

ITSM Configuration Coordinators

Role and Responsibilities



FOUNDED BY BRIGHAM AND WOMEN'S HOSPITAL
AND MASSACHUSETTS GENERAL HOSPITAL

Document Ownership

Document Owner	ITSM Role, Department
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Revision History

Version #	Revision Date	Revision Author	Revision Summary	Approvers
1.0	5/3/2015	Rahul Sheth	Initial creation	
1.1	6/18/2015	Rahul Sheth	Added weekly responsibilities	
1.2	7/20/2015	Rahul Sheth	Created and Excel report	
1.3	1/28/2016	Rahul Sheth	New self-service fields	
2.0	11/14/2016	Paul Censullo	General revision	
3.0	3/31/2017	Paul Censullo	Added additional CI maintenance options	
4.0	9/6/2017	Paul Censullo	Updated graphics	
5.0	11/21/2017	Paul Censullo	Updated options for maintaining CI relationships	
6.0	2/8/2018	Paul Censullo	Clarified method to delete relationships	
7.0	10/15/2018	Paul Censullo	Added steps for mapping relationships for app-Isilon storage servers and cloud apps-to-network gear	
8.0	2/28/2019	Paul Censullo	Added steps for mapping relationships for network gear-to-network gear	
9.0	3/28/2019	Paul Censullo	Added steps for mapping relationships for applications-to-Citrix	
10.0	5/8/2019	Paul Censullo	Added link for customizing CI relationships	
11.0	8/29/2019	Paul Censullo	Corrected steps for adding relationships for cloud app-to-IP switch	
12.0	1/31/2019	Paul Censullo	Added ITSM CMDB Dashboard	

13.0	3/30/2020	Paul Censullo	Additional information regarding ServiceNow Discovery	
14.0	8/5/2020	Paul Censullo	Added format for indicating Data Center locations.	

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Overview

Purpose

This document provides a high-level overview of the role and responsibility of configuration coordinators at Partners HealthCare (PHS).

The CMDB

The Configuration Management Database (CMDB) represents the authorized configuration of the significant components of the IT environment.

It supports the processes that manage the ServiceNow Configuration Management Database (CMDB), which in turn enables most other ServiceNow applications that automate IT services. Configuration Management helps organizations better understand the IT environment by providing insight into not only the impact of incidents, problems and changes, but also financial resources, service availability and capacity management. The application presents a logical model of the enterprise infrastructure to give IT more control over the environment and to facilitate decision-making.

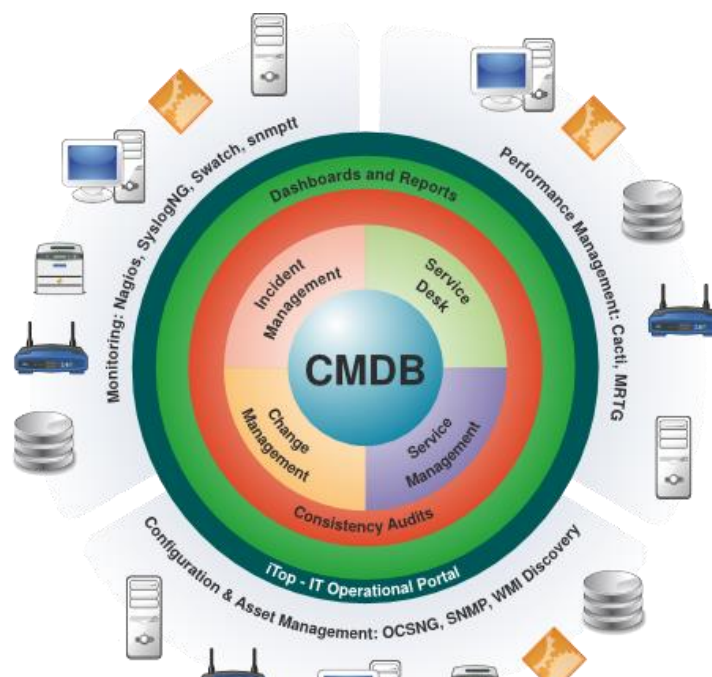


Figure 1: Representation of CMDB

Configuration Item

In ITIL terminology, configuration items (CI) are components of an infrastructure that currently is, or soon will be under configuration management. CIs may be a single module such as a monitor or tape drive, or more complex items, such as a complete system.

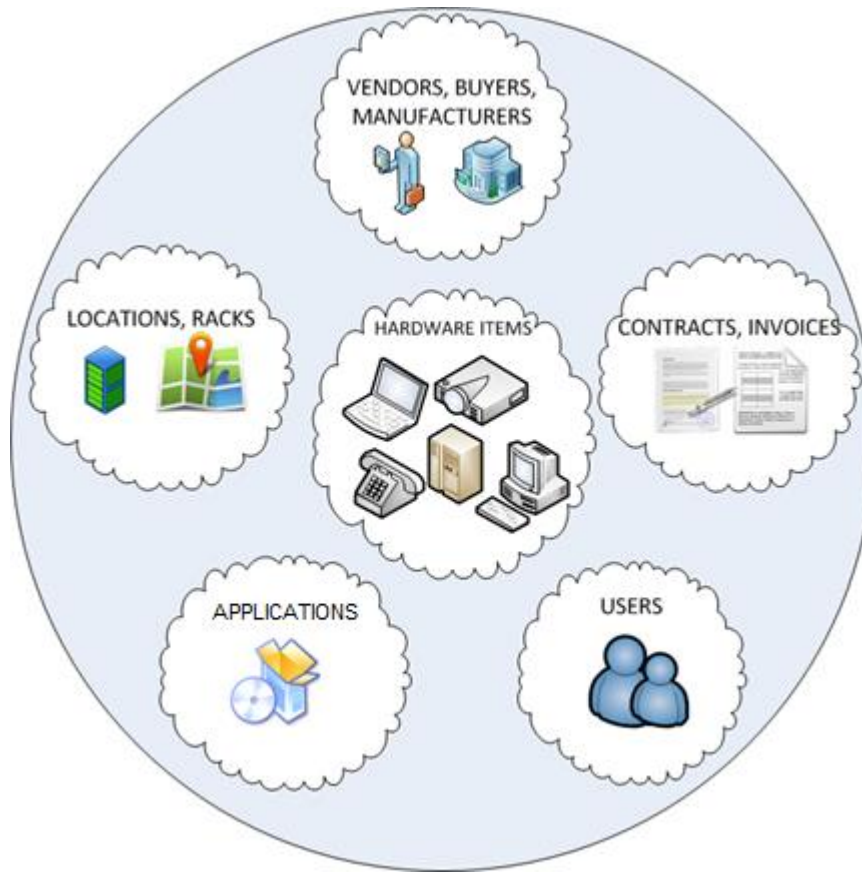


Figure 2: Example of Configuration Items in CMDB

Configuration Coordinators

Configuration Coordinators are team members across the enterprise that are champions of the Configuration Items (CIs) that their team manages or uses on a daily basis. They are akin to the data quality analyst role from an ITIL perspective and have the knowledge, responsibility, and access to modify key attributes of CIs in the Configuration Management Database (CMDB).

This document describes their role in the organization and how they can support the CMDB.

Configuration Coordinators as Liaison

Configuration Coordinators act as a liaison or intermediary between team/department and configuration management to escalate issues and manage resolutions. They are responsible for maintenance of their department CIs.

The following graphic denotes the support model for configuration management

- Configuration coordinators support their team members
- For escalation issues, configuration coordinators are the point-of-contact to the Configuration Manager

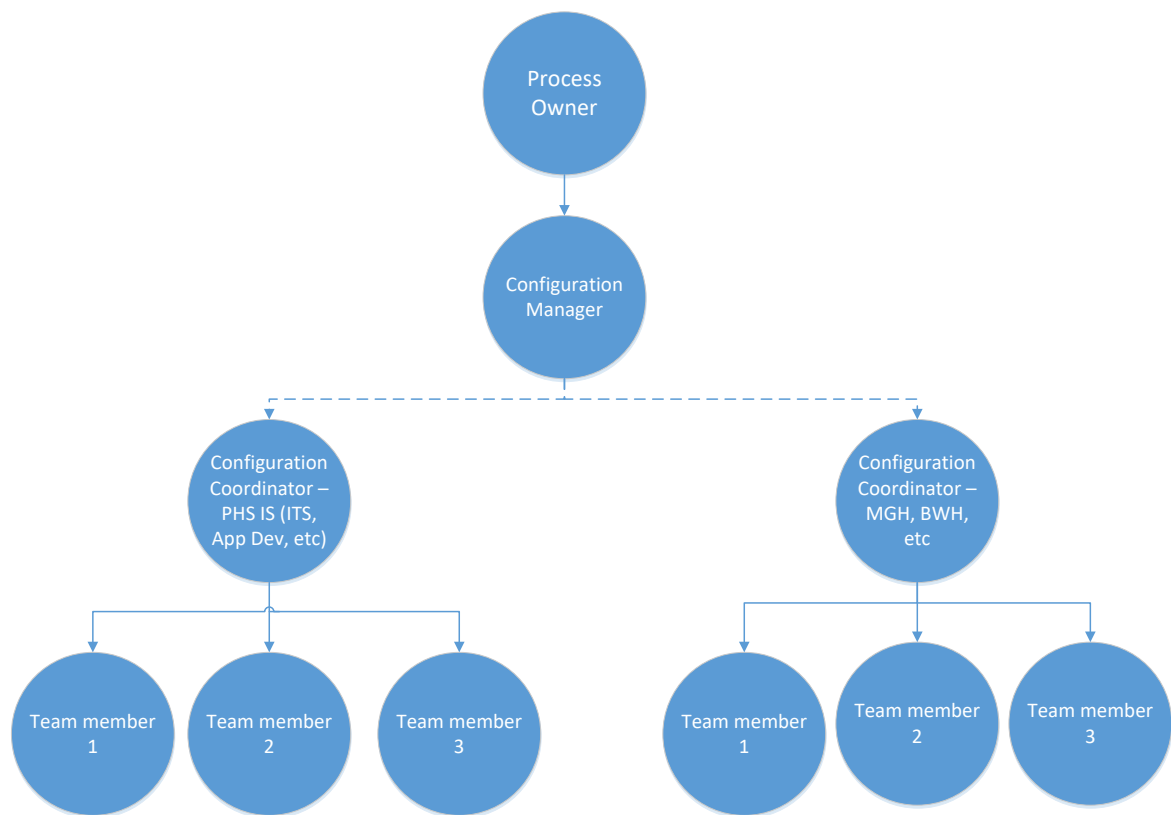


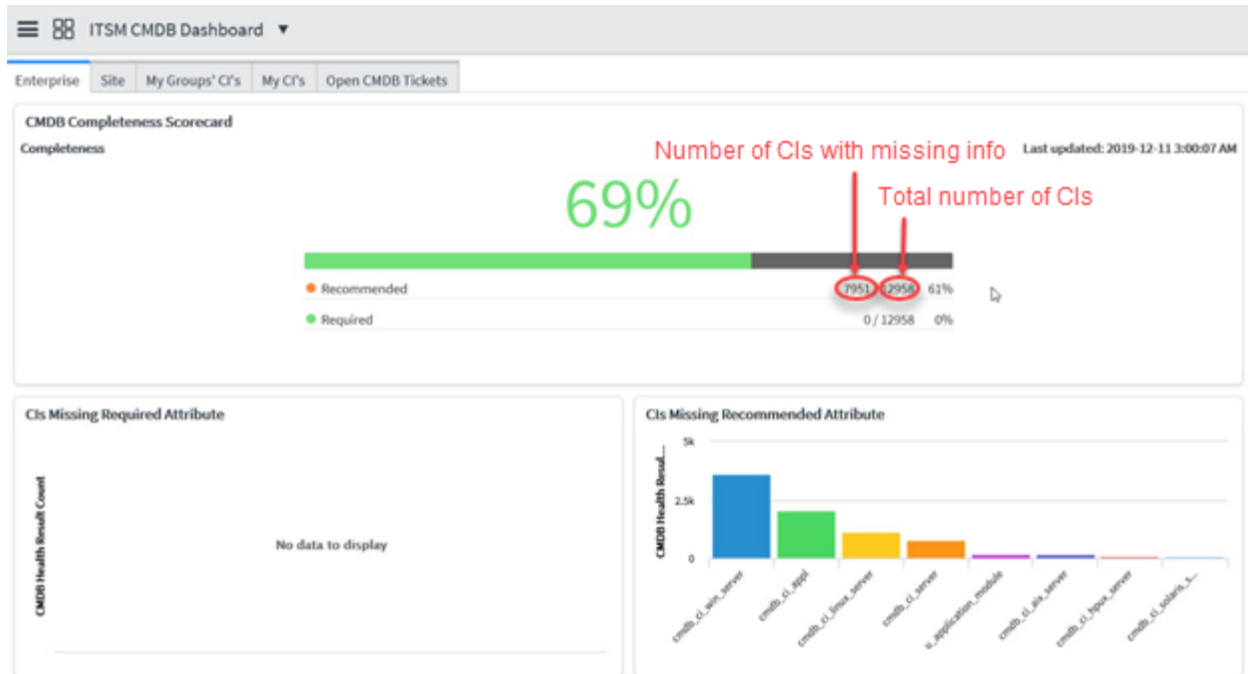
Figure 3: Support Model for Configuration Management

Configuration Coordinators by Department

For a spreadsheet of configuration coordinators by department, see https://partnershealthcare.service-now.com/nav_to.do?uri=phsess/knowledge.do?sysparm_document_key=kb_knowledge,19f6581e4f1dda40e0161fb5f110c787 (KB0025558).

Managing Your Configuration Items (CIs)

ITSM CMDB Dashboard



CMDB Health

Currently, our assessment of CMDB health is based on an evaluation of the *Completeness* of CIs at the CI, class, and hierarchical levels (Enterprise, Site, and configuration coordinator groups). ServiceNow facilitates this assessment using the Completeness Scorecard on the ITSM CMDB Dashboard.

Work is also underway to expand the ITSM CMDB Dashboard to evaluate the *Correctness* and *Compliance* of CIs. Completeness, Correctness, and Compliance are all key performance indicators (KPIs) for best practice Configuration Management.

Understanding the Completeness Scorecard

The Completeness Scorecard on the ITMS CMDB Dashboard assesses health of a CI is based on the CI record having completed required and recommended fields. Required and recommended fields are the metrics that support this KPI. The only required field across all CI classes is the CI name. Although most recommended fields are standard across all CI classes, there are some additional fields based on class, as follows:

Required fields	Recommended fields
Name	<ul style="list-style-type: none"> • Criticality • Support group • Owning Entity • CI Owner • Technical Owner • Business Owner • Description (Application and Application Module) • Keyword Terms (Application and Application Module) • Location (Server) • Maintenance Group (Windows Server)

Percentages and Thresholds

The CMDB health on the Enterprise and Site tabs is displayed as a percentage of CIs with all fields completed. The percentage displayed at the top of these tabs is an average of the required and recommended percentages. Individual percentages for CIs with completed required and completed recommended fields complete are displayed below the overall percentage.

Thresholds are color-coded, based on the percentage complete as follows:

67% or greater complete – **Green**

33% or greater complete – **Orange**

32% or under complete - **Red**

Using the ITSM CMDB Dashboard

This dashboard includes the following tabs:

- Enterprise
- Site
- My Groups' CIs
- My CIs
- Open CMDB Tickets

The intent of the ITSM CMDB Dashboard is that by taking care of your own CIs, you will provide value to the Site and Enterprise. The goal is to attain 100% completion for the Completeness Scorecard for our Enterprise and Sites. We get there by everyone using the My CI's and My Groups' CIs to complete all required and recommended fields for their associated CIs.

Note: Updates that you make to fields for your CIs are not reflected in real-time in the CMDB Scorecard percentages. CMDB Scorecard percentages are refreshed each morning at 3am.

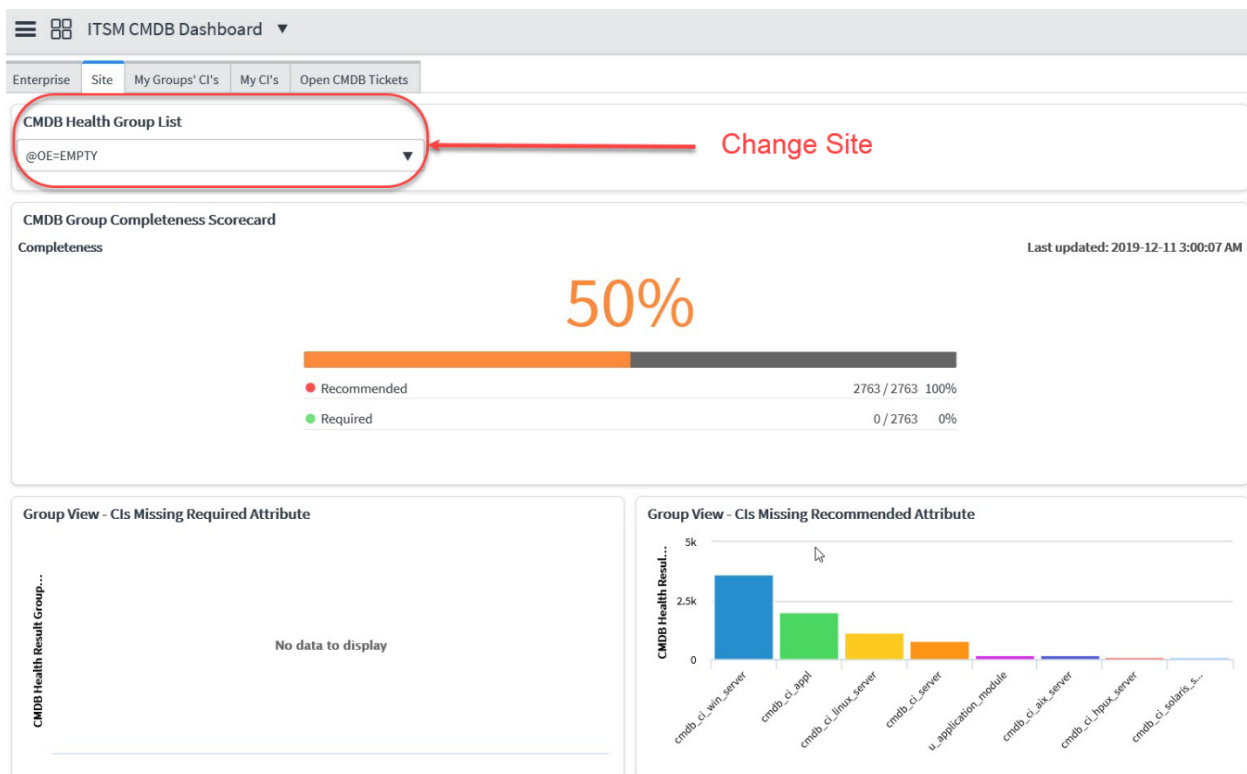
The dashboard also allows you to display open tickets assigned to ITSM Configuration Management – phs or any configuration coordinator group.

Reviewing the Completion Score for the Enterprise or Any Site

For the Enterprise and Site tabs, the upper section displays the CMDB Completion Scorecard. This section includes the overall percentage for required and recommended fields. Beneath this overall number, are specific percentages for recommended and required items.

For the Site tab, click the drop-down list to display CIs from another Site.

Note: The @OE=EMPTY entry includes CIs for which the Owning Entity field is blank.



Beneath this section, are sections for CIs Missing Required Attribute and CIs Missing Recommended Attribute. These sections display a graphical breakdown of CIs missing attributes, grouped by CI class.

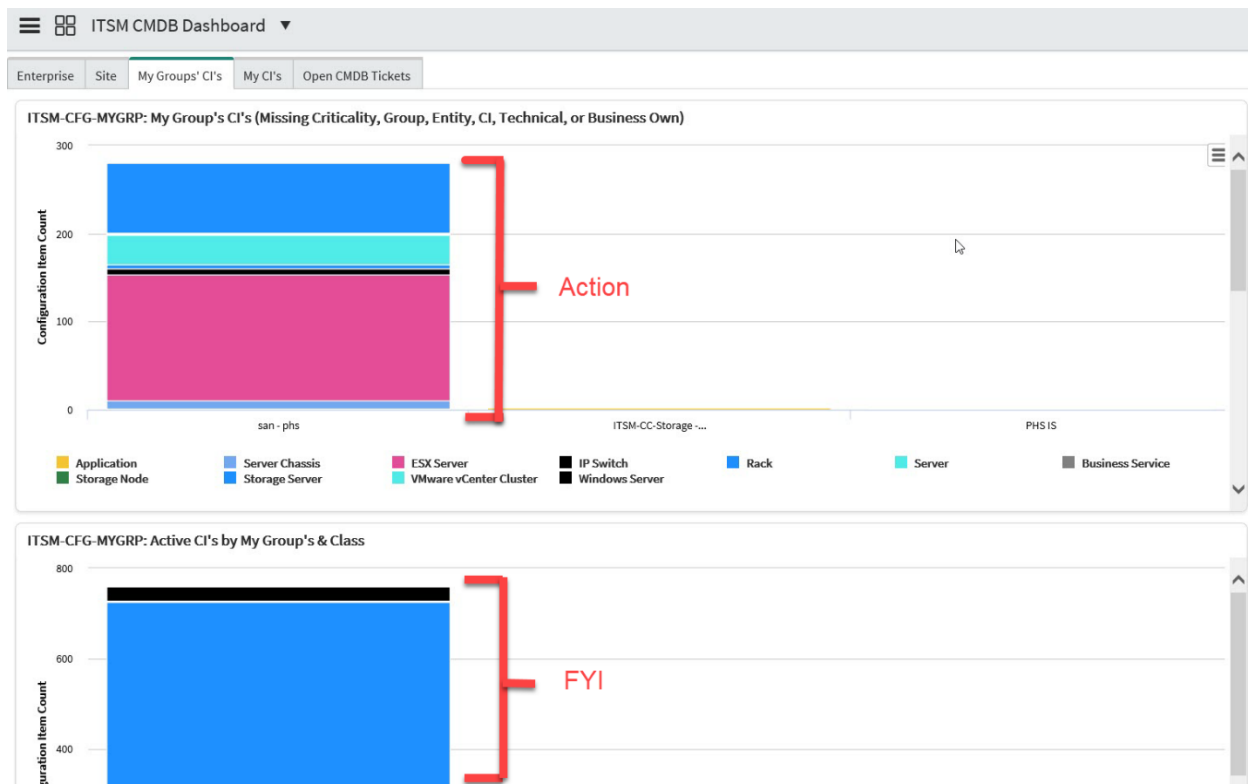
Next, are sections for the CI trends for Missing Required Attribute and Missing Recommended Attribute. These sections include running totals for failed CIs on either a daily basis (for CIs missing required attribute) or every other day basis (for CIs missing recommended attribute).

The bottom of the tab includes a list of all CIs that are missing required or recommended attributes.

Note: To update any CI with missing requirements, navigate down to the CI record to make any updates to CI fields. This may require several clicks.

Reviewing Your Groups' CIs

For the My Groups' CIs tab, only CIs associated with support groups for which you are a member are included. The top section includes a graphical representation of the CIs missing recommended fields, grouped by support group. The bottom of the tab includes a graphical representation of all active CIs, grouped by support group. Note each section includes a different bar for each of your support groups. Segments within any bar are color-coded for different CI classes.

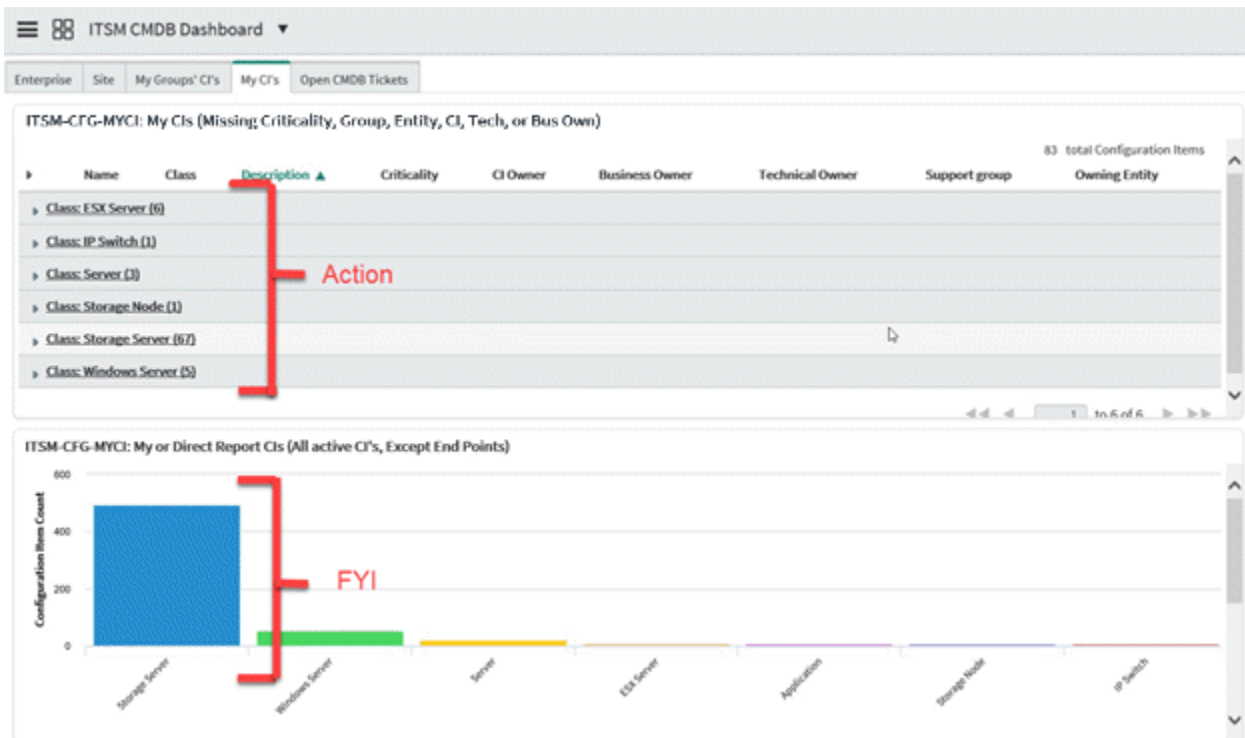


Hover over any segment of any bar in the top section to display the counts for CIs with missing recommended fields for that CI class and support group. Click to display the list of CIs that make up that count. You would typically use this list to take action to complete missing fields. See [Updating Configuration Item Attributes](#) for additional information on updating fields using a list view.

Hover over any segment of any bar in the bottom section to display the counts for *all* CIs for that CI class and support class (not just those with missing fields).

Reviewing Your CIs

For this tab, only CIs for which you are the CI owner, business owner, or technical owner are included. The top section displays an expandable list of all CIs that are missing one or more recommended fields, grouped by support class. The bottom section displays a graphical representation for all CIs for which you are the CI owner, business owner, or technical owner, grouped by CI class.

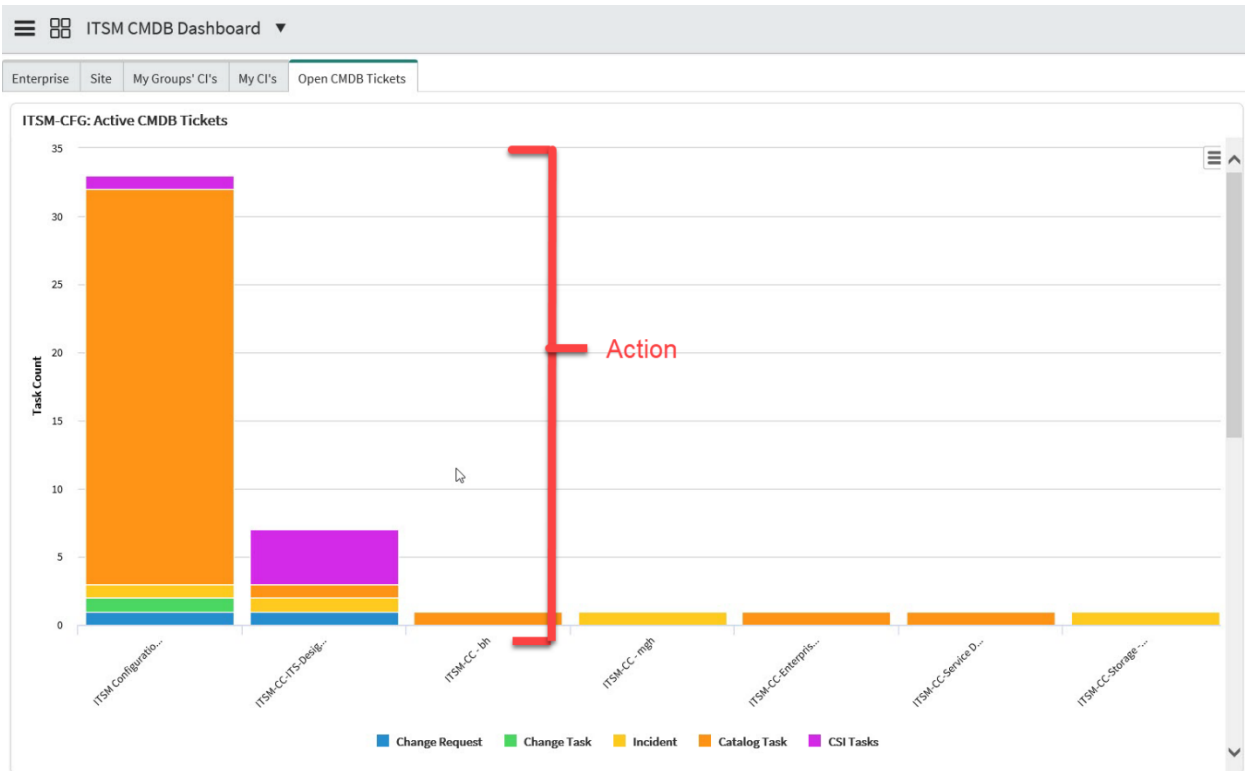


Expand any CI class in the top section to display a list view of the CIs from that class that are missing required fields. You would typically use this list to take action to complete missing fields. See [Updating Configuration Item Attributes](#) for additional information on updating fields using a list view.

Hover over any bar in the bottom section to display the actual counts for each CI class.

Managing CMDB Tickets

The Open CMDB Tickets tab displays open tickets assigned to ITSM Configuration Management – phs or any configuration coordinator group.



The top section displays a graphical representation of all CMDB tickets, sorted by assignment group, including Change Requests, Change Tasks, Incidents, Catalog Tasks, and CSI (Continual Service Improvement) Tasks. Beneath this section is a table of the actual counts for each configuration coordinator assignment group and CMDB ticket types.

Hover over any section for your team to display actual counts for each type of CMDB ticket. Click any section to display the specific tickets associated with that configuration coordinator assignment group and CMDB ticket type.

ServiceNow Discovery

The Discovery tool in ServiceNow can help you identify missing configuration items (CIs). ServiceNow automatically runs a Discovery Scan every night to add and update CIs. For an overview of ServiceNow Discovery, click [here](#).

Important: Additional requirements must be met to enable ServiceNow Discovery for Windows and Open System servers. Configuration coordinators should work with CI owners and technical owners to ensure the following:

- For Windows Servers -Service Account SA291 must have administrator access
- For Open System Servers (Linux, Solaris, HP-UX, AIX) - SX434 must be given root access (if this is not possible, a pseudo configuration must be set up per ServiceNow's specifications). Contact Andrew McCabe for additional information.

Note: There are a limited number of CI types that are not identified or updated using the Discovery tool. For these CI, you may need to use the CI import template. For additional information, see [Using the Configuration Item Import Template](#) for details.

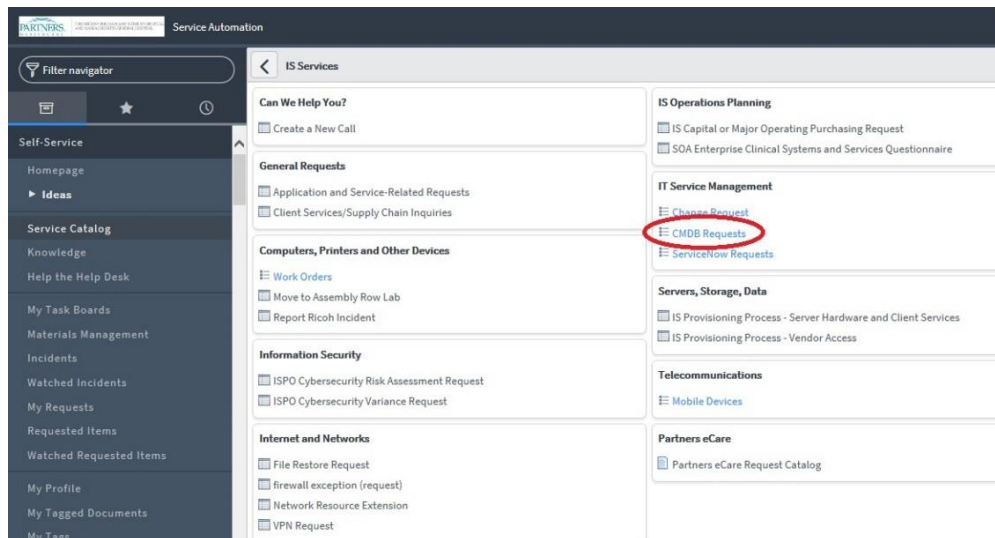
Discover CIs by IP Address

You can also initiate a scan in ServiceNow for any of the following types of CIs for which you know the IP address:

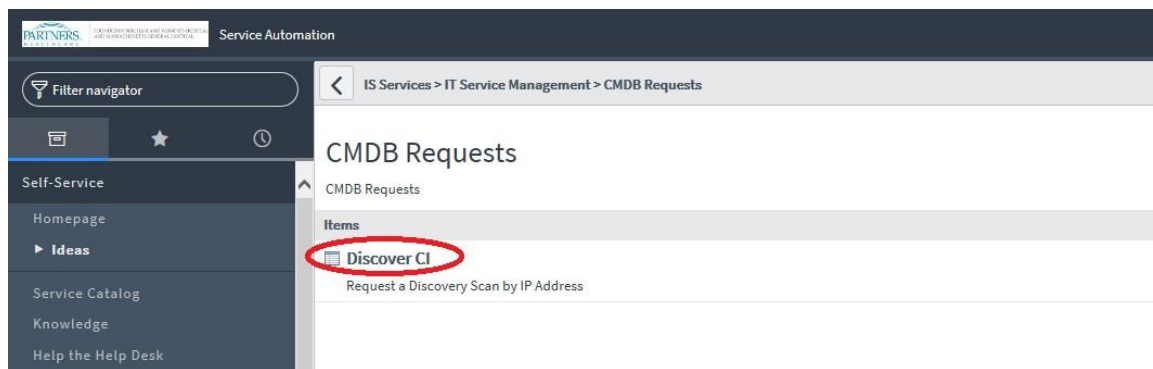
- Windows Server
- Unix Server
- Linux Server
- Network Switch
- Network Router
- Printer

Do so as follows:

1. Using the Service Catalog module in the Application Navigator, select **CMDB Requests**.



2. Click **Request a Discovery Scan by IP Address**.



3. Type the IP address of the device and click **Order Now**.

IS Services > IT Service Management > CMDB Requests > Discover CI

Request a Discovery Scan by IP Address

This request is to initiate a Discovery Scan of an IP Address and **create/update** a CMDB CI record of the discovered device. It will take approximately 15 minutes to complete the discovery scan. After completion of the request, you'll receive an email notification with the results.

If the CI record was created/updated, please validate or update the following fields:

- CI Owner
- CI Description
- Owning Entity
- Support Group

If the CI record was not created/updated, please follow the instructions in the closure email.

****Note****

The following devices are currently supported:

- Window Server
- Unix Server
- Linux Server
- Network Switch
- Network Router
- Printer

* Please enter the IP Address to scan

IP Address Syntax

172.27.113.181

Order this Item

Delivery time 1 Day

Order Now

Add to Cart

Shopping Cart

Empty

4. Click **Submit Order** at the verification screen to complete your request.

Shopping Cart

Are the contents of your cart correct? Please double check the items and remove and edit where appropriate

	Item	Delivery Time	Price (ea.)	Quantity	Total
Delete	Edit	Request a Discovery Scan by IP Address - Discover CI	1 Day	-	-
Total					-

If this request is for someone other than yourself please provide detailed information in the fields provided below

Requested for: Paul Censullo

Deliver to: 399 Revolution Drive
Somerville, MA 02145

Special instructions

Add attachment...

Back to Catalog

Submit Order

5. ServiceNow displays the RITM number of your request, allowing you to track your request.

Order Status

Thank you, your request has been submitted

Order Placed: 2017-02-21 2:11:45 PM

Request Number: REQ0449320 [Bookmark request](#)

Estimated Delivery Date of Complete Order: 2017-02-22

Number	Description	Delivery Date	Stage	Price (ea.)	Qty	Total	
RTM0530152	Request a Discovery Scan by IP Address	2017-02-22	▶ ✓ ✓ ➡ ○ ○	-	1	-	
					Total	1.0	-

Tasks that belong to REQ0449320

Number	Short description
<div>Back to Catalog</div> <div>Continue Shopping</div>	

Home

*Note: You can also track the status of your request by selecting **Requested Items** under **Self Service** in the ServiceNow navigation bar.*

- After approximately 10 minutes, ServiceNow sends an email indicating if the CI record has been created. The closure notes within the message indicate whether or not the scan successfully created the CI record, as follows:

- If successful:

Closure Notes:

CI record was added/updated successfully. Discovery Scan for IP Address 10.224.130.1 created/updated CMDB CI "ocores103"

- If unsuccessful:

Closure Notes:

No CMDB CI created/updated - 10.224.130.1

- If successful, review the following fields within the CI record, updating them as needed:

- CI Owner
- CI Description
- Owning Entity
- Support Group

8. If unsuccessful, complete the following troubleshooting steps:

- Check to be sure that the IP address you have for the CI is correct.
- Check to be sure that the device is powered on.
- If the CI is a server, be sure that the associated account has the proper privileges.
 - For Windows servers, account SA291 must have local admin rights.
 - For Unix and Linux servers, account SX434 must have ssh (secure shell) privileges.
- If the CI is a network router and switch, check for SNMP Community string accuracy.
- After completing the following steps, repeat the discovery scan as previously described. If the scan is still not successful, submit a new service request in ServiceNow as described in the following section.

Submitting a Request for Failed Discovery by IP Address

The following steps should be used to submit a ServiceNow request for assistance when a discovery by CI has failed only after completing all troubleshooting steps as previously described.

Before proceeding, be sure that you know the RITM number and Discovery Log Entry number, both indicated in the details of your failed request in ServiceNow:

RITM number

Additional comments (Customer visible)

Resolve notes: No CMDB CI created/updated - 172.27.113.181

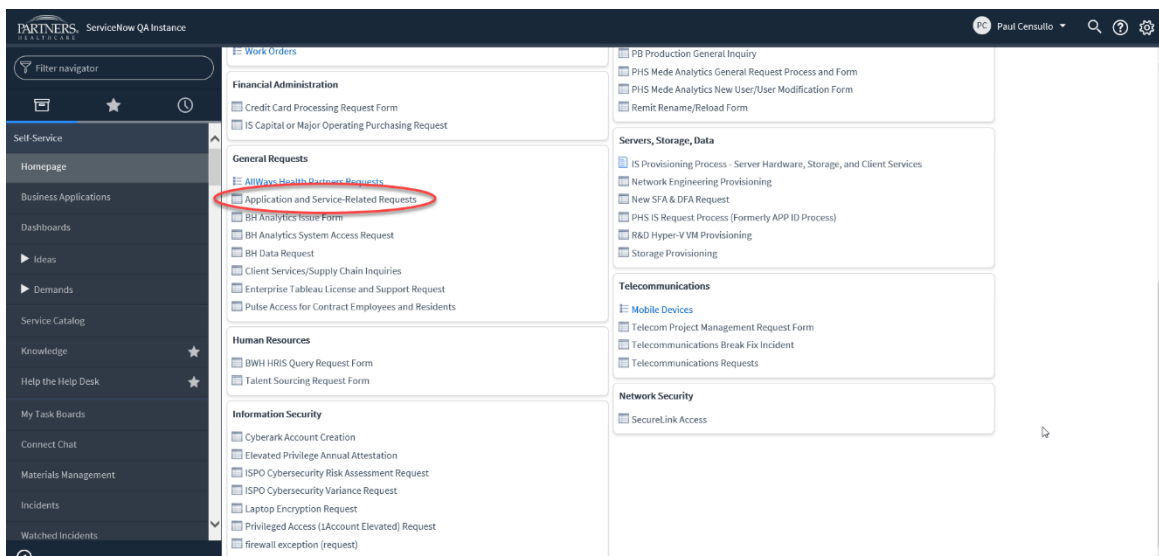
Work notes

Activity

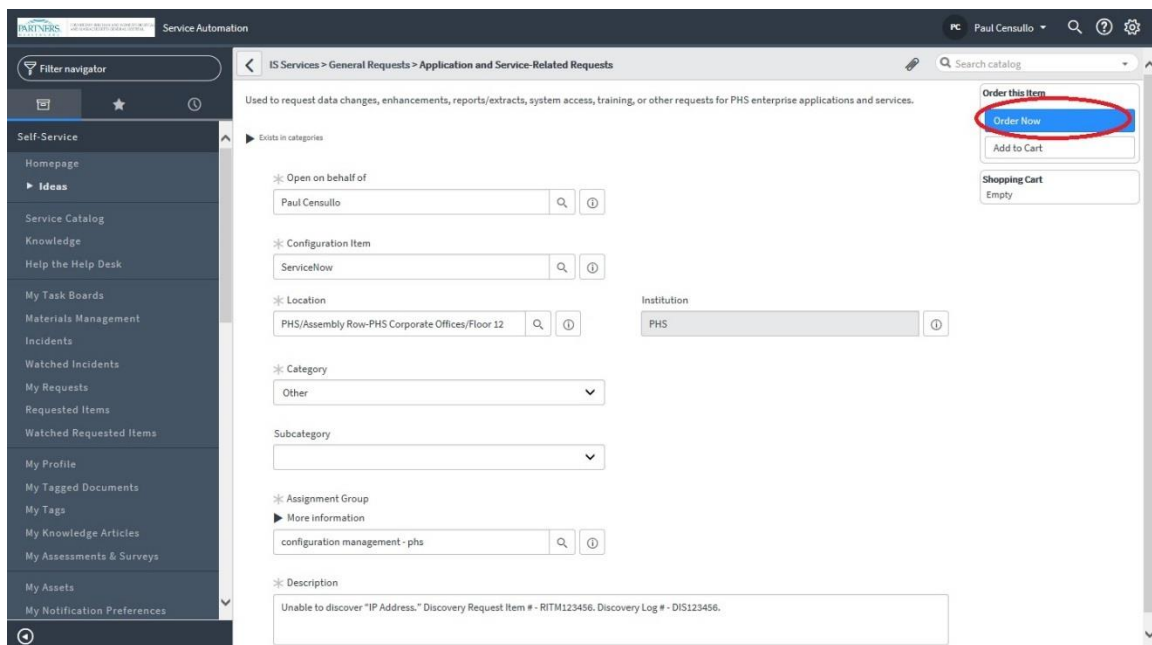
- 2017-03-23 3:28:50 PM Your ticket RITM0350780 has been CLOSED. Email sent
- 2017-03-23 3:28:41 PM System Changed: Stage, State, Work notes
 - Stage: Completed was: Awaiting Scan Completion
 - State: Closed Complete was: Open
 - No CMDB CI created/updated for IP Address 172.27.113.181.
 - Scan of IP 172.27.113.181 completed.
 - Discovery Log Entry DIS0017217 complete.

Discover Log Entry number

1. Select the **Service Catalog** option under Self Service in the ServiceNow navigation bar.
2. Under General Requests, select **Application and Service Related Requests**.



3. Complete the displayed request form as follows:
 - Configuration Item – ServiceNow
 - Location – Enter the location where you sit
 - Category – Other
 - Subcategory – Leave blank
 - Assignment Group – ITSM Configuration Management – phs
 - Description – Unable to discover “IP Address.” Discovery Request Item # - RITMxxxxxx.
Discovery Log # - DISxxxxxx.
4. Click **Order Now**.



5. ServiceNow displays a verification message. Click **Submit Order**.

How to Check the History of a CI

1. To view the history of any CI, right-click the heading within the CI record and click **History > Calendar**.

2. ServiceNow displays a list of dates and times of updates to this CI. Click any item to expand it to display additional information about any entry.

2016-08-10 10:58:35 AM Updated by TSystem System (195 Days 5 Hours 4 Minutes)

2016-08-11 1:39:05 PM Updated by System System (194 Days 2 Hours 23 Minutes)

last activity was 1 Day 2 Hours 40 Minutes earlier

created 1 Day 3 Hours 19 Minutes earlier

Field	before	after
Name	PHSAIXECDBPRD8	PHSAIXECRPT4

2016-08-11 1:39:18 PM Updated by System System (194 Days 2 Hours 23 Minutes)

2016-08-11 1:40:55 PM Updated by System System (194 Days 2 Hours 21 Minutes)

2016-12-01 4:38:12 AM Updated by System (82 Days 10 Hours 24 Minutes)

2016-12-28 9:31:35 AM Updated by TSystem System (55 Days 5 Hours 31 Minutes)

2017-02-16 6:12:46 PM Updated by Mid zServer (4 Days 20 Hours 49 Minutes)

3. ServiceNow displays before and after values for the change.

ServiceNow List View

Reviewing and Updating Your CIs

Configuration coordinators will work with CI owners on their teams to verify attributes for their configuration items. This should be done on a regular basis to assure the integrity of the CMDB. ServiceNow includes a CMDB which provides high level views of the Completeness, Compliance, and Correctness of CI information.

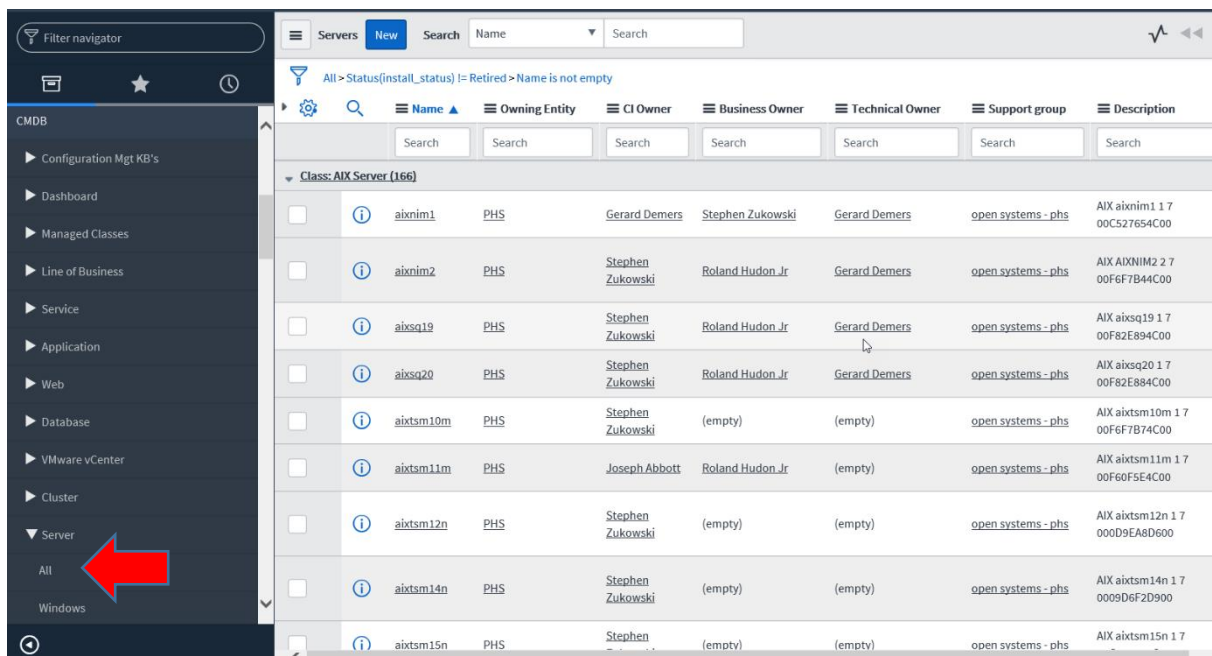
Steps include the following:

- [Filtering the List View to CIs for You or Your Team](#) – This involves using the filter options in ServiceNow to limit the CIs to only those for you, your team, or only specific CIs. See also [Reviewing Your Groups' CI](#) and [Reviewing Your CIs](#) for additional ways to filter your list view.
- [Updating Configuration Item Attributes](#) – This involves updating the previously noted attributes using the list view.
- [Maintaining Relationships](#) – This involves accessing the detail view for CIs to update the relationship between applications and servers, servers and applications, and applications and SQL databases.

Filtering Configuration Items (CIs) for You or Your Team

This section provides information on how to filter your list view of servers, applications, and SQL databases in ServiceNow. You can filter the list to include only CIs belonging to you or your team or only those with a specific name or other attribute. Doing so allows you to focus on only those CIs that are within the scope of your responsibilities.

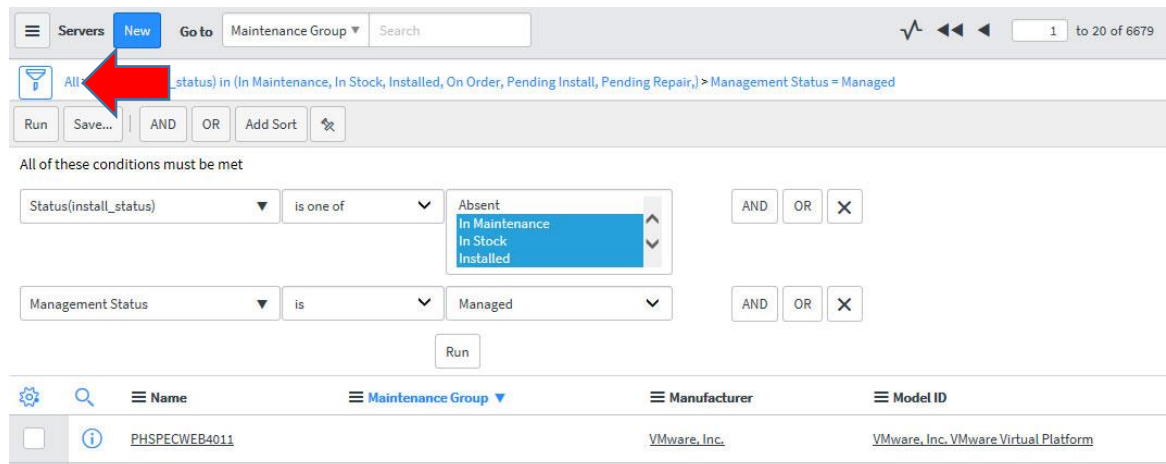
- Using the CMDB module in the Application Navigator, select the CI type to be associated with this list view. Doing so displays a list of all associated CIs.
 - For servers, click **All** under the **Servers** heading.
 - For SQL databases, click **Microsoft SQL** under the **Database** heading.



The screenshot shows the ServiceNow CMDB interface. On the left, the 'Server' heading is expanded, and the 'All' filter is selected, indicated by a red arrow. The main area displays a list of AIX Servers. The table has columns for Name, Owning Entity, CI Owner, Business Owner, Technical Owner, Support group, and Description.

Name	Owning Entity	CI Owner	Business Owner	Technical Owner	Support group	Description
aixnim1	PHS	Gerard Demers	Stephen Zukowski	Gerard Demers	open systems - phs	AIX aixnim1 1.7 00C527654C00
aixnim2	PHS	Stephen Zukowski	Roland Hudon Jr	Gerard Demers	open systems - phs	AIX AIXNIM2 2.7 00F6F7B44C00
aixsq19	PHS	Stephen Zukowski	Roland Hudon Jr	Gerard Demers	open systems - phs	AIX aixsq19 1.7 00F82E894C00
aixsq20	PHS	Stephen Zukowski	Roland Hudon Jr	Gerard Demers	open systems - phs	AIX aixsq20 1.7 00F82E884C00
aixtsm10m	PHS	Stephen Zukowski	(empty)	(empty)	open systems - phs	AIX aixtsm10m 1.7 00F6F7B74C00
aixtsm11m	PHS	Joseph Abbott	Roland Hudon Jr	(empty)	open systems - phs	AIX aixtsm11m 1.7 00F60F5E4C00
aixtsm12n	PHS	Stephen Zukowski	(empty)	(empty)	open systems - phs	AIX aixtsm12n 1.7 00D9EA8D600
aixtsm14n	PHS	Stephen Zukowski	(empty)	(empty)	open systems - phs	AIX aixtsm14n 1.7 0009D6F2D900
aixtsm15n	PHS	Stephen	(empty)	(empty)	open systems - phs	AIX aixtsm15n 1.7

- From the list view, click the Filter icon to display the Condition Builder.



Servers New Go to Maintenance Group Search 1 to 20 of 6679

All status in (In Maintenance, In Stock, Installed, On Order, Pending Install, Pending Repair,) > Management Status = Managed

Run Save... AND OR Add Sort

All of these conditions must be met

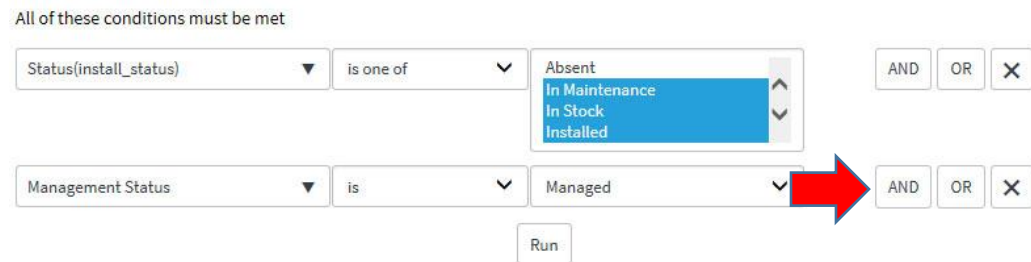
Status(install_status) is one of Absent In Maintenance In Stock Installed AND OR X

Management Status is Managed AND OR X

Run

Name	Maintenance Group	Manufacturer	Model ID
PHSPECWEB4011		VMware, Inc.	VMware, Inc. VMware Virtual Platform

3. Click the **AND** button to add a new condition to your view.



All of these conditions must be met

Status(install_status) is one of Absent In Maintenance In Stock Installed AND OR X

Management Status is Managed AND OR X

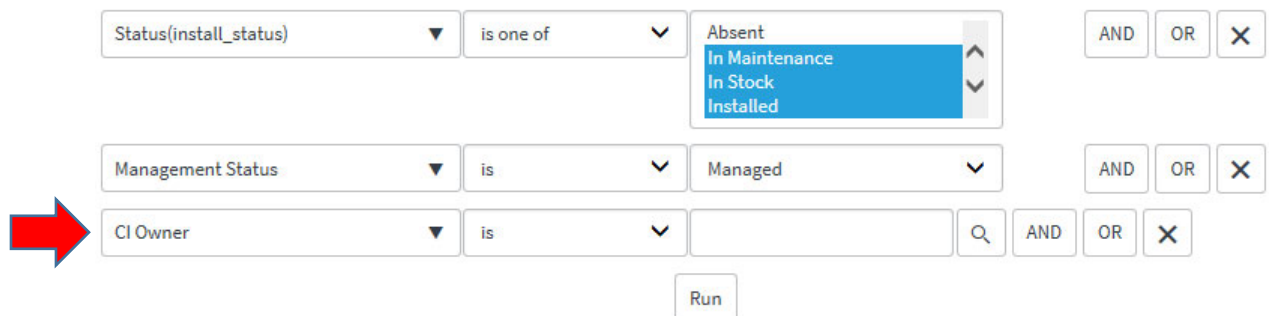
Run

4. Do one of the following:

- To filter the list view to one or more CI Owners, go to step a.
- To filter the list view to one or more Support Groups, go to step b.
- To filter the list view to a list of CI names, go to step c.

a. Filter the list view by CI Owners as follows:

- Use the drop-down list to select **CI Owner** and then type the name of a team member for which you are the configuration coordinator.



Status(install_status) is one of Absent In Maintenance In Stock Installed AND OR X

Management Status is Managed AND OR X

CI Owner is AND OR X

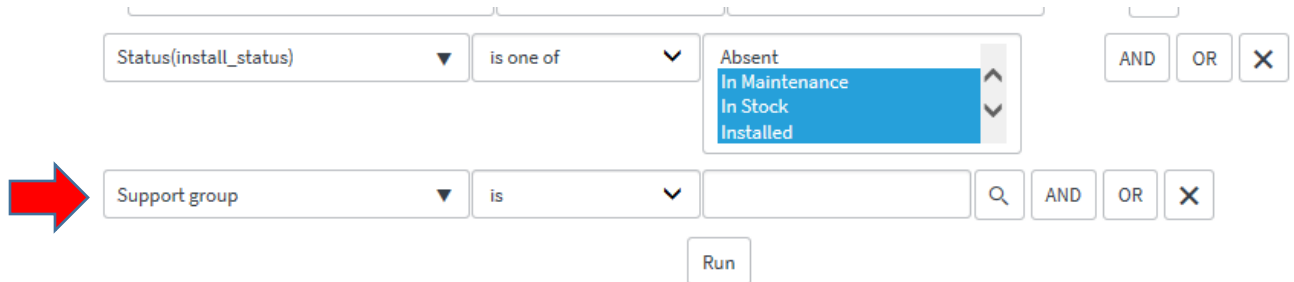
Run

- Repeat the previous step for each member of your team.

- 3) Click **Run** to display the filtered report. Note that you must filter your list each time you view the list view for CIs.

b. Filter the list view by Support Groups as follows:

- 1) Use the drop-down list to select **Support Group** and then type the name of the Support Group for which you are the configuration coordinator.



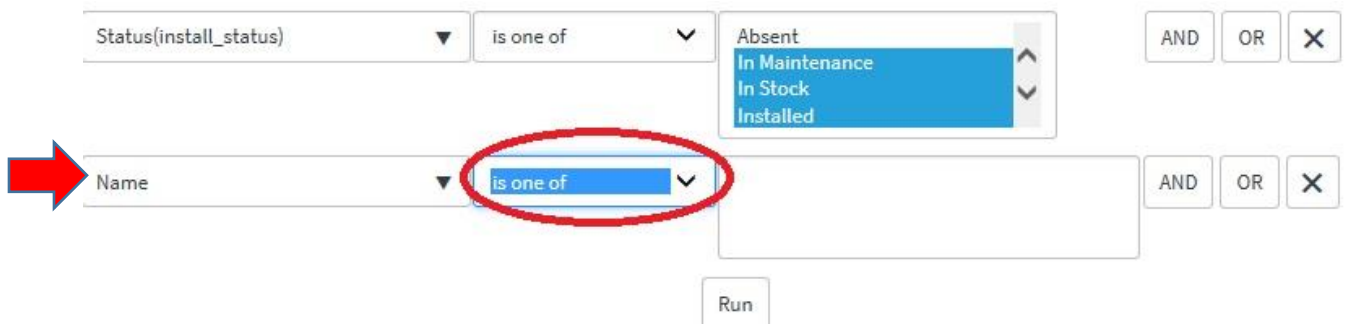
Filter interface for Support Groups:

- Filter 1: Status(install_status) is one of [Absent, In Maintenance, In Stock, Installed]
- Filter 2: Support group is []
- Buttons: AND, OR, X
- Run button

- 2) If applicable, repeat the previous step other Support Groups you are responsible for.
- 3) Click **Run** to display the filtered report. Note that you must filter your list each time you view the list view for CIs.

c. Filter the list view by specific CI Names as follows:

- 1) Use the drop-down list to select **Name** and **is one of**.



Filter interface for specific CI Names:

- Filter 1: Status(install_status) is one of [Absent, In Maintenance, In Stock, Installed]
- Filter 2: Name is one of []
- Buttons: AND, OR, X
- Run button

- 2) Type or copy-and-paste the name or names that you wish to include in your filter. Note that if you have a list of CIs in a spreadsheet, you can copy-and-paste the list of names directly from that spreadsheet into this field.
- 3) Click **Run** to display the filtered report. Note that you must filter your list each time you view the list view for CIs.

Updating Configuration Item Attributes

1. **Review** the previously created list view, looking for fields that are either missing or inaccurate.

All > Class = Application .or. Class = Application Module > Status(install_status) in (In Maintenance, In Stock, Installed, On Order, Pending Install, Pending Repair,) > Management Status = Managed > CI Owner = William Test .or. CI Owner = Alex Test

	Name	CI Owner	Operational status	Criticality	Class	Category
<input type="checkbox"/>	Televox	William Test	Operational		Application	
<input type="checkbox"/>	PATA PHONE APPOINTMENT MANAGEMENT SYSTEM	William Test	Operational		Application	Software
<input type="checkbox"/>	MS OLAP	William Test	Operational		Application	Software
<input type="checkbox"/>	OR DYNAMIC VIEW	William Test	Operational		Application	Software
<input type="checkbox"/>	ORSTAT	William Test	Operational		Application	Software
<input type="checkbox"/>	ARCHER	Alex Test	Operational		Application	Software
<input type="checkbox"/>	Archer - GRC	Alex Test	Operational		Application	Software

Actions on selected rows... 1 to 7 of 7

2. To **update a single attribute**, click into the associated field to display either a drop-down list of text field, and complete your update.

	Name	CI Owner	Operational status	Criticality	Class	Category
<input type="checkbox"/>	Televox	William Test	Operational	None	Application	Software
<input type="checkbox"/>	PATA PHONE APPOINTMENT MANAGEMENT SYSTEM	William Test	Operational	Mission Critical	Application	Software
<input type="checkbox"/>	MS OLAP	William Test	Operational	Non-Production	Application	Software
<input type="checkbox"/>	OR DYNAMIC VIEW	William Test	Operational	Standard Support	Application	Software

3. To **update multiple attributes** at once from the same column with the same value, hold down the SHIFT key while dragging the range of rows before making your updates. ServiceNow indicates the number of rows that will be updated. Use the drop-down list or type into the text field to complete your update.

All > Class = Application .or. Class = Application Module > Status(install_status) in (In Maintenance, In Stock, Installed, On Order, Pending Install, Pending Repair,) > Management Status = Managed > CI Owner = William Thornhill .or. CI Owner = Alex Thai

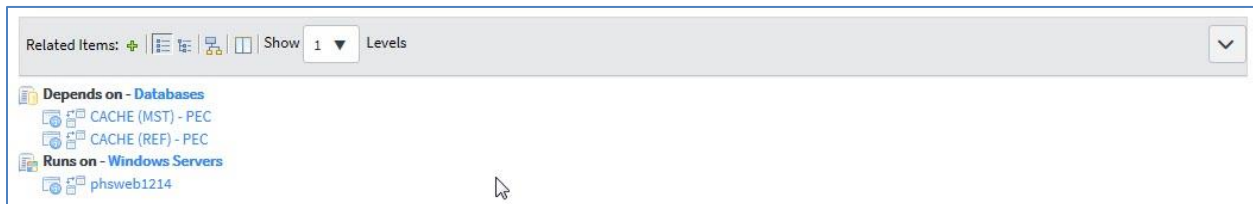
	Name	CI Owner	Operational status	Criticality	Class	Category
<input type="checkbox"/>	Televox	William Test	Operational	None	Application	Software
<input type="checkbox"/>	PATA PHONE APPOINTMENT MANAGEMENT SYSTEM	William Test	Operational		Application	Software
<input type="checkbox"/>	MS OLAP	William Test	Operational		Application	Software
<input type="checkbox"/>	OR DYNAMIC VIEW	William Test	Operational		Application	Software
<input type="checkbox"/>	ORSTAT	William Test	Operational		Application	Software
<input type="checkbox"/>	ARCHER	Alex Test	Operational		Application	Software
<input type="checkbox"/>	Archer - GRC	Alex Test	Operational		Application	Software

7 rows will be updated

Maintaining Relationships

Note: For information on customizing your view of CI relationships, see [KB0032972](#).

The relationship between servers and applications (and applications and databases) is accessed via the CI detail view. This relationship is noted in the CI record, as shown in the following graphic.



Mapping of relationships allows ServiceNow to auto-populate the Impacted CIs tab for all CIs associated in the Affected CIs tab. This, in turn, allows us to better understand the impact of a change, incident, or problem, as it relates to applications, hardware, or services.

Note that relationships are viewed from the customer's perspective, where the line of business (MGH, BWH, and so on) is considered the highest-level parent. As such, the application CI is considered the parent CI to both servers and databases. Relationships are also maintained at the parent CI. For network gear-to-network gear, each CI can serve as both a parent and child.

Note: Depending on the hierarchy, any CI can be viewed as both a parent and child. For example, although an application is a child to the parent line of business, it is a parent CI to an associated server.

This document describes the steps for mapping the following types of relationships:


Relationship	Relationship Type	Parent CI	Child CI
App-to-Server	Parent (Runs On...)	App CI	Server CI
App-to-SQL Database	Parent (Depends on...)	App CI	SQL database CI
App-to-Isilon Storage Server	Parent (Depends on...)	App CI	Isilon storage server CI
Cloud App-to-IP Switch (Network Gear)	Parent (Uses...)	Child app CI	IP switch
Network Gear-to-Network Gear	Parent (Used by...) or Child (Uses...)	IP router/IP switch	IP router/IP switch
App-to-Citrix	Child (Uses...)	Citrix CI	App CI

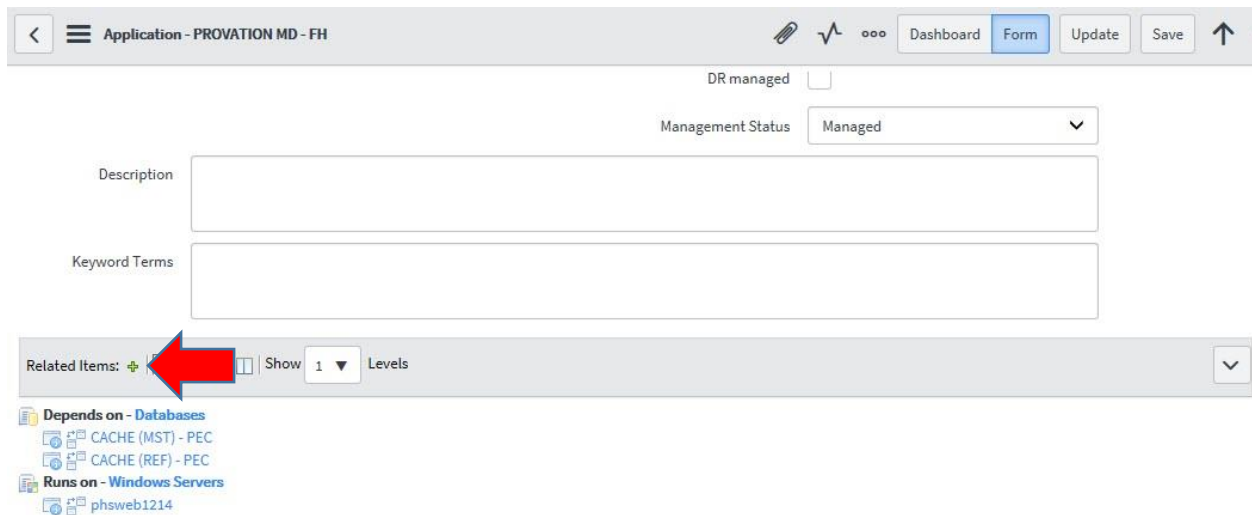
Adding app-server relationships

Add a relationship using the following steps. These steps describe how to map a server to an application. As previously noted, the app-server relationships are always added at the application CI (parent).

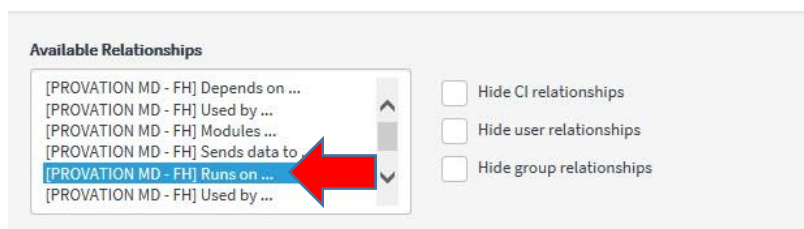
Parent CI	Relationship	Child CI
App CI	Parent (Runs On...)	Server CI*

**Note that this is the only relationship currently enabled on the Impacted CIs tab in ServiceNow.*

1. Locate the application CI in the previously created list view, and click the name to display the record.
2. Click the  to the right of **Related Items**.



3. In the Available Relationships section, click **Runs On...**



4. Type the name of the application in the search box.

Note: The Class must be Server. You must set the class before typing the name of the application CI.

Show All

All of these conditions must be met

Class	is a	Server	AND	OR	X
Location	is anything		AND	OR	X
Operational status	is anything		AND	OR	X

Available CIs

phsweb1212

PROVATION MD - FH Runs on these CIs

--None--

- Once you find the server, click to select it and then click the right arrow to move it into the right column. Repeat for multiple servers.

Available CIs

phsweb1212

PROVATION MD - FH Runs on these CIs


--None--

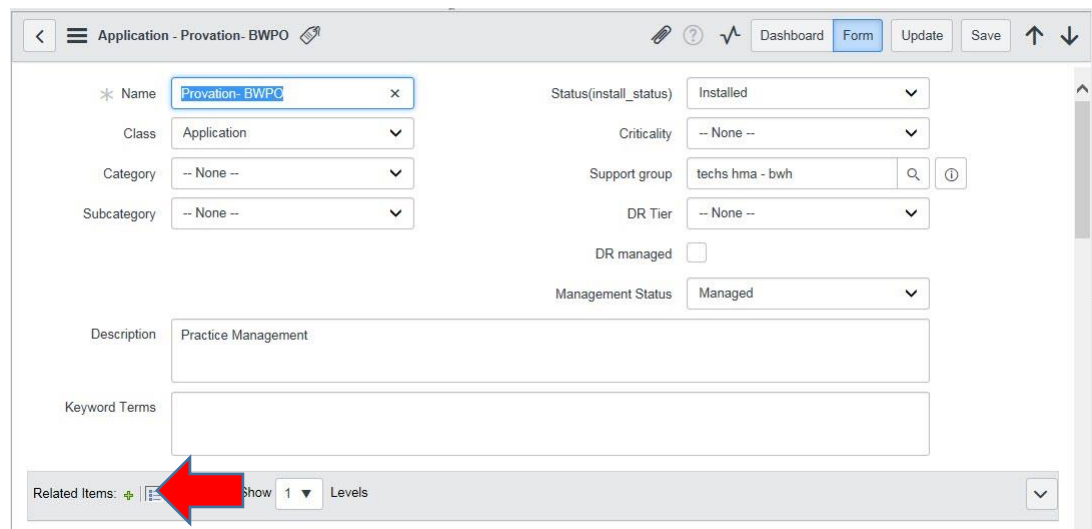
- Click **Save** at the bottom of the screen.

Adding app-SQL database relationships

Add a relationship using the following steps. App-SQL database relationships are always added at the application CI (parent).

Parent CI	Relationship	Child CI
App CI	Parent (Depends on...)	SQL database CI

1. Locate the application CI and click the name to display the record.
2. Click the  to the right of **Related Items**.



Application - Provation- BWPO

Name: Provation- BWPO

Class: Application

Category: -- None --

Subcategory: -- None --

Status(install_status): Installed

Criticality: -- None --

Support group: techs hma - bwh


DR Tier: -- None --

DR managed: ☐

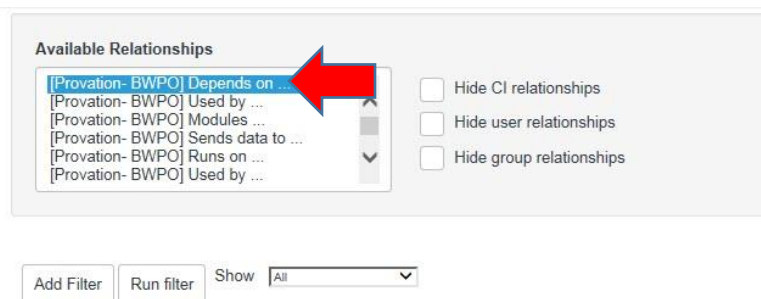
Management Status: Managed

Description: Practice Management

Keyword Terms:

Related Items:  Show 1 Levels

3. In the Available Relationships section, click **Depends on...**



Available Relationships

- [Provation- BWPO] Depends on ...
- [Provation- BWPO] Used by ...
- [Provation- BWPO] Modules ...
- [Provation- BWPO] Sends data to ...
- [Provation- BWPO] Runs on ...
- [Provation- BWPO] Used by ...

☐ Hide CI relationships
☐ Hide user relationships
☐ Hide group relationships

Add Filter Run filter Show All

4. Type the name of the database in the search box.

Note: The Class must be MSFT SQL Catalog. You must set the class before typing the database CI.

Class

▼

is a

▼

MSFT SQL Catalog

▼

AND

OR

X

Available CIs

PEC

PEC JIRA QA

Provation- BWPO Depends on these CIs

--None--

- Once you find the database, click to select it and then click the right arrow to move it into the right column. Repeat for multiple databases.

Available CIs

PeCReporting_Dev

PeCReporting_PRD

PeCReporting_Prod

PeCReporting_QA

PeCReportingPortal_Dev

PeCReportingPortal_Prod

PeCReportingPortal_Stage

Provation- BWPO Depends on these CIs

--None--

>

<

Save


Cancel

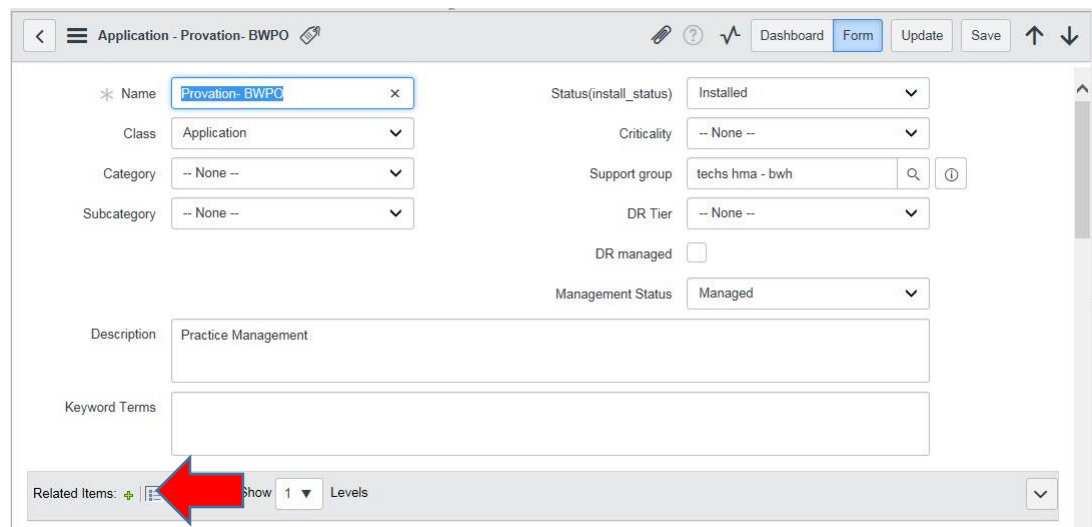
- Click **Save** at the bottom of the screen.

Adding app-Isilon storage server relationships

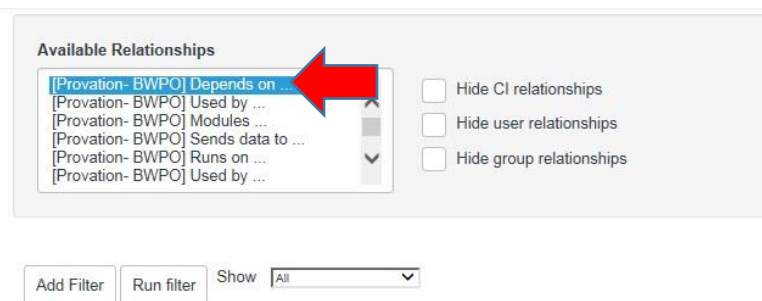
Add a relationship using the following steps. App-Isilon storage server relationships are always added at the application CI (parent).

Parent CI	Relationship	Child CI
App CI	Parent (Depends on...)	Isilon storage server CI

1. Locate the application CI and click the name to display the record.
2. Click the  to the right of **Related Items**.



3. In the Available Relationships section, click **Depends on...**



4. Type the name of the storage server in the search box. For Partners eCare apps, use "phspecisilon." For all other apps, use "phsisilon2."

Note: The Class must be Storage Server. You must set the class before typing the Isilon storage server CI.

Class ▼ is a ▼ Storage Server ▼ AND OR X

Available CIs

phsisilon2

phsisilon2

Provation- BWPO Depends on these CIs

--None--

- Once you find the Isilon storage server, click to select it and then click the right arrow to move it into the right column.

Available CIs

phsisilon2

phsisilon2

Provation- BWPO Depends on these CIs

--None--

>

<


Save Cancel

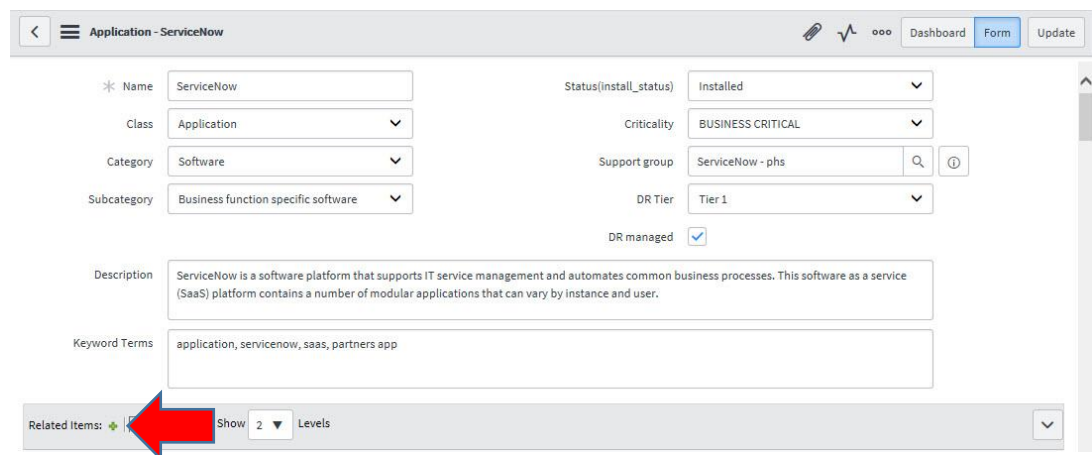
- Click **Save** at the bottom of the screen.

Adding cloud app-IP switch (network gear) relationships

Cloud applications get mapped to the two IP switches that they use to get into and out of the network, ecores5 and ecores6. Add this relationship using the following steps. For network gear, the cloud app is considered the parent to the IP switch (child).

Child CI	Relationship	Parent CI
IP Switch	Parent (Uses...)	Cloud App

1. Locate the cloud application CI and click the name to display the record.
2. Click the  to the right of **Related Items**.



Application - ServiceNow

Name: ServiceNow

Class: Application

Category: Software

Subcategory: Business function specific software

Status(install_status): Installed

Criticality: BUSINESS CRITICAL


Support group: ServiceNow - phs

DR Tier: Tier 1

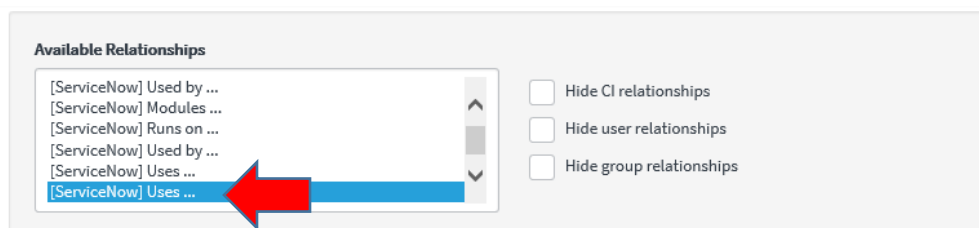
DR managed: ☒

Description: ServiceNow is a software platform that supports IT service management and automates common business processes. This software as a service (SaaS) platform contains a number of modular applications that can vary by instance and user.

Keyword Terms: application, servicenow, saas, partners app

Related Items:  Show 2 Levels

3. In the Available Relationships section, click **Uses...** (Note that there are two Available Relationships listed as **Uses...** Select the one that includes IP Switch in the Class field.)



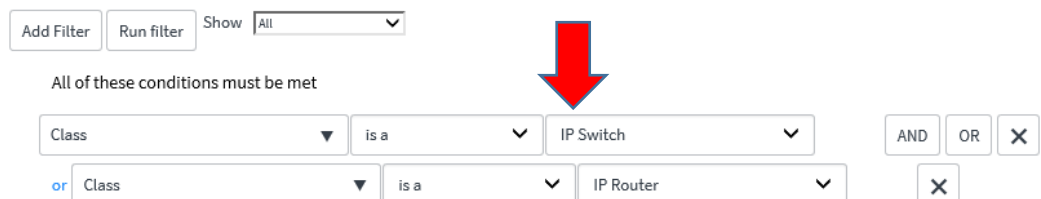
Available Relationships

- [ServiceNow] Used by ...
- [ServiceNow] Modules ...
- [ServiceNow] Runs on ...
- [ServiceNow] Used by ...
- [ServiceNow] Uses ...
- [ServiceNow] Uses ...

☐ Hide CI relationships

☐ Hide user relationships

☐ Hide group relationships



Add Filter Run filter Show All

All of these conditions must be met

Class is a IP Switch

or Class is a IP Router

AND OR X

4. Type the name of the network gear ("eCores5") in the search box.

The screenshot shows a configuration interface with two main sections: "Available CIs" and "ServiceNow Depends on these CIs". At the top, there are three dropdown menus: "Class" (set to "Class"), "is a" (set to "is a"), and "IP Switch" (set to "IP Switch"). To the right of these are buttons for "AND", "OR", and "X". In the "Available CIs" section, a search box contains the text "eCores5". A red arrow points to this search box. Below the search box, a list of available CIs is displayed: "eCores5", "eCores5", "eCores5-ext", and "eCores50". The "ServiceNow Depends on these CIs" section is currently empty, showing "--None--".

5. Once you find the CI, click to select it and then click the right arrow to move it into the right column.

The screenshot shows the same configuration interface as before, but with more options in the "Available CIs" list: "eCores5", "eCores5", "eCores5-ext", "eCores50", "eCores51", "eCores52", "eCores53", "eCores54", "eCores55", "eCores55-1", "eCores55-1", "eCores56", "eCores57", "eCores58", and "eCores59". The "eCores5" option is highlighted in blue. A red arrow points to the right arrow button (>) located between the two columns. The "ServiceNow Depends on these CIs" section remains empty, showing "--None--". At the bottom of the interface, there are "Save" and "Cancel" buttons.

6. Repeat steps 4 and 5, also adding the CI "eCores6."
7. Click **Save** at the bottom of the screen.

Adding network gear-to-network gear relationships

Note that mapping for network gear-to-network gear relationships is unlike mapping for servers and applications. A network gear CI (such as an IP router or IP switch) can be either a parent or a child, depending on the network topology. An IP switch can be a parent or child to any IP router or any other IP switch.


If starting from the parent CI:

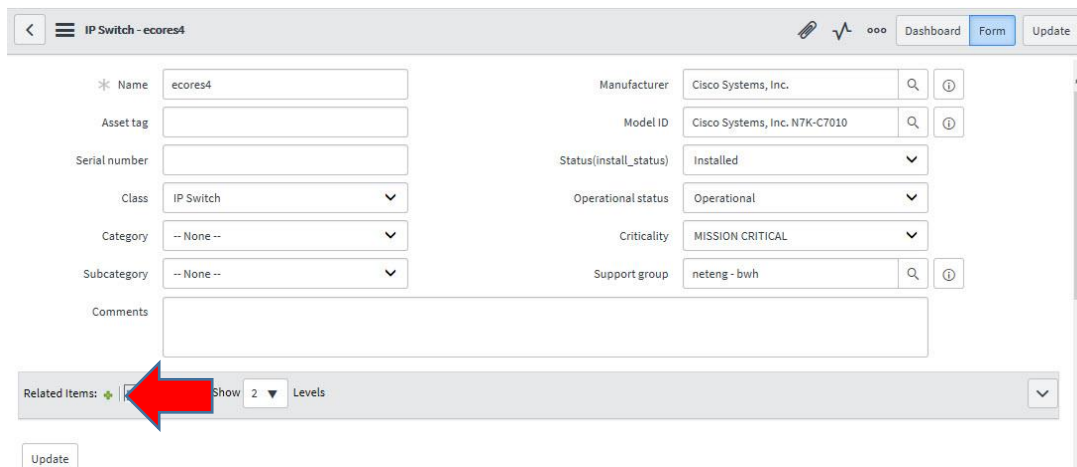
Parent CI	Relationship	Child CI
IP Router	Parent (Used by...)	IP Switch
IP Router	Parent (Used by...)	IP Router
IP Switch	Parent (Used by...)	IP Router
IP Switch	Parent (Used by...)	IP Switch

If starting from the child CI:

Child CI	Relationship	Parent CI
IP Router	Child (Uses...)	IP Switch
IP Router	Child (Uses...)	IP Router
IP Switch	Child (Uses...)	IP Router
IP Switch	Child (Uses...)	IP Switch

Add a relationship using the following steps.

1. Locate the parent network gear CI and click the name to display the record. The parent network gear CI can be either an IP switch or an IP router.
2. Click the  to the right of **Related Items**.



3. In the Available Relationships section, click **Used by...**

Available Relationships

[ecores4] Used by ...
[ecores4] Uses ...
[ecores4] Log reviewed by ...

☐ Hide CI relationships
☐ Hide user relationships
☐ Hide group relationships

Show All

4. Type the name of the network gear (such as "eCores5") in the search box.

Note: The Class must be either IP Switch or IP Router, based on the class of the network gear you are mapping to. You must set the class before typing.

Class ▼ is a ▼ IP Switch ▼
AND OR ×

Available CIs

ecores5
ecores5
ecores5-ext
ecores50

ServiceNow Depends on these CIs

--None--

5. Once you find the CI, click to select it and then click the right arrow to move it into the right column.

Available CIs

ecores5
ecores5
ecores5-ext
ecores50
ecores51
ecores52
ecores53
ecores54
ecores55
ecores55-1
ecores55-1
ecores56
ecores57
ecores58
ecores59

ServiceNow Depends on these CIs


--None--

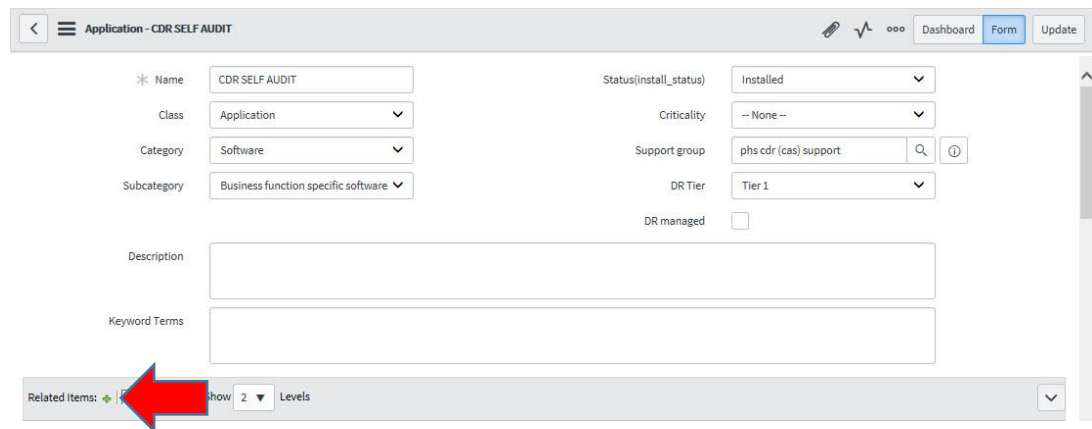
6. Repeat steps 4 and 5, as needed, to map all network gear.
7. Click **Save** at the bottom of the screen.

Adding app-Citrix relationships

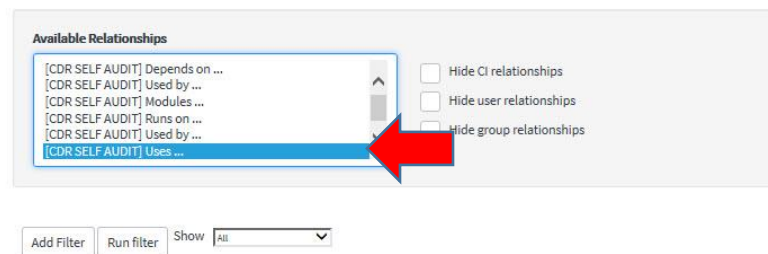
Add applications to Citrix relationships using the following steps.

Child CI	Relationship	Parent CI
App CI	Child (Uses...)	Citrix CI

1. Locate the application CI and click the name to display the record.
2. Click the  to the right of **Related Items**.

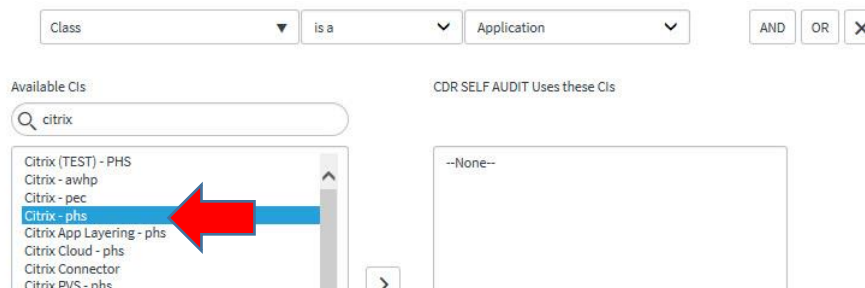


3. In the Available Relationships section, click **Uses...**



4. Type the name of the Citrix application in the search box.

Note: The Class must be Application. You must set the class before typing.



- Once you find the CI, click to select it and then click the right arrow to move it into the right column.

The screenshot shows a web interface for 'CDR SELF AUDIT'. On the left, under the heading 'Available CIs', there is a search bar containing 'citrix'. Below the search bar is a scrollable list of Citrix-related items. The item 'Citrix - phs' is highlighted with a blue background. To the right of this list are two buttons: a right-pointing arrow (>) and a left-pointing arrow (<). A large red arrow points from the 'Citrix - phs' item to the right-pointing arrow button. On the right side of the interface, under the heading 'CDR SELF AUDIT Uses these CIs', there is a large empty box with the text '--None--' at the top. At the bottom of the interface, there are two buttons: 'Save' (in blue) and 'Cancel' (in white).

- Click **Save** at the bottom of the screen.

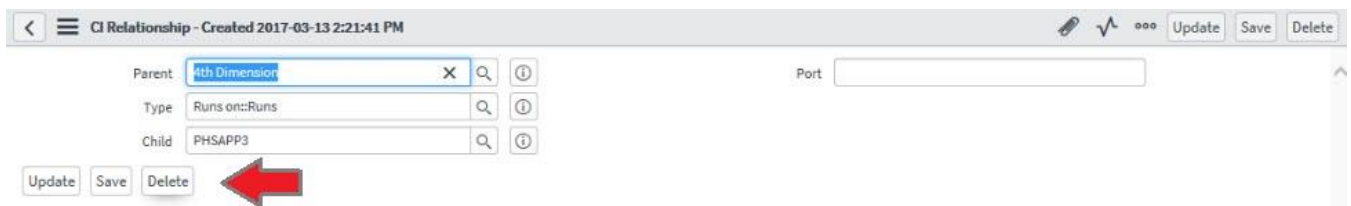
Deleting relationships

You can delete relationships as follows:

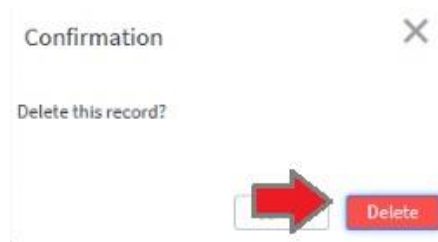
1. Click the Relationship Record icon.



2. Click the **Delete** button.



3. ServiceNow displays a confirmation message. Click **Delete** again.



4. Click **Save**.



*Note: You can also click the **+** to the right of **Related Items** and reverse the steps for adding relationships. However, this method does not work if the CI is retired.*

Using the Configuration Item Import Template

The Configuration Item Import Template can be used to import one or more configuration items (CIs) into ServiceNow. Click [here](#) to access the import template. The bottom of the template includes tabs to tailor the information to the type of CI: HW (hardware), Apps (applications), or App-Svr (application-server relationship). For each type of CI, the template also includes an example tab with other helpful information.

Note: ServiceNow automatically runs a Discovery Scan every night to add and update CIs. However, there are a limited number of CI types that are not identified or updated using the Discovery tool (such as HBOX). Use this template to add and update those CI types, as needed.

Note that if you add an application, you must also add the associated server or servers (if it has not already been added). Likewise, if you add a server, you must add the associated application or applications (if it has not already been added). Guidelines for completing each field is provided later in this document. All fields are required.

Initiate a request to import CIs into ServiceNow, as follows:

1. Complete the template, based on the type of CI. You will need to click **Enable Editing** to make your updates. All fields are required.
2. Save the template onto your desktop.
3. Using the navigation bar in ServiceNow, select **Service Catalogs** from the Self-Service option. Then, select the **IS Services** catalog.
4. Under General Requests, select **Application and Service-Related Requests**. ServiceNow displays the associated request form.
5. Complete the form as follows:
 - a. Configuration Item - **Configuration Management**
 - b. Location - Enter the location where you sit.
 - c. Category - **Data Change**
 - d. Subcategory - Leave blank
 - e. Assignment Group – **ITSM Configuration Management - phs**
 - f. Description - Enter "See attached" or additional information.
6. Attach the completed template to your ticket by clicking the paper clip icon in the upper right corner.
7. Click **Order Now** and submit your request.

Import Template Field Descriptions

Name or PHS Name	Name of the hardware device (Name) or application (PHS Name). For applications that are used at more than one site, the configuration management team may name your application using the format <application name> <Site abbreviation>, such as Peoplesoft – MGH.
Serial Number	Hardware only. The unique physical or virtual identifier assigned by the manufacturer of this CI.
Manufacturer	Who makes this device.
Manufacturer Product Name	Application only. The official name of the software from the manufacturer.
Application Module	Application only. Is this an application module or sub software (Yes or No)?
Model ID	Hardware only. The model number assigned by the manufacturer.
CI Owner	The PHS ID of the person with final approval authority to make decisions for this CI. This includes approving of change requests.
Business Owner	The PHS ID of the person responsible for the service of this CI, as well as his or her first and last name.
Technical Owner	The PHS ID of the person responsible for technical upkeep and authority of this CI, as well as his or her first and last name.
Support Group	The group that will be notified when an incident or change is recorded against this CI; the group that supports this CI.
Location	Hardware only. The location of this CI. Location of the host if it is a virtual machine. For the Data Centers, use the format: "PHS/Needham Data Center" and "PHS/Marlborough Data Center."
Owning Entity	The entity that owns the CI (PeC CIs are noted as "PARTNERS ECARE").
In Use at Sites	Which sites use this application.
Description of this CI	Describe the function of this device or what the application does.
Criticality	See the following chart.

Criticality Guidelines

Criticality	Support	Response Expectation	Resolution
Mission	24x7x365	15 minutes	ASAP
Business	7am - 7pm x 7 days/week	15 minutes	ASAP
Standard Support	7am - 5pm x 5 days/week (no holidays)	24 hours	1 hour
Pre-Production	7am - 7pm x 5 days/week (no holidays)	No expectation/Best effort	
Non-Production	7am - 7pm x 5 days/week (no holidays)	24 hours	

Supplemental Information

Reserved for future use.