# ServiceNow Hosting Demand Management

## Forecasting Process Training

***Audience:*** *Requesters, Approvers, and Provisioning Personnel*

# The ServiceNow Audience Breakdown

## What is Your Role?

ServiceNow's Hosting Demand Management application breaks the infrastructure request process into three audiences:

1. (**Requesters**) Those who enter hosting demands. For example, Portfolio Managers, BU PMs, or Business Analysts.

2. (**Approvers**) Those who approve hosting requests, such as BU approvers.

3. (**Provisioners**) Those who enter provisioning details and who may also assist in the provisioning process once Demands are approved. This group could include Service Delivery Teams, Plant Ops, or other others who may play a part in bringing infrastructure to a state of readiness.

4. Each audience is addressed in this training.

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# What’s Covered in this Training?

Navigation Power Tips

Hosting Demand Management in ServiceNow

- Entering a Demand Record
- Entering an Environment Request
- Entering Environment Details
- Copying Environments
- Entering Returns
- Entering Moves
- Entering Resizes
- Deleting
  - Demand Record
  - Environment Requests
  - Environment Details
- Approval Process
- Provisioning



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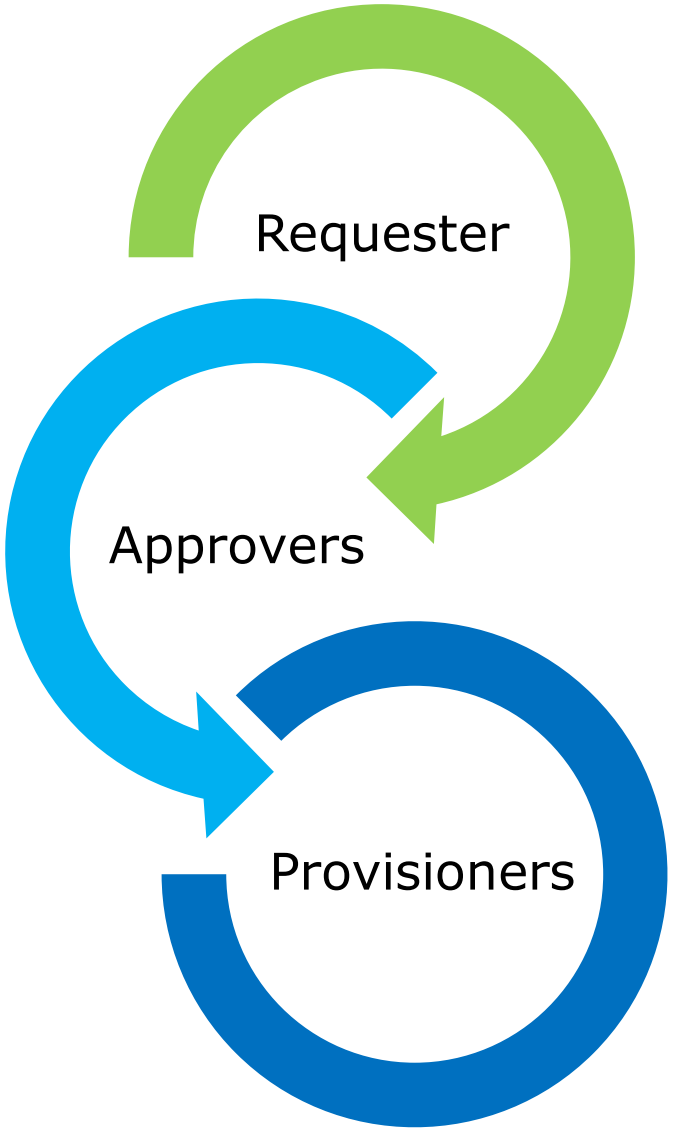
# Hosting Demand Management By Role (Overview)




- Enter new Demands
- Enter Environment Requests
- Enter Environment Detail records
- Submit Demands for approval

- Review Demands at designated intervals
- Approve/Reject Demands

- Enter provisioning details
- Could also submit Change Requests
- May also close out Catalog Tasks



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# Hosting Demand Management in ServiceNow
## By Role

The process for requesting hosting needs is:

**Requestor Role**

1. Enter a Demand record.
2. Enter an Environment Request record.
3. Enter one or more Environment Detail records.
4. Submit your request for approval.

   *Unless the approval is denied, the part of the requester in the process ends here.*

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# Hosting Demand Management in ServiceNow
## By Role

The process for requesting hosting needs is:

**Approver Role**

1. Review requests at designated intervals.
2. Approve requests that are seen as valuable to your BU.
3. Continue reviewing new and previously approved infrastructure until 1 quarter out from need.

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# Hosting Demand Management in ServiceNow
## By Role

**Provisioner/Plant Ops/Service Delivery Team (one or more of these roles may be involved):**

1. If the Demand is approved, at 1 quarter out, begin entering provisioning details in Hosting Demand Management application in ServiceNow).
2. Once the provisioning details (IR records) are entered, those details will generate Catalog Requests in ServiceNow.
3. The Change Requests will spawn one or more Request records that generate one or more Catalog Tasks that are assigned to provisioning team members to provision.

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# Hosting Demand Management in ServiceNow
## By Role

**Provisioner/Plant Ops/Service Delivery Team (cont'd):**

5. Once a Change Request is completed for the infrastructure, the CR is closed, and then the Catalog Task is closed by the person who submitted the Change Request.
6. After all Catalog Tasks are completed for a Request record, that Request is closed.
7. Once all Requests for an environment are closed, the Environment Request is completed and closed.
8. Once all Environment Request' Requests are closed, the Demand status is changed to Closed Complete inside the Hosting Demand Management application.

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# Power Tips for Navigating, Searching, and Viewing in ServiceNow

***Note: If you are an experienced ServiceNow user, skip the next few slides by clicking here.***

***Note: This link will only work if you are viewing this PPT in presentation mode. Links do not work in editing view.***



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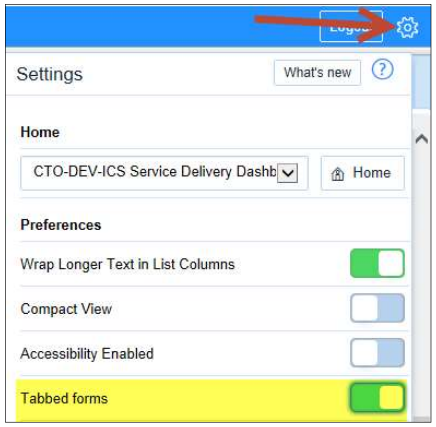
# Tips for Viewing Demand Records

ServiceNow lets you configure how your environment will appear. Host Demand Management works better when you do not have a tabbed view. When you have tabs, you have to remember to click on the correct tab to view what you want to see.

To turn off tabbed viewing:

1. Click on the Gear at the top left corner of your screen in ServiceNow.




2. Toggle the Tabbed Form to off.

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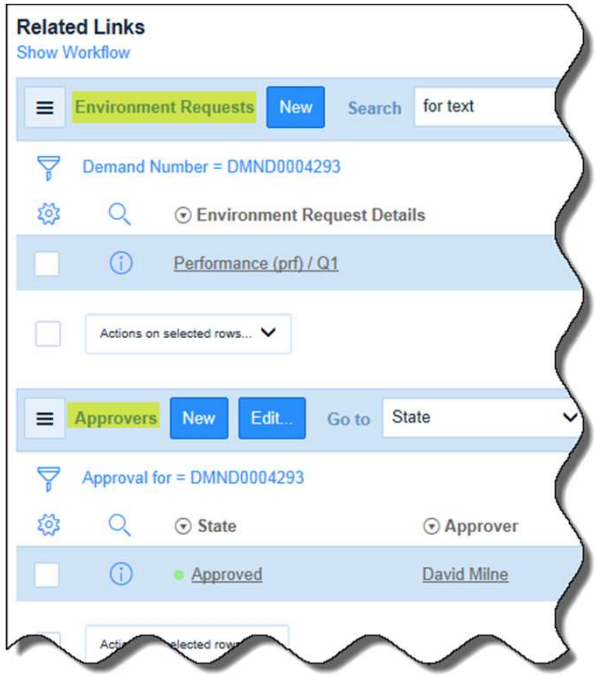
# Tips for Viewing Demand Records

Instead of seeing your type of request in a tabbed view as below:

Your records show up in a scrollable view and each section (see highlighted areas) is scrollable and you won't have to worry if you're on the right tab or not to see data associated with your demand record.



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# Tips for Searching for Data

The easiest way to quickly enter information into the various records that make up your request are as follows:

| Methods | Directions |
|---|---|
| Search for data using variables<br>* Data Center \| *QDC \| Quincy Data Center (QDC) | Use * in front of any data to quickly locate the information you want. For instance, when searching for the Data Center in the Environment Details record, enter *QDC to locate Quincy Data Center (QDC). |
| Click on the Search Icon | Clicking the magnifying glass will display the entire list of allowable entries. You can either scroll through them or use the **Go to** fields to filter your search on a specific field. For instance, if you enter training it will filter your results to display any name containing the word “training”. |
| Or, after the search list displays, click the magnifying glass again and enter a filter to display specific results.<br>Go to \| Name \| training | In this example, entering *ptg in the BUFG L2 field causes all applications for PTG to display, making it easier to select what you want.<br>Name ▲ \| Manufacturer \| Class \| Site \| BUFG L2 \| BUFG L3 \| Asset t<br>Search \| Search \| Search \| Search \| *ptg \| Search \| Search<br>AAG/PTG dynaTrace Non-Production \| (empty) \| Application \| (empty) \| ProTax Group (PTG) \| (empty)<br>AAG/PTG Production dynaTrace \| (empty) \| Application \| (empty) \| ProTax Group (PTG) \| (empty) |



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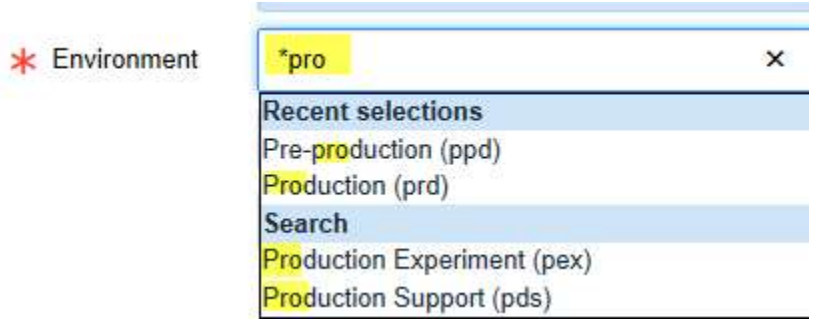
# Tips for Searching for Data

Use the wild card search (example: *pro) in the field itself without first displaying the list of all available fields for the fastest results. You will immediately see all fields containing your wild card search term in the drop-down list.



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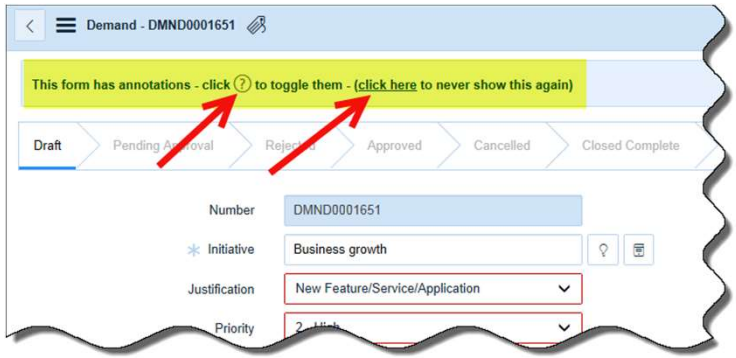
# Annotations

The Hosting Demand Management application contains annotations on the Demand form. Annotations point out key information about the record. To see them, click the ? and to disable them permanently, click the link.




In this case, the message indicates that you can enter fields with red borders at any time prior to requesting approval. You can begin to enter your demand and associated details without knowing what to select in the red bordered fields. You can save and return to your demand. However, these fields must be complete before you can request approval of your environment.

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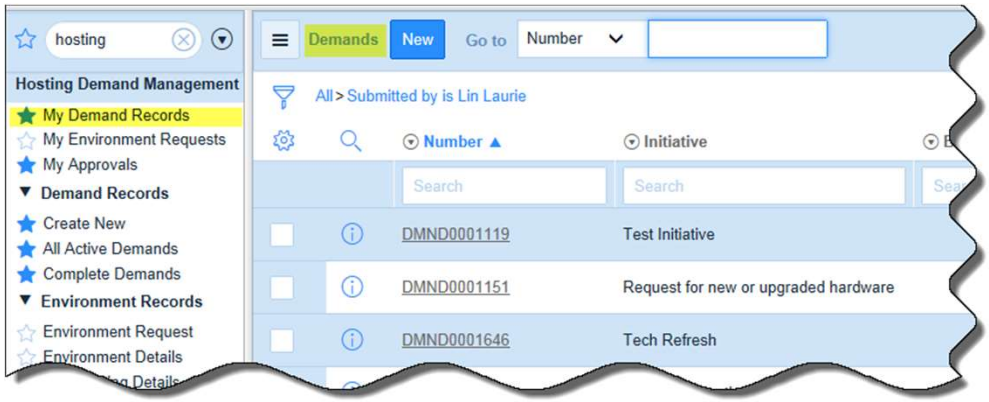
# Navigation Tips

You can easily navigate up one level or one record type by:

- Clicking the back button and from a lower level record, it will take you up a level, like from the Environment Request record, you can back up to the Demand record level. If you are at the top level of a record, (Demand) clicking this button will take you out of the application to a list of all your Demand records.



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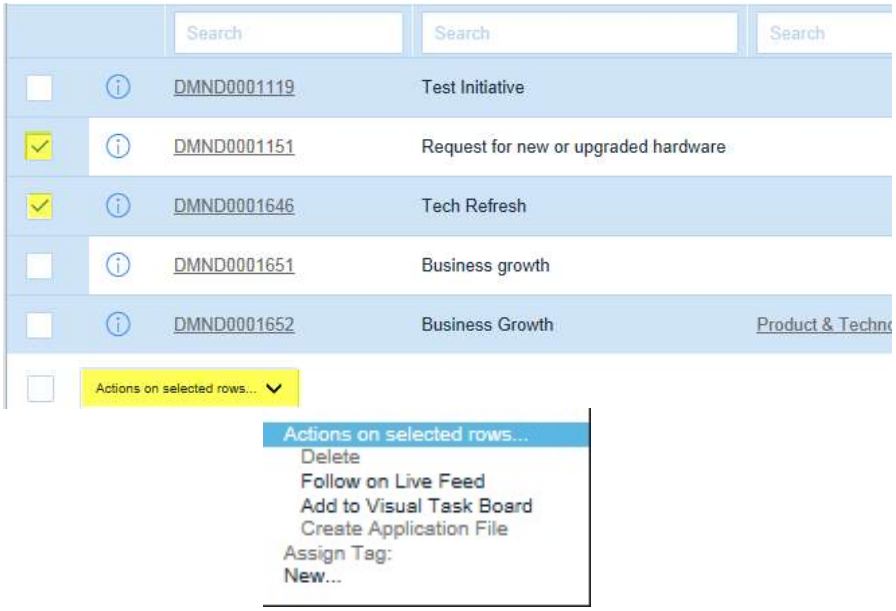
# Navigation Tips

**Working With Multiple Records**

From anywhere in ServiceNow that displays a list of records, you can select multiple records and perform an available action on all displayed items.

1. Check the records you want to select.
2. Click the Actions on select rows button.
3. Select the action you want to take.

   The action will happen to all selected items provided it was an allowable action.



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# Requesters



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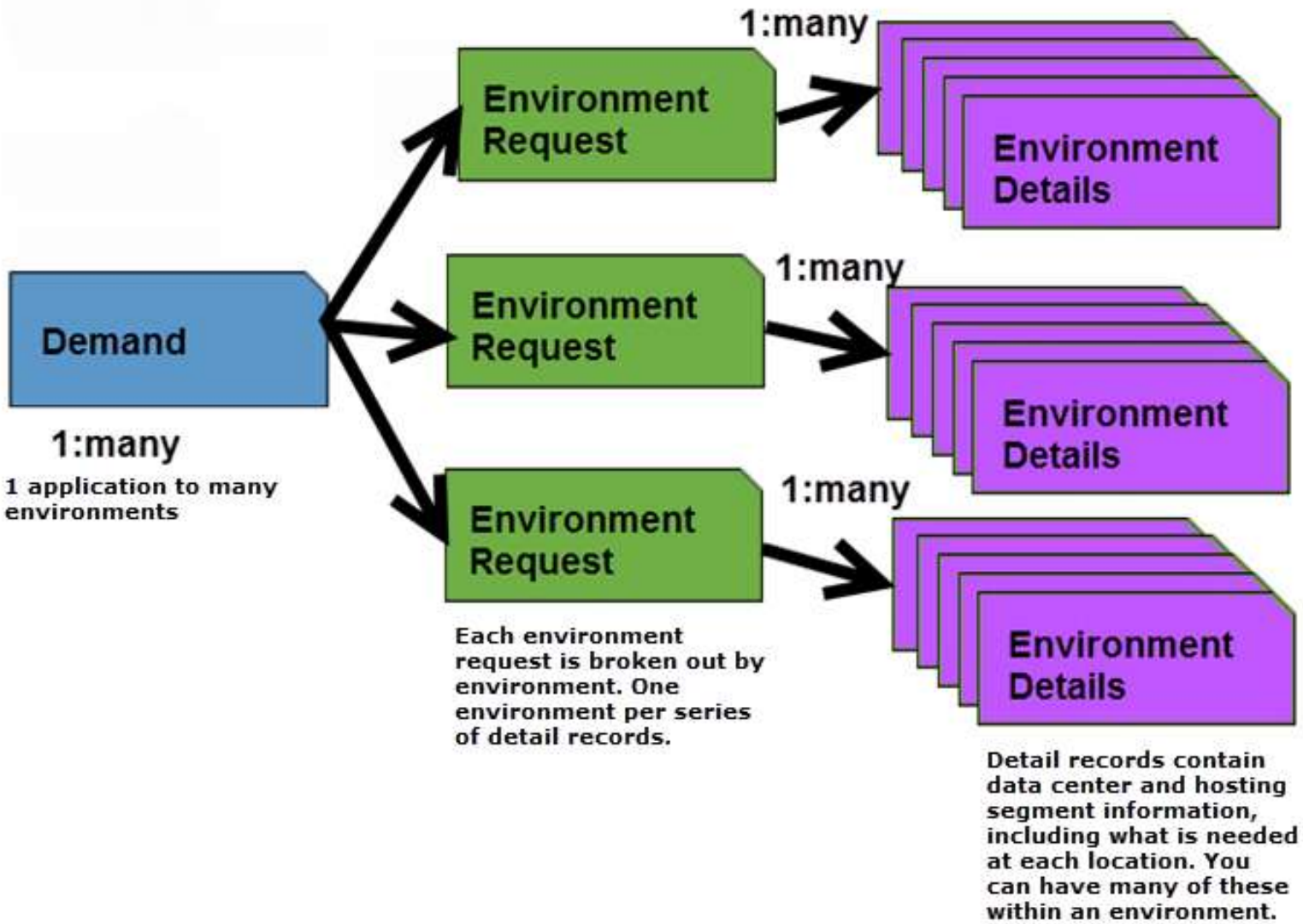
# Demand Record Relationships



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# Demand Relationships by Record Type

In ServiceNow's Hosting Demand Management application, create the following records during the Forecasting phase:

- One Demand record for each application requested.
- Create as many Environment Requests (ERs) as needed (one for each environment needed for the application to reside in).
- Create as many Environment Detail (ED) records needed to provision as much infrastructure as the BU requires.
- Submit for approval.

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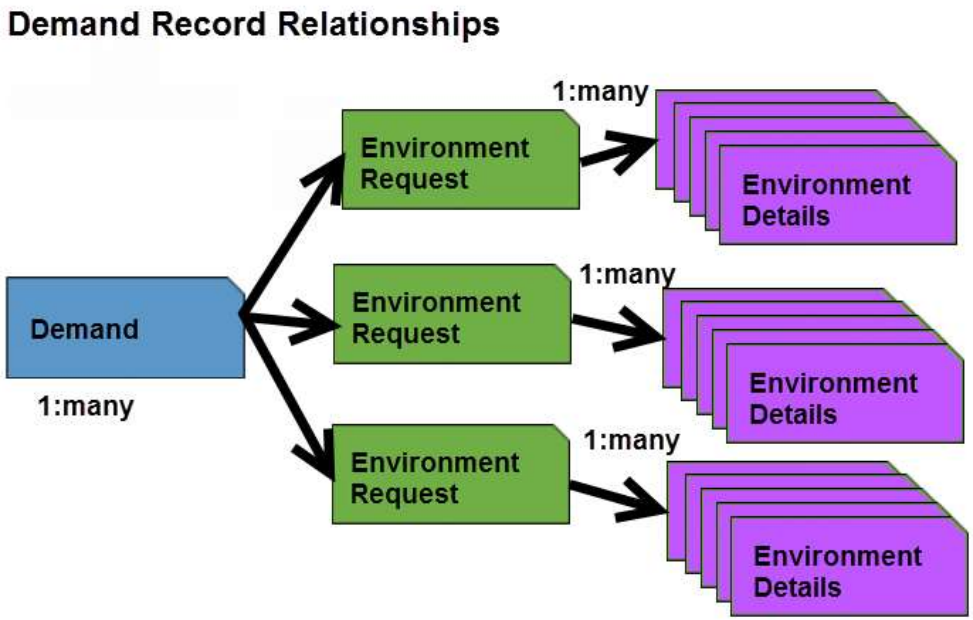
- One Quarter out from need, you will begin entering the provisioning part of this process. See the Forecasting Training – Provisioning.ppt for this part of the process.



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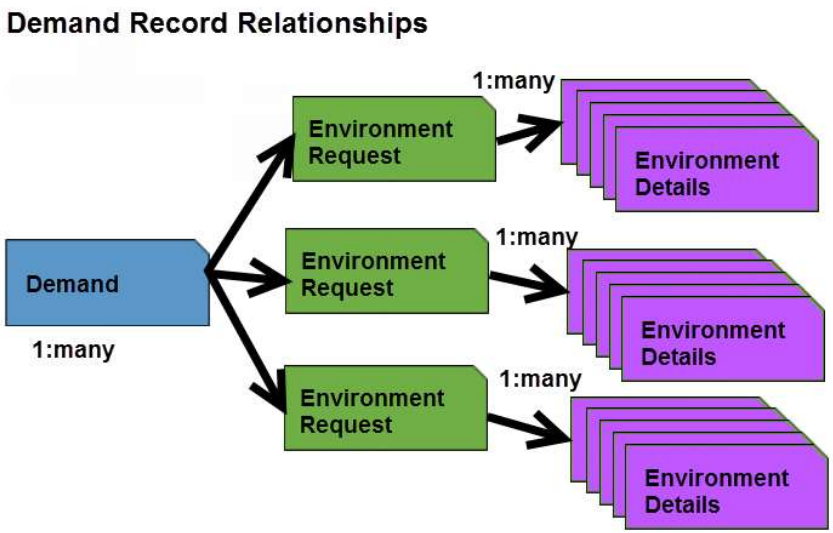
# Breakdown of Data Collected by Record Type

- **Demand Record –** High level data: Initiative, Justification, Priority, Fiscal Year, Application, Description, and Business Case
- **Environment Request Records –** Aggregates costs from detail records and collects Environment, Alternate Funding Source, Environment Priority, and Month when environment is needed.
- **Environment Detail Records –** Data Center, Hosting Segment, Server Size/Storage Size, and Quantity.

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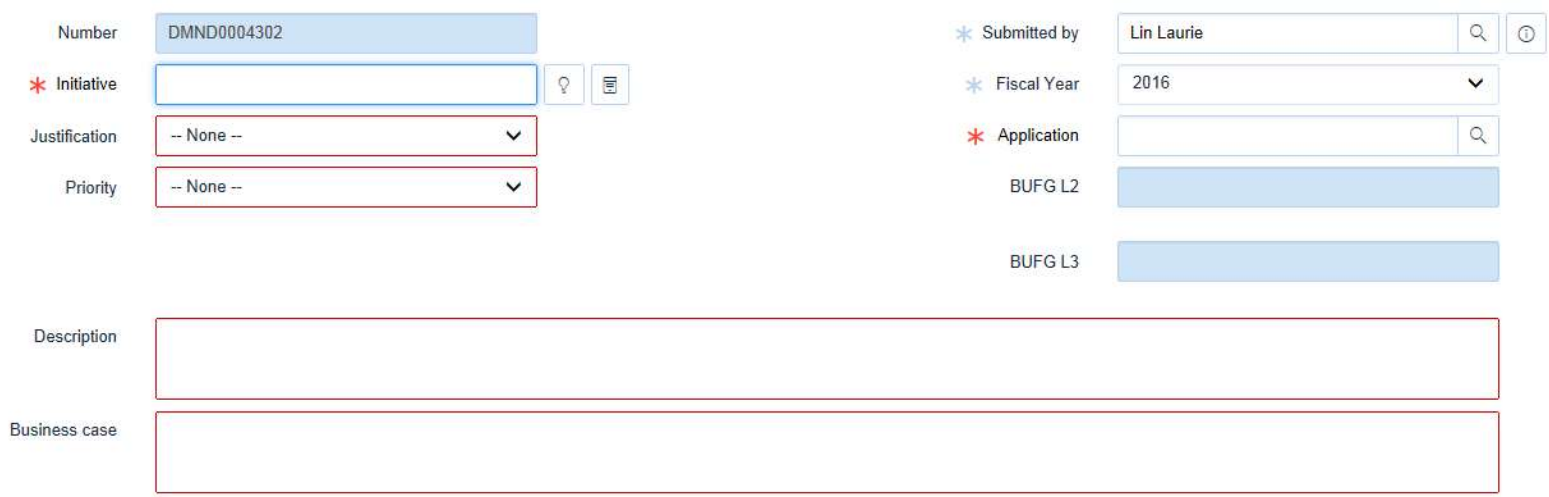
# Demand Relationships by Record Type

| Fiscal_Year | Fiscal_Qtr | BUFG___Top_Level | BUFG | Application |
|---|---|---|---|---|
| 2016 | Q1 | CTG | CTG | App Ops |
| 2016 | Q1 | CTG | CTG | App Ops |
| 2016 | Q1 | CTG | CTG | App Ops |
| 2016 | Q1 | CTG | CTG | App Ops |
| 2016 | Q1 | CTG | CTG | CFP Data Platform CTG |
| 2016 | Q1 | CTG | CTG | CFP Data Platform CTG |
| 2016 | Q1 | CTG | CTG | CFP Data Platform CTG |
| 2016 | Q1 | CTG | CTG | CFP Data Platform CTG |

The Demand is the highest level of information gathered and you only have one Demand record for an environment.

It determines the Fiscal Year when the environment is needed, the application the environment supports, and the BU (L2 and optionally L3) that requires the environment.

In this example, you would have one Demand record for App Opps needs for Q1 and another Demand for CFP Data Platform CTG needs for Q1.



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# Relationships by Record Type

Environment Request records contain a breakdown of costs, server quantities and storage sizes.

Each environment type (prod, dev, etc.) will have its own Environment Request record. This record also lets you override the requesting BU in cases where a different BU is responsible for paying for the need. It also lets you select the month (within the FY selected in the Demand record) when the environment is needed.

Costs, Storage Size, and Total Servers roll up from the Environment Details records.

Using this example, we would need one Environment request for pre-prod for App Ops Q1 needs, and another for Prod needs.

| Fiscal_Year | Fiscal_Qtr | BUFG__Top_Level | BUFG | Application | | Data_Center | Hosting_Segment | Env_for_Capacity |
|---|---|---|---|---|---|---|---|---|
| 2016 | Q1 | CTG | CTG | App Ops | | QDC | QDC-C | Pre-Prod |
| 2016 | Q1 | CTG | CTG | App Ops | 1 Demand record | QDC | QDC-C | Prod |
| 2016 | Q1 | CTG | CTG | App Ops | | LVDC | LVDC-A | Prod |
| 2016 | Q1 | CTG | CTG | App Ops | 1 Environment Request for Pre-Prod and a second for Prod | QDC | QDC-C | Prod |

| | | | |
|---|---|---|---|
| Demand Number | DMND0004302 | * Month | August |
| * Environment | | Quarter | Q1 |
| * Funding Source | Requesting BU/FG | Total Cost | $0.00 |
| * Environment Priority | -- None -- | Total Storage (in GB) | 0 |
| | | Total Servers | 0 |
| Environment Business Case | | | |



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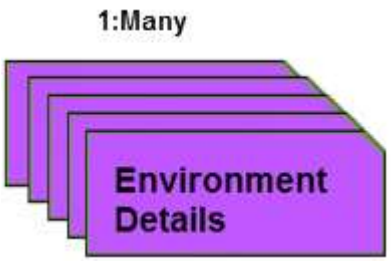
# Relationships by Record Type




Environment Details contain Data Center, Hosting Segment, and number of systems broken down by type and quantity. The dollar amounts are loaded as allocated costs and are associated with what you need.

You will have multiple Environment Details records for each Environment Request record you submit. For our App Ops example, you would need to add:

- 6 L VMs for pre-prod QDC-C
- 3 M VMs for Prod in QDC-C
- 2 M VMs for Prod in LVDC-A
- 3000 GB storage in QDC-C for External Storage

| Data_Center | Hosting_Segment | Env_for_Capacity | __of_Systems | __of_BMs | __of_VMs | __of_BigData | System_Size | Local_Storage__GB_ | External_Storage__GB_ |
|---|---|---|---|---|---|---|---|---|---|
| QDC | QDC-C | Pre-Prod | 6 | | 6 | | L | 360 | |
| QDC | QDC-C | Prod | 2 | | 2 | | M | 120 | |
| LVDC | LVDC-A | Prod | 2 | | 2 | | M | 120 | |
| QDC | QDC-C | Prod | 0 | | | | | 0 | 3000 |

Environment Details

* Data Center

* Hosting Segment

* Server Size / Storage Size

* Quantity

Submit New Environment Details



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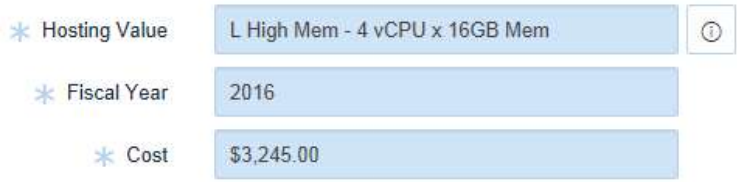
# Cost Allocations

When you select a server/storage from the drop-down list, each item has a cost associated with it. If you request the item for use in Q1, then your BU is charged for the entire cost (in this example, $3,245).

If you want the item for use in FY16 Q3, then it divides the cost of the item by the number of quarters of use you will get from the item and it charges you accordingly. So in this example, to use a VM of the size shown below, your BU would be charged half of the yearly price, or $1,622.50. You will see the total cost of the item when you select it, but the roll-up amount will be the usage total.




Costs roll up to the Environment Request level. To get a view of the costs you have entered to date for all Q1 needs for App Ops QDC-C Pre-prod, you would open the Environment Request for that environment and review the rolled up costs.



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# General Rules

Some things you should know before you begin:

- All fields are required when you submit your request for approval but you can leave the ones with red borders blank to begin entering your demand records unless they show an * to the left of the field. Those fields displaying the * must be completed before you can save your work.
- If your initiative is spread across fiscal years, you must enter two demand records: one for each year.
- You can enter a demand before you have a new application in ServiceNow. But by one quarter before need, your new application must be set up in ServiceNow and must be selectable from the Application drop-down list. You must return to your demand and update the Application name prior to the purchasing of your equipment.
- The Fiscal Year defaults to the current year (in this case FY16). However, you can select another year from the drop-down list. Currently you can only add FY16 or FY17 demands in ServiceNow.
- It is important that you enter valid and pertinent data into all fields so your approval will not be held up or sent back for additional data.


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# Demand Record

**Step 1: Enter a Demand record and click Save to keep your work.**

Demand - DMND0001652 | Save

Draft | Pending Approval | Rejected | Approved | Cancelled | Closed Complete

Red bordered fields are required only when submitting for approval.

| | | | |
|---|---|---|---|
| Number | DMND0001652 | * Submitted by | Lin Laurie |
| * Initiative | Tech refresh strategy | * Fiscal Year | 2016 |
| Justification | Tech Refresh - Operational | Total costs | $0.00 |
| Priority | 1 - Critical | * BUFG L2 | Product & Technology Group (Tech) |
| | | * BUFG L3 | Global Ready Offerings (Tech - GRO) |
| Description | We need to begin upgrading outdated servers over 3 years old. | | |
| Business case | Our infrastructure is aging, it is impacting availability, and we need to refresh aging technology for better SLAs. | | |

| Field | Description |
|---|---|
| Initiative | This is a key directive from leadership. |
| Description | Enter the '*what*' the initiative is for. |
| Business Case | Enter the '*why we need what we're requesting*' reason in this field. |
| BUFG L2 and L3 | These fields are associated with the application you select. The only time you can specify them is when you are requesting infrastructure for a new application. |



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# Demand Record – No Application Exists

Demand - DMND0002474

Update | Save | Request Approval

Draft | Pending Approval | Rejected | Approved | Cancelled | Closed Complete

Clicking Update will take you out of the current record.

Red bordered fields are required only when submitting for approval.

Number: DMND0002474

Initiative: SBG Eco Iniative

Justification: New Feature/Service/Application

Priority: 2 - High

Submitted by: Lin Laurie

Fiscal Year: 2016

Total costs: $0.00

No Application: ✓

BUFG L2: Product & Technology Group (Tech)

BUFG L3: Global Ready Offerings (Tech - GRO)

Description: Our tech refresh strategy is to remove older servers that are impacting performance.

Business case: Customers are being required to sign on multiple times in a single session as older servers are not keeping up with demand.

When the application does not exist:

- Select New Feature/Service/Application in the Justification field. This will cause the No Application box to appear. Check this box and enter the BUFG L2 and L3 fields to indicate who will pay for the requested infrastructure. BUFG L2 and L3 are tied to an application. If you check No Application these will become required fields.
- If you check No Application, it means that you need to request a new application as a separate step. You can submit the request for approval but you must enter a separate request to create a new application in ServiceNow and once it is available, you must return to the Demand record and select the application from the drop-down list.



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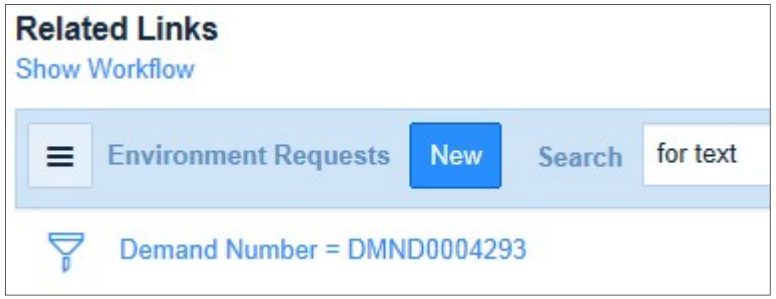
# Environment Request

**Step 2: Scroll down the page and click New to enter a Environment Request record.**




**Note:** If you have Tabbed View enabled, you may have to click on the Environment Request tab first.

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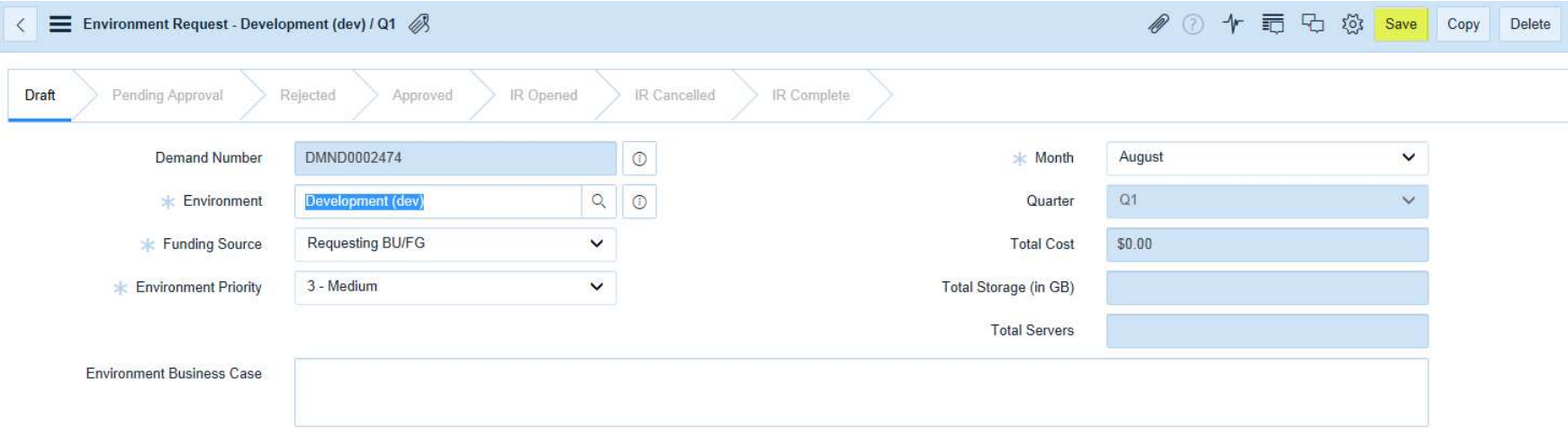
# Environment Request

**Step 2: Enter a Environment Request record, and then click Save to keep your work.**




About the Environment Request record:

- All fields are required except the Environment Business Case.
- There are business rules applied to Month and Quarter to prevent entries in a closed FY or Quarter. You may select another Month from the drop-down list but only if it is open for the FY you selected in your Demand record.
- If you want to have your infrastructure built in phases, you can enter different Environment Requests for each quarter and then enter the detail records for that which should be built out in each quarter. You can also build out one environment or one phase, and then copy the environment request and change the month it is needed to achieve phased results easily.
- Contents of the Total Cost, Total Storage, and Total Servers fields are aggregated from data in the Environment Details records you will create next.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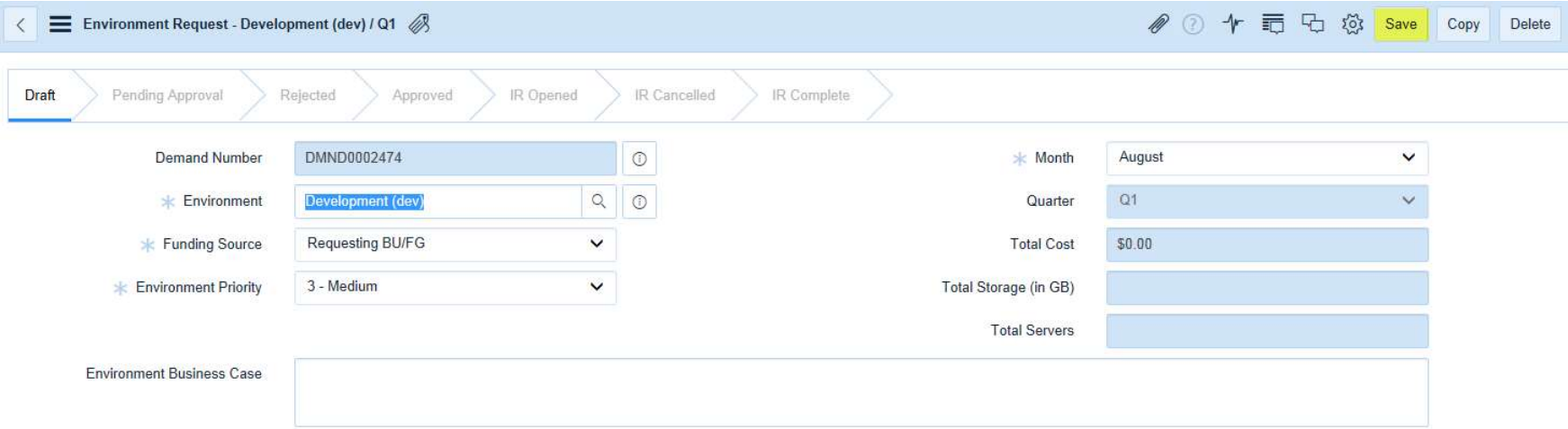
# Environment Request




About the Environment Request record (Contd.):

- You will need a new Environment Request for each environment you want to build.
- You can change the default BUFG L2 and L3 associated with the application you're building out by changing the Funding Source for instances when the owner of the application is not paying for the new infrastructure.
- You can set the priority at the environment level to be different than that specified at the Demand level.
- The Total Cost field is calculated using the cost allocation model for the current FY multiplied by the Total Servers or Total Storage.
- Costs are prorated depending on the quarter they are requested for and the cost allocation model. If a server costs $2,000 but was only being used for 1 quarter in the current FY, the cost that should display is $500.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# Environment Request

Environment Request - Development (dev) / Q1

Save | Copy | Delete

Draft | Pending Approval | Rejected | Approved | IR Opened | IR Cancelled | IR Complete

| | | | |
|---|---|---|---|
| Demand Number | DMND0002474 | * Month | August |
| * Environment | Development (dev) | Quarter | Q1 |
| * Funding Source | Requesting BU/FG | Total Cost | $0.00 |
| * Environment Priority | 3 - Medium | Total Storage (in GB) | |
| | | Total Servers | |
| Environment Business Case | | | |

About the Environment Request record (Contd.):

- You can have one or more Environment requests for each Demand record.
- Each Environment Request must have at least one Environment Detail record associated with it before you can request approval for your Demand.
- You must be in the Demand record before you can request approval.



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# Environment Details Record

**Step 3: Scroll down the page and click on the Environment Details tab to begin entering more specific information about your environment.**

**Step 4: Click Submit New Environment Details after you enter each details record.**

About the Environment Details record:

- All fields are required
- When you click Submit New Environment Details, the contents of the Server/Storage Sizes and Quantity fields will roll up to the Environment Request record.
- The Data Center selected filters the contents of the Hosting Segment so you will only see hosting segments that are available for your data center.
- You can one or more Environment Details record for each Environment Request record.
- You must be in the Demand record before you can request approval.



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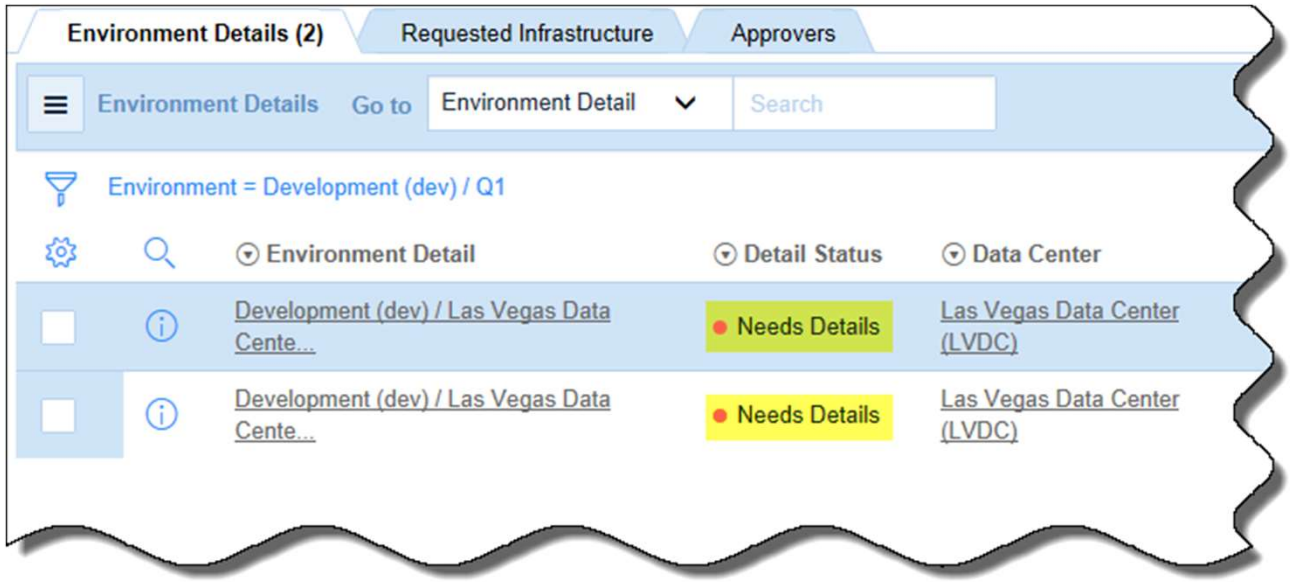
# Environment Details Record




About the Environment Details record (Contd.):

- After you enter an Environment Details record, the Detail Status says "Needs Details," referring to the infrastructure details needed to provision your servers. You can submit your Demand request for approval without completing these details.
- Once quarter prior to when the infrastructure is needed, a provisioner must return to the ServiceNow Hosting Demand Management application and complete the infrastructure details prior to the provisioning of your request.



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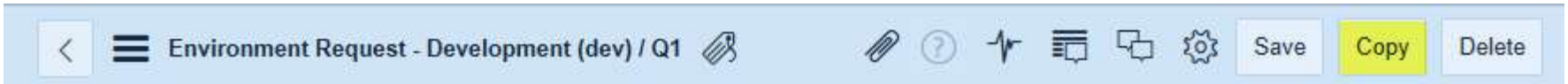
# Copying an Environment

Once you've entered all an environment, including Environment Detail records, you can copy the entire environment. In the example below, there are three identical environments.

1. **To create a duplicate of this environment, first display the Environment Requests.**

2. **At the top of the screen, click Copy.**




**Note:** Your entire environment with all Environment Detail records will be duplicated. You can easily open one of these copied environments and change the environment (for example, to Pre-production) and immediately have a complete duplicate of your production environment without having to duplicate all the detail entries.

When you copy an environment, it adds it to the current Demand record.



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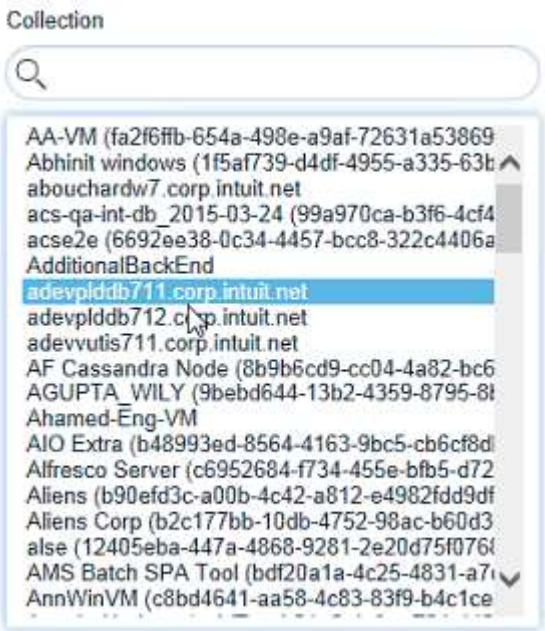
# Moves, Resizes, and Returns

Most of your hosting requests will likely be requests for new equipment. In those cases, you won't need to know the equipment details, such as the server name. However, there are times when you need to reference existing equipment. When you return equipment, resize it, or move it, you must link the details requested to the server name. This process is called relating CIs.

If you do not know the name of the server, you must find it before you can submit your Demand Request for approval. You must be able to select a name from this list for each server you are requesting an action for.



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# Rules for Moves, Resizes, and Returns

Currently moves are restricted by Data Center. You can move within zones but not outside. This will be addressed in Phase II.



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# Moves and Resizes

Some moves and resizes are not done in the Hosting Demand Management application. If there is no impact to budget or capacity, you would perform a change request to perform a move. Here is a list of what is allowable and where you should go to initiate what you need:

| | Move | | Resize |
|---|---|---|---|
| | **Same Hosting Segment** | **Different Hosting Segment** | |
| VM | Change Request | Demand Request | Demand Request |
| BM | Change Request | Demand Request | Not Allowed |
| Big Data | Change Request | Demand Request | Not Allowed |
| Storage | Change Request | Demand Request | Demand Request |

**Change** – Originate from Service Catalog request
**Demand** – Originate in Hosting Demand Management
**Not Allowed** – Cannot perform in any application in ServiceNow

**Note:** All moves require at least one positive and negative quantity. You must give back the old infrastructure (- quantity) and then request new infrastructure using a positive quantity. The total of the negative and positive records must net to zero.


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# Moves

1. **Enter your Demand record and click Save to keep your work.**
2. **Enter your Environment Request record and click Save to keep your work.**
3. **Enter your negative Environment Detail record (to return the old) and click Submit New Environment Details.**

4. **Enter the positive Environment Details record(s) and click Submit New Environment Details.**

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# Moves

You must make sure that your negative and positive detail records have a net zero balance before you can proceed. After you have both of your move Environment Details records added, you must relate the negative record with the positive record and also indicate that you are doing a move. Right now the system doesn't know what to do with each of these detail lines.

Environment Details (2) | Requested Infrastructure | Approvers

Environment Details  Go to  Environment Detail  Search

Environment = Development (dev) / Q1

| Environment Detail | Detail Status | Data Center | Hosting Segment | Size | Quantity | Total Cost |
|---|---|---|---|---|---|---|
| Development (dev) / Quincy Data Center (... | Needs Details | Quincy Data Center (QDC) | QDC-A | XL - 8 vCPU x 32GB Mem | -5 | ($30,905.00) |
| Development (dev) / Quincy Data Center (... | Needs Details | Quincy Data Center (QDC) | QDC-C | XL - 8 vCPU x 32GB Mem | 5 | $30,905.00 |



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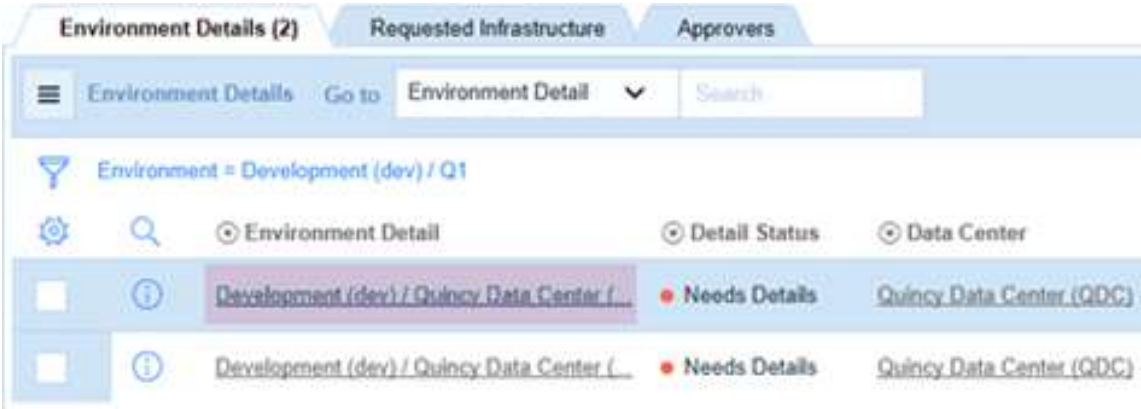
# Moves – Relating CIs

1. **Open the negative Environment Detail record by clicking on the Environment Detail line.**



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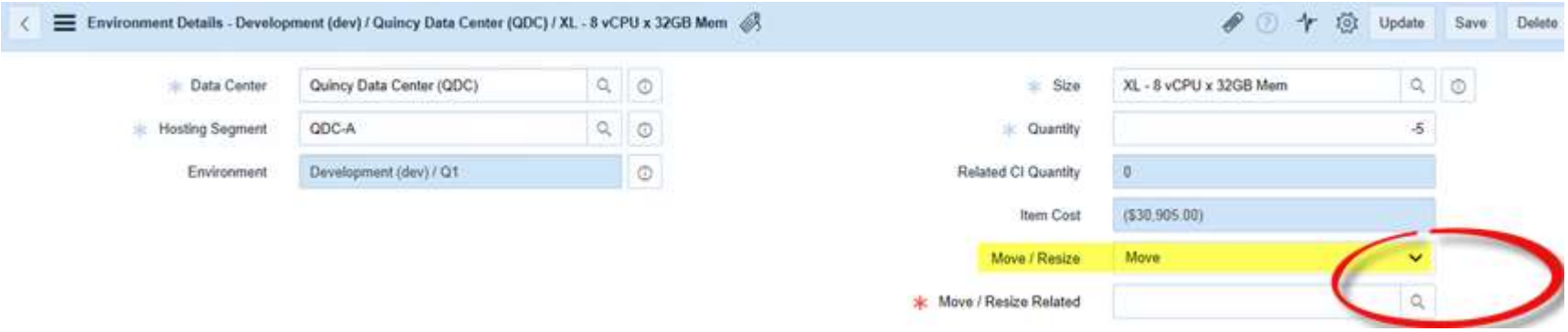
# Moves

2. **In the Move/Resize drop-down, select Move from the drop-down list.**

3. **Click the magnifying glass to the right of the Move/Resize Related field.**



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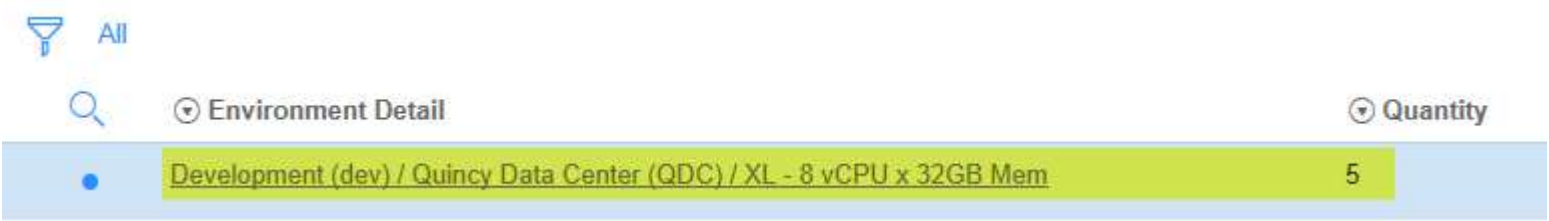
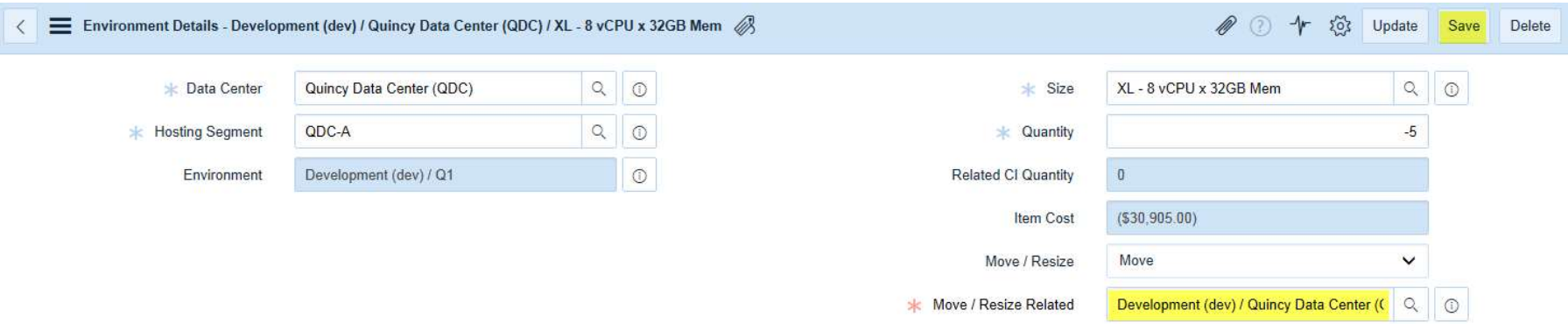
# Moves – Relating Records

4. **Return to the Environment Details and click to select the Environment Detail record containing the request for new infrastructure and has a positive number.**




5. **Click Save to keep the relationship between both negative and positive records for your move.**

   **Note:** You can open the positive record to verify that the relationship shows up in both records but you want to use the negative record as the way into relating the positive.



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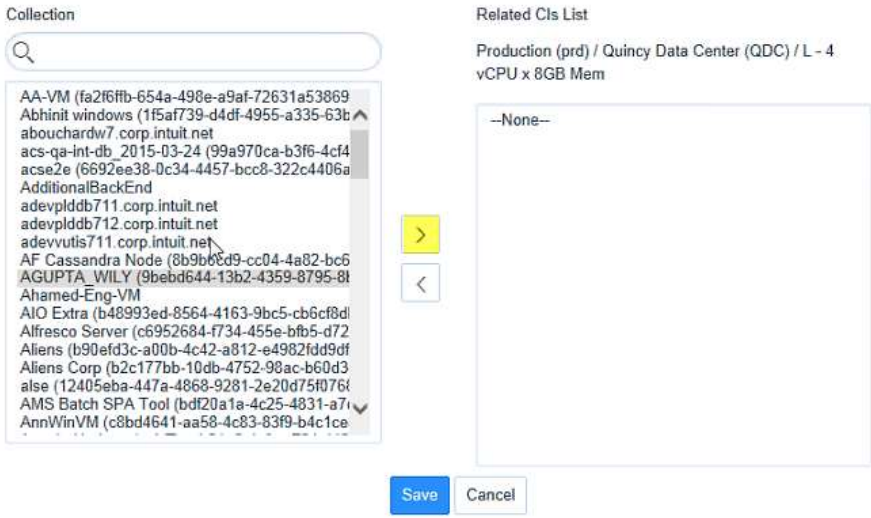
# Moves – Related CIs

Now you want to tell the system the host name of the servers you are moving from. The system will give the new server a name at the new move location but you must tell it where to move the old servers from.

1. **Open the Related CIs tab and click Edit.**

2. **Locate the asset (servers) you want to move. You can select multiple servers by holding CTRL and clicking on each name. If you move five servers, you need to select five names. Click the right arrow to move them to the Related Cis List, and save.**



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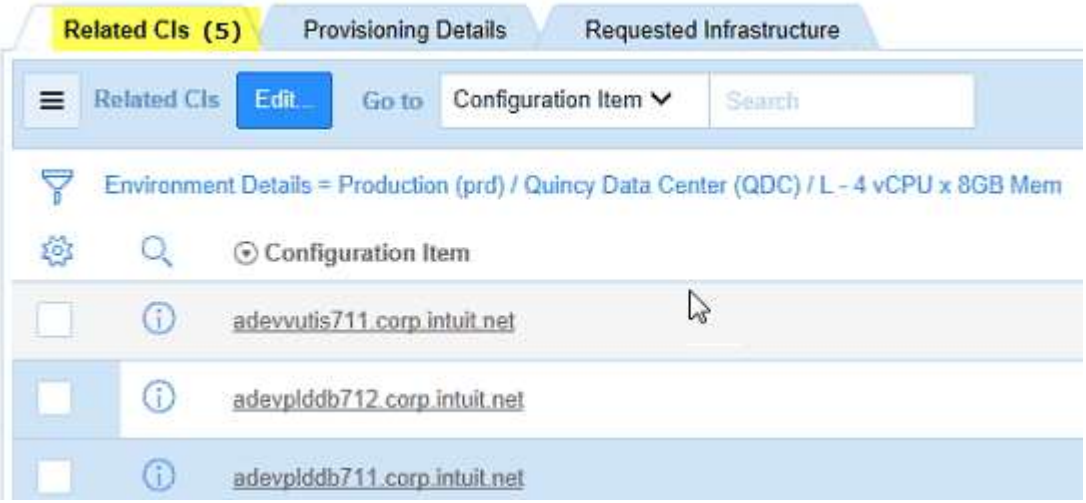
# Moves – Related CIs

Once you relate all your Configuration Items (CI) records, and click Save, you will see a list of the items you selected. You can verify the number showing in the tab with the number of moves to know you've completed this portion of the move.

Normally PMs, Portfolio Managers, and others with a similar role would not know this information so you will have to work with provisioning team or others to get the information you need so you can select it for your move. When you've completed this step you can go up to the Demand record and click Request Approval of your Move unless it was entered as part of a larger request.



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# Returns

A return means that you are giving back the infrastructure that is no longer required by your business unit (BU) and also results in a credit back to your BU's budget for the unused cost allocation. Returns only require one Environment Details record.

1. **To enter a return, enter the Data Center and Hosting Segment, and then specify the Server and enter a negative amount in the Environment Details record, just as you did for a move.**

2. **Click Submit New Environment Details.**
3. **Click Save your work.**
4. **Click the Environment Details tab to verify your entry or return to the Demand record and request approval if you have no other infrastructure to request.**

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# Resizes

A resize can result in a negative or positive change in your BU's budget, depending on whether you are requesting a larger or smaller server. In the example below, we are giving back two small devices, and then requesting two medium servers, resulting in an increase to the cost of your Environment Request. As in a move, you want to enter the "give back quantity" or negative amount first.

Resizes must be done in the same Data Center and Hosting Segment as the initial server was housed.

1. **Enter the Data Center and Hosting Segment, and then specify the Server and enter a negative amount in the Environment Details record, just as you did for a move or return.**

2. **Click Submit New Environment Details, and repeat the process except change the server size and enter the quantity as a positive number.**

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# Resizes

3. **Click Submit New Environment Details.**

| Environment Detail | Detail Status | Data Center | Hosting Segment | Size | Quantity | Total Cost |
|---|---|---|---|---|---|---|
| Build (bld) / Las Vegas Data Center (LVD... | Needs Details | Las Vegas Data Center (LVDC) | LVDC-A | M - 2 vCPU x 4GB Mem | 2 | $3,244.00 |
| Build (bld) / Las Vegas Data Center (LVD... | Needs Details | Las Vegas Data Center (LVDC) | LVDC-A | S - 1 vCPU x 2GB Mem | -2 | ($1,622.00) |

Notice that you now have a net zero different in quantity, a debit and a credit in total costs, and a difference in the size requested and the size returned.

4. **Click on the negative Environment Detail record to open it so it can be related to the positive detail record.**

Environment Details - Build (bld) / Las Vegas Data Center (LVDC) / S - 1 vCPU x 2GB Mem

| | | | |
|---|---|---|---|
| Data Center | Las Vegas Data Center (LVDC) | Size | S - 1 vCPU x 2GB Mem |
| Hosting Segment | LVDC-A | Quantity | -2 |
| Environment | Build (bld) / Q1 | Related CI Quantity | 0 |
| | | Item Cost | ($1,622.00) |
| | | Move / Resize | Resize |
| | | Move / Resize Related | Build (bld) / Las Vegas Data Center (LVDC) / |

5. **Select Resize from the Move/Resize drop-down list.**



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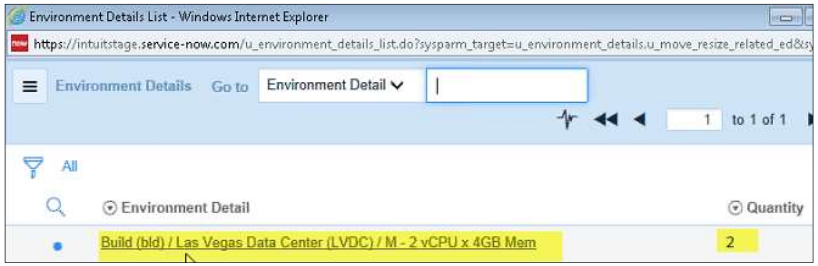
# Resizes

6. **Click the magnifying glass to select the related CI for this resize.**

7. **Select the Environment Detail to link or relate your negative resize record to.**




8. **Click Save.**



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# Resizes – Relating CIs

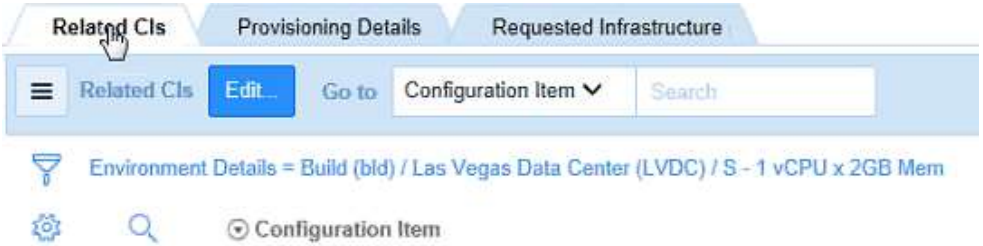
For a resize, you will need to relate both the positive and the negative Environment Details records.

1. **Display the Environment Details and select one of the two resize Detail records.**

Environment = Build (bld) / Q1

| Environment Detail | Detail Status | Data Center | Hosting Segment | Size | Quantity | Total Cost |
|---|---|---|---|---|---|---|
| Build (bld) / Las Vegas Data Center (LVD... | Needs Details | Las Vegas Data Center (LVDC) | LVDC-A | M - 2 vCPU x 4GB Mem | 2 | $3,244.00 |
| Build (bld) / Las Vegas Data Center (LVD... | Needs Details | Las Vegas Data Center (LVDC) | LVDC-A | S - 1 vCPU x 2GB Mem | -2 | ($1,622.00) |

2. **Click on the Related CIs tab and click Edit.**



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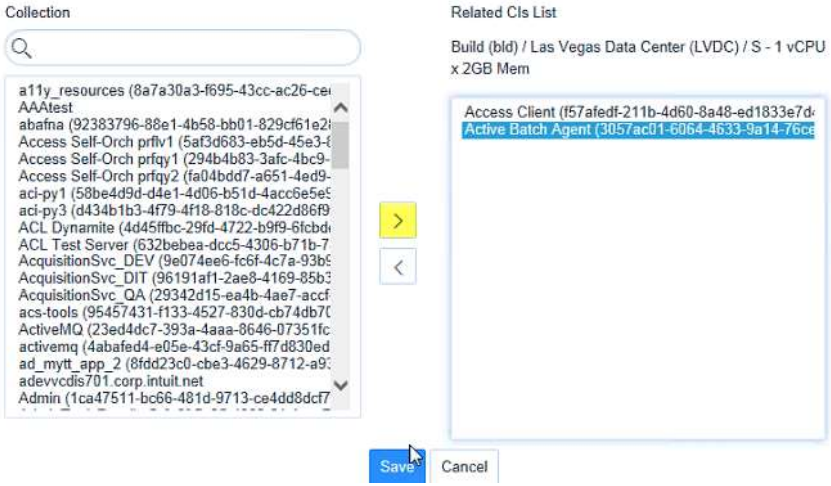
# Resizes – Relating CIs

3. **Display the Environment Details and select one of the two resize Detail records.**
4. **Click on the Related CIs tab and click Edit.**
5. **Select the number of assets you need to associate with the resizes, and click the right arrow.**
6. **Click Save.**
7. **Repeat the process with the second part of the resize Environment Detail so that both positive and negative sides of the request are both related to their device asset records.**




**Note:** Since we are resizing two servers, you need to associate 2 Cis to the return and 2 for the new size being requested.



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# Moves, Resizes, and Returns – What's Next?

At this point, if you have no other Environment Detail records to enter, you can submit your request for approval. You must be in the Demand Record to view the Request Approval button. If you do not see the button, your Demand is not ready for approval and you must return to the detail records to review them until you find the issue that keeps it from being ready for approval.

- **From the Demand record, click Request Approval.**


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# Requesting Approval



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# Requesting Approval

You can request approval from two levels:

- Initial Approval – Done at the Demand record level for the total environment requested.
- Environment Request – If any Environment or Details records are changed after Initial Approval, the impacted environment will become unapproved and need to be reapproved.
- When you change any part of the Demand after Initial Approval, you will be asked to provide a justification. Indicate the reason for the revision and then enter/correct anything requiring changes.
- Request approval at the Environment Request level if you make a change and need to request reapproval for any part of the initial Demand.


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# Requesting Approval

After you've entered all of your hosting needs, you can request approval for your environment.

Once you request approval your status will change from Draft to pending Approval.

You can view your requests at any time to see where they are in the approval process.



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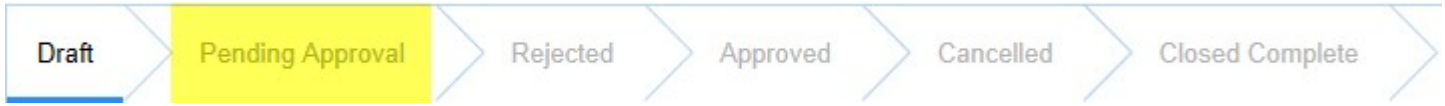
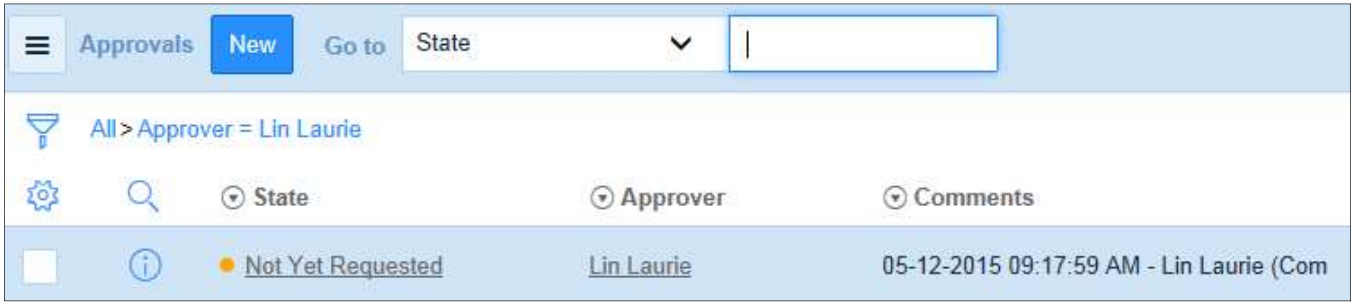
# Explaining Approval Status States




The state of a demand is shown at the top of your screen any time you are in a Demand or Environment record.

You can also track your approvals by clicking on the My Approvals link in the Hosting Demand Management.



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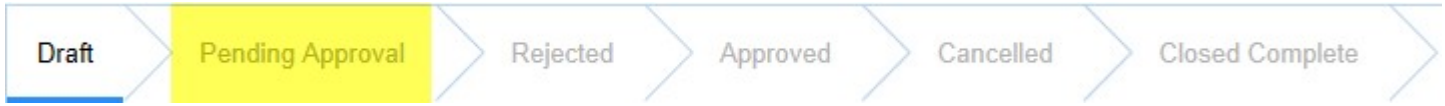
# Explaining Approval Status States




Here is an explanation for each of the approval states:

- Draft – not ready for submission or not submitted for approval.
- Pending Approval – You have requested approval but your request has not been reviewed yet.
- Rejected – Leadership has not decided to fund your request. Your request may not align with a technology roadmap  or business strategy.

  You can set the request back to draft and then update the appropriate fields, and then submit your request again. At this point, you would request reapproval at the Environment Request level. In essence, you've split one environment out of the normal approval process but the Demand, with the exception of any changed Environments, is still considered approved.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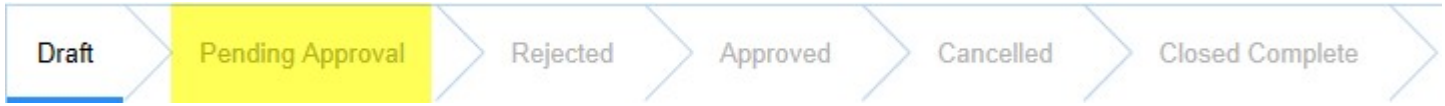
# Explaining Approval Status States




- Approved – Your request has been approved.
  Depending on how far out your request was made in the Forecasting process, you may want to check back when the request is about 30 days from being provisioned. Sometimes other requests may have a higher priority and your hosting equipment may be reallocated.
- Cancelled – Your request was completely cancelled and you will need to create a new request to obtain your needed environment.
- Closed Complete – Your request was provisioned and it now closed.

- When your Demand is approved, the Approved state will show in the status bar above. It will also show when the Demand has been submitted for IR (provisioning) and when the provisioning is complete.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# Approval Groups

Approvers are assigned to groups by BU. If a Demand requires approval from a director in a BU and there are five directors, once any of them approve it, the approval is routed to the next required approval group.

Once all required groups of approvers have submitted their approval for a Demand, the status of the Demand record is changed from Pending to Approved.



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# Rejecting a Demand

A demand can be rejected. Some reasons for rejection are because the request:

- Does not align with the current technology roadmap
- Does not fall within the Initiative entered by the requester
- Is a low priority request
- Is pushed back to allocate resources to a higher priority Demand

When your request is rejected you can review the reason and make adjustments to it. Then resubmit it for another review.


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# Entering the Infrastructure Details



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# Next Steps

- After your demand has been approved, it remains in the approval state until 1 quarter out from need. When it is ready to accept provisioning details, the Need Details message will appear.

- When the message requesting details appears, a provisioner can open each Environment Details record and enter the provisioning details for each requested item.

| Environment Detail | Detail Status | Data Center | Hosting Segment | Size |
|---|---|---|---|---|
| Performance (prf) / Las Vegas Data Cente... | Need details | Las Vegas Data Center (LVDC) | LVDC-B | S High M Mem |



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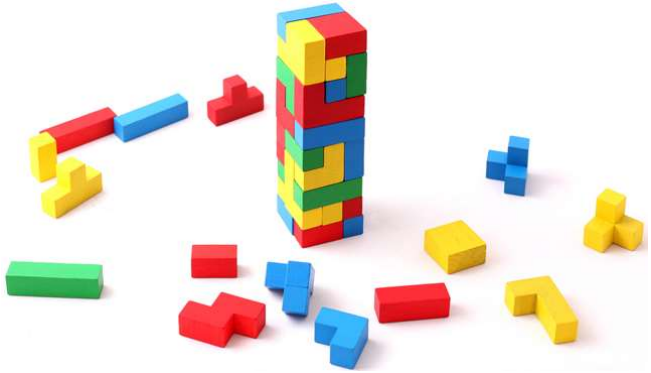
# Infrastructure Requests (IR)

At any time after your Environments have been approved and no later than one quarter out from when it is needed, you can open each detail record and enter the provisioning information required before the infrastructure can be built out.



Usually the people who will be doing this portion of the process are provisioning personnel because of the knowledge of details required to proceed.



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# Infrastructure Requests (IR)

1. **Click on My Demand Records to open a list of demands you created.**

2. **Locate the Demand that contains the details you want built out for you and open that Demand. It must be a demand that is in Approved state.**

3. **Open the Environment Request record.**
4. **Scroll down to the Environment Details section and open each detail record that has a "Needs Approval message displayed.**

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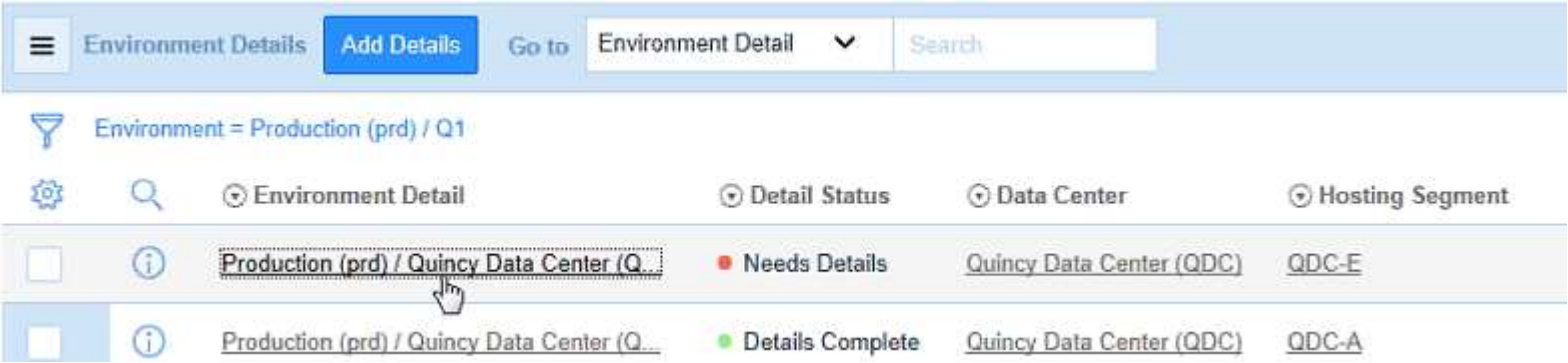
# Infrastructure Requests (IR)

If you are doing a Move, you will only need to complete the details for the positive record. The negative number had the CIs related at the point it was entered into ServiceNow.

1. **Open the Environment Details record containing the Needs Details Status by clicking on the Environment Detail line, or you can check the box to the left of the line you want to open and then click Add Details.**



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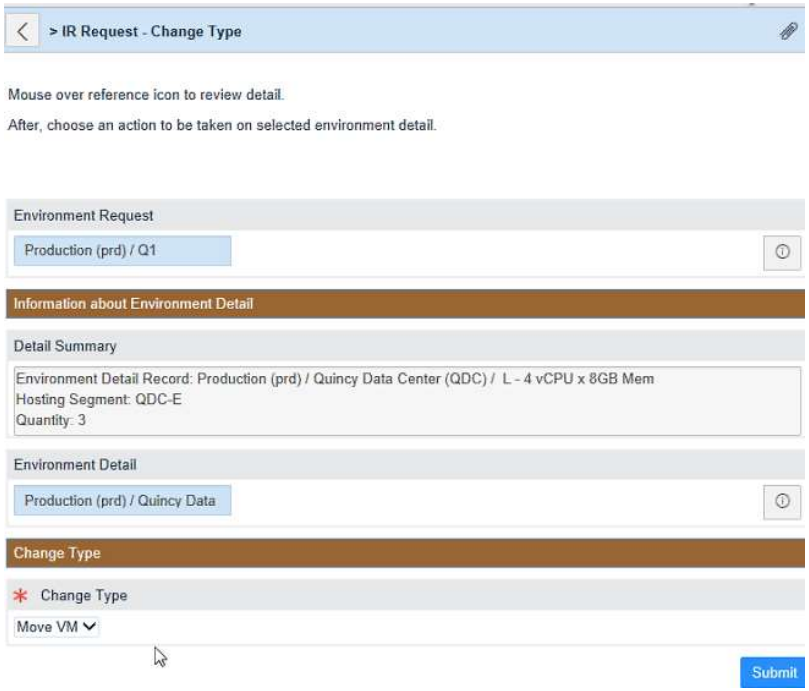
# Infrastructure Requests (IR)

If you are doing a Move, you will only need to complete the details for the positive record. The negative number had the CIs related at the point it was entered into ServiceNow.

## 2. When the IR Request form displays, click Submit.



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# Infrastructure Requests (IR)

If you are doing a Move, you will only need to complete the details for the positive record. The negative number had the CIs related at the point it was entered into ServiceNow.

2. **When the IR Request form displays, click Submit.**
3. **In the next screen (scroll down past the data that was pulled from the Demand to the *Security Zone field and begin entering the requested values.**
4. **Click Submit and then return to the Environment Details record to enter additional servers and details until you've provisioned all of the servers listed in your Environment Details record.**

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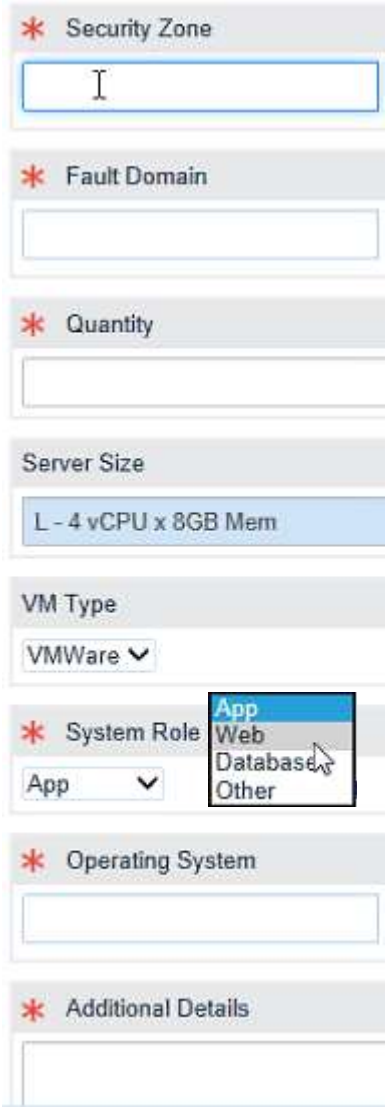
# Infrastructure Requests (IR)

4. **Enter Security, Fault Domain, Quantity, Server Size, System Role, Operating Details, and Additional Details.**

Note: If you have different servers that will be built out as app, web, or , you can enter the quantity of each type and then enter the remaining details for that type of server, then on the next screen enter additional information on the next type of server you want. You can continue to break out servers by type until you've added enough records to encompass all of your needs for that details record.



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# Infrastructure Requests (IR)

After you've entered all needed details for the Environment Details record you were provisioning, the Detail Status should show "Details Complete". At this time, you can submit the completed details provisioning.

Note: You can also copy the existing Environment Request (with all Details) prior to submitting a request for infrastructure in order to duplicate it at a starting point for another similar request.

5. **Scroll to the top of the Environment Request record and click Request Infrastructure.**

6. **Click Save.**

**At this point, your request is submitted into ServiceNow and can begin to be worked on by provisioning personnel.**



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# Infrastructure Requests (IR)

After you request infrastructure you can save your work. Once saved, you can drill down into the Request if you're curious, the view what happens next.

**6. Click Save.**

You can scroll down to the Requested Infrastructure tab and view the Request that was created.

You can also look at the top of the Environment Request to see that an Requested Infrastructure record was created, indicating that your request is on its way to being ready for use. And once complete, it will also show its status in the bar as IR Complete.

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# Next Steps

- You can view additional training and get more support by contacting Lin Laurie by email.
- Access the SharePoint site for additional information and training.


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