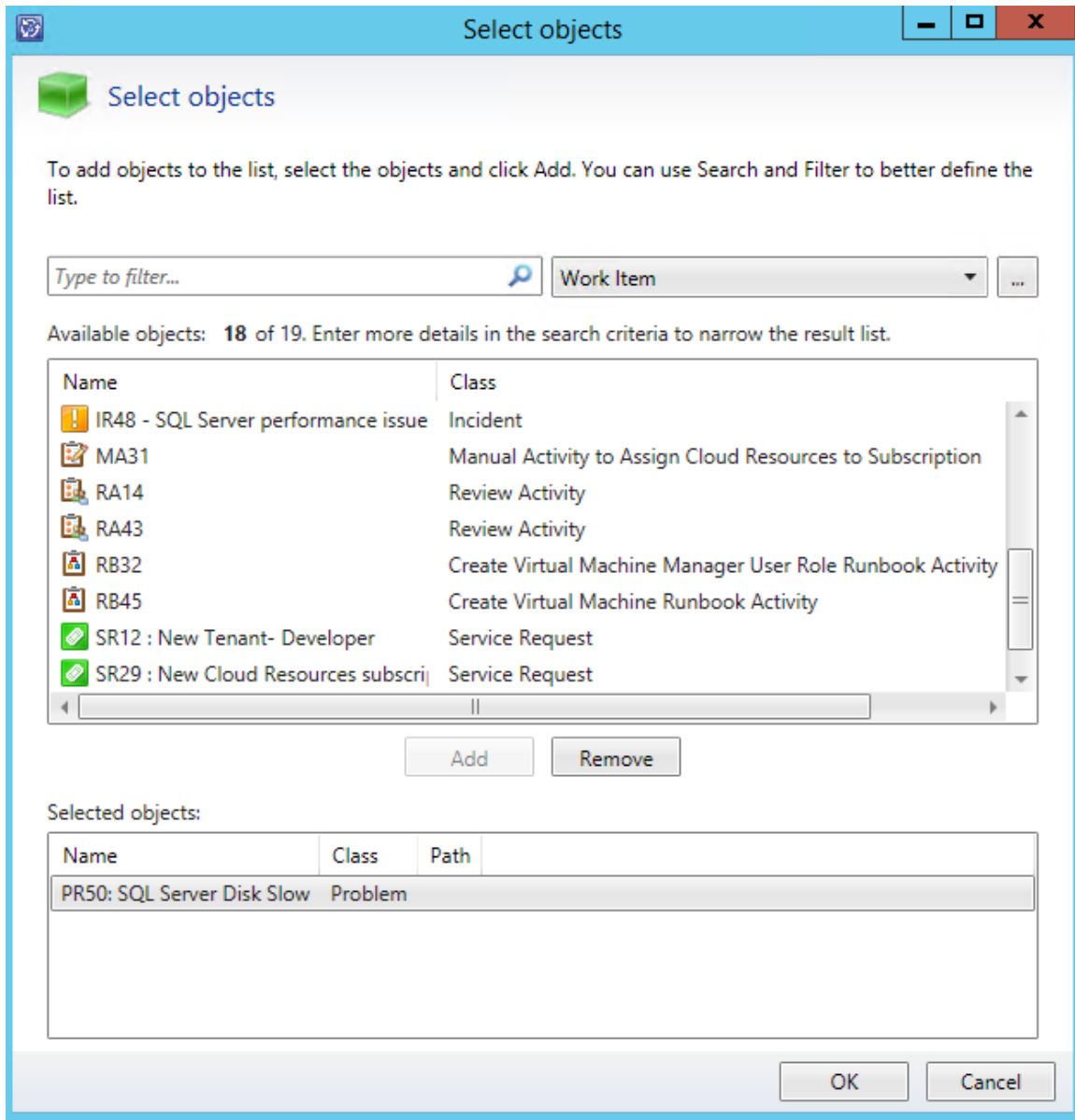
12. In the **Configuration Items Computer Services and People** box, click **Add**.

13. Once the Select objects loads, select **SCOM01** and click **Add**.

14. From the **Computers** dropdown, scroll down to **User**.

15. In the filter, type **developer** and click the **search** icon.

16. Select the object named **Developer** in the class **Active Directory User**.
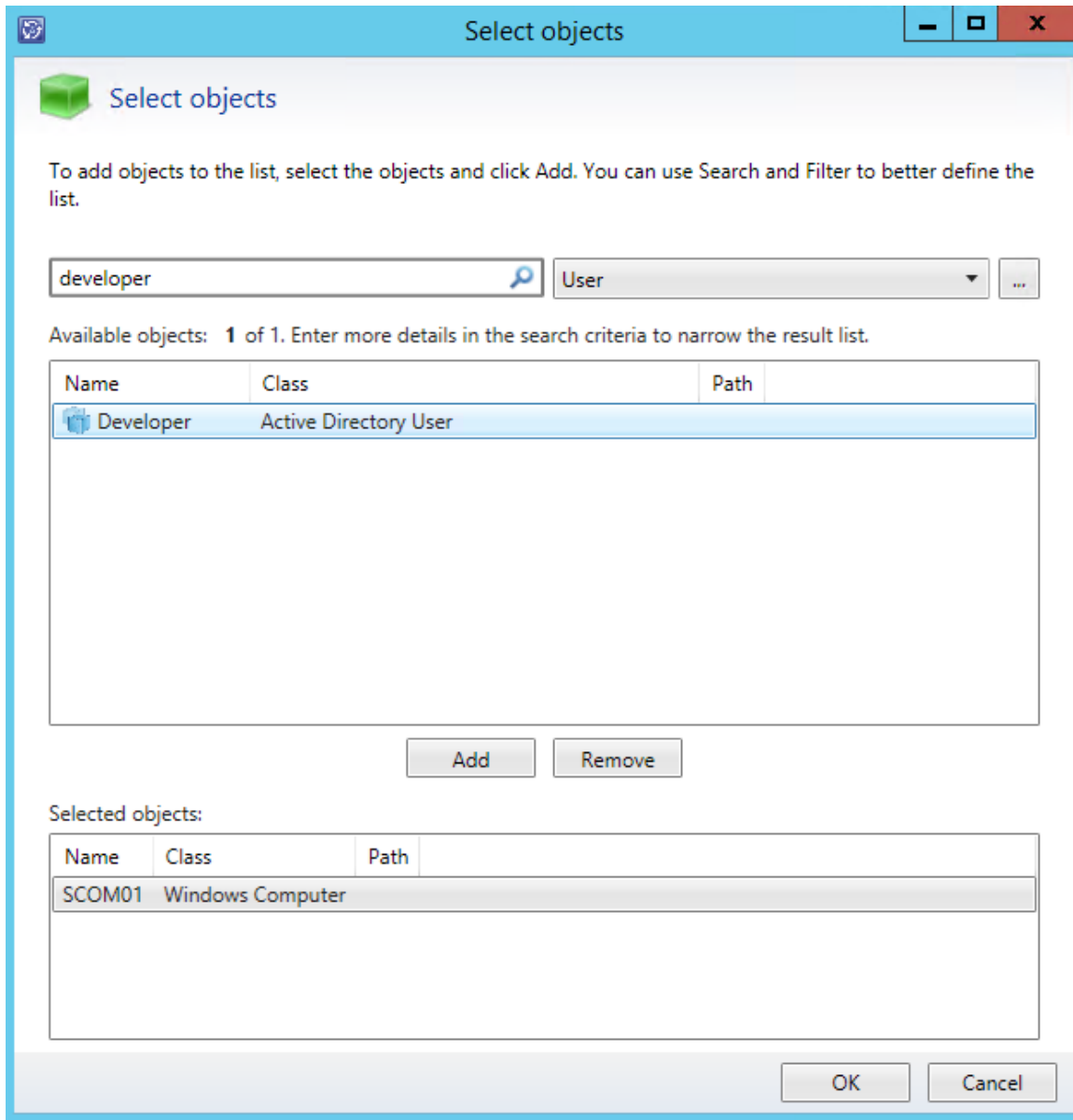
17. Click **Add** then click **OK**.

18. In the **Knowledge Articles** click **Add**.

19. Select the Knowledge Article called **Contoso SQL Server Performance is Slow**.
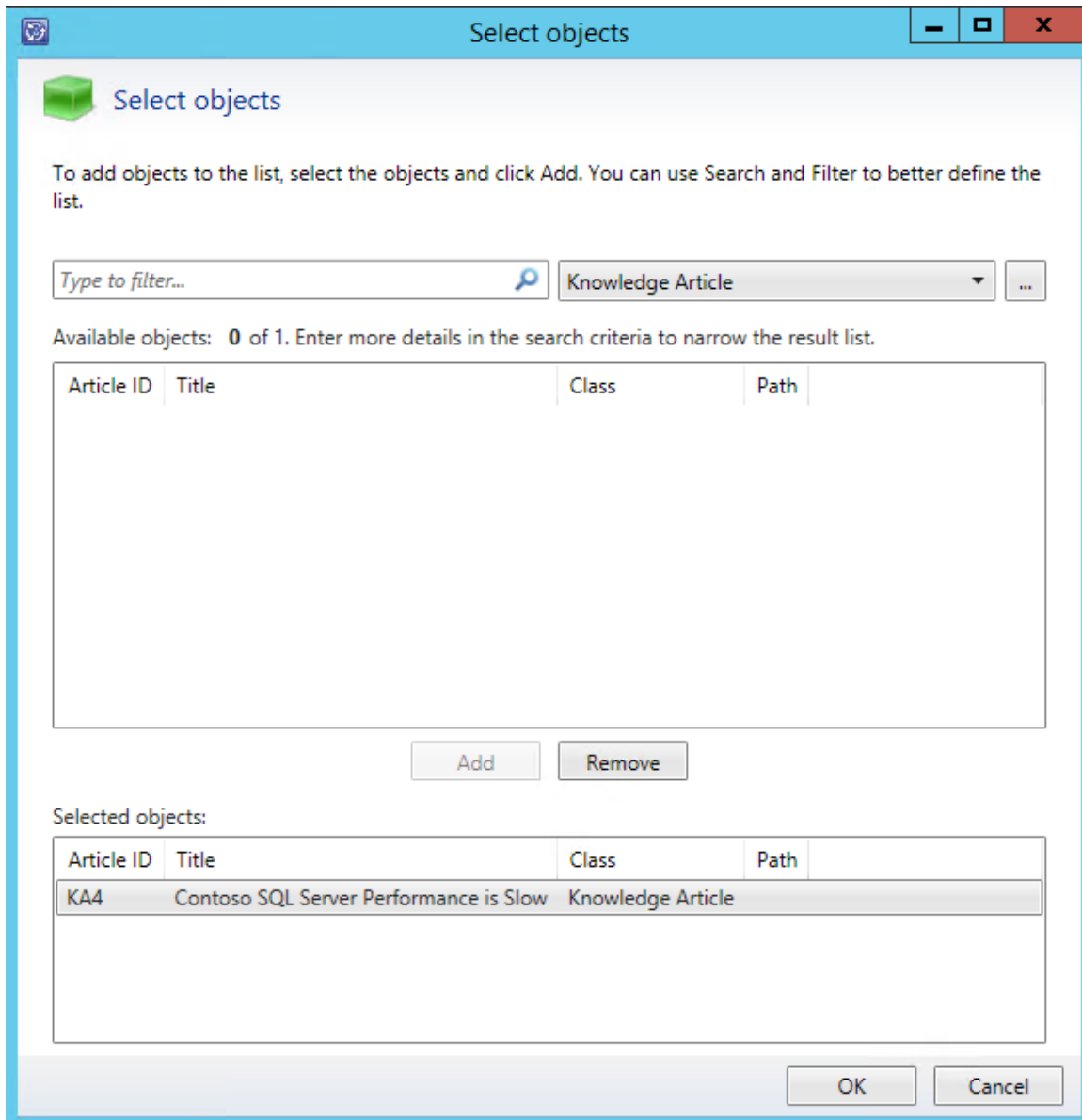
20. Click **Add** then click **OK**.

21. Select **Apply**, then click the **Resolution** tab.

22. Check the **Known Error** checkbox and under **Error Description** enter **SQL server runs slowly** then click **Apply**.
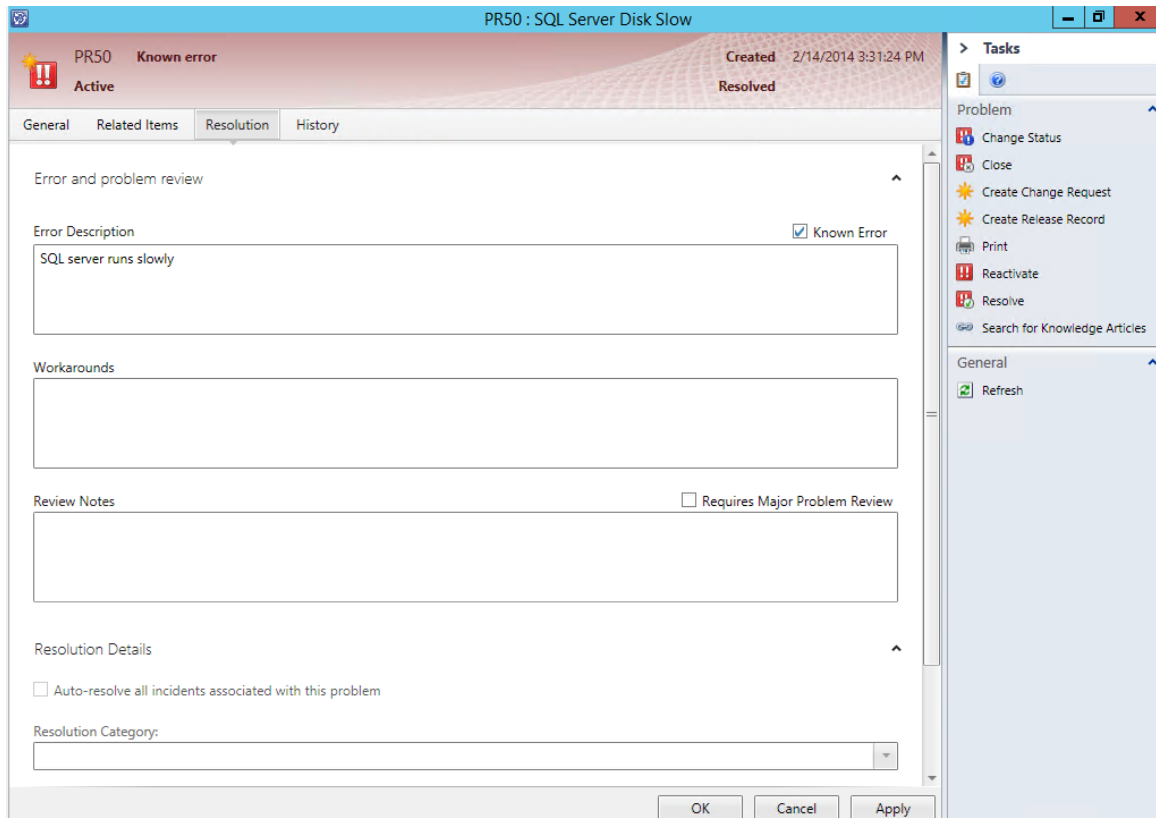
23. In the task bar on the right, click **Resolve**.

24. Scroll down to **Resolution Details** and under **Resolution Category**, select **Hardware**.

25. Under **Resolution Description**, type: **Larger disk will be added at 18:00**.

26. Select the checkbox **Auto-resolve all incidents associated with this problem**.
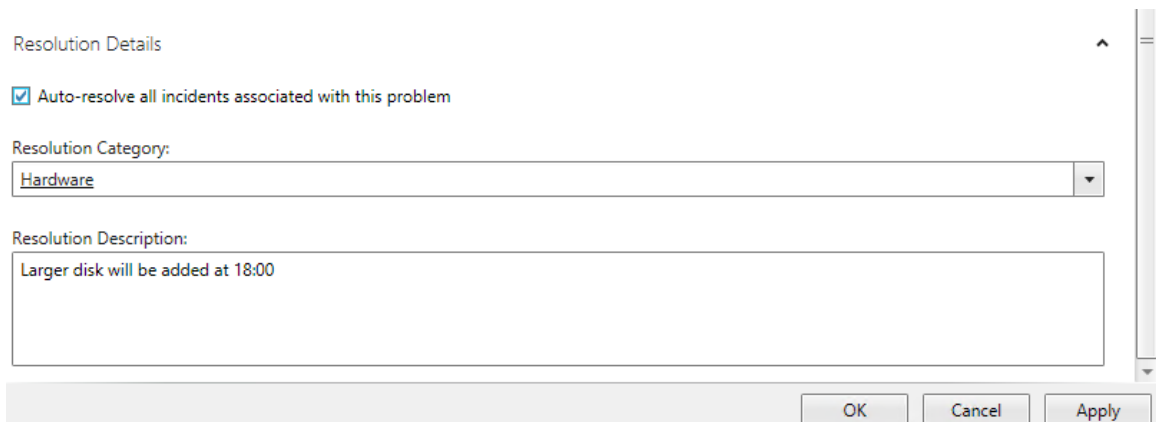
27. Click **Apply** and click **OK**.

28. Under **Problem Management**, navigate to **Resolved Problems** and note that this problem is now resolved.

29. From the **Work Items** workspace, navigate to **Work Items | Incident Management | All Incidents**.
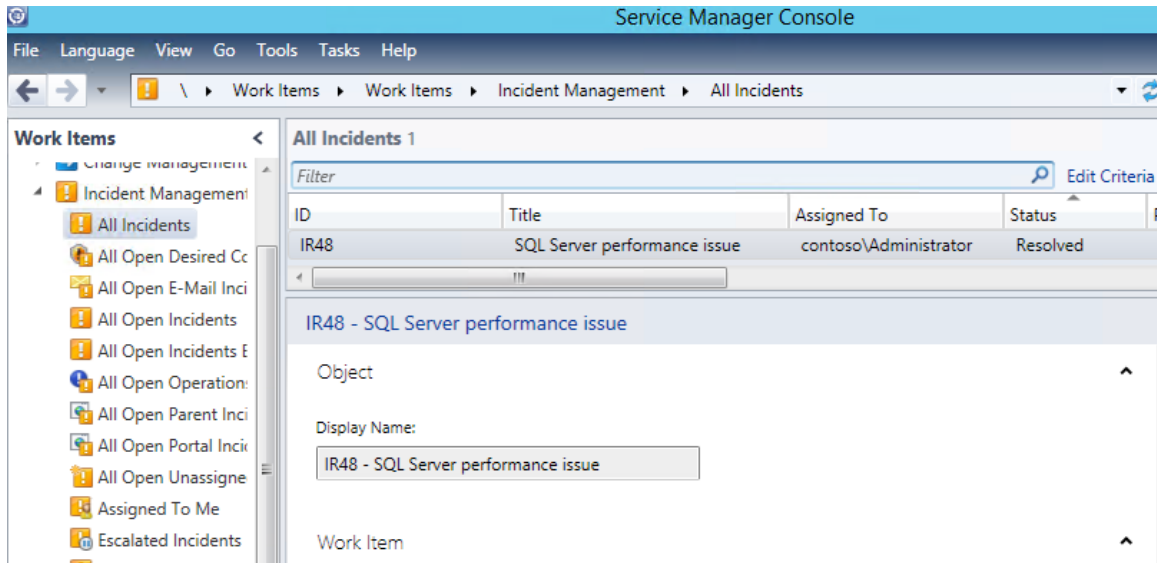
30. Select the incident that was reported and from the task pane, select **Edit**.

31. Once the incident opens, note that its status is **Resolved**.
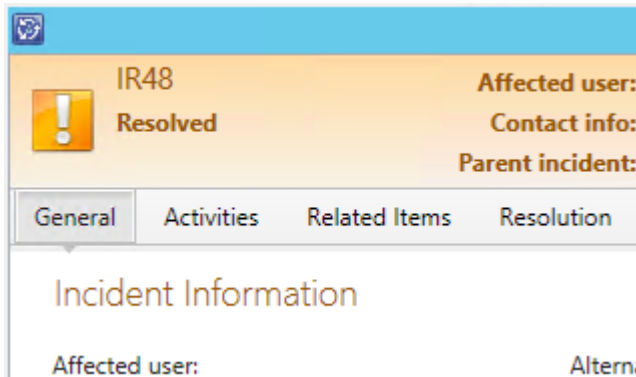
32. Select the **Resolution** tab and note under **Resolution Details** under **Resolution category** it says, **Fixed by analyst** and **Adding a new disk**.

33. Change the time worked to **1 hour** and select **Add** then **Apply**.

34. Note that the time updates with the additional minutes that this page has been opened.

35. Click **OK** to close the incident.

4.4 - SCSM: Manage Change Requests

4.4.1 - SCSM: Create a Change Request

In this exercise, the Service Manager console is used to create a change request. The IT Infrastructure Library (ITIL) defines "change " as "the addition, modification or removal of anything that could have an effect on IT services. The scope should include changes to all architectures, processes, tools, metrics and documentation, as well as changes to IT services and other configuration items." (http://www.itil.org/custom/glossaren/**)**

Note: Some items in the Service Manager console may not display correctly when it is maximized and running in a virtual machine. If any display issues are encountered, resize the Service Manager console so that it is not maximized.
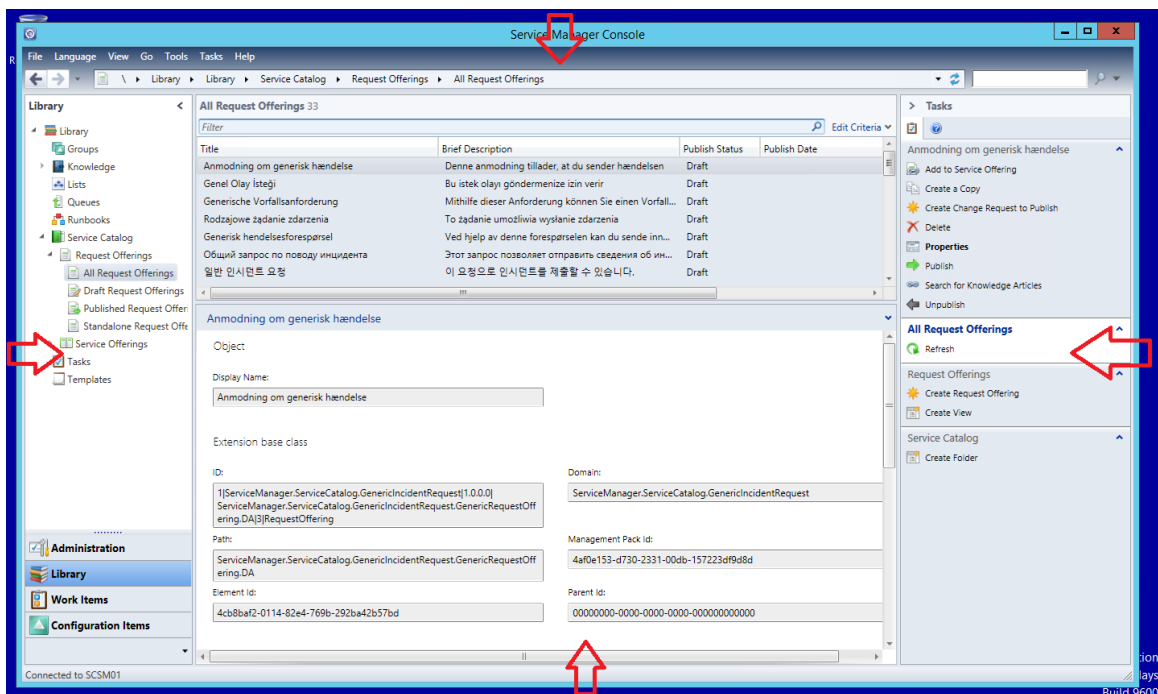
Estimated time to complete: 10 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Work Items** workspace.
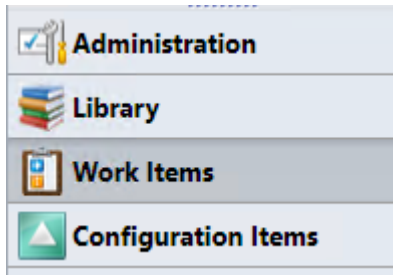
3. Select and expand **Change Management | All Change Requests**.
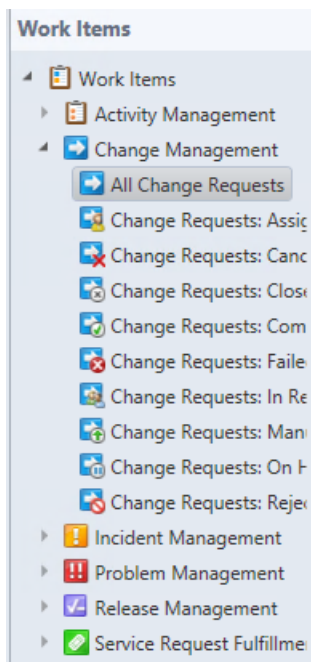
4. Under **Tasks** in the right hand pane select **Create Change Request**.

5. When the **Select Template** screen appears, select **Standard Change Request** and click **OK**.
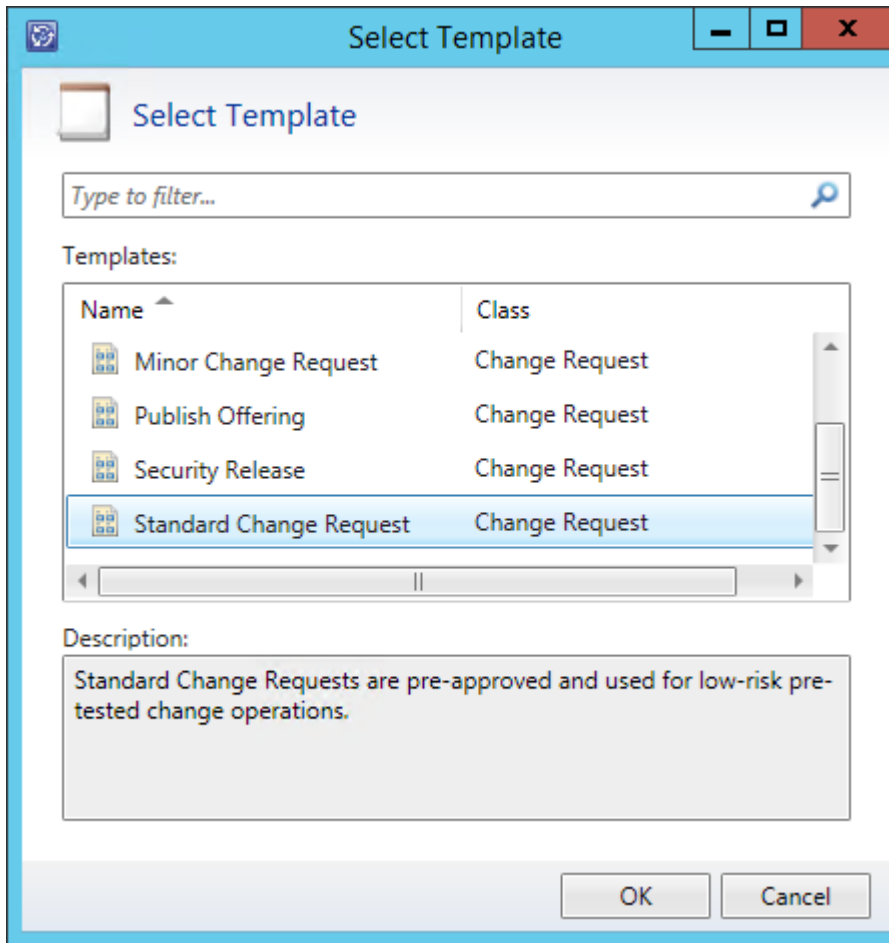
6. When the **Standard Change Request** form loads, under **Title** enter: **SQL Storage Change Request**

7. Under **Description** enter: **Increase capacity of SQL Server disk on SCOM01**

8. For **Reason** enter: **Running out of free disk space**

9. Under **Area**, click the drop down then expand **Hardware** and select **Storage**.

10. **Select** the **ellipses (…)** next to **Assigned To:**

11. When the **Select User** dialog opens select **Tier2** and press **OK**.
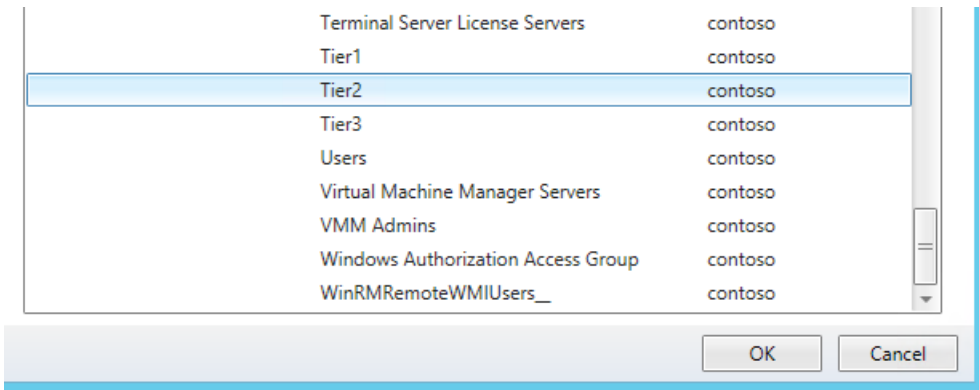
12. Scroll down, then under **Config Items to Change** select **Add** then select **SCOM01** and click **Add** and click **OK**.

13. Click **Apply**.

14. If an error appears at any point which states Failed to execute Submit operation, then click Close. Close the change request and reopen it and repeat the steps again. To view a current change request select the All change requests tab.
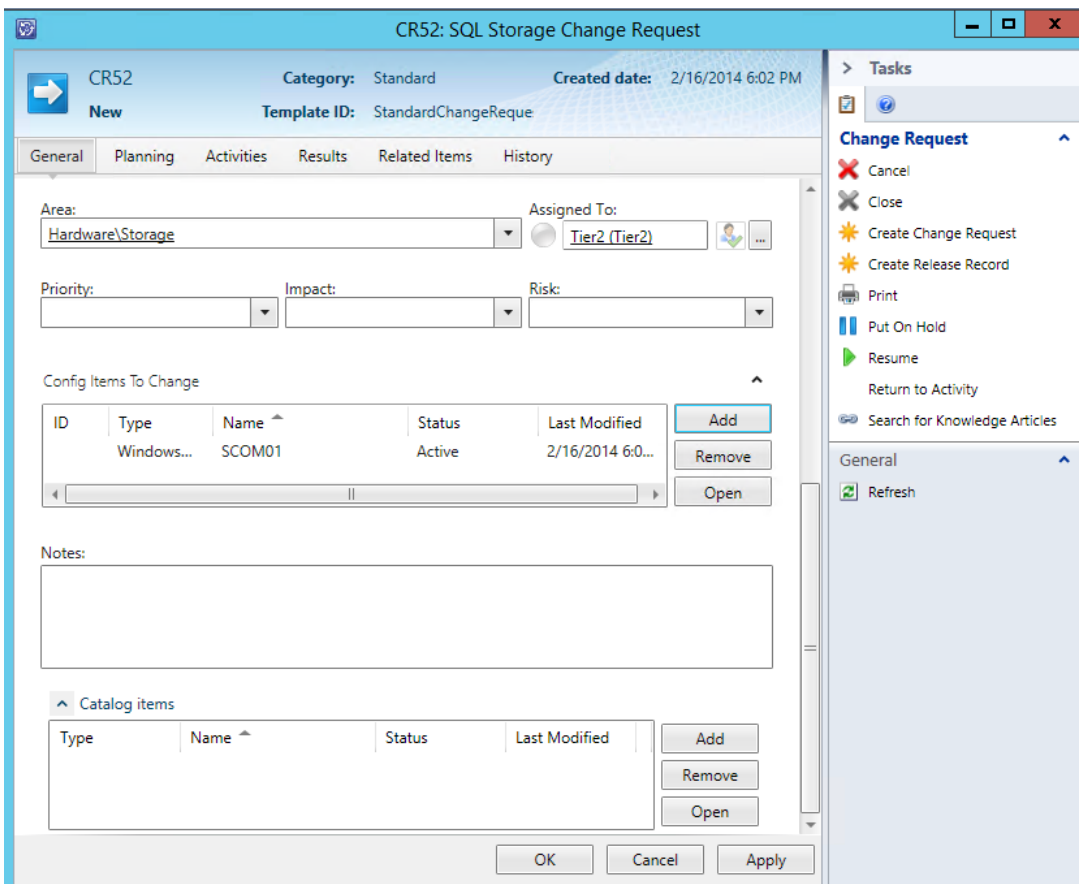
15. Select the **Planning** tab from the top menu.

16. Select the first **calendar icon** and select **today's date**.

17. Select the second **calendar icon** and select **today's date**.

18. Under **Implementation Plan** enter: **Place Operations Manager monitoring into maintenance. Take disk offline. Expand. Bring disk online. Resume SCOM monitoring.**

19. Click **Apply**.

20. Select the **Related Items** tab. Under **Work Items** click **Add** and add the incident request from the previous exercise and the click **OK**. If the previous exercise was not completed, select any object and click **Add**.
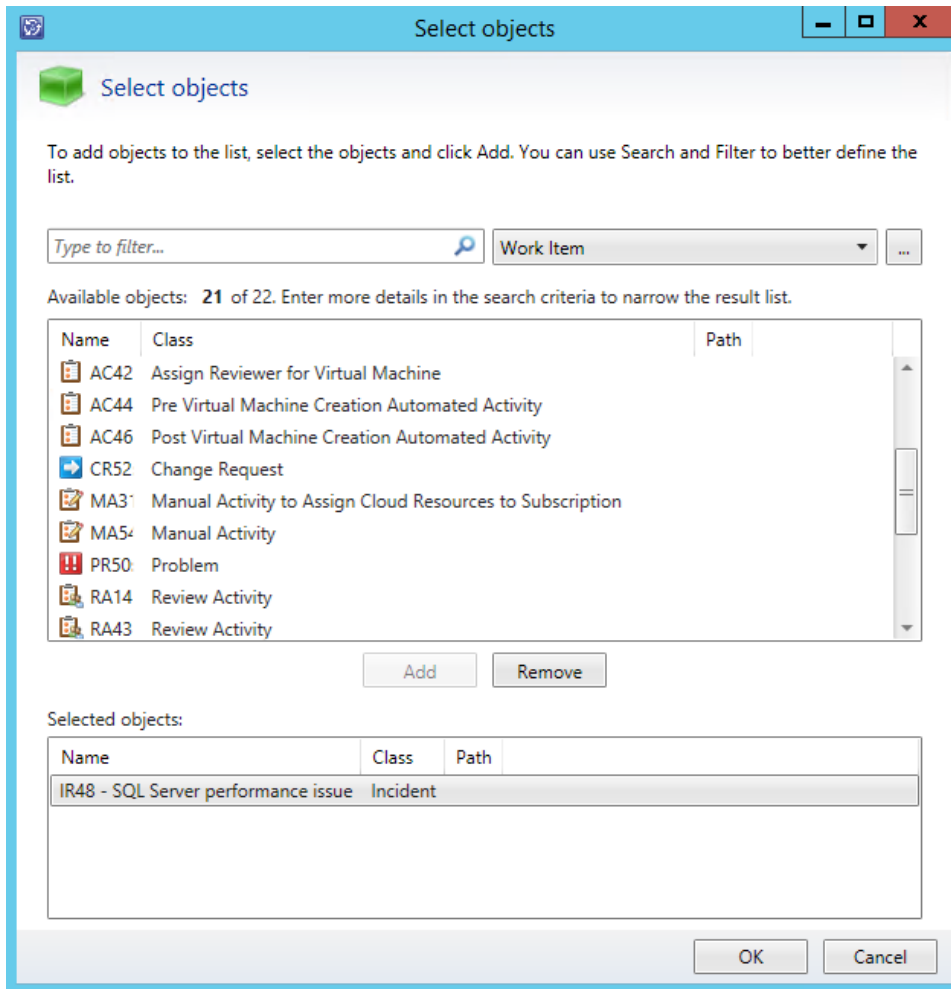
21. Under **Configuration Items** click **Add**, select **SCOM01** and click **Add**.

22. At the top of the **Select Objects** dialog select the **Computer** drop down, then select **SQL Computers** from the list.

23. Now select **SQL Computers** from the list of Available objects and click **Add** then click **OK**.
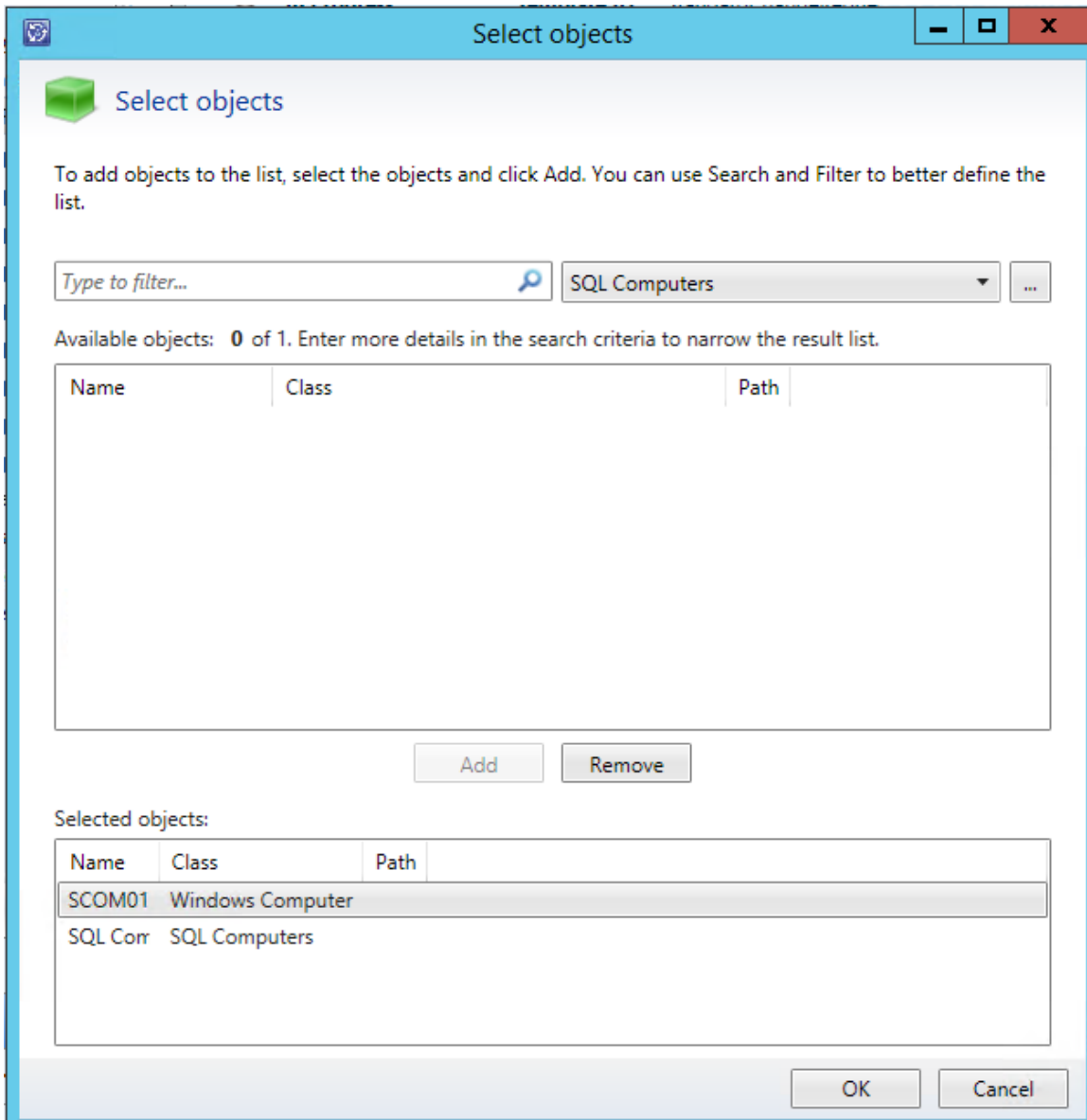
24. Under **Knowledge Articles** click **Add**.

25. Select the knowledge article called **Contoso SQL Server Performance is Slow** and click **Add**, then click **OK** to close Select objects.
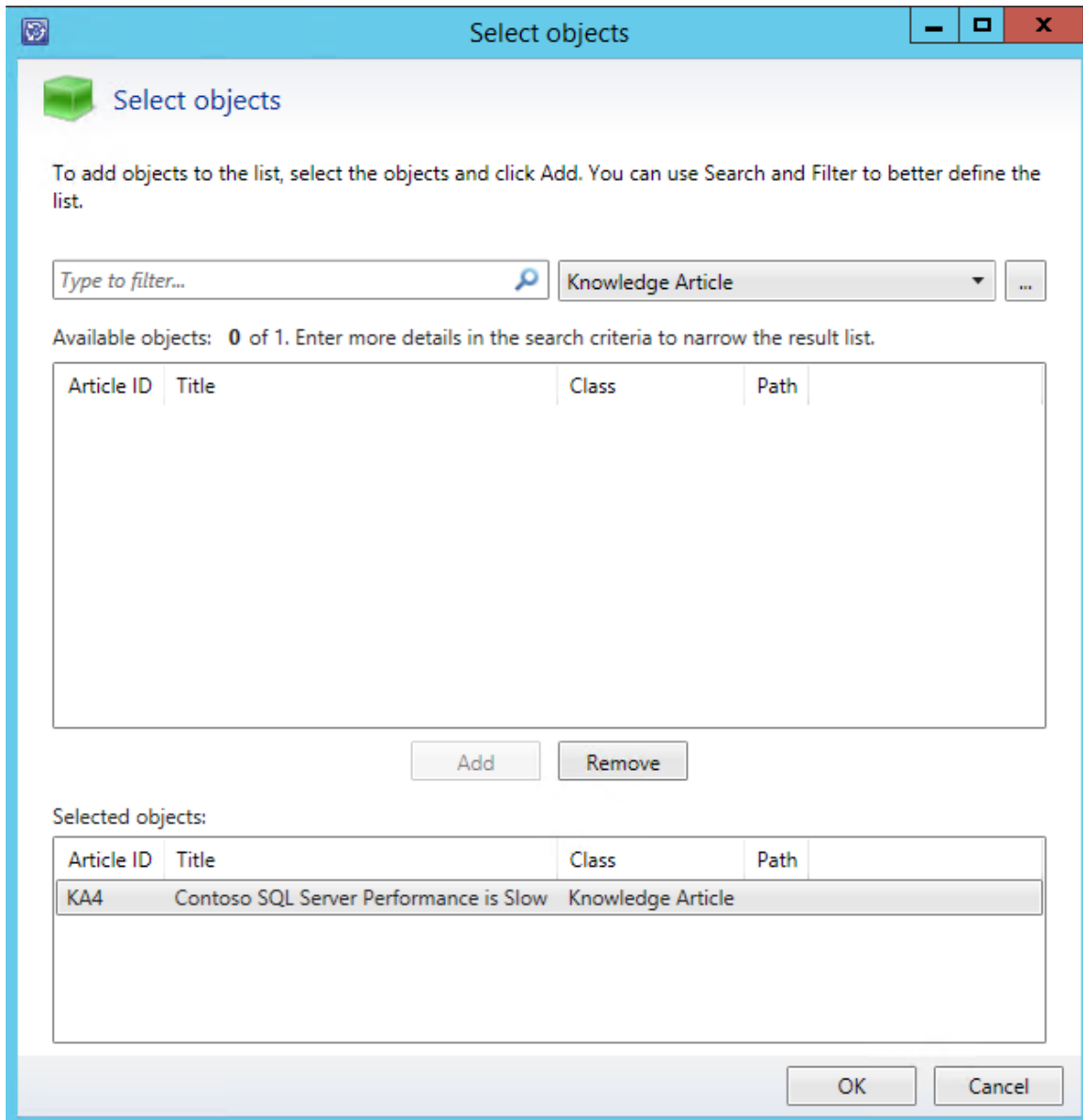
26. Click **Apply**.
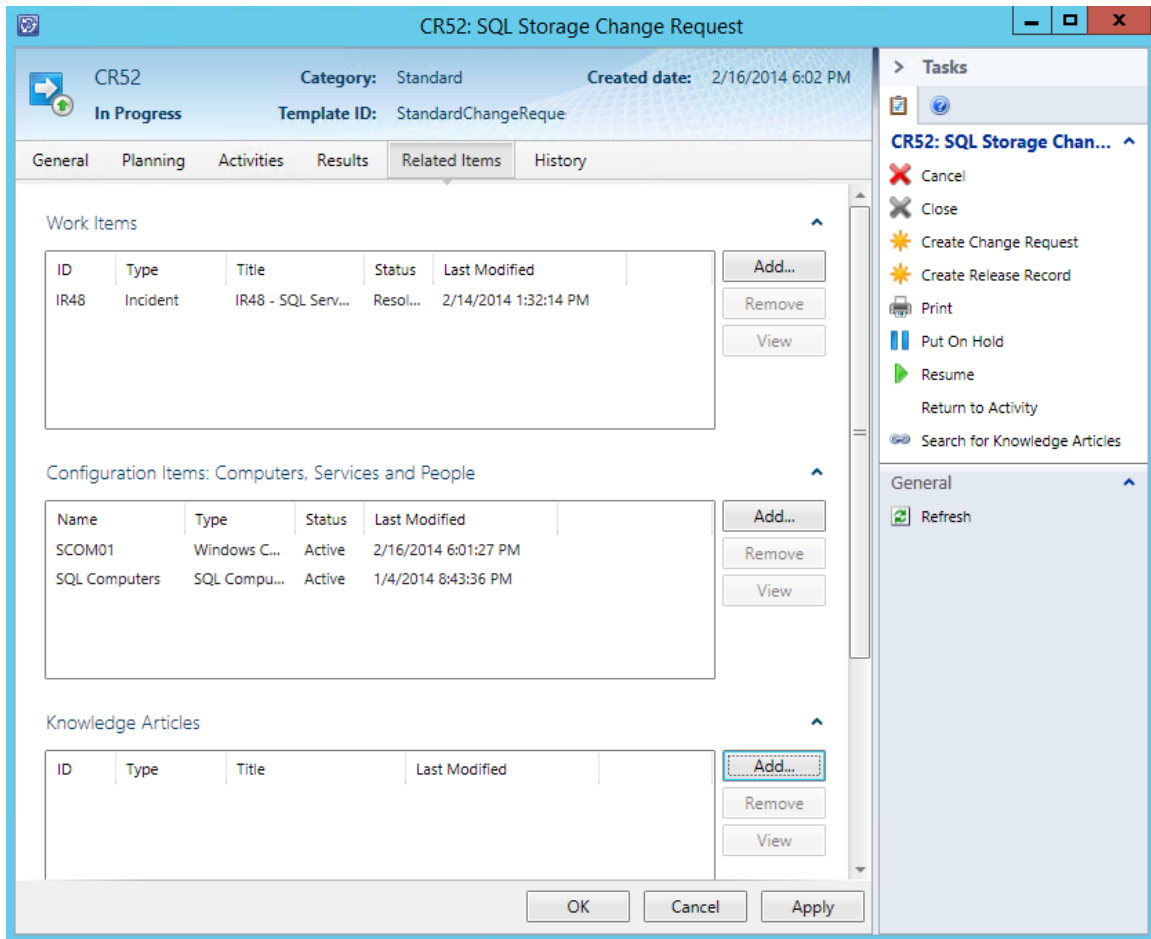
27. Click **OK** to close the Change Request form.

4.4.2 - SCSM: Review a Workflow

In this exercise, a change request will be reviewed and managed. In this scenario, the Tier 2 support team is assigned a work item and a procedural workflow is reviewed.

Estimated time to complete: 5 minutes

SCSM01

*Perform the following on **SCSM01***

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Work Items** workspace.
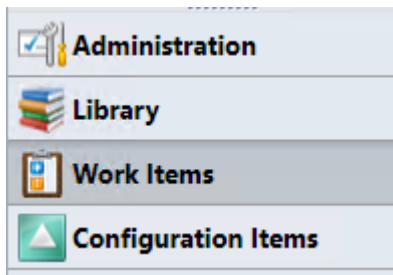
3. Expand **Work Items | Change Management**, then click on A**ll Change Requests**.
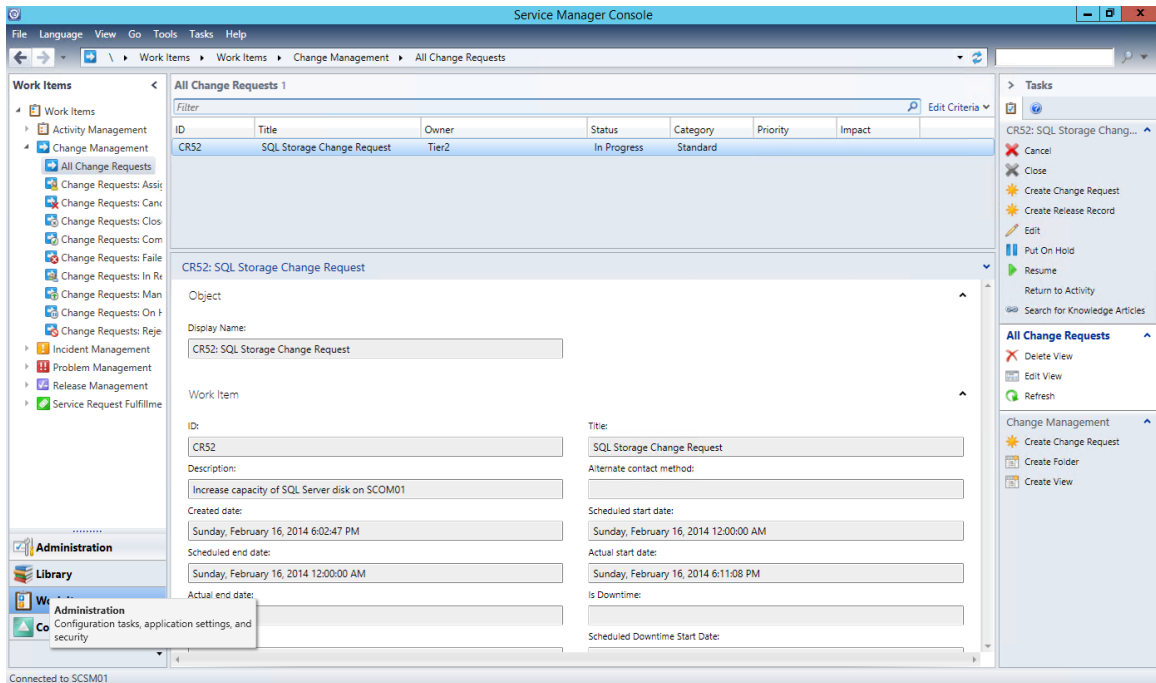
4. Select the **SQL Storage Change Request** that was created in the previous exercise and from the tasks pane select **Edit**.

5. Select the **Activities** tab. This shows the approval workflow which contains two activities. The first activity is approving the change and the second activity is applying the change.
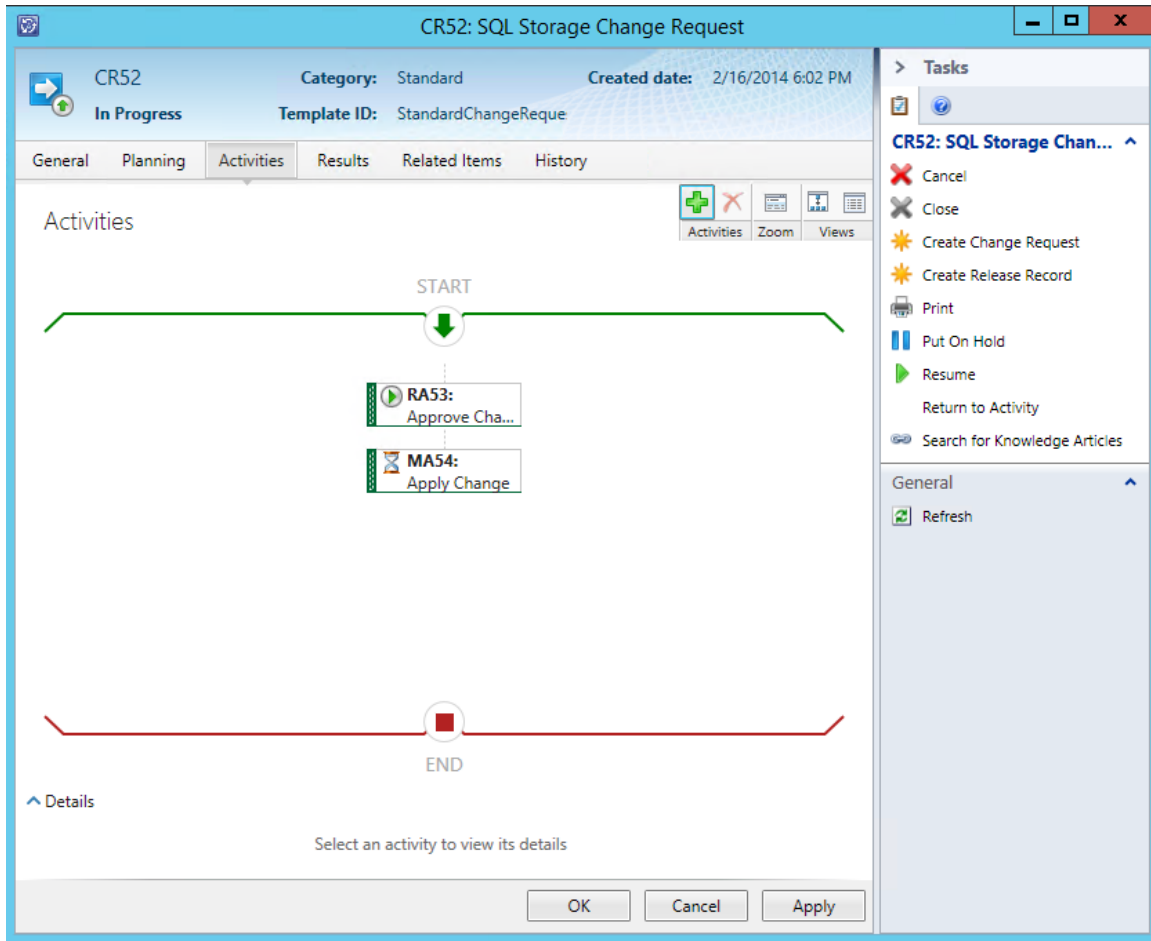
6. Right-click the upper **Approve Change Request** activity and select **Open**.
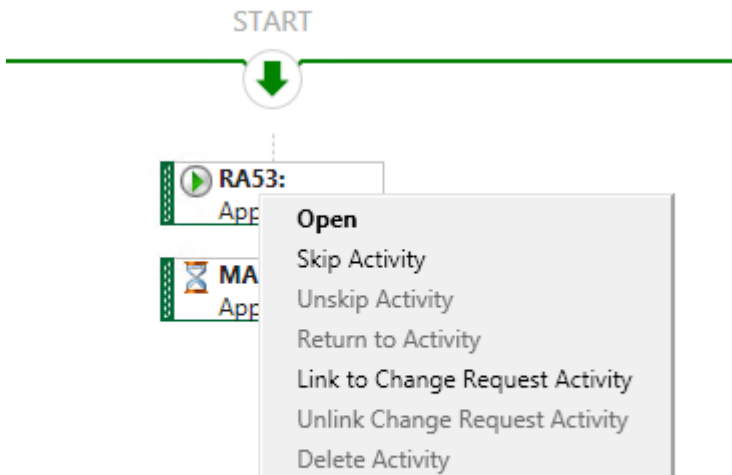
7. When the **Approve Change Request** opens, under **Stage** click the drop down and select **Approve**.

8. Under **Reviewers** select the first line the select **Approve**.

9. When the comments dialog box opens, under comments enter **Change request approved** and click **OK**.

10. Click **Apply** and click **OK** to close the Approval change request.

11. After returning to the **SQL Storage Change Request**, right-click on the lower **Apply Change** activity and select **Open**.
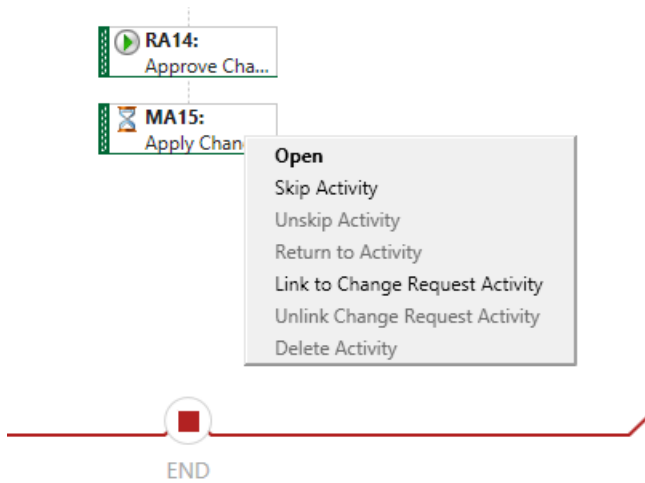
12. Change the **title** of the activity to **Increase Disk Capacity**.

13. Under **Activity Implementer** select the **ellipses (…)** when the Select User dialog opens select **Tier2** and click **OK**.

14. Under **Area** click the drop down then expand **Hardware** and select **Storage**.

15. Under **Priority** click the drop down and select **Immediate**.

16. Under **Stage** click the drop down and select **Approve**.

17. Under **Scheduled start date** select todays date and under **Scheduled end date** select todays date.

18. Under **Impacted Configuration Items** select **Add**.

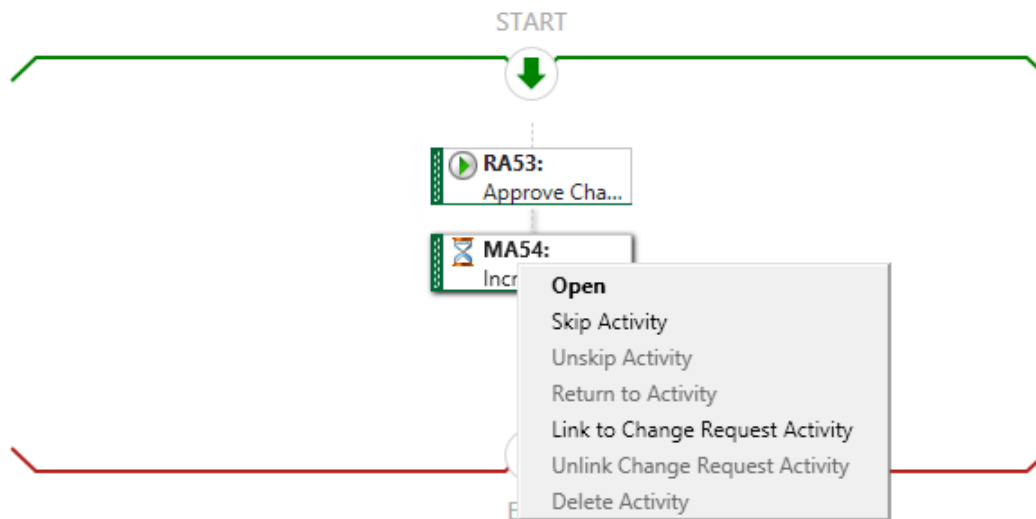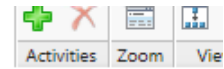19. When the Select objects form loads enter **SQL** in the filter.
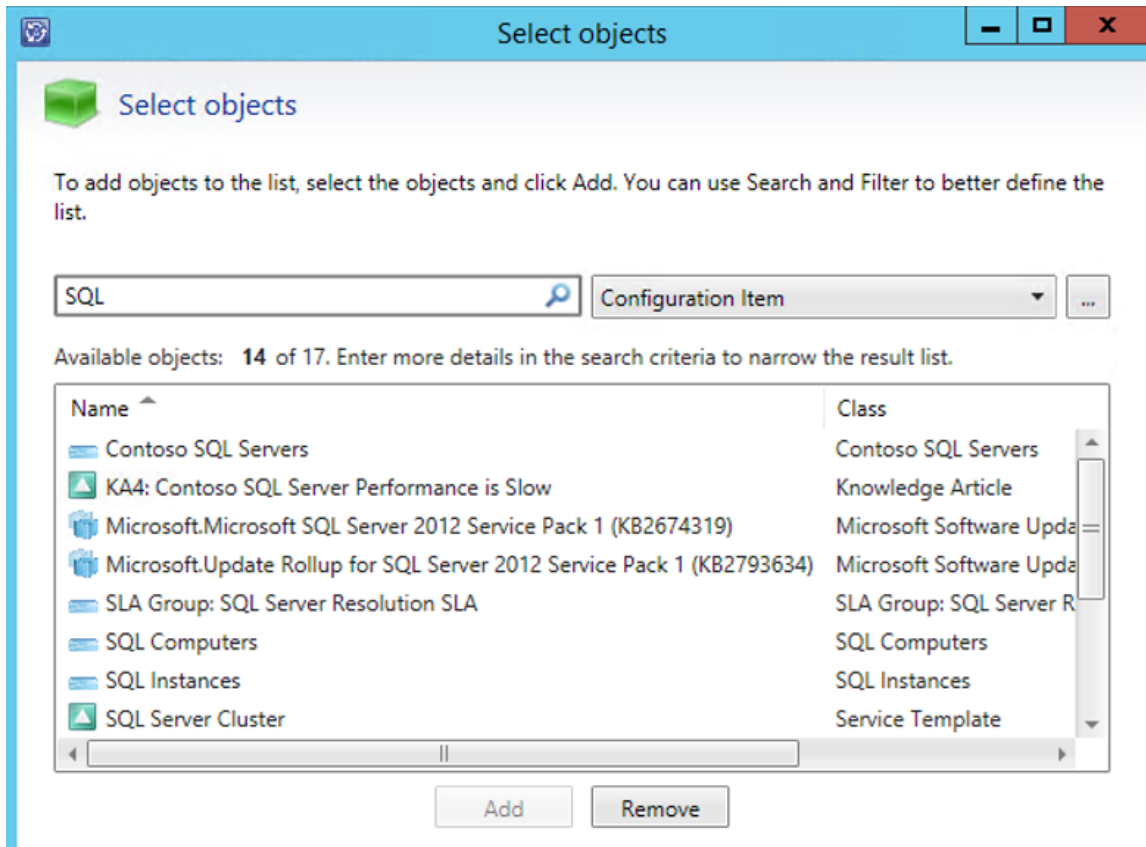
20. Select **SQL Computers** and click **Add**.

21. Select **contoso\SQL Admins** and click **Add**.

22. Select **contoso\!sql** and click **Add**.

23. Click **OK** and then click **OK** again to close the window.

24. After returning to the Activities screen right-click the **Apply change activity** and select **Skip Activity**. This activity is skipped to speed up the length of this lab.

Activities

25. When the comments dialog appears enter **No additional hardware available in this virtual lab environment** and click **OK**.

26. Click **OK** to close the Change Request.

4.4.3 - SCSM: Create a Release Record

In this exercise, the Service Manager console is used to create a release record. The IT Infrastructure Library (ITIL) defines a "release" as "one or more changes to an IT service that are built, tested and deployed together. A single release may include changes to hardware, software, documentation, processes and other components." (http://www.itil.org/custom/glossaren/**)**
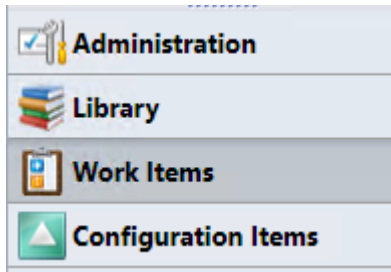
Estimated time to complete: 10 minutes

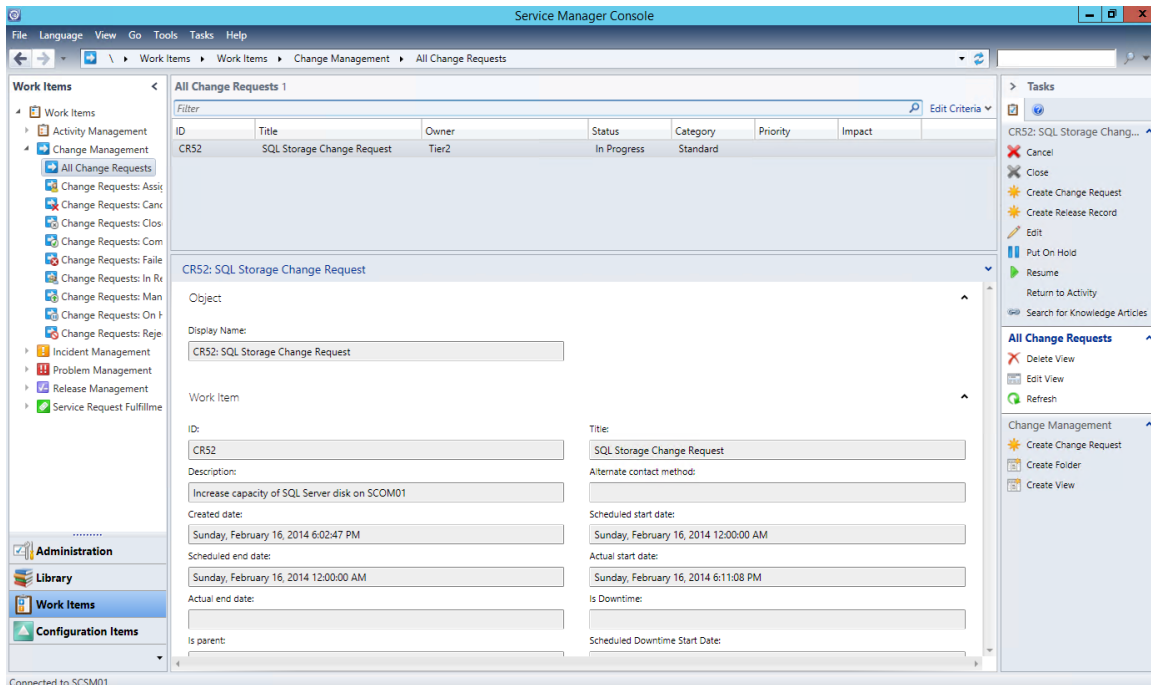SCSM01

Perform the following on SCSM01

1. From **SCSM01**, open the **Service Manager Console** by selecting the icon from the taskbar.

2. Navigate to the **Work Items** workspace.

3. Expand **Work Items | Change Management** then click on **All Change Requests**.

4. Select the change request titled **SQL Storage Change Request** then select **Edit** from the tasks pane.

5. When the change request opens select the **Activities** tab. Note that the first activity was approved and the second activity was skipped.
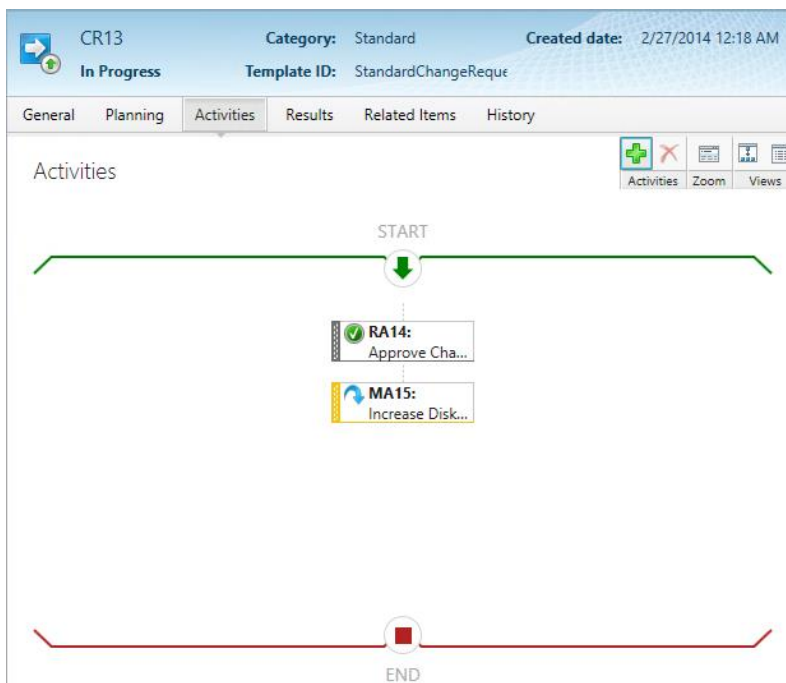
6. Select the **Results** tab, then from the Tasks tab select **Create Release Record**.
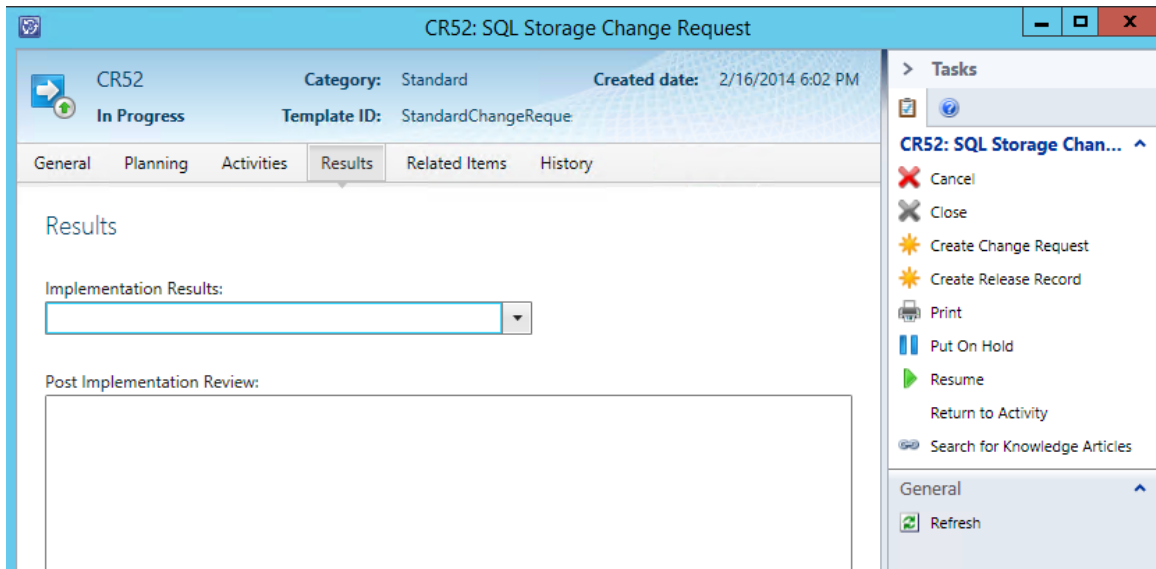
7. When the **Select Template** dialog appears, select **Default Release Record** then click **OK**.
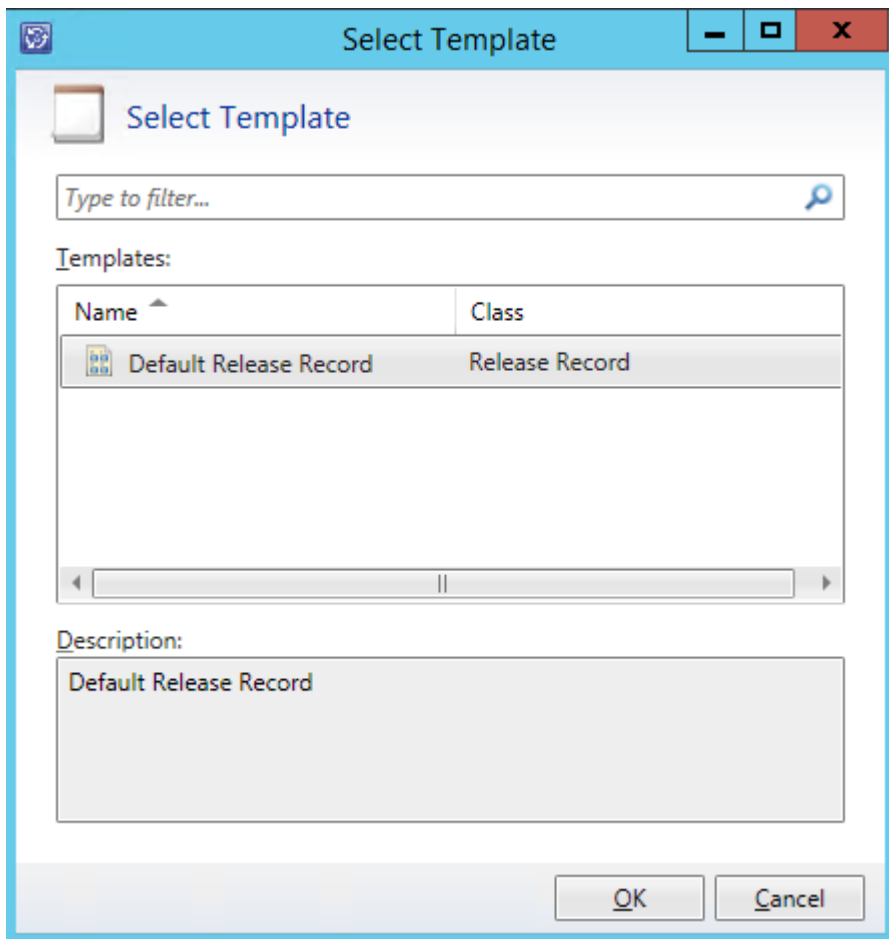
8. When the **Default Release Record** form opens, change the **Title** to **Updating SQL Disk**.

9. Under **Description** enter **Increasing SQL Disk from 3 TB SILVER to 5 TB GOLD SSD**.

10. Under **Type** select **Unplanned**.

11. Under **Category** select **Fix**.

12. Under **Assigned To** select the ellipsis (**…**).

13. Select **Tier2** and click **OK**.

14. Under **Impact** select **Standard**.

15. Under **Risk** select **Medium**.

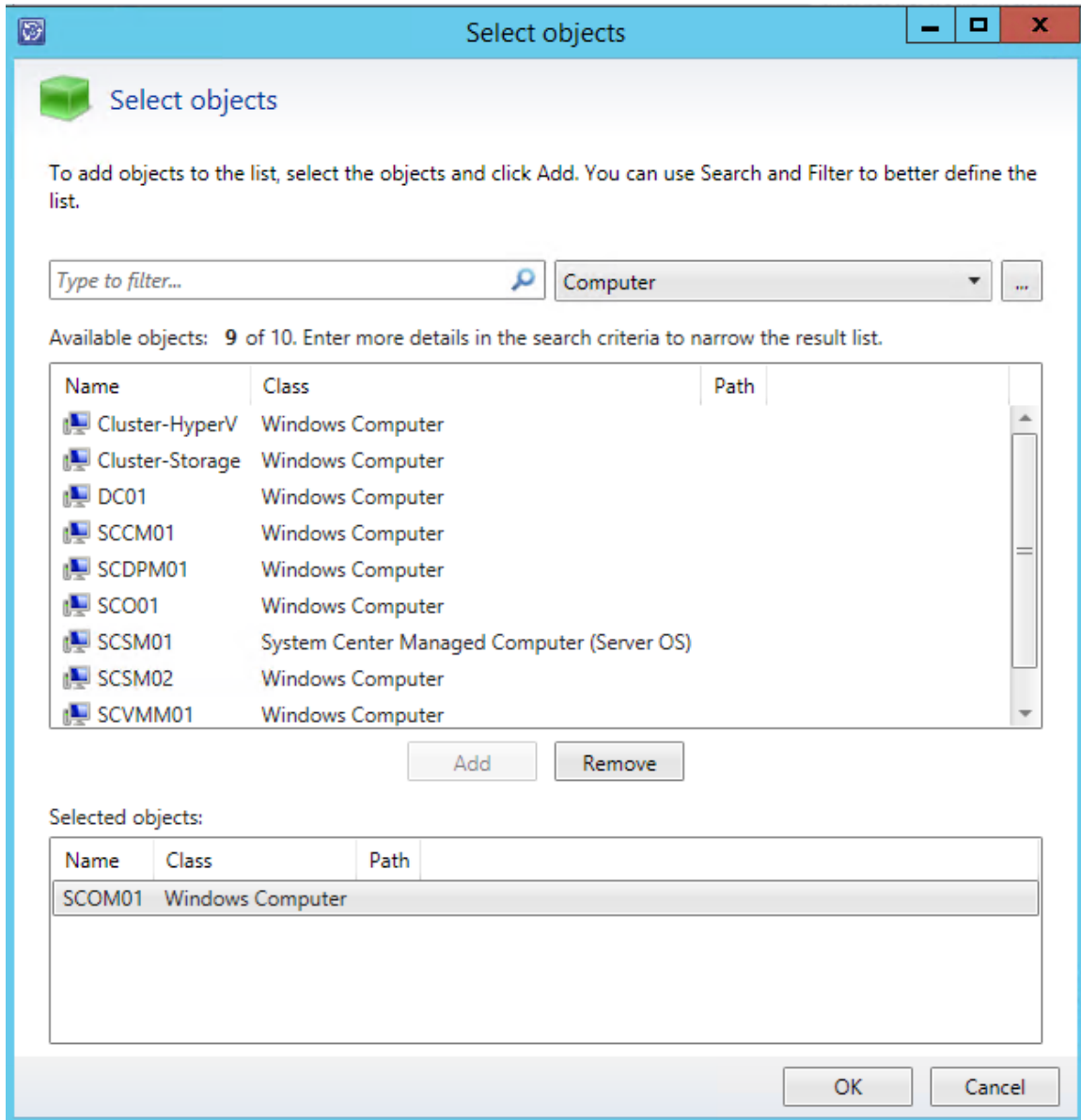16. Under **Priority** select **Immediate**, then click **Apply**.

17. Click the **Release Package** tab.

18. Under **Configuration Items to Modify** click **Add** then select **SCOM01** and click **Add**. Click **OK**.

19. After returning to the Release Record page, under **Affected Services** click **Add**.
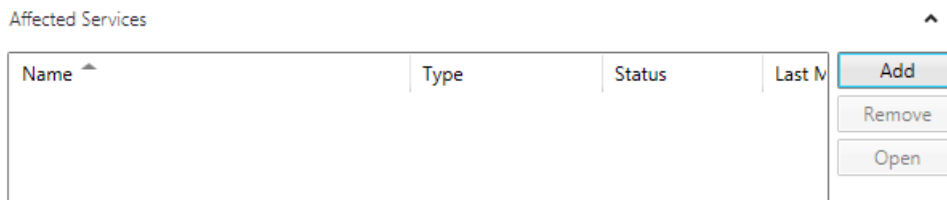
20. On the Select Objects page select **Operations Manager Management Group** and click **Add** then click **OK**.
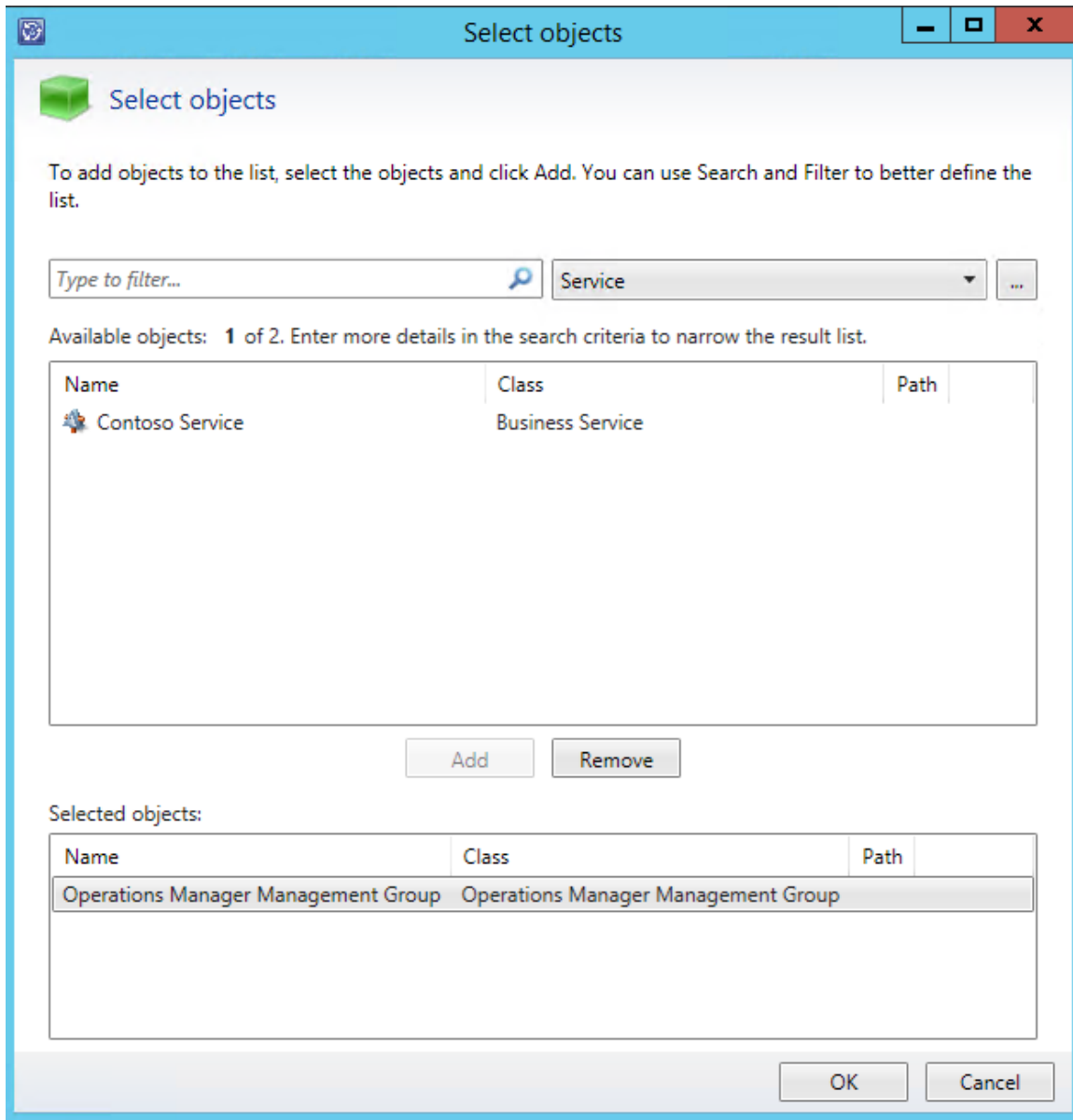
21. Click **Apply.**

22. Click the **Scheduling** tab.

23. For **Required by** select the calendar icon and choose tomorrow's date.

24. For **Scheduled start time** select todays date and change the time to **6 PM**.

25. For **Scheduled end time** select todays date and change the time to **8 PM**.
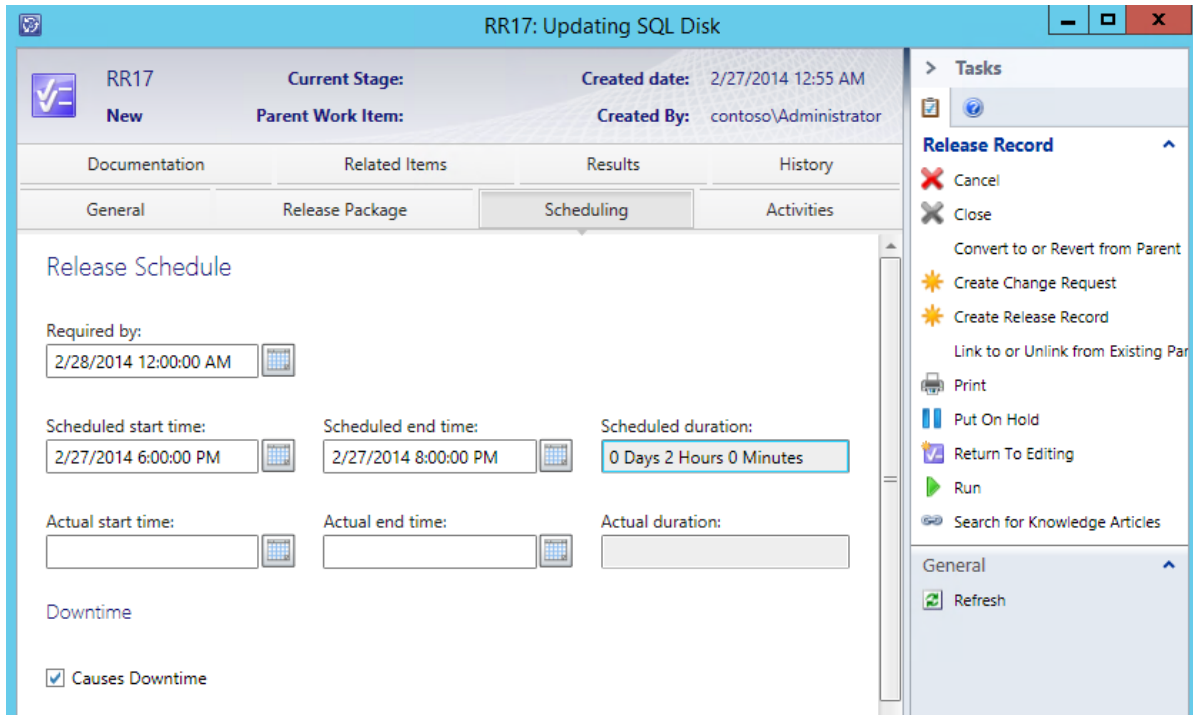
26. Click **Apply**.

27. If an error appears at any point which states Failed to execute Submit operation, then click Close. Close the release record and reopen it and repeat the steps again. To view the current change requests, navigate to Work Items | Release Management | All Release Records.
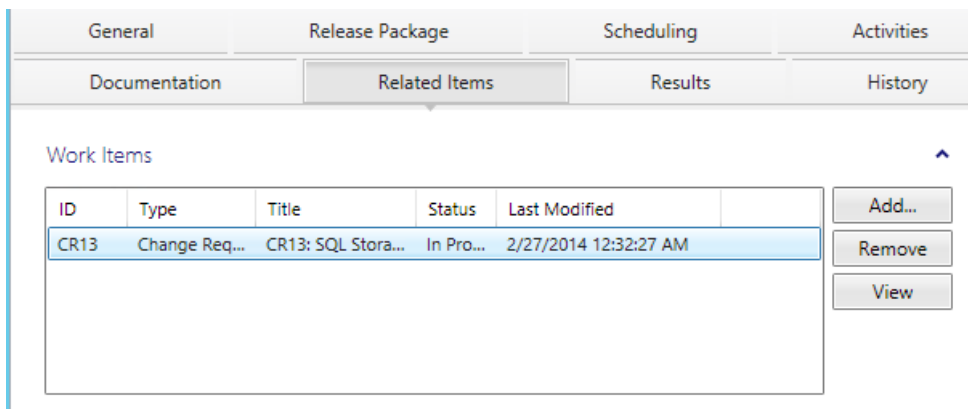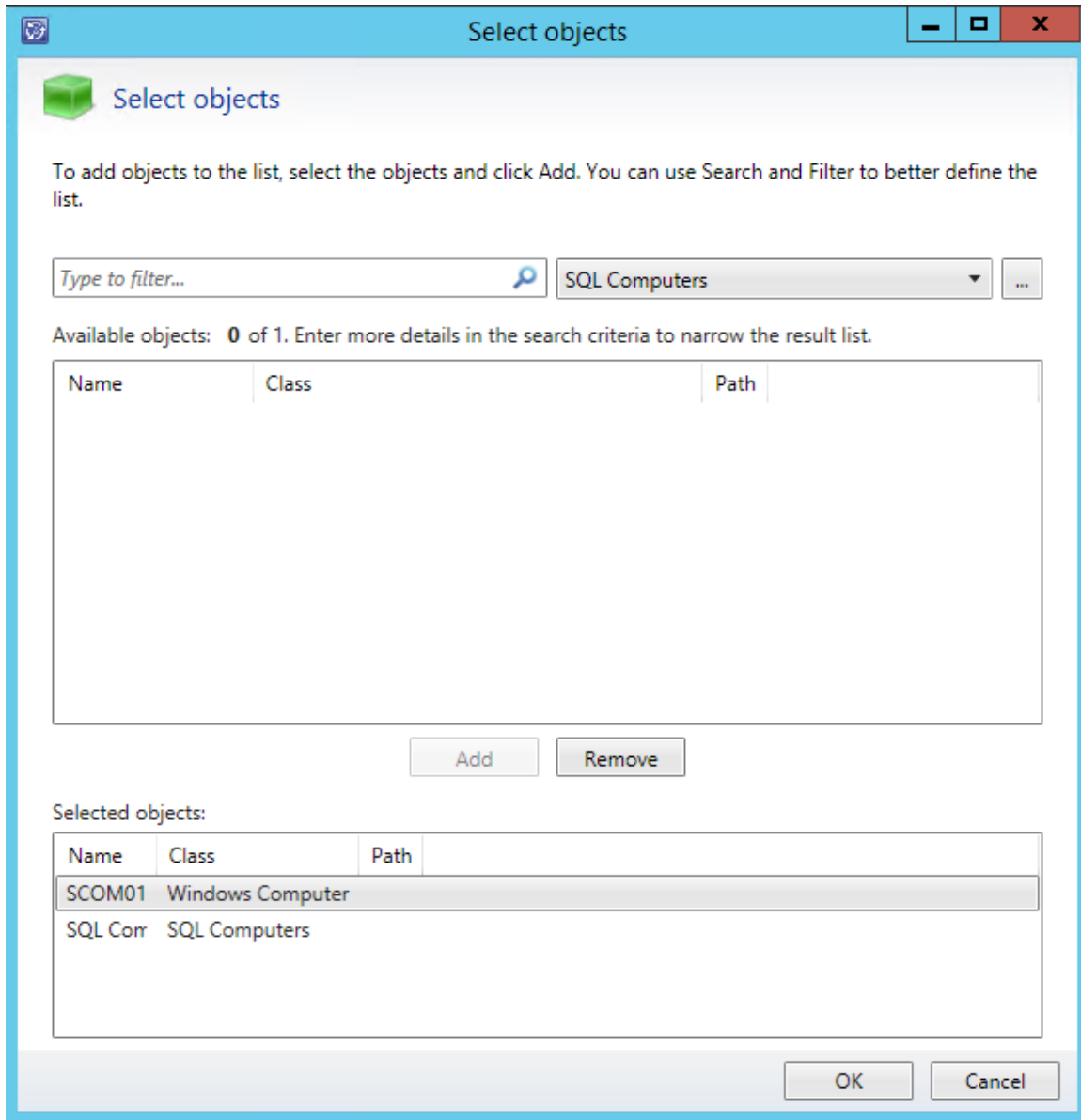
28. Click the **Related Items** tab.

29. Under **Work Items** note that the change request that this was created from is linked to it.


30. Under **Configuration Items: Computers, Services and People** click **Add**.

31. Select **SCOM01** and click **Add.**

32. Select the dropdown filter and change it to **SQL Computers** then from the list of available objects select **SQL Computers.** Click **Add** and click **OK.**

Select objects

To add objects to the list, select the objects and click Add. You can use Search and Filter to better define the list.

Type to filter...   🔍   SQL Computers   ▾   ...

Available objects: **0** of 1. Enter more details in the search criteria to narrow the result list.

Name	Class	Path

Add   Remove

Selected objects:

| Name	Class	Path
SCOM01	Windows Computer	
SQL Com	SQL Computers	

OK   Cancel

33. Under **Knowledge Articles** click **Add.**

34. Select the **Knowledge Article** with the title **Contoso SQL Server Performance is Slow**. Click **Add**. Click **OK**.
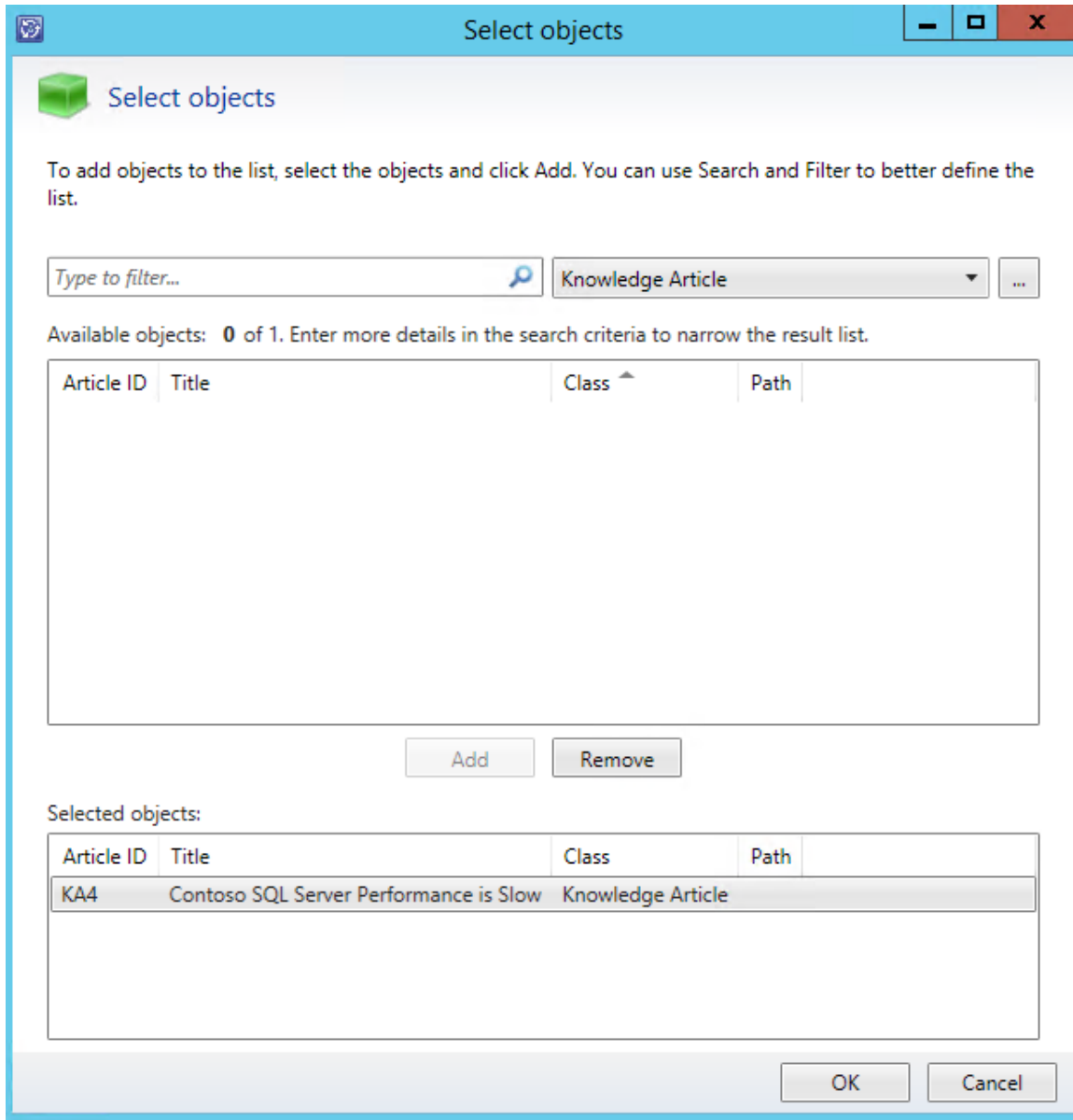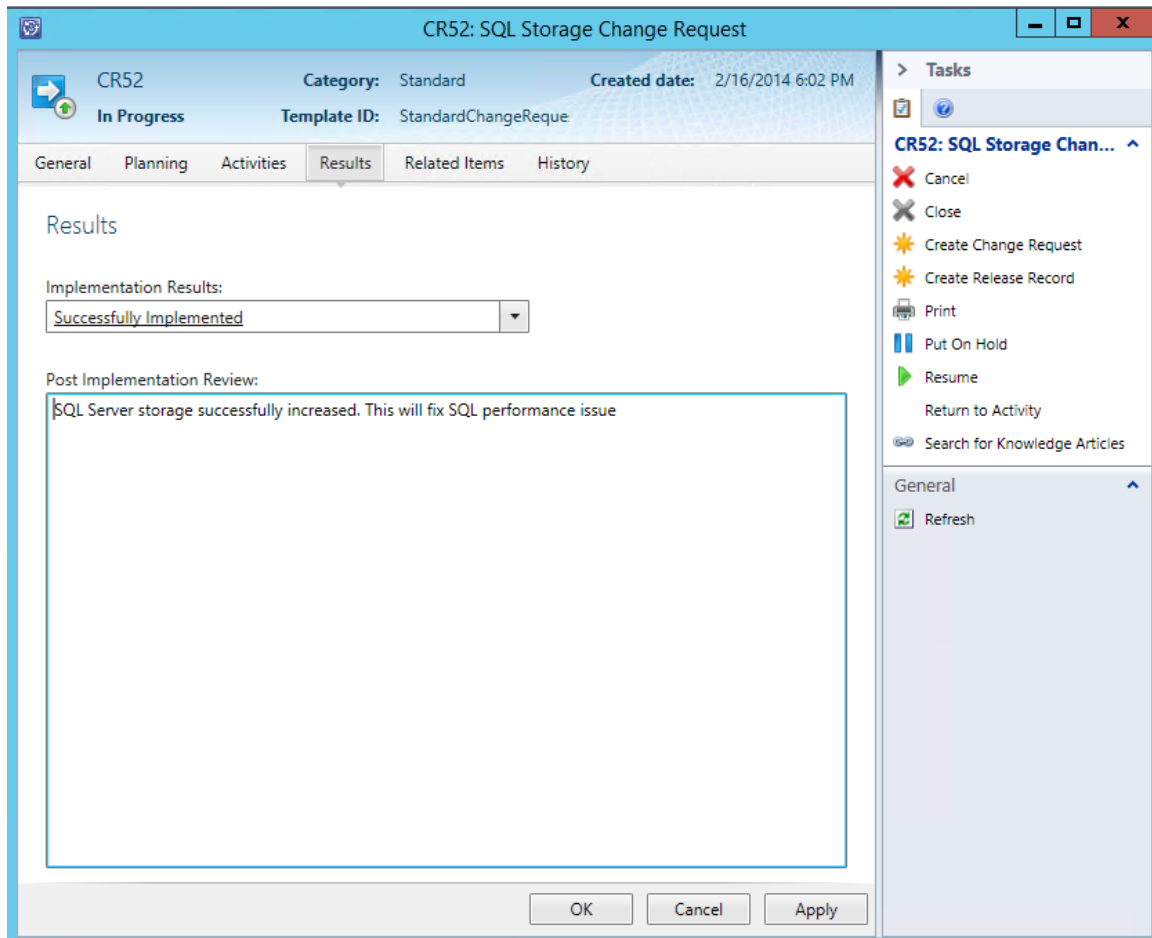
35. Click **Apply**.

36. Select the **Results** tab.

37. Under **Implementation Results** choose **Successfully Implemented**.

38. In **Post Implementation Review**: enter **Storage successfully updated.** Click **Apply.** Click **OK.**
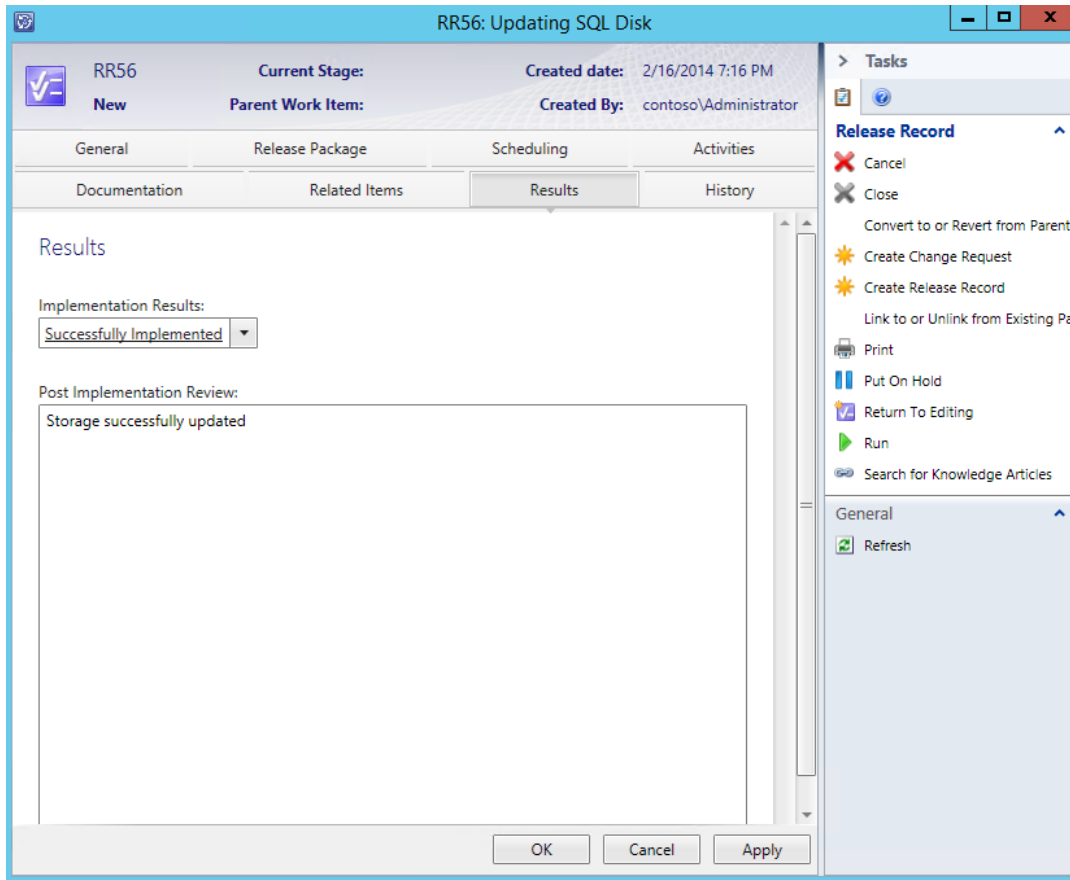
39. Navigate to the **Work Items | Release Management | Release Records: All** view.
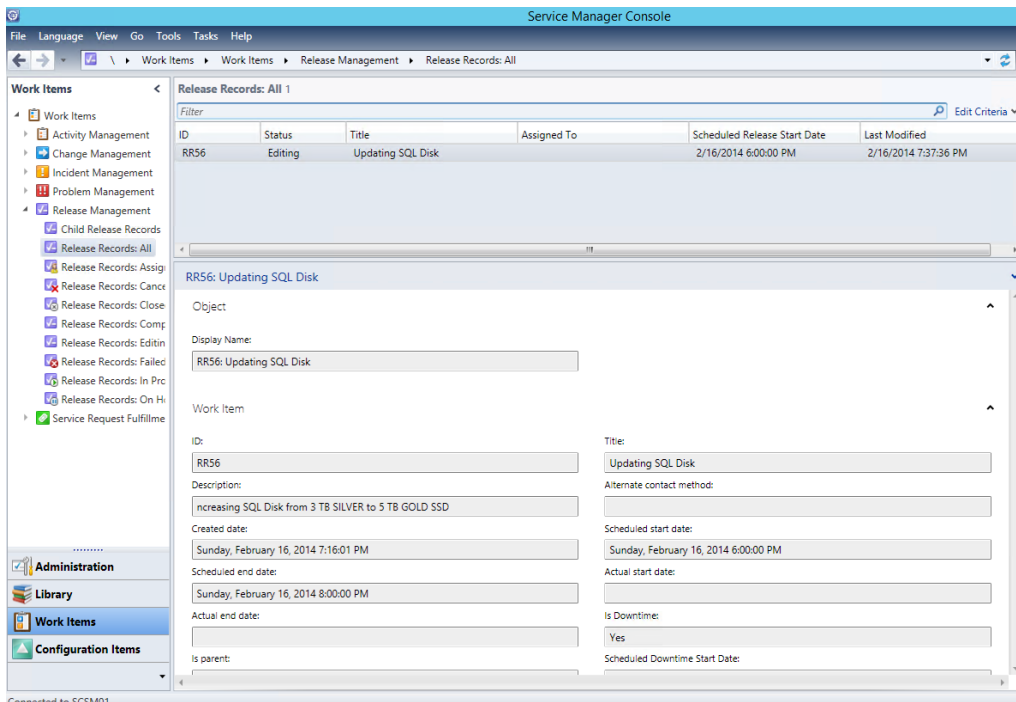
40. Review the details pane.

41. From the **Work Items** workspace, navigate to **Work Items | Change Management** and select **All Change Requests.**

42. Select **SQL Storage Change Request** and click **Edit** from the tasks menu.

43. Select **Results** tab**.**

44. Under **Implementation Status** choose **Successfully Implemented.**

45. Under **Post Implementation Review** enter**: SQL Server storage successfully increased. This will fix SQL performance issue.** Click **Apply.**

46. Click **OK** to close the Change Request.