Yale Change Management Training Manual

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Introduction to ServiceNow

What is ServiceNow?

Service Now is a suite of cloud-based services for enterprise IT management. It is built and designed around ITIL principles.

What is SaaS?

Software as a Service, sometimes referred to as "on-demand software", is a software delivery model where software and any data associated with it are hosted off-site, typically over the internet. ServiceNow hosts all software and data centrally at the ServiceNow server farms and are accessed via the internet on a web browser. VPN is not needed to access Service Now.

What is PaaS?

Platform as a Service is the delivery of a computing platform and solution Stack as a service. This means that users need only to buy the service, but do not have to worry about maintaining the underlying hardware and software.

What browsers are supported

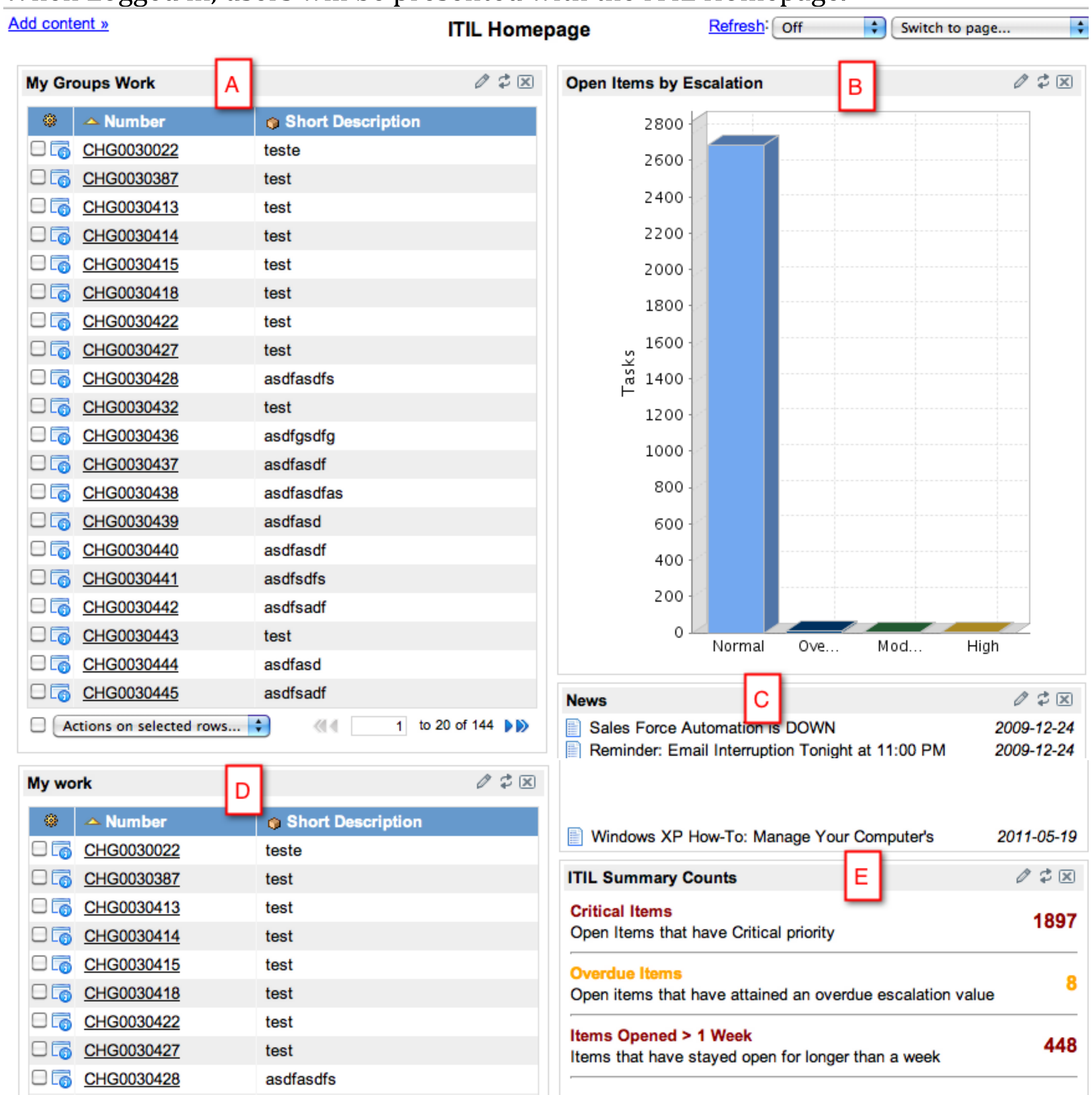
ServiceNow supports all current web browsers, including Internet Explorer, Mozilla Firefox, Google Chrome, Safari, and Opera. The only web browser that has had any reported issues is IE6, which is a far-outdated version of Internet Explorer.

Logging in to ServiceNow

Assuming users are logged into Yale's network, they will be automatically logged in to ServiceNow. To access Yale's ServiceNow website, simply go to: yaleproduction.service-now.com in the web browser if your choice. The user will be automatically logged in by the Yale's Active Directory system

Homepage

When Logged in, users will be presented with the ITIL Homepage.



Homepage Content:

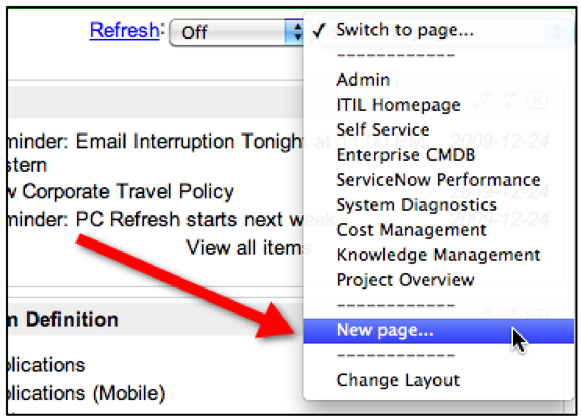
A. My Groups Work: A list of all work items that have been assigned to the logged in user's assignment groups

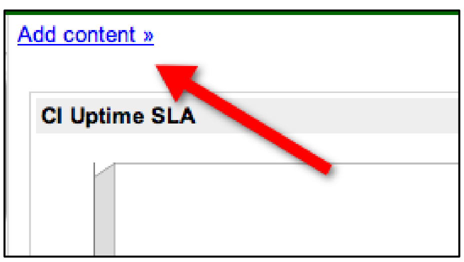
B. Open Items by Escalation: A bar chart of all open work items grouped by their escalation level
C: News: A scrolling ticker of all news items that have been published
D: My Work: A list of all work items assigned to the logged-in user
E. ITIL Summary Counts: A breakdown of work items based on three criteria: Open items that have a critical priority, open items that have attained an overdue escalation value, and items that have stayed open longer than a week

Editing ITIL Homepage Content

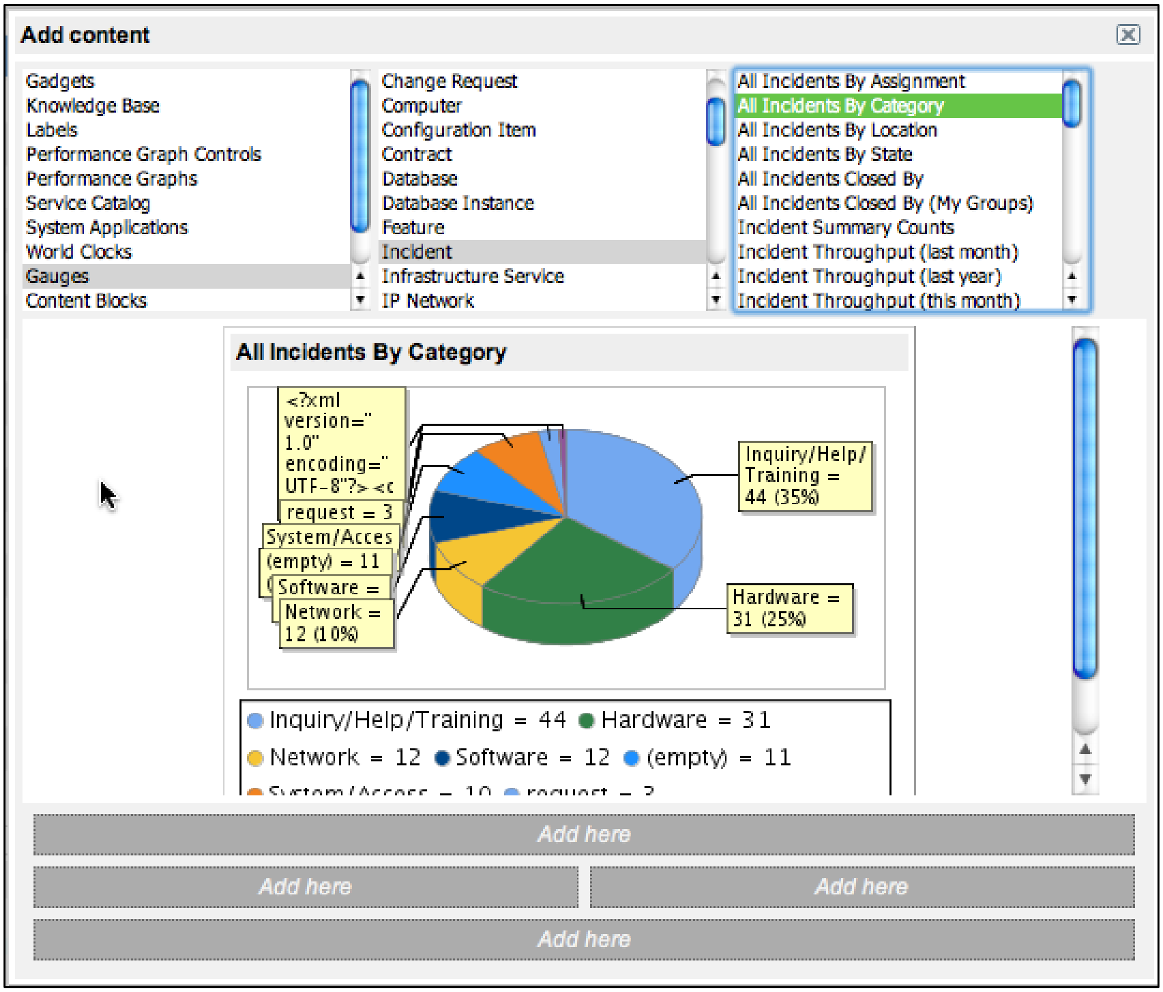
Users can create and edit their own homepages. To do this:

1. On the upper right corner of the homepage, click the "switch to page…" drop down and select "New page"
2. On the new page, select the "add content" link. This brings up the add content screen





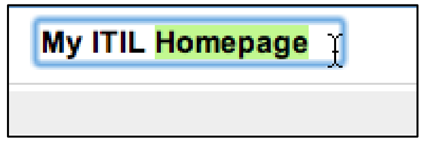
To create content using the add content screen:



1. Select the kind of content the user wants in the first column (gauge, performance graphs, etc
2. Select the data source in the second column
3. Select the specific grouping of data in the third column (not all content will use the third column)
4. The content you have “created” will display right below the three columns. This will allow users to preview before they commit to adding something to a homepage
5. Click one of the 4 “add here” buttons to add that content to the homepage
6. When done, click the [x] button in the upper right corner

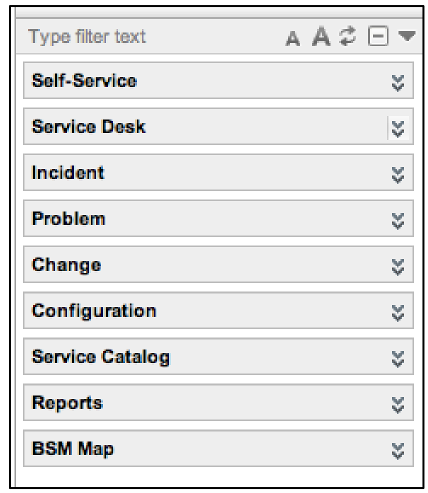
Note about Content: All content on homepages are dynamic. Users can click parts of graphs to see a list of the data represented in the graph. In the picture above, the user could click the green portion of the pie chart, the 31 Hardware incidents, and see a list of those 31 incidents.

To name the users new homepage, simply click the title and edit it.



To remove content from a homepage, simply click the small [x] in the upper right corner of every content block.

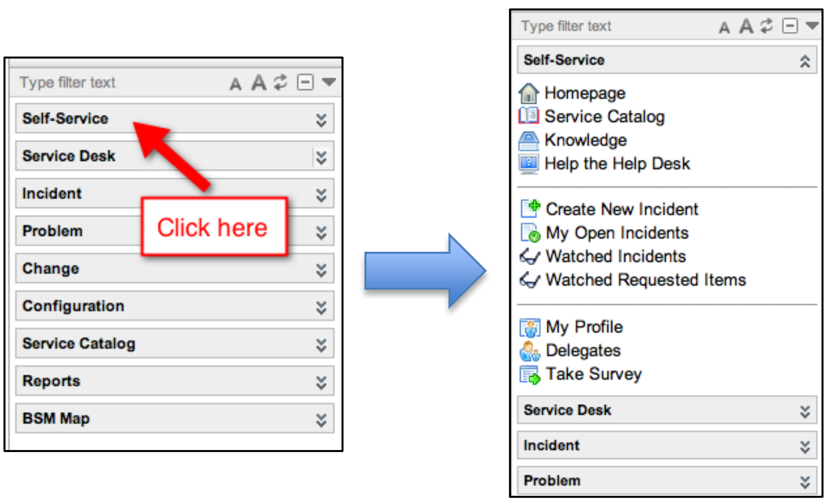
Left-Hand Navigation Toolbar

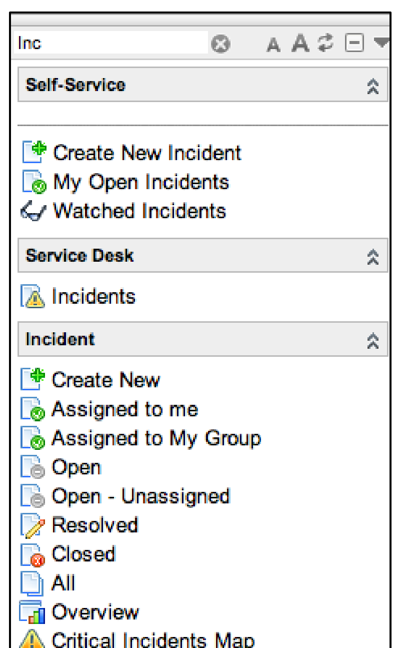


On the left of the screen, is the left hand navigation toolbar. Regardless of what you're doing within ServiceNow, the left-hand toolbar will always be present.

This toolbar will show all the applications the logged-in user has access to.

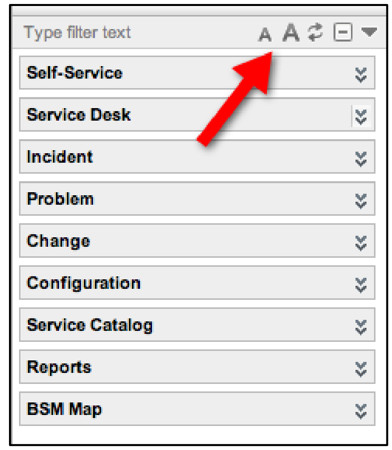
Users can click the header of each application to expand/collapse it.





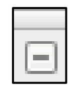
At the top of the toolbar is the filter text box. This is a dynamic text box that will filter out all contents of the search bar that do not have the search terms. Example: If the user types in "Inc" in the textbox they will see Create New Incident, My Open Incidents, and Watched incidents under the Self-Service application, Incidents under the Service Desk application, and the entire Incident application.

Additionally, at the top of the tool-bar the user the user will see 3 different buttons.

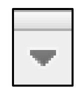


Clicking the smaller A will make all text one font size smaller, and the larger A will make all text one font size larger. Users do not need to re-adjust the font size every time, their settings will be saved after they do it.

The button immediately to the right of the larger "A" (a circle made from two arrows) is the refresh button. This will refresh the contents of the navigation toolbar.



Clicking the square with a line through it will collapse all applications (as they appear in the picture to the right). Clicking it again will turn it into a "+" sign, which will expand all applications.



The downward-pointing triangle button has two functions. First, it will show all roles the user has assigned to them within ServiceNow. Second, it will allow the user to "select" that role and only view applications that specific role applies to.

ServiceNow Header

The header of ServiceNow in the upper right corner has additional buttons.

Logout: The logout button will log the user out of ServiceNow
Home Icon: The home icon, if clicked, will take the user back to the last homepage visited. In addition, if the user "hovers" over it with their mouse, they will see a list of homepages they can select.
Printer Icon: Will pop-up a new, printer friendly version of the current page
Help Icon: Will open a new web page/browser tab and take the user directly to the ServiceNow wiki

User Interface (UI)

In the upper – right corner of the screen, the user will see the "Switch to New UI" link. Clicking this will bring up the ServiceNow's new UI.

On the far left of the page, users will see a thin bar that runs the whole length of the screen. This is the UI bar.

The top two buttons are the screen expanders. The button on the left will collapse the left hand tool-bar from view, and the one on the right will collapse the top header from view.

The next two buttons are the split screen buttons. Clicking the button on the left will divide the screen into two pages vertically. Users will be able to have homepages or lists open on the left screen and items opened from lists (ex: incidents, problems, etc) on the right. The right button will split the screen horizontally, with the homepages/lists on top, and forms on bottom. Clicking either of these buttons again will undo the split screen.

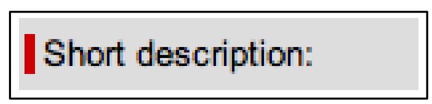
The Star button will display a list of all booked marked items. Users have the ability, from list views, to click and drag individual records over to the bookmark bar. They can then click these links to go directly to that record.

To edit a bookmark: Point to the Star button and select the gear next to the bookmark you want to edit. Users can also hover over the bookmark and select edit bookmark.

Field Basics

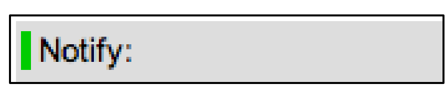
Some fields have colored bars next to the left of them. These colors indicate various conditions:

Red: Indicates the field is required. The ticket cannot be saved or updated if there is not a valid value in the field.

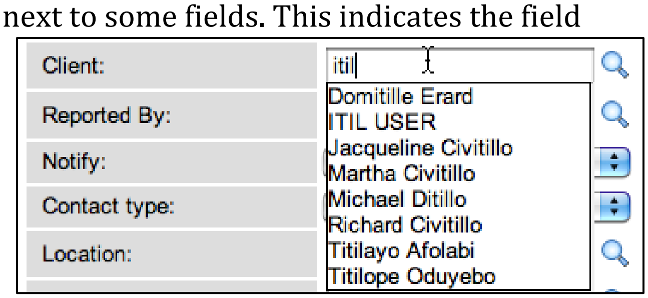


Yellow: Indicates the field is auto-generated based on other conditions. For example, the incident number is auto-generated by ServiceNow when the ticket is created. Reopened is automatically checked when the moves from the "resolved" to "active" state.

Green: Indicates the field has recently been changed, and the ticket has not yet been saved. This will let users see what they have changed before saving a ticket.



Users may also notice a magnifying glass next to some fields. This indicates the field is a reference field. Users have two options:



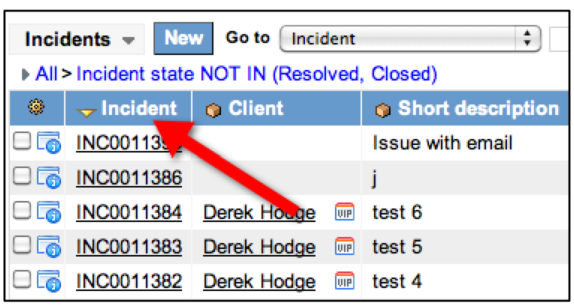
1. Type directly into the field, to get a google-like search that dynamically shows all valid entries with the terms entered. It does not matter what part of the word the user types in, it will find all values that contain the search term. Ex: Typing "ian" would find users with the first name "Brian" or the last name "Christian" in addition to others.
2. Click the magnifying glass to bring up the table the field references

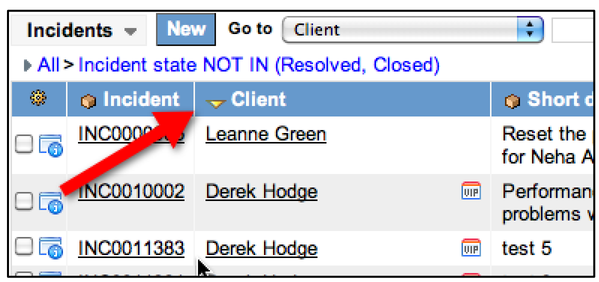
Editing Lists

Column Sorting

When looking at list of items, like "Open" Incident list, users can sort columns. To do this, simply click the column header by which the user wishes to sort by. The column being sorted by will have a small yellow triangle on it.

Example: The first picture is being sorted by Number, the second is being sorted by Client Item. Both lists are the exact same lists, just sorted differently.

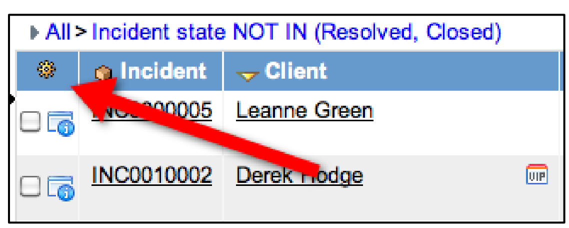


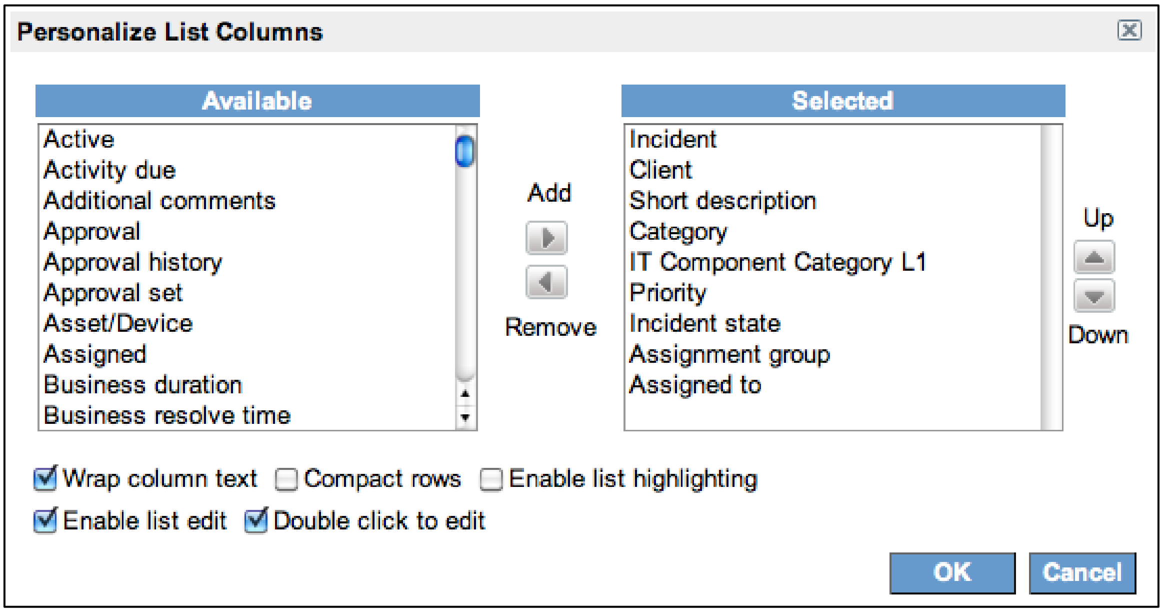


Personalized Lists

Personalize lists using the personalize list column dialog box.

To open this box click the gear button in the top left corner of ANY list.

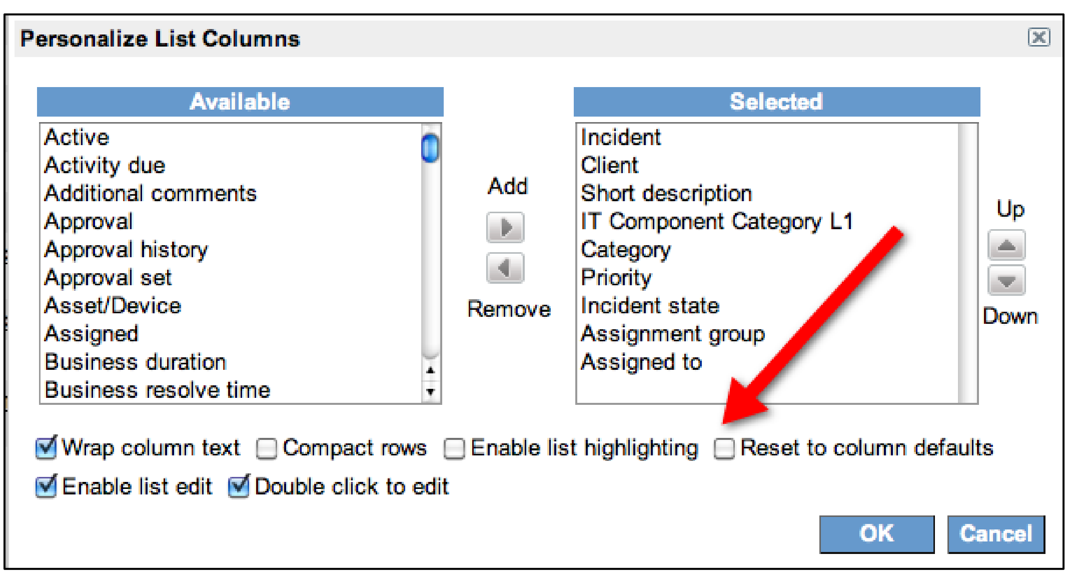




The fields in the "Selected" column are the fields that will be the column headers on your list. To change these:

1. Find the field you want to add from the "Available" column on the left
2. Select it, and then click the "Add" button in the middle
3. The field will automatically be added to the bottom of the selected, meaning it will be the last column on your list. Select it and hit the up or down buttons to rearrange your list order
4. Similarly, you can remove fields from the Selected column using the remove button in the middle
5. Once satisfied with the content of the Selected column, click OK to confirm, or cancel exit without saving your changes
6. The list will only be modified for you, it will not be modified for any other users. It will remain modified until the users changes it again.

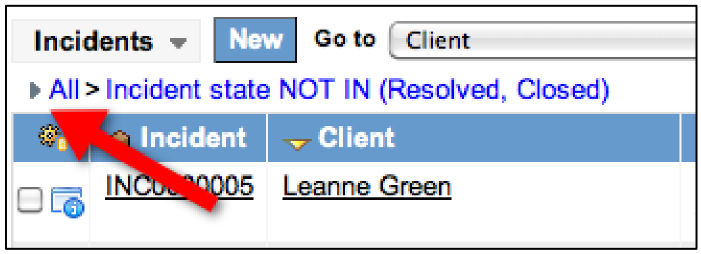
To restore a list to default settings, click the gear again and check the "Reset to column defaults" box and hit OK

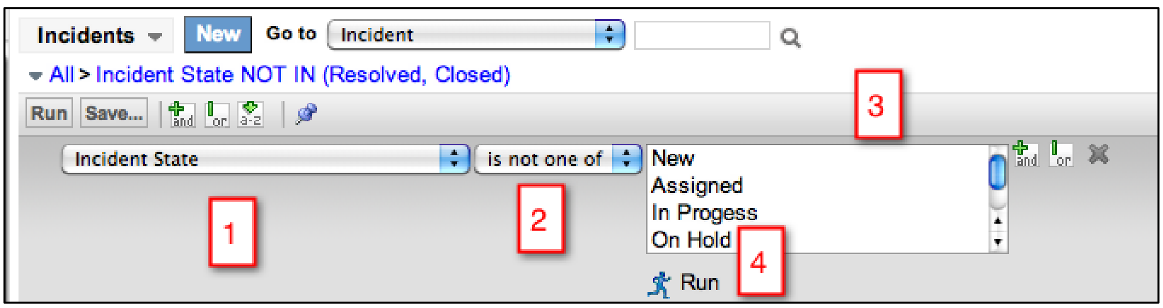


Customized Filters

The final method of adjusting a list view is creating a customized filter. To do this:

1. Click the grey right-pointing triangle at the top of any list. The run filter dialog displays any currently running filters.





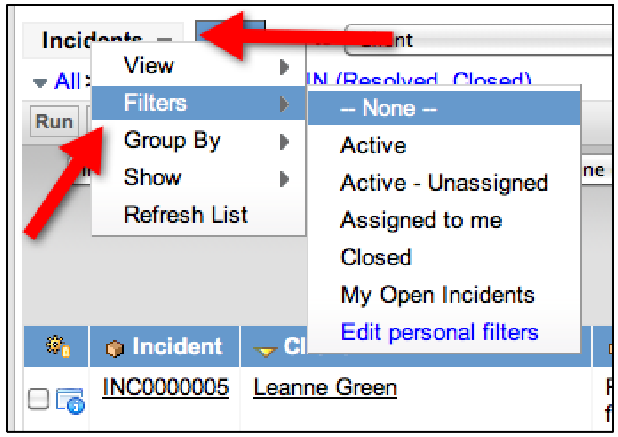
To create the filter:

1. Choose the field you wish to filter (this can be any field available, not just the fields that are the list's column header)
2. Choose the operation. Ex: "Is", "Greater than", "Contains"
3. Choose the value. This should be criteria by which you are looking to sort that initial field by
4. When satisfied with the filter criteria, click Run

Notes about filters:

- The user can choose to run multiple filters at once. At the top of the filter screen, simply click the "and", "or", or "a-z" buttons to add another filter
    - "and" will filter assuming that BOTH criteria you search are met
    - "or" will filter assuming EITHER criteria you search are met
- Click the save button and name your filter to save it.

- Access saved filters by clicking the drop down at the top of the list



Change Process

Change Management Overview

What is Change Management?

- Process to coordinate the change needed by business
- Authorizes changes and coordinates change timelines to avoid conflict
- Responsible for governance, not execution activities

Why is it Important?

- Manages risk and priority
  - On average, 80% of are incidents caused by change
  - Compliance (SOX, ISO9000, etc)
  - Prioritizes to implement most important changes first
  - Rapid change capability for business
- Can help maintains a complete view of change in the organization

Key Concepts

Change Requests	**Service Requests**
Optimize risk exposure	Something typically planned for
Minimize the severity of any impact and disruption	Has a standard, low/known risk, highly repetitive changes
Proactive: Improve services, reduce costs, maintenance/prevention	Well-defined activities that result in fulfillment
Reactive: Resolve known errors and	Access to an existing service, requests

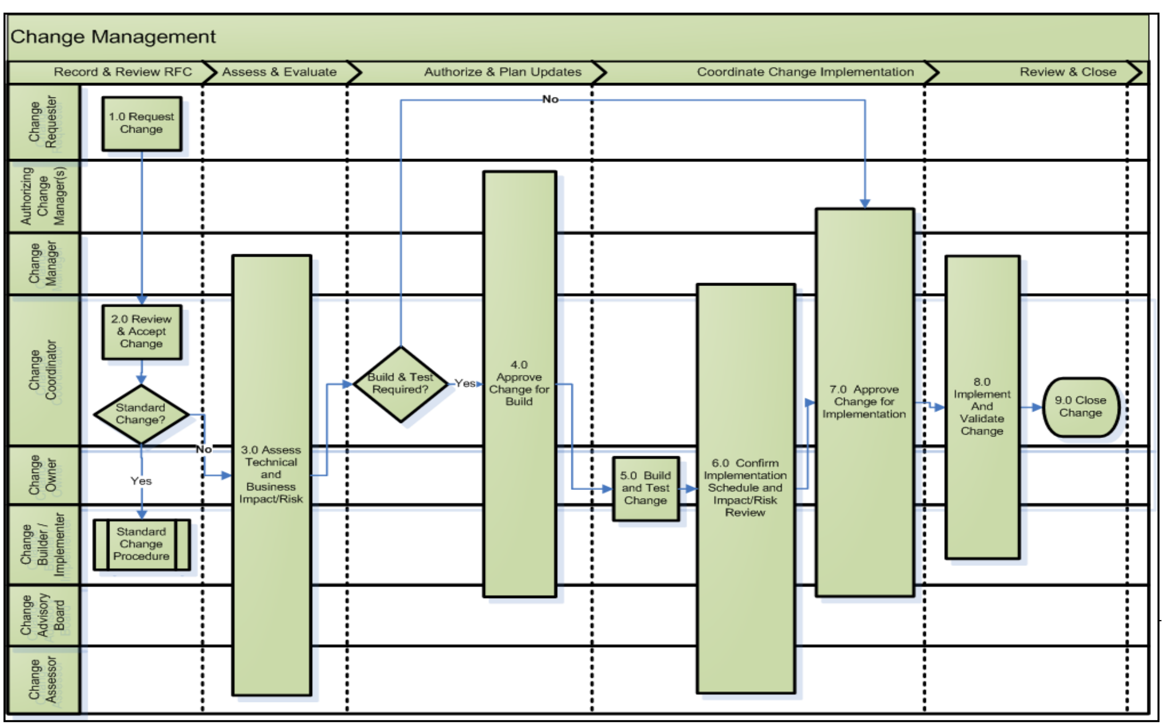
adapt to business changes	for information, or something that has been pre-approved by the Change Advisory Board

Change Types

Change type	Impact	CAB Review	Oversight	Over Time
Minor	Low impact and risk to the organization if the change is unsuccessful	Specific minor changes may be pre-approved or approval may be delegated to specific groups / individuals under specific situations Use of CAB(s) is seldom required, but minor changes are still presented on the FSC	Changes are still recorded and assessed to confirm that risk and impact is low	If there is a high volume of minor changes, their impact and risk are predictable and the procedures are well defined, they become candidates for standard changes
Significant	Medium to high impact or risk if the change is unsuccessful	Changes typically will require review at a CAB(s), requiring sufficient lead time to allow for adequate assessments	Significant changes are far less predictable, requiring more change oversight to ensure success	Over time, mitigation of impacts and risks for specific significant change types may allow them to be processed as minor changes
Major	High impact and high risk if the change is unsuccessful	These changes always require review at CAB(s) Additional lead time is required to properly assess both the	The focus of major change approvals is often placed on mitigation plans (e.g. backout steps), detailed	Business planning and readiness is often a requirement for major changes (e.g. training of staff)

		build-test (if applicable) and implementation approvals for these types of changes	communication plans and QA validation Major Changes often require oversight found in the Release and Deployment process	
Standard	Changes with a standard approach and pre-authorized procedure and/or detailed instructions.	RFCs are not required to implement a Standard Change, and they are (may be) logged and tracked using a different mechanism, such as a Service Request	May be executed as Service Requests from the service catalog (fast, simplified approvals, cost handling etc.)	Intent is to streamline the execution as much as possible. Typically absent from the FSC

High-Level Process



RACI Chart

A RACI chart stands for Responsible, Accountable, Consulted, and informed. RACI clearly lays out what roles own every part of the incident process.
Responsible: Those who do the work to achieve the task
Accountable: The one ultimately answerable for the correct and thorough completion of the deliverable or task
Consulted: Those whose opinions are sought, typically subject matter experts
Informed: Those who are kept up-to=date on progress, often only on completion of the task or deliverable

Process / Procedural Step	Change Requester	Authorizing Change Manager(s)	Approving Change Manager	Change Coordinator	Change Owner	Change Builder / Implementer	Change Advisory Board	Change Assessor	Change Process Owner
1.0 Request Change	AR								
2.0 Review & Accept Change	C		AR	R					
3.0 Assess Technical and Business Impact/Risk				R	AR			R	
4.0 Approve Change for Build		R	AR	R	R		R		
5.0 Build and Test Change					AR	R			
6.0 Confirm Implementation Schedule and Impact/Risk Review			R	R	AR			R	
7.0 Approve Change for Implementation		R	AR	R	R		R		
8.0Implement and Validate Change					AR	R			
9.0 Close Change	C		AR	R	R		C		
Process Maturity and Evolution	C	R	R	R	C	C	C	C	A

Main Roles

Role	Description
Change Requestor	The individual asking for a change to be made. May or may not be the change owner. The requestor should be the person sponsoring or advocating the change, usually business.
Change Owner	Individual stakeholder ultimately accountable for the end result of change, seeing it through its lifecycle Ex: A Network Engineer may be the change owner for a router upgrade
Approving Change Manager	Approves changes for build-test and implementation for changed owned by their jurisdiction Accountable for the execution of the change process in support of the change owner Conducts CAB meetings Oversees change process
Change Advisory Board (CAB)	A body that exists to support the authorization and approval of changes Assists Change Management with assessment / prioritization feedback Provides guidance to the Change Manager
Change Coordinator	Facilitates changes process Assists the Change Manager and Change Owner throughout the change process
Change Assessor	Responsible for contributing to the business and technical risk and impact assessment of a change for their domain
Change Builder / Implementer	Individual responsible for performing the build/test and/or implementation
Authorizing Change Manager(s)	Authorizes changes where their jurisdiction is impacted Participates in CAB meetings as required

ServiceNow Roles

Within ServiceNow, there are two main roles, ITIL and Reporting.

The ITIL Role gives users access to the processes within ServiceNow. It will allow them to create tickets and send them through the entire process.
The reporting role will allow users to create reports. This will be essential in the final step, Process Maturity and Evolution.

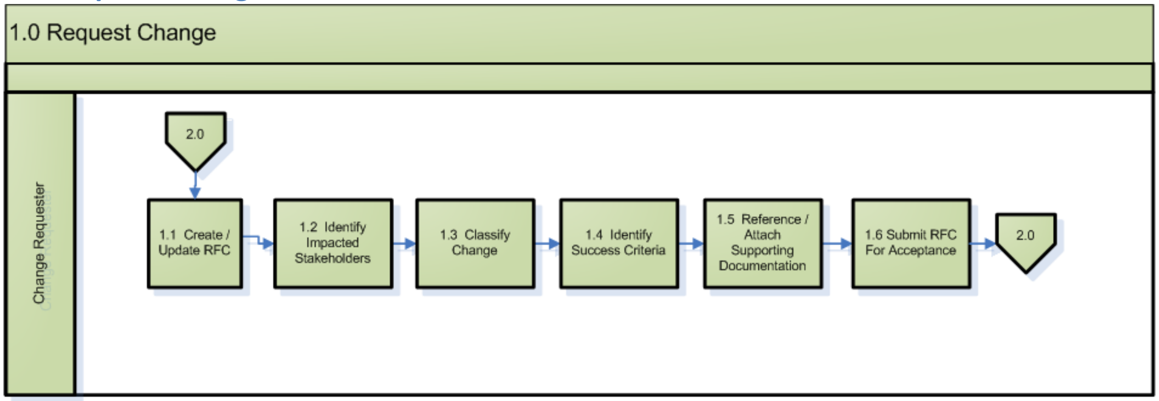
Policies

Policies help define and ensure the Change Management process achieves its objective and adheres to the defined process.

1. The Change Owner is ultimately accountable for the success of their respective change.
2. The approving Change Manager is accountable for the successful execution of the process, as a means to mitigate impact and risk for stakeholders/customers.
3. Change Management will manage all changes made to the production environment, including the operational test environment. This includes changes implemented by vendors and external organizations.
4. Effective Risk and Impact Assessment is enforced and is considered the foundation of Change Management.
5. All customers are informed of changes that affect the Service(s) they receive prior to change implementation.
6. There is a mechanism to implement URGENT changes to the managed environment with minimum destabilization of that environment.
7. The number of changes deemed URGENT is reduced to a pre-specified and progressive metric through proper planning.
8. A Change Advisory Board (CAB) exists and the Change Manager is the ultimate decision making authority within the CAB.
9. A Change implementation plan is required prior to change deployment.
10. All Service Providers will fulfill their roles in compliance with the Change Management process.
11. A Request for Change (RFC) should not be approved for implementation unless relevant back-out plans are in place.

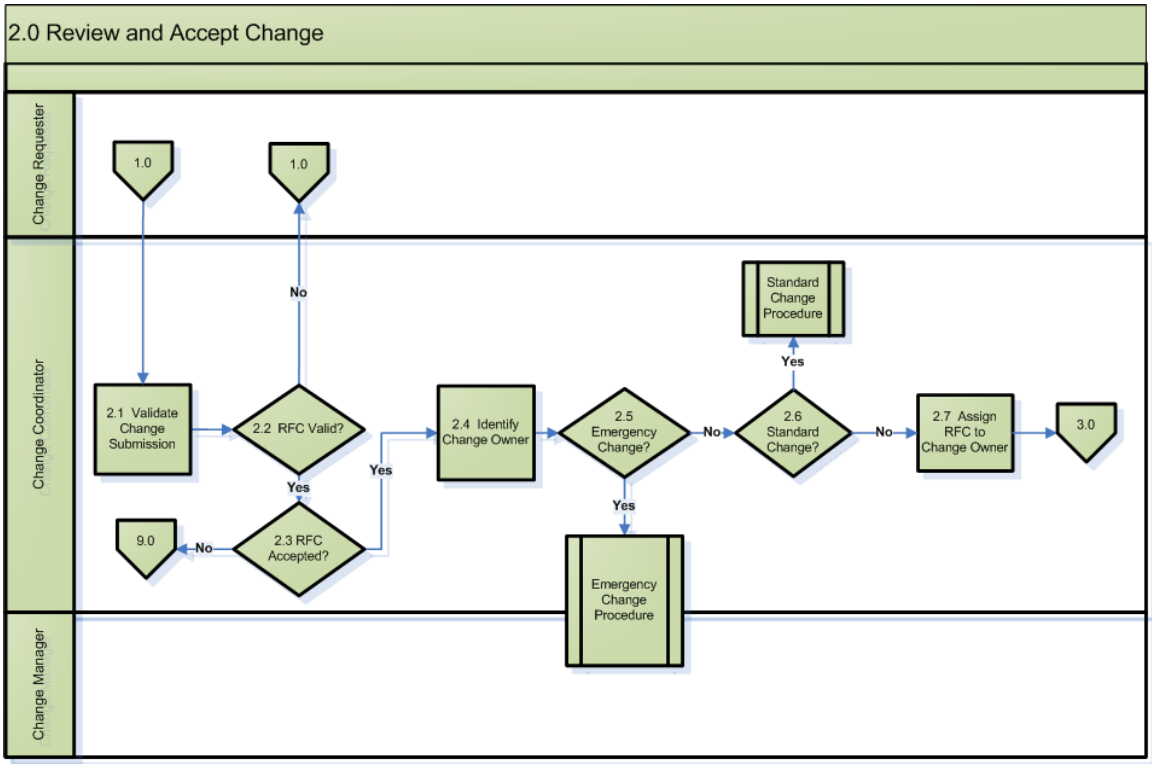
Process Procedures

1.0 Request Change



1.1 Create / Update RFC	Identify required information, such as contact information, requested schedule business rationale (eg. Functional enhancement to an application or service, increased performance/capacity/availability, resolution/fix to a known error…). It is possible some of these values may be updated by the change coordinator/manager and/ or owner.
1.2 Identify Impacted Stakeholders	Identify impacted stakeholders by identifying impacted CI's & services and indicate if they are located in other jurisdictions (change authorization required). Identify if resources will be required from other jurisdiction(s) to assist in the change .
1.3 Classify Change	Change requestor will provide the initial classification elements. This includes completing an initial impact/risk assessment to determine the change type.
1.4 Identify Success Criteria	Identify the Business objectives that will be used by to Validate Change Success after the change has been implemented and prior to closure.
1.5 Reference / Attached Supporting Documentation	Include all documentation appropriate to the nature of the change Project Charter, Business Case, detailed Change Description , etc) Note: If build-test is in-scope an Implementation plan, back-out plan, communication plan etc. may be included at this time, but are not mandatory.
1.6 Submit RFC for Acceptance	Once the request is complete, submit for acceptance.

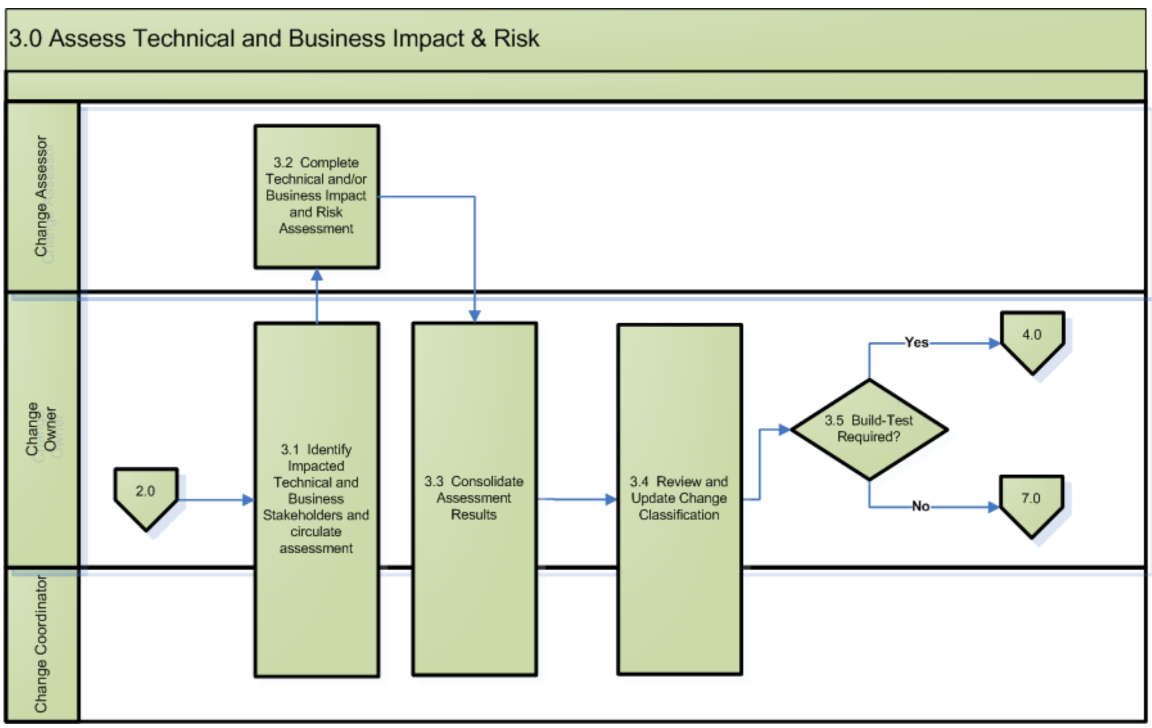
2.0 Review and Accept Change



Step	Activities
2.1 Validate Change Submission	Verify that all information required to process the RFC has been provided.
2.2 RFC Valid?	Verify that the RFC complies with Change Management Standards and any jurisdiction-specific policies and business requirements. Refer exceptions to the Change Requestor for correction, otherwise notify the Change Manager.
2.3 RFC Accepted?	Verify that this is a legitimate RFC. If not, reject the RFC and if so, continue processing. It is possible to meet all validation requirements in 2.2 but still not be considered legitimate. This could include changes outside the scope of IT.
2.4 Identify Change Owner	Change Coordinator identifies the Change Owner and confirms the accuracy of the selection with the Change Owner. If the Change Owner will come from another jurisdiction, the Change Coordinator will request the Change Manager/Coordinator from that jurisdiction to identify the Change Owner.

2.5 Emergency Change?	Determine if change meets emergency change criteria . If change is emergency, Chance Coordinator notifies approving Change Manager who invokes local emergency change procedures, otherwise change is processed under normal procedures .
2.6 Standard Change?	Verify that this is a legitimate "standard" change and defer the to the Standard Change Procedures.
2.7 Assign RFC to Change Owner	Assign RFC to Change Owner for subsequent Review and Assessment.

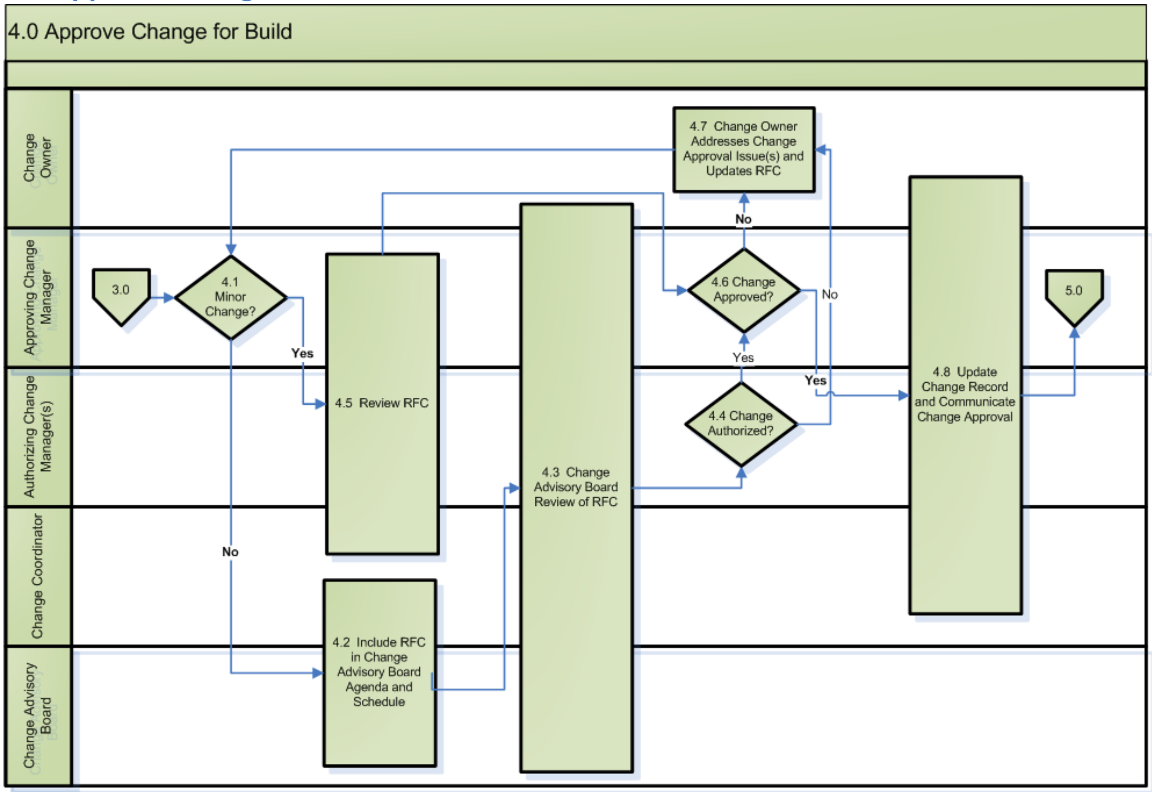
3.0 Assess Technical and Business Impact & Risk



Step	Activities
3.1 Identify Impacted Technical and Business Stakeholders and circulate assessment	With the assistance of the change owner jurisdiction, the Change Owner requests appropriate participation to assess the change using the standard risk/impact assessment (RIA) model. If RFC impacts other jurisdictions, the Change Owner requests their Change Managers to coordinate the jurisdictional assessment. By default a single assessment task is sent to each jurisdiction but this may prompt additional tasks to be

	created by the jurisdictional change coordinator. A specific “Release” task will be sent to the release manager to determine if release coordination activities are required for this specific change. Release criteria will be defined and managed separately.
3.2 Complete Technical and/or Business Impact and Risk Assessment	1. Change Owner uses the RIA model to conduct both Business Risk-Impact assessments and Technical Risk-Impact assessments. This may be updated following responses from assessors in 3.3. 2. This may be a Re-Assessment prior to Implementation approval if significant scope change encountered during Build-test 3. Operational procedures resolve conflicts with scheduling.
3.3 Consolidate Assessment Results	Change Owner will consolidate input from all jurisdictions, which may inform updates to the overall impact and risk assessment. If Assessments are provided from multiple jurisdictions, Change Owner will: • Use worst case scenario to update the RIA to arrive at a single value for Risk, Impact and derived Change Type value. • Consolidate Operational Discovery feedback which may influence build/test and/or implementation plans.
3.4 Review and Update Change Classification	Following Assessment, Change Owner will confirm accuracy of Classification elements: • Jurisdiction(s) • Change Type reflects Risk-Impact value If Assessment tasks have identified additional impacted jurisdiction(s), the Change Owner will update RFC accordingly and request an assessment from each jurisdiction and reflect the input in final classification.
3.5 Build-Test Required?	If Build-test activities are not required, or if this is a re-assessment following Build-test completion, then request approval for Implementation.

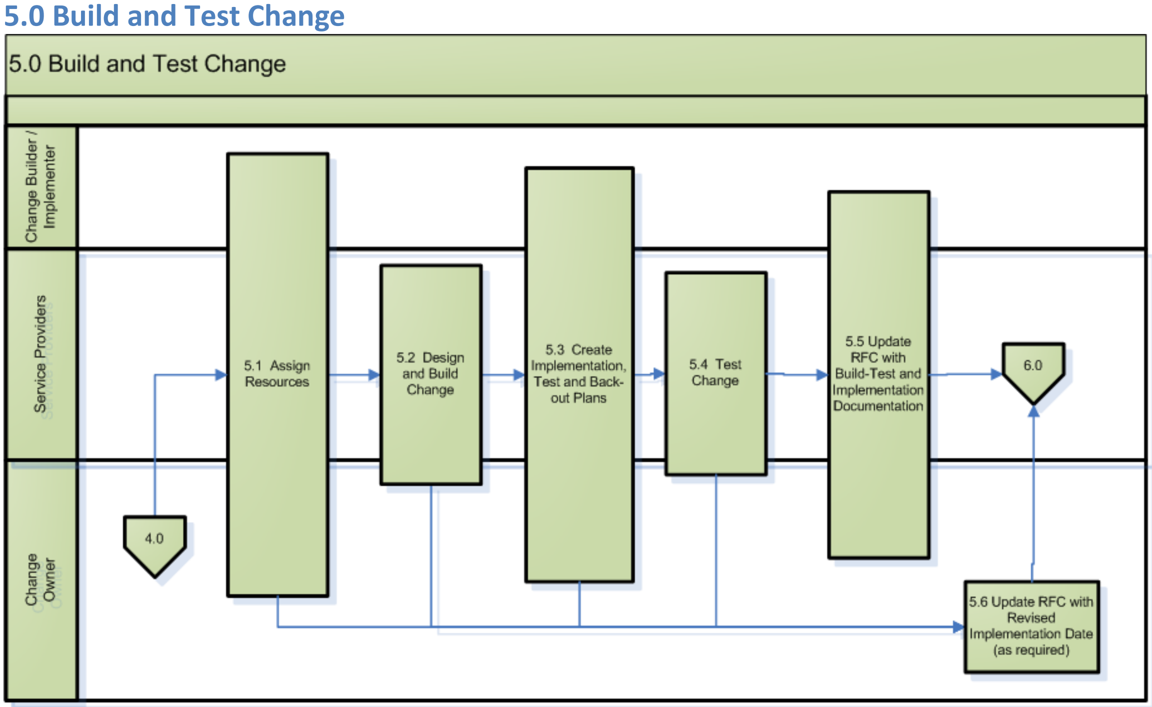
4.0 Approve Change for Build



Step	Activities
4.1 Minor Change?	Verify that this is a legitimate “minor” change.
4.2 Include RFC in CAB Agenda and Schedule	Take the steps necessary to include the RFC in the agenda for upcoming CAB meeting. This may be necessary across multiple CABs.
4.3 Change Advisory Board Review of RFC	CAB members review the RFC to provide additional input. The change owner may be requested to speak to these items, and provide additional details in the change as identified by the CAB prior to full change approval.
4.4 Change Authorized?	Impacted jurisdictions will review RFC, Risk-impact Assessment and associated documentation and provide authorization. CM will consider local assessment values to determine whether or not to involve their respective CAB. If impacted CM does not provide authorization, he/she must specify the conditions that would support authorization.

4.5 Review RFC	The RFC is reviewed for approval. This may include ensuring that all authorizations are provided should the minor change impact multiple jurisdictions.
4.6 Change Approved?	Prior to approval, CM will ensure that any conditions (from conditional Authorizations) are satisfied. Owner jurisdiction Change Manager approves start of Build-Test, involving CAB at his discretion. This can only occur if all jurisdictions have authorized the change.
4.7 Change Owner Addresses Change Approval Issue(s) and Updates RFC	If all avenues for approval have been exhausted, CM will deny the change and inform stakeholders.
4.8 Update Change Record and Communicate Change Approval	Update the record with all necessary information and ensure the approval of the change is approved accordingly.

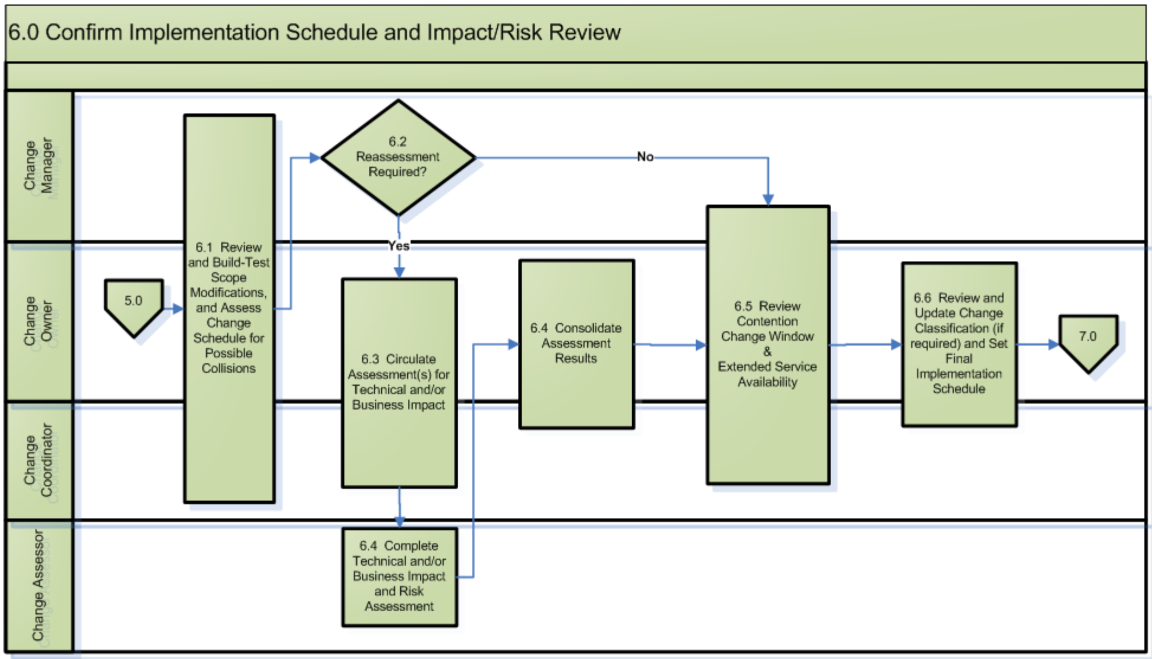
5.0 Build and Test Change



Step	Activities
5.1 Assign Resources	Change Owner and Builder ensures necessary resources (HW, SW, staff) are assigned to perform B-T activities, with assistance from other

	jurisdictions. Example: in addition to application development/testing, infrastructure resources may develop and test the Build Kit, while network resources test new router configurations .
5.2 Design and Build Change	Develop Build-test detailed schedule and review/agree with B-T resources from all jurisdictions . Build Team executes the build plan to develop the solution.
5.3 Create Implementation, Test and Back-out Plans	Change Owner ensures that the Build-test team prepares the Implementation Plan, containing the following: 1. Implementation instructions & estimated duration 2. Verification test instructions & estimated duration 3. Backout instructions, which must specify estimated duration , backout decision point & protocol, backout verification procedures 4. Communication protocol to communicate implementation, verification & backout results
5.4 Test Change	Testing scope includes everything from unit testing, through system testing up to & including Pre-Prod staging. The Implementation Plan is also tested (estimated timeframes are confirmed). The Change Owner may also request that Change Implementers assist in some of the above activity to familiarize themselves with what to expect during implementation.
5.5 Update RFC with Build-Test and Implementation Documentation	Prepare or update other collateral appropriate to the Change, including, at a minimum, Communication Plan (content approved for distribution) and Operations Discovery - prepare description of Configuration Management data to be updated (may include documentation as well as HW/SW components)
5.6 Update RFC with Revised Implementation Data (as required)	If the previously scheduled Implementation Date is no longer achievable, due to Build-test slippage or external factors, the Change Owner requests that a revised Implementation date be scheduled asap. Note, this may require a reassessment in some cases.

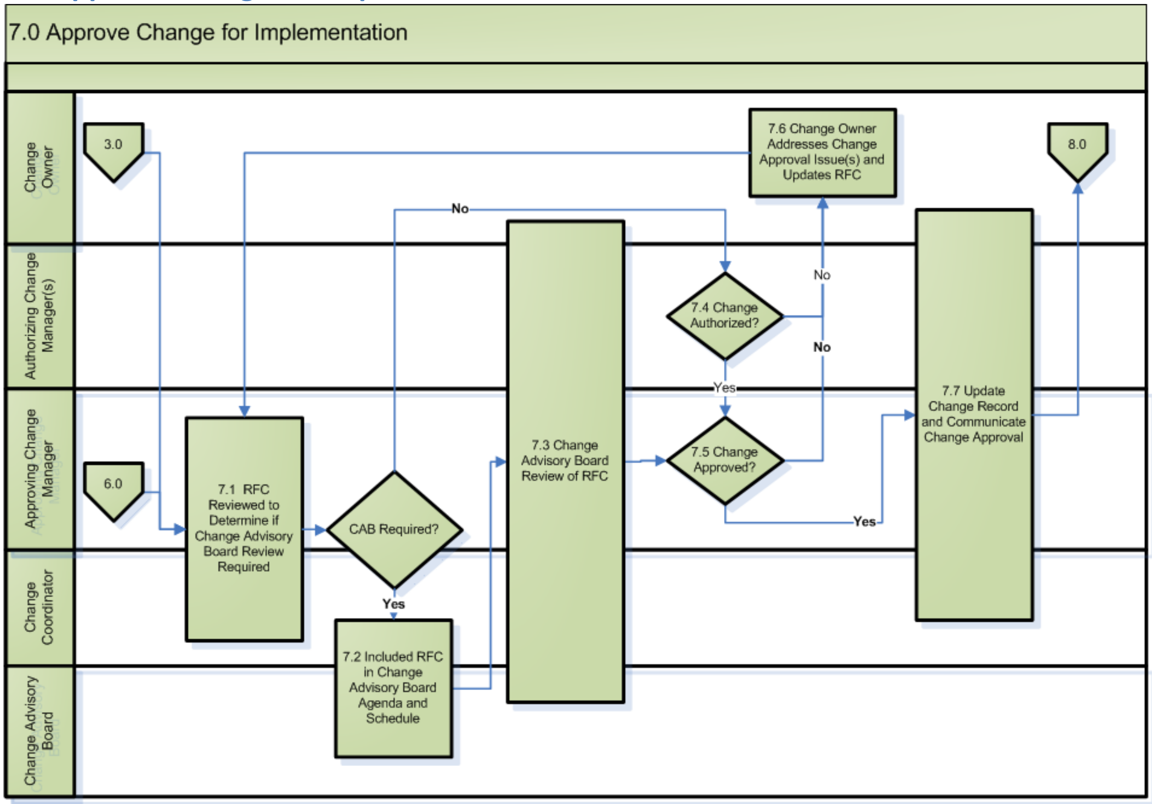
6.0 Confirm Implementation Schedule and Impact/Risk Review



Step	Activities
6.1 Review Build-Test Scope Modifications and Assess Change Schedule for Possible Collisions	Compare Build-test estimated effort against with assigned resources to determine reasonableness of proposed implementation date.
6.2 Reassessment Required?	Compare requested date against known scheduling constraints (ie freezes), and review scope of the original change request to determine if the change needs to be re-assessed. CM consults CAB based upon jurisdiction-specific detailed instructions if/as required.
6.3 Circulate Assessments(s) for Technical and/or Business Impact	CM requests impacted jurisdiction CM's to provide authorization.
6.4 Complete Technical and/or Business Impact and Risk Assessment	1. Change Owner & Change Assessors use the RIA model to conduct both Business Risk-Impact assessments and Technical Risk-Impact assessments 2. This may be a Re-Assessment prior to Implementation approval if significant scope change encountered during Build-test 3. Operational procedures resolve conflicts with

	scheduling.
6.5 Consolidate Assessment Results	Change Owner will consolidate input from all jurisdictions, which may inform updates to the overall impact and risk assessment. If Assessments are provided from multiple jurisdictions, Change Owner will: • Use worst case scenario to update the RIA to arrive at a single value for Risk, Impact and derived Change Type value. • Consolidate Operational Discovery feedback which may influence build/test and/or implementation plans.
6.6 Review Contention Change Window & Extended Service Availability	If conflicts or change window contention are acceptable, confirm requested date and inform Change Owner
6.7 Review and Update Change Classification (if required) and Set Final Implementation Schedule	Use priority and RIA to select candidate RFC's to be rescheduled and negotiate revised date(s) with the Change Owner(s) in order to minimize or eliminate contention and impact. If RFC being considered for change is in another jurisdiction, request CM from that jurisdiction to facilitate access to the CO

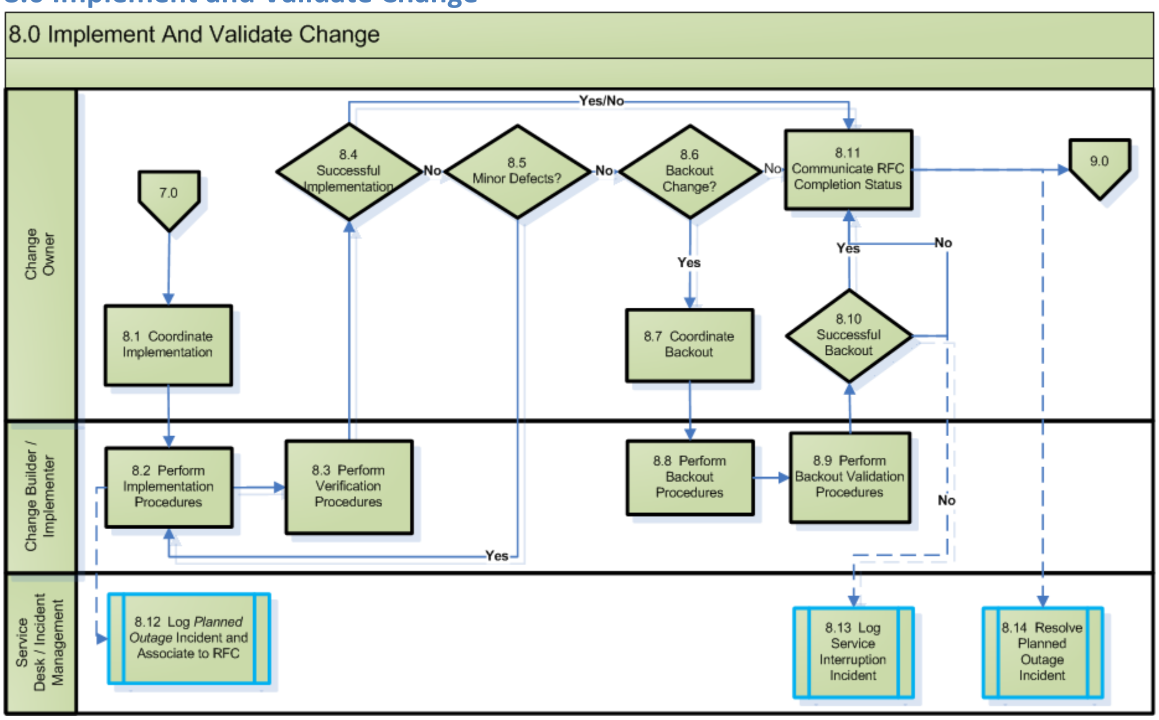
7.0 Approve Change for Implementation



Step	Activities
7.1 RFC Reviewed to Determine if Change Advisory Board Review Required	CM determines if CAB approval is required to proceed to implementation.
7.2 Include RFC in Change Advisory Board Agenda and Schedule	If CAB approval is required, take the steps necessary to include the RFC in the agenda for upcoming CAB meeting. This may be necessary across multiple CABs.
7.3 Change Advisory Board Review of RFC	CAB reviews all RFC to approve the change for implementation.
7.4 Change Authorized?	Impacted jurisdictions will review RFC, Risk-impact Assessment and associated documentation and provide authorization. CM will consider local assessment values to determine whether or not to involve CAB . If impacted CM does not provide authorization, he/she must specify the conditions that would support authorization.
7.5 Change Approved?	Prior to approval, CM will ensure that any conditions (from conditional Authorizations) are satisfied. Owner jurisdiction Change Manager approves implementation, involving CAB at his or her discretion. This

	can only occur if all jurisdictions have authorized the change.
7.6 Change Owner Addresses Change Approval Issue(s) and Updates RFC	If all avenues for approval have been exhausted, CM will deny the change and inform stakeholders.
7.7 Update Change Record and Communicate Change Approval	Update the record with all necessary information and ensure the approval of the change is approved accordingly.

8.0 Implement and Validate Change



Step	Activities
8.1 Coordinate Implementation	Confirms that any prerequisite prep work has been performed and implementation resources: • are available at scheduled times • have documented implementation, verification, and backout plans • understand their implementation tasks • are aware of implementation task dependencies • are aware of communication protocols • are aware of change window timelines, backout go/no-go decision point • have necessary parts, files, media • have necessary logical & physical access

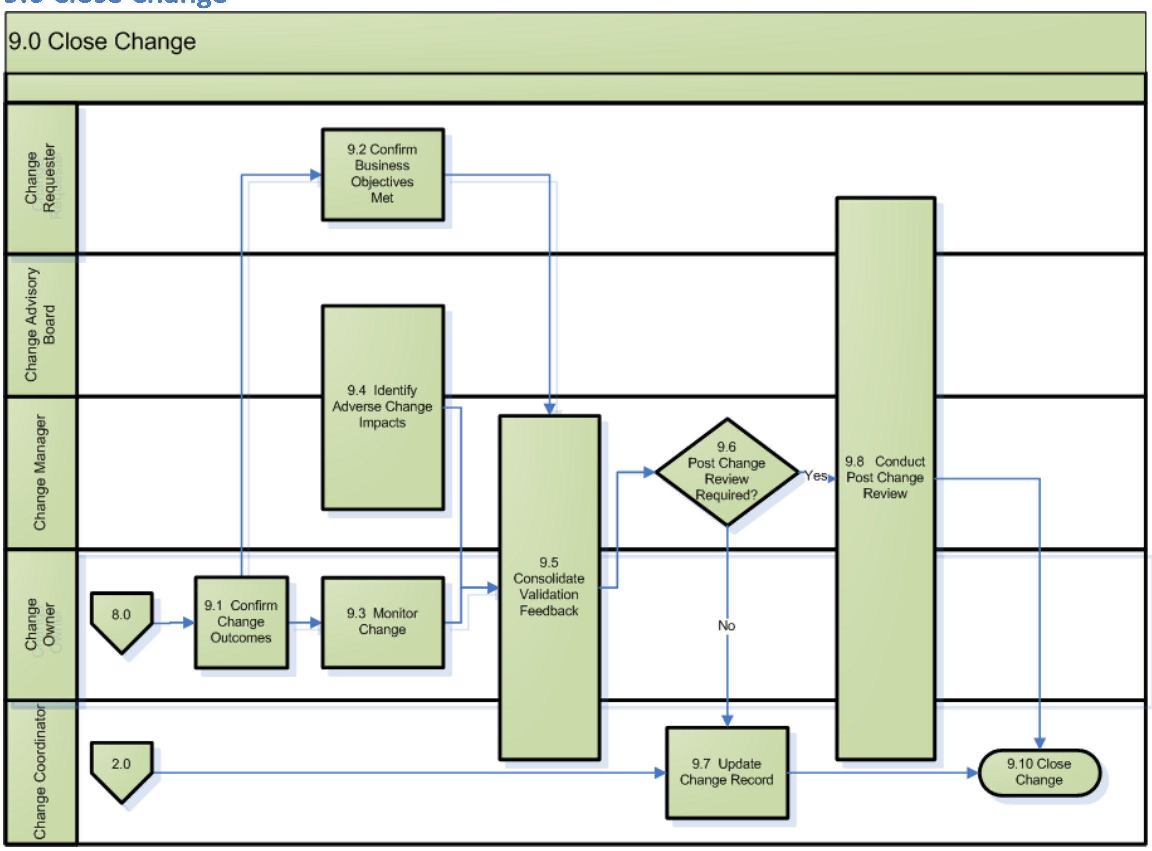
- Ensure a lead is assigned if multiple Change Implementers involved

8.2 Perform Implementation Procedures	Execute Implementation tasks per approved, documented implementation plan. Documents and resolves any minor deviations/corrections in the implementation procedures (eg. Used HTTP-S instead of HTTP). Reports implementation results to Change Owner.
8.3 Perform Verification Procedures	Execute Verification tasks per approved, documented verification plan and reports verification results to Change Owner.
8.4 Successful Implementation?	Check to see if successfully implemented as planned. If yes, goto "Update RFC Completion Status" and if no, go to "Backout Change?"
8.5 Minor Defects?	If the cause of verification failure is known, and corrective action is minor in scope, the Change Owner may direct Change Implementer to fix the defects and re-conduct verification Testing. The Change Implementer must document any deviations/extra steps performed during this activity. At no time can the corrective action jeopardize the ability to execute the backout plan within the originally approved Change Window.
8.6 Backout Change?	Determine whether the change can/should be backed out or whether it will be left in a partially implemented state. Change requestor/implementers may be consulted to assist in this decision if the direction to contact the Change Requestor is detailed in the change verification/backout plans.
8.7 Coordinate Backout	Communicate backout decision to implementation team Ensures that implementation resources • understand their backout tasks • are aware of backout task dependencies • are aware of communication protocols • are aware of change window timelines
8.8 Perform Backout Procedures	Perform the backout plan and report backout results and any deviations to Change Owner.
8.9 Perform Backout Validation Procedures	Execute validation tasks per approved, documented plan and report results to Change Owner. Document any deviations and send results to the change owner.
8.10 Successful Backout?	Determine whether change appears to have been successfully backed out as planned. If yes, goto "Update RFC Completion Status" and if no, go to "Unsuccessful Change" and also Update the RFC completion status.
8.11 Communicate RFC Completion Status	Change Owner (or delegate) will: • inform Service Desk and other stakeholders of Change completion status., as explicitly described in the Implementation Plan communication protocol.

- Update RFC completion codes (Successful or not)
- notify Configuration Management to update Configuration Data to reflect the change

8.12 Log Planned Outage Incident and Associate to RFC	Create a Service Outage Incident that serves as the Master Incident linked to the RFC and any incoming incidents can be associated with.
8.13 Log Service Interruption Incident	Contact Service Desk and report Incident associated to RFC and include details in the Incident that describe the deficiencies in the production environment resulting from the partially implemented change (ie. functionality, performance, outage)
8.14 Resolve Planned Outage Incident	Resolve the Planned Service Outage Incident that was previously created.

9.0 Close Change



Step	Activities

9.1 Confirm Change Outcomes	Change owner asks Change Requester and impacted jurisdiction CM's to validate the change success from their perspectives.
9.2 Confirm Business Objectives Met	Change Requestor uses Validation criteria to confirm that requested business objectives were met.
9.3 Monitor Change	Determine if any adverse affects resulted from Change that were not encountered during verification testing . If related issues exist, Incidents should have been reported
9.4 Identify Adverse Change Impacts	Determine if the change introduced adverse service impact on impacted jurisdictions either during the change window (eg. Impact to unintended CI's) or following implementation.
9.5 Consolidate Validation Feedback	Consolidate input received (to be used by the Post Implementation Review, PIR). Note that feedback may indicate unacceptable impact, which could lead to logged Incident and subsequent RFC to remediate or backout the change. Set the change closure code with an initial value.
9.6 Post Change Review Required?	Review results from validation task. Use the following criteria to determine if formal PIR should be considered: - Implemented - Without approval - Implemented - Not as planned - Service impact exceeds those approved - Implemented - Partially implemented - Backed out - Urgent Change - Latent Change - Failed Standard Change - Negative indication from Validate task - Business Objectives not met - Incidents from Impacted Jurisdictions
9.7 Update Change Record	Change record is updated accordingly, including the change closure code if necessary.
9.8 Conduct Post Change Review	Summarize post change review details and attach to Change Record. • Analyze Change - perform root cause analysis and determine why change did not meet objectives • Recommend improvements - remedial actions for Change Owner to address root cause, Change Procedure suggestions for Change manager, suggestions for other processes (eg. SDLC) • Distribute PIR Report
9.9 Close Change	Ensure appropriate documentation is attached to RFC (updated IVB instructions, PIR collateral, etc), update RFC State=closed and confirm closure code is populated.

Example Change Acceptance Checklist

Criteria		Mandatory	Optional
RFC Identification	RFC Short Description (Title)	✓	
	Impacted Areas (CI & Jurisdiction)	✓	
	Description of Change	✓	
	Reason for Change	✓	
	Business Areas impacted (impacted IT Business Services)	✓	
	Physical Locations Impacted	✓	
	Requested Start of Build-Test Date		✓
	Requested Implementation Date/Time	✓	
	Problem Associations		✓
	Incident Associations	if classified as Emergency Change	✓
	RFC Associations		✓
	Reference to Standard Change RFC #	if classified as Std Change	
Stakeholder	Change Requester Contact Details	✓	
Identification	Impacted Jurisdictions		✓
	Service Owner		✓
Assessment Details	Risk Impact Assessment	✓	
Classification and Categorization	Jurisdiction (approving & impacted)	✓	
	Change Type	✓	
	IT Business (impacted) and Provider (affected) Service Categories		
	Component Category	✓	
	Security Driven	✓	
	Submission Priority	✓	
	Meets Emergency Change criteria	if classified as Emergency Change	
Supporting Documents	Business Case		✓
	Project Charter		✓
	Briefing Note (Legislative Change)		✓
	Implementation Plan		✓
	User Manuals, training materials		✓
	Support Model (Service Level Mgmt)		✓

Schedule Details	Requested start of Build-Test meets lead-times for CAB review	for Significant, Major Changes	

Build-Test Approval/Authorization Checklist

Conditions for Build-Test Approval ***(if Build-Test required)***	**Mandatory**	**Optional**
Approving Jurisdiction - Confirmed & acknowledged	✓	
Impacted Jurisdictions - Confirmed & acknowledged	✓	
Assessments • **Received from all impacted jurisdictions OR** • **Received indication of 'no impact'**	✓	
Authorizations • **Received from all impacted jurisdictions** • **Conditional Authorizations – all conditions satisfied**	✓	
Supporting Documentation – appropriate to nature of change		✓
Guidance from Stakeholders – available to inform Change Owner		✓
Development & Test environments – available/scheduled as required	✓	
Build-Test Resources – availability confirmed	✓	
Requested start date – meets allowable lead-times for approval	✓	

Implementation Approval/Authorization Checklist

Conditions for Implementation Approval / Authorization	**Mandatory**	**Optional**
Evidence of formal acceptance of Build-Test phase	if conducted	
Implementation Plan – available, content meets guidelines	✓	
Re-Assessment of Risk-Impact	If required following Build-Test	

Operational Discovery • **updated by Build-Test OR** • **indication of no update required**	✓	
User Guides, Training material – appropriate to nature of change		✓
Support Model – in place, or updates provided	✓	
SD Communication Plan – exists, message content approved		✓
Authorizations • **Received from all impacted jurisdictions** • **Conditional Authorizations – all conditions satisfied**	✓	
Implementation & Verification resources – availability confirmed	✓	

Creating New Changes

Theory

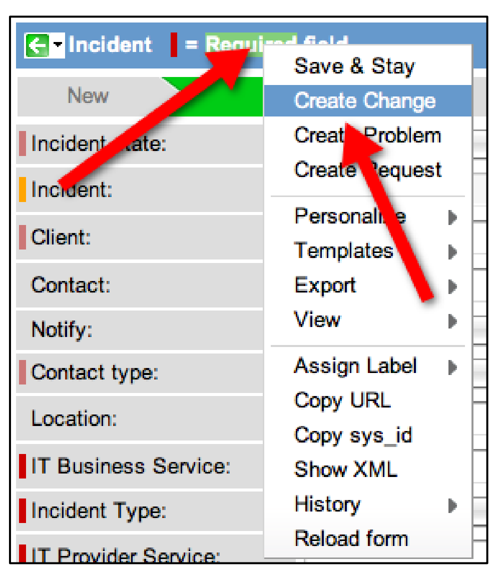
Conceptually, the need for a change can come from many sources. They can be the fix for an incident, the root cause fix for a problem, the cause of an incident, part of a larger change, or even part of a service request. This concept is captured within ServiceNow with the ability to create from other forms.

The process will typically follow this:

1. An incident occurs and an incident record is created
2. After initial diagnosis, it is discovered that the incident is actually the symptom of a problem
3. The problem record is created
4. The root-cause analysis occurs. To fix the root-cause of the problem, a change is required
5. A change is created.

New Change From Forms

To create a change from another form (in this example, incident):



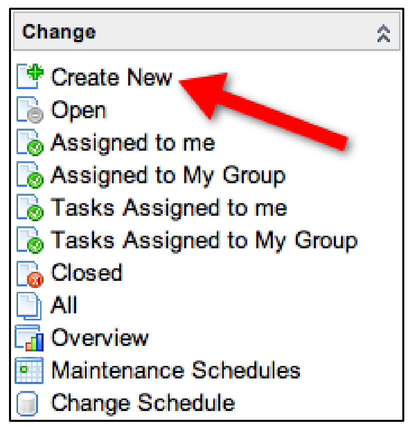
1. Open the form
2. Right click the blue bar at the top that has the Save & Exit button
3. Select Create Change

This will create a new change that is linked to the record from which it was created.

Creating Change from Lefthand Toolbar

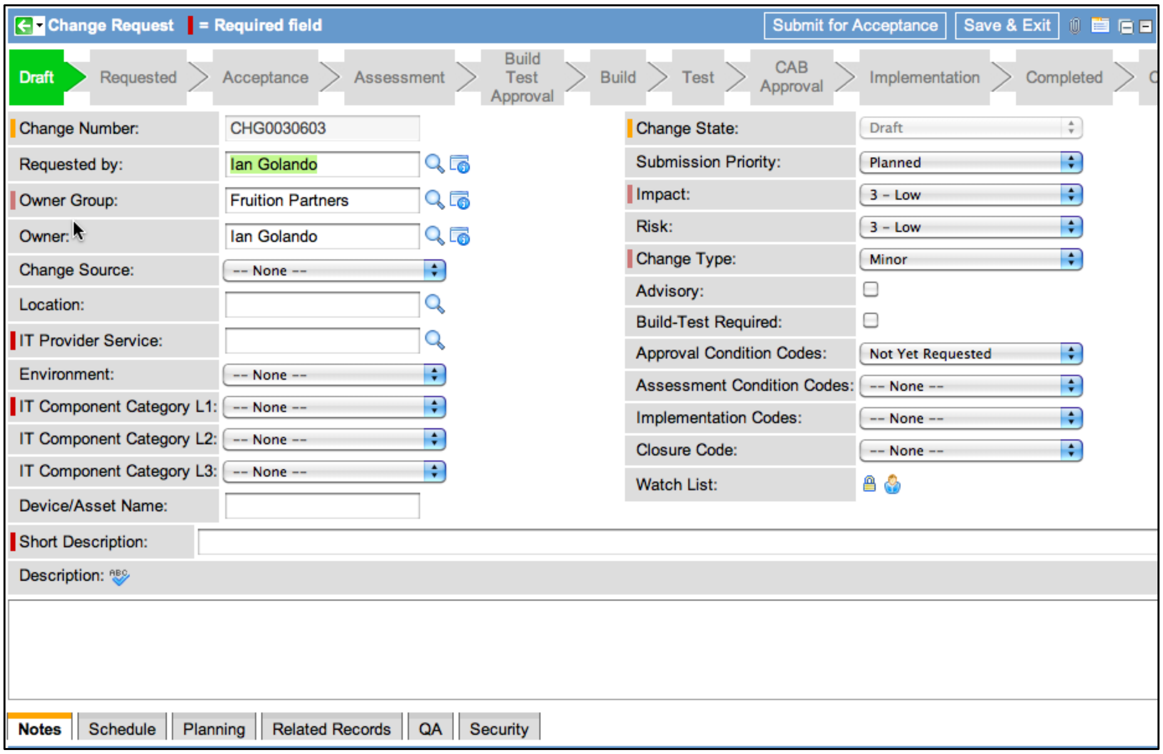
Like the other applications, users have the ability to create new changes via the left hand toolbar. To do this:

1. Navigate to the left hand toolbar
2. Find the change application
3. Select "Create New"
4. This will take the user to the new change form



Change Form

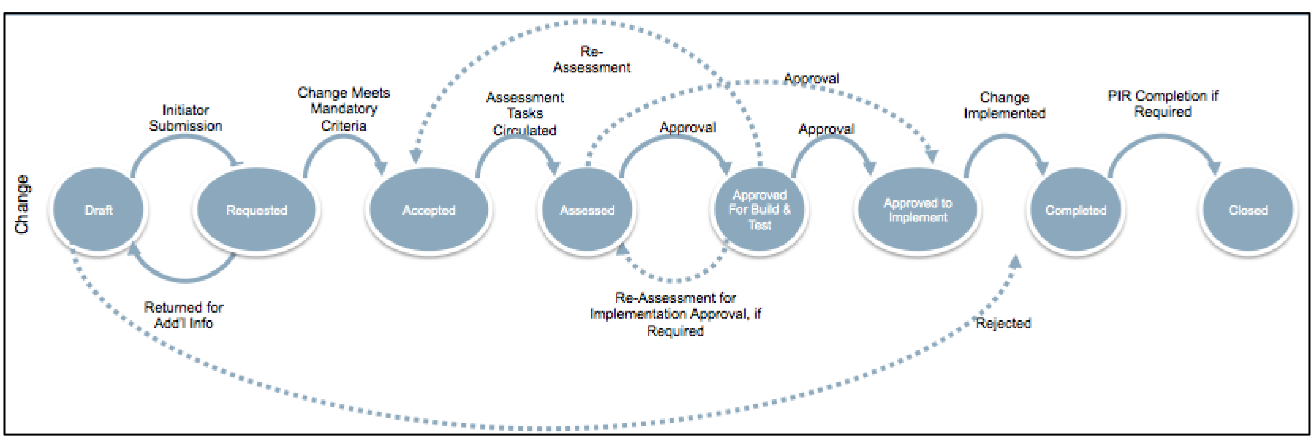
New change screen



Change States

Change states allow for the capture of key process milestones. Each milestone represents an important point in time within the process that needs captured.

At the top of the change form, users will see the change state, with the current state highlighted in green. The change will move through the various states via the following process:

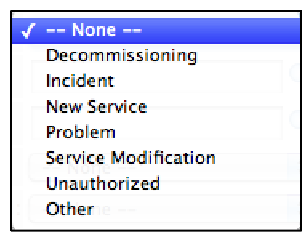


Draft: The change is still being created and has not been submitted

Requested: The change has been submitted
Accepted: The owning group has accepted the change for review based on mandatory criteria
Assessed: The assessment tasks have been circulated and completed
Approved for Build & Test: The change has been approved to be built
Approved to Implement: The change has been passed testing and has been approved to be implemented into the desired environment
Completed: The change has been implemented
Closed: Post implementation review has been completed

New Change Field Definitions and Use

Change Number: The unique number for the change that is auto-generated by ServiceNow
Requested by: Person that is requesting the change. This will automatically fill with the logged in user's own name, but can be changed
Owner Group: Yale group that owns the change and is responsible for seeing it through the lifecycle. It is a required field
Owner: The person who owns the change (change owner in the process/RACI)
Change Source: A drop-down to indicate what is generating this change. See picture to the right for values



Location: The location where the change will occur
Environment: Indicates whether the change will be in production or a non-production environment
IT Provider Service: The high-level service IT provides that is affected (if applicable)

Categorization: Yale utilizes a 3-tier categorization scheme.

- Recognizes the need to capture service vs. technology details
- Future-proofed for introduction of service asset and configuration management
- Enhances value of reporting by defining IT service view in terms the business should understand

IT Component Category 1: The first of the categorization scheme, the high-level view.
IT Component Category 2: The second level of the categorization scheme, the values are dependent on Category 1
IT Component Category 3: The final level of the categorization scheme, the values are dependent on Category 2. There will not always be an applicable value for Category 3
Device/Asset Name: A text field to enter the name of the specific asset being changed

Change State: The state of the incident. This progresses automatically based upon actions within ServiceNow. See the Change State section for additional information about the change states
Submission Priority: The order in which the changes should be handled.
Impact: Measure of the business criticality of the affected service
Scale – Low, Medium, High
Risk: The potential impact and financial effect the change could have on business. This field is autocalculated from various factors
Change Type: Determines what kind of change is being implemented. A list:

Type	Implementation Approval Lead Times *(prior to CAB to accommodate assessments)*			Pre-Approval?	CAB Required?	PIR?
	Planned	Urgent - Unplanned	Urgent - Emergency			
Standard	As Defined	N/A	N/A	Always	No, unless explicitly defined	Only on Major Incident
Minor	>= 1 Day	<1 Business Day, Business Hours	<1 Business Day, Non-Business Hours	Often / Encouraged	No, unless explicitly requested by Owner / Change Manager	Only on Major Incident or If Requested
Significant	>= 5 Business Days	<5 Business Days, >=1 Business Days	<1 Business Day or Non-Business Hours	Never	Often / Encouraged	On Any Incidents or If Requested
Major	>= 14 Business Days Days	<14 Business Days, >= 3 Business Days	<3 Business Days	Never	Always	Always

Advisory: A checkbox to indicate whether or not the change is an advisory
Build Test Required: A checkbox to indicate whether or not a change is required for approval
Approval Condition Codes:

Approved Conditionally	The Change Is approved for Build-Test or Implementation, pending the outcome of some outstanding criteria (e.g. completion of test cases that are currently in-progress)

Approved Release Schedule	The Change Is approved and will execute against a release schedule, which may include multiple dates where implementation activities will occur
Approved	The Change is approved for Build-Test or Implementation
Exempt	The Change may proceed but is not in-scope for approvals (e.g. regulatory Change)
Not Approved	The Change has not been approved with specific criteria that, if met, would result in a future approval once addressed (e.g. implementation plan issues that must be addressed)
Advisory	The Change is raised purely for advisory / informational purposes (e.g. Telco planned maintenance that will affect all Telco customers)

Assessment Condition Codes:

Request for BT CAB Agenda	A Change has been assessed and requires Build-Test approval, and is waiting to be scheduled for an upcoming CAB meeting
Scheduled for BT CAB Agenda	A Change has been scheduled for Build-Test Approval at an upcoming CAB
Request for IMPL CAB Agenda	A Change has been assessed and requires Implementation approval, and is waiting to be scheduled for an upcoming CAB meeting
Scheduled for IMPL CAB Agenda	A Change has been scheduled for Build-Test Approval at an upcoming CAB
<<Blank Value>>	Change did not require CAB approval (e.g. Minor Change), or the Change Owner is in the process of consolidating assessment feedback

Implementation Codes:

Implemented - As Planned	The Change implementation proceeded to plan issues encountered.
Implemented - Not As Planned	The change was ultimately implemented but with some issues encountered and resolved, or activities that had to be adjusted during the change window (e.g. minor defects).

Implemented - Partially	The Change could not be fully implemented. Some actives were successfully completed.
Not Implemented - Backed Out	The Change could not be implemented and was backed out. Note, the backout may have been unsuccessful as noted in the closure condition codes.
Not Implemented	The Change could not be implemented and was not attempted due to external factors (e.g. implementer was sick, major incident drew resources away from the implementation team etc.).

Closure Code:

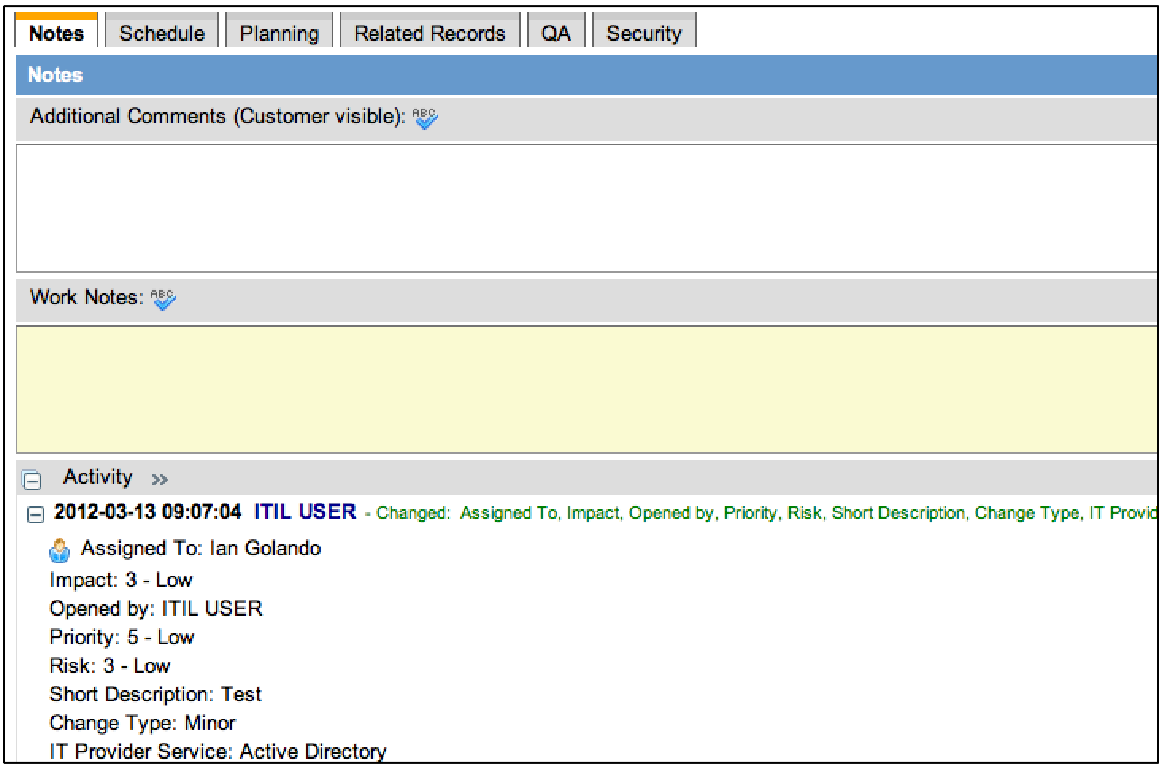
Successful	The Change was successful and met the defined business objectives defined by the change requestor.
Partially Successful	Some aspects of the Change were successful and met the business objectives defined by the requestor however, not all outcomes were achieved (e.g. Change partially addressed a service degradation incident).
Unsuccessful - Not Backed Out	The Change was unsuccessful but could not be backed out, or the backout attempt failed. This condition often leads to incidents that should be analyzed through problem management. Unsuccessful Changes that have no backout opportunity would also take on this closure code.
Unsuccessful - Backed Out	The Change was unsuccessful and the change was successfully backed out.
Cancelled	The Change was cancelled by the Change Owner at some point in the change lifecycle. This could be the result of budget cuts, changing business needs etc.
Rejected	While the Change may have been successfully validated by a Change coordinator, the Change does not meet organizational policies for the Change process (e.g. a Change to business processes, or staffing allocation).

Watch List: A list of people who receive all notifications the client would receive. Clicking the lock will open the field to allow Users to add additional people to the watch list. Clicking the lock again will close the field, locking into place what users are placed on the list. The watch list can be used to give notifications to key resources (e.g. Change manager)

Short Description: A short text field to describe the incident. The lightbulb icon next to the short description will pop-up a window of common issues. Clicking the issue will fill the short description with that value. The book icon will search the knowledge base using the contents of the short description. Depending on how you create your templates (covered later) the short description field could be over-written, so fill it out last.
Description: A large text field for a long description of the incident

Tabs

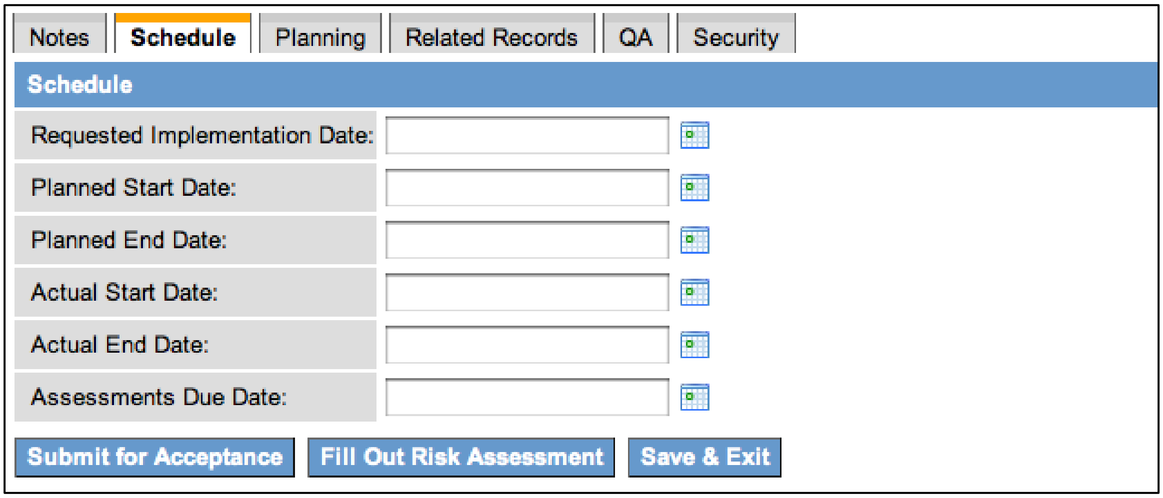
Notes Tab



Additional Comments: Whenever the user enters text into this field and saves the ticket, the contents of the field will be EMAILED directly to the client. This email, and the reply if the client replies, will be entered directly into the activity log. This can be best used when additional information is needed from the user experiencing the issue. This can also be used, if the user cannot be called, to give them instructions on how to resolve their incident (ex: "Restart your router") or with workaround details.
Work Notes: Whenever the user enters text into this field and saves the ticket, the contents of this field will be entered into the activity log. This is NOT customer facing, internal only
Activity: This is a running activity log of all changes and updates made to a ticket

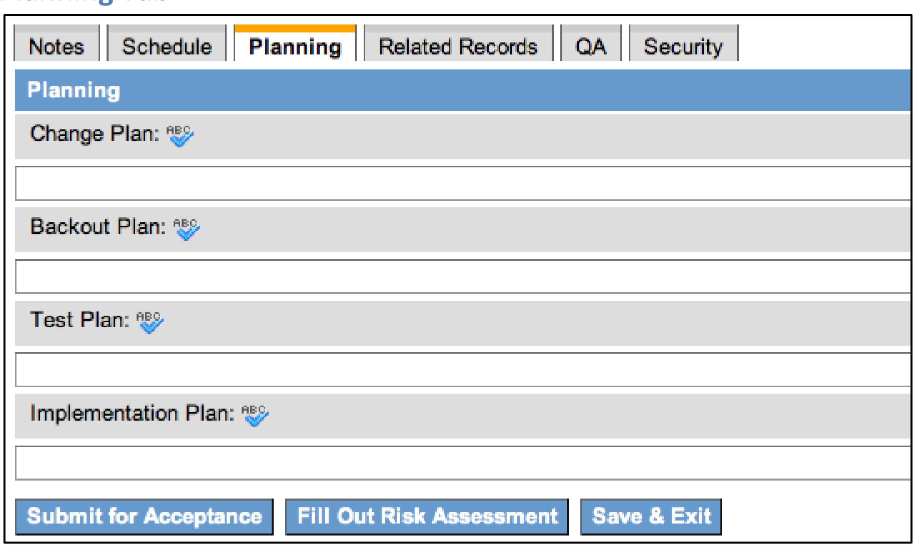
Schedule Tab

Requested Implementation Date: The date the requester wants the change to be implemented by
Planned Start Date: The date the change should begin



Planned end date: The date the change implementation should end
Actual Start Date: The date the change implementation actually starts, may not be same as planned start date
Actual End Date: The date the change implementation actually ends, may not be same as planned end date
Assessments Due Date: The date the assessments are due

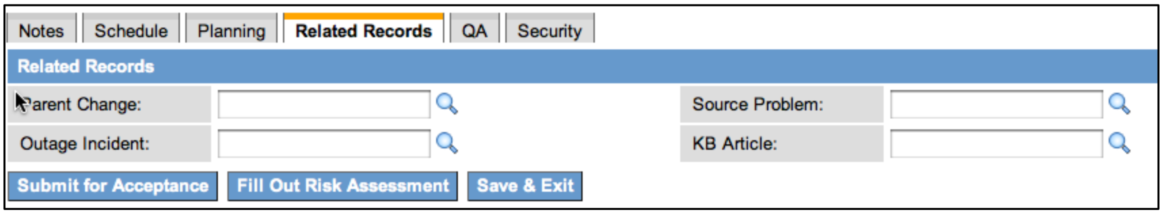
Planning Tab



Change Plan: A large text field to enter the change plan
Backout Plan: A large text field to enter the backout plan for the change
Test Plan: A large text field to enter the test plan for the change

Implementation Plan: A large text field to enter the implementation plan for the change

Related Records Tab

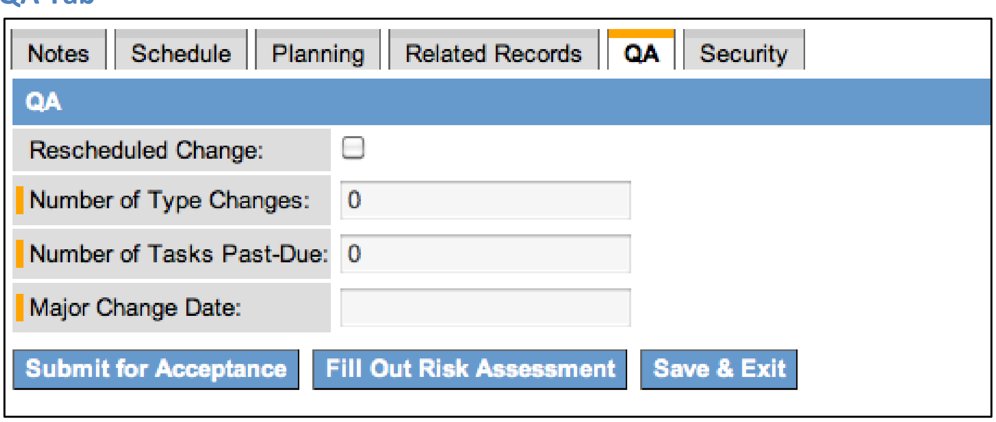


Parent Change: If this change is part of a larger change, the parent change's number would be entered here
Outage Incident: If the change is fixing an outage incident, that incident number is entered here
Source Problem: If the change is fixing the root cause of a problem, that problem number is entered here
KB Article: If the incident is associated to a change article, enter the KB article number here.

When users open a KB article, they will see a "Attach to Incident" button in the upper right corner. This button will fill the KB article into the "KB Article" field under related records.

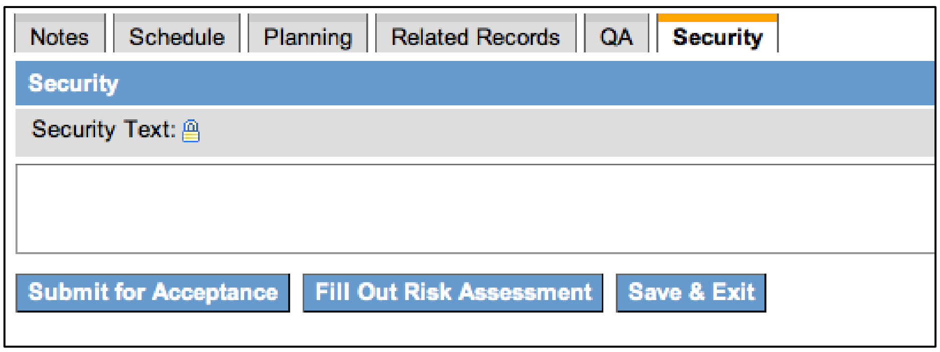
Also on the KB article, in the bottom right, users will be able to rate KB articles and flag them. If users check the "Flag Article" checkbox, another field will appear asking for feedback. Knowledge managers will then be able to review all flagged articles for content and evaluate based on the user's feedback.

QA Tab



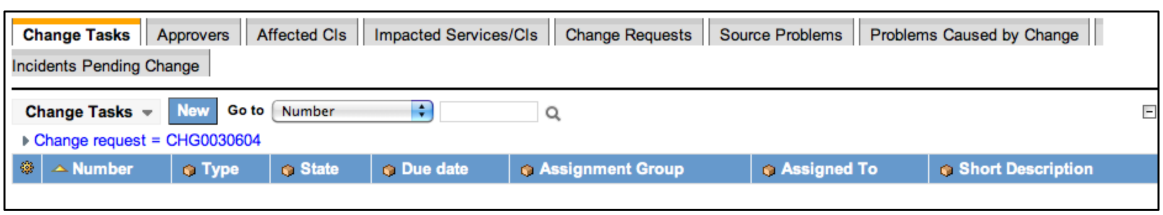
Rescheduled Change: A checkbox that automatically checks when the change has been rescheduled
Number of Type Changes: An auto-generated field that counts the number of times the type of change is modified
Number of Tasks Past Due: An auto-generated field that counts how many tasks are now past due
Major Change Date: An auto-generated field that gives the date needed of a major change

Security Tab



Security Text: A large text field that will be encrypted

Change Tasks Tab

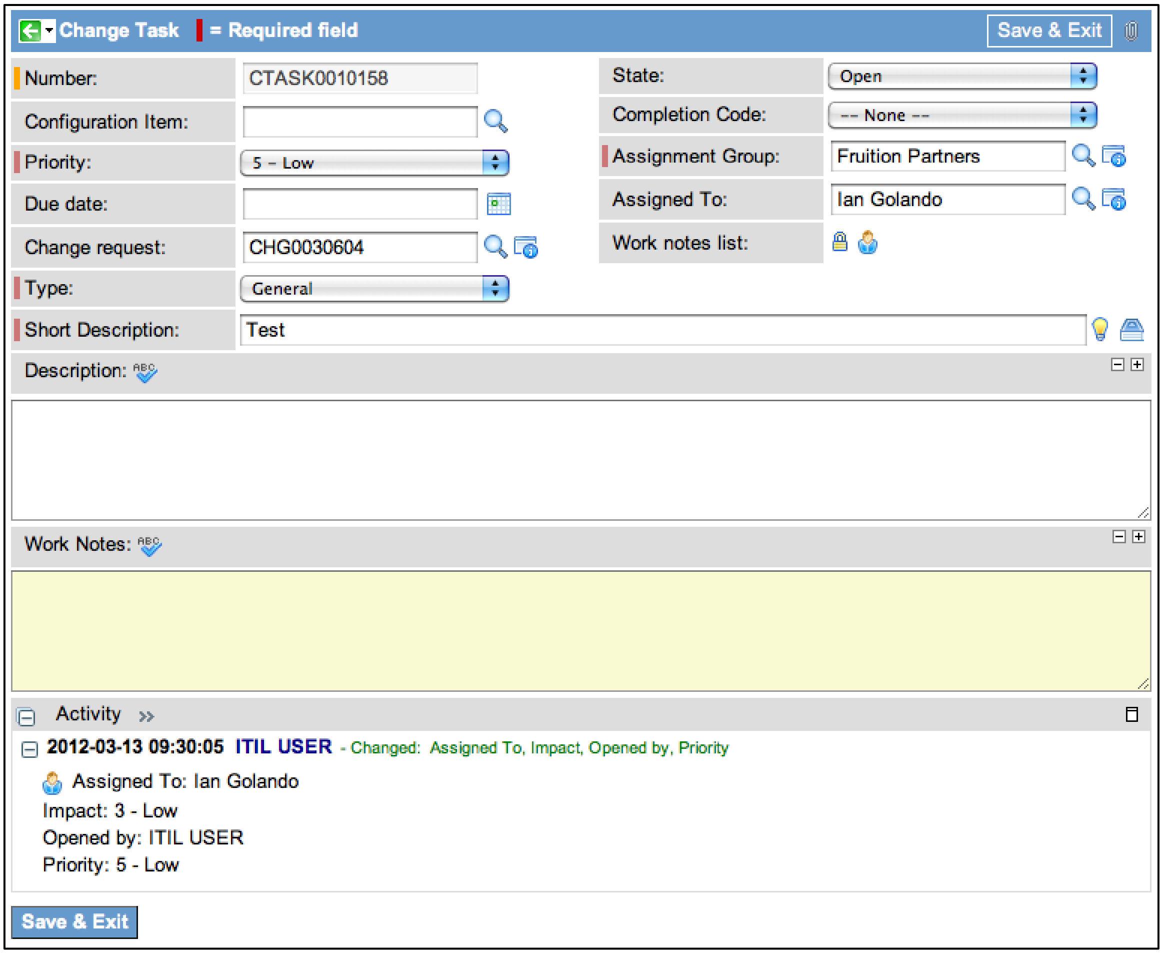


Change tasks are discreet pieces of work that must be completed to advance the change. However, the change owners may not be able to complete all these tasks. Change tasks allow these pieces of work to be assigned to different groups and owners while keeping ownership of the change with the original owner.

Change tasks can be used to delegate work within the owner group and also to delegate work to outside groups without changing ownership of the change.

To create a new Change Task, simply click the "New" button under the change tasks tab.

Change Task Screen:

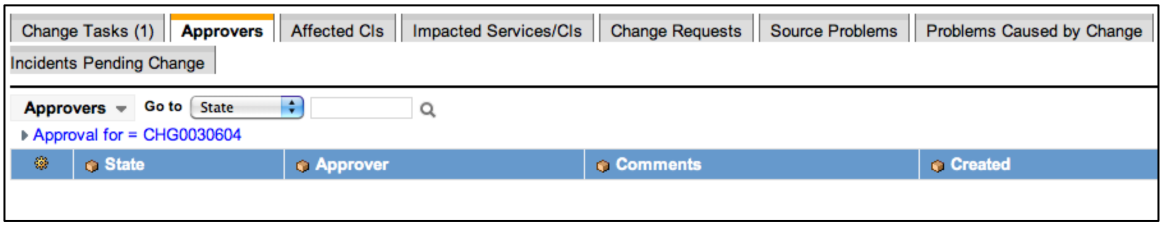


Change task fields:

Number: The unique change task number generated by ServiceNow
Configuration Item: The specific CI the change relates to
Priority: The order in which change tasks should be handled, values 1-5 with 5 being low and 1 being major
Due Date: The date the task must be completed
Change request: The change the task is related to
Type: What kind of task this task is, values are: General, Assessment, Build, Test, Implementation, Post Implementation
State: The status of the task, values are: Open, In progress, Closed complete
Completion Code: Describes the nature of the state, values are: None, Complete, Not Completed, Partially Completed
Assignment Group: The group that owns the task
Assigned to: The individual person from within the assignment group that owns the task:
Work Notes List: Any user that is on this list will receive all updates to the work notes field.

Short Description: A brief description of what the task is
Description: A long description of the task
Work notes: A text field to enter the activities done outside of ServiceNow to fulfill a task
Activity: The running log of all changes and updates made to the task

Approvers Tab

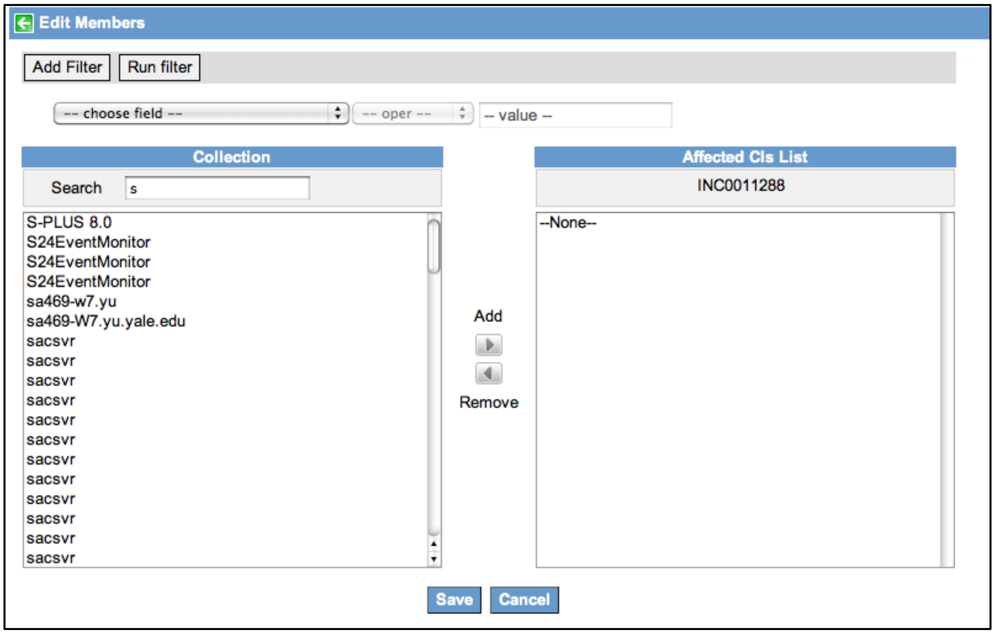


The approvers tab will show all users whose approval is required for the change to advance. It will also show the status of the change, and whether it has been approved/rejected

Affected CIs Tab

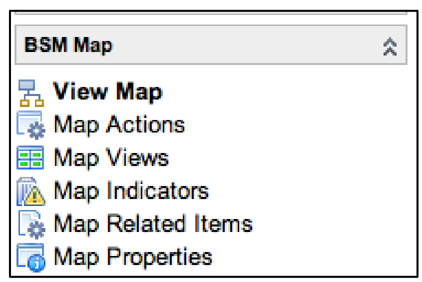
The affected CI's tab will allow users to associate additional Configuration Items to the incidents. Configuration Items are discrete items that could cause an incident or be affected by a change. These can range from a piece of hardware like a server or a laptop, pieces of software like Adobe, or even a business service like Messaging. These CI's should be CI's that are AFFECTED by the incident, but are not CAUSING it. To do this:

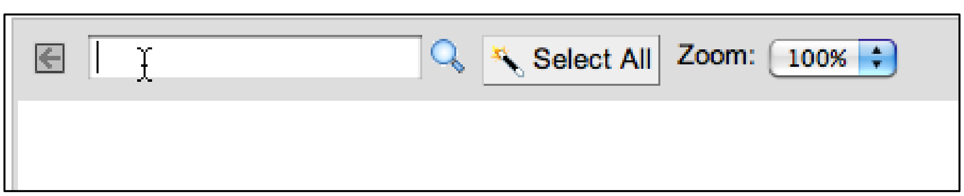
1. Click the Edit Button
2. User will be taken to the Edit members screen
3. Users can search all CI's, and add as many as needed by selecting them in the "Collection" column and hitting the "Add" button. The selected CI's should appear on the Affected CIs list on the Right
4. Click Save



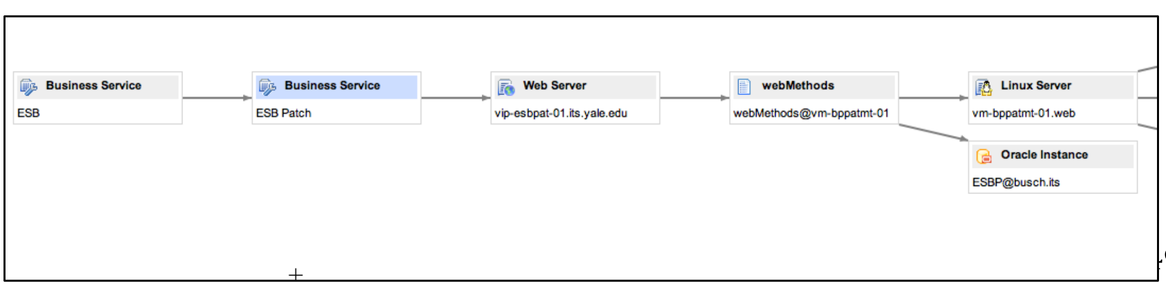
In addition, users can simply look at BSM (Business Service Maps). These will generate a "map" that displays how CI's are related to each other. To do this:

1. Go to the sidebar and find the BSM map application
2. Select View map
3. This will take the user to the BSM map screen. At the top, they can enter the Configuration Item

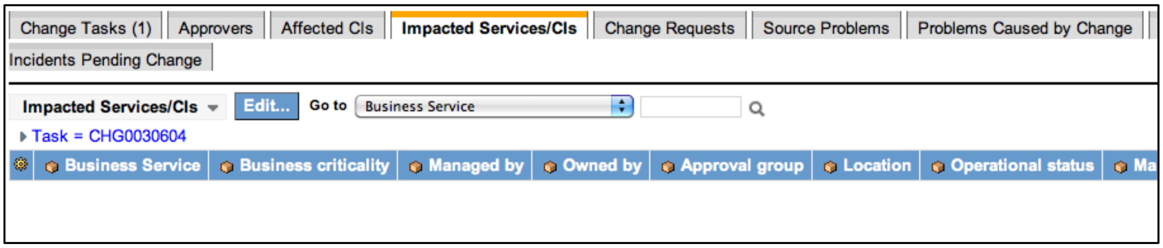




In the top bar, users enter in Configuration items. ServiceNow will then draw a map of other CI's that are connected, so Users can quickly see how other CI's may be affected.

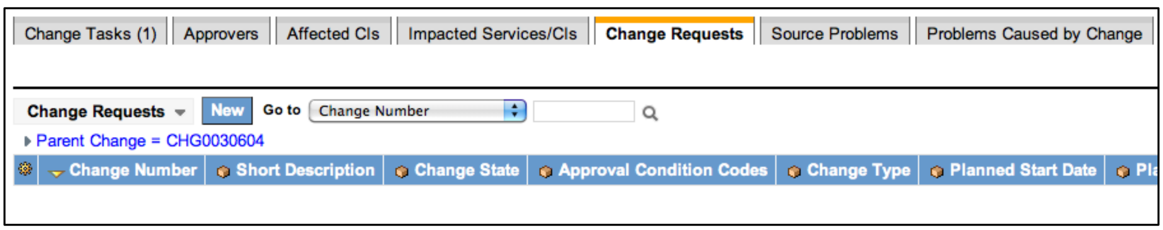


Impacted Services/CI's Tab



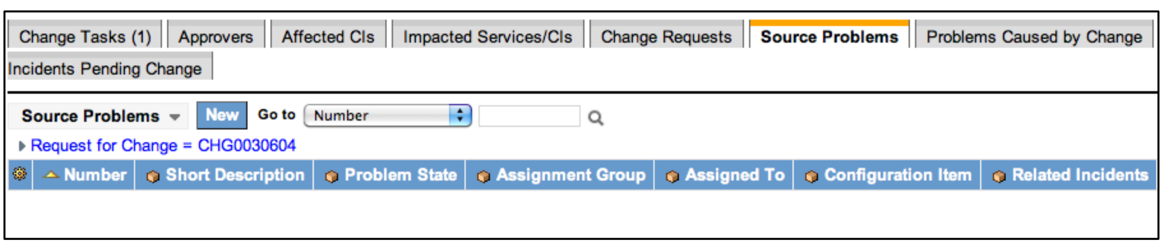
Impacted Services is similar in function to the Affected CI's tab, but only applies to services. Clicking the edit button will open up the "edit members" screen like on the affected CI's tab. Please see that section on how to use that screen.

Change Requests Tab



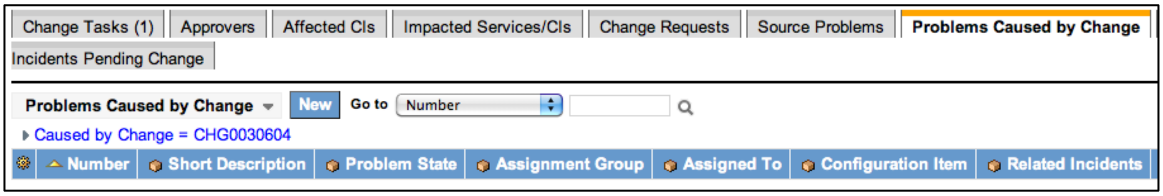
The Change request tab allows the user to see any change requests that are linked to this one via the "Parent Change" field on the related records tab. Ex: CHG001 enters CHG002 as the "Parent Change" in that field on its change form. CHG002 will see CHG001 in the "Change Requests" Tab

Source Problems Tab



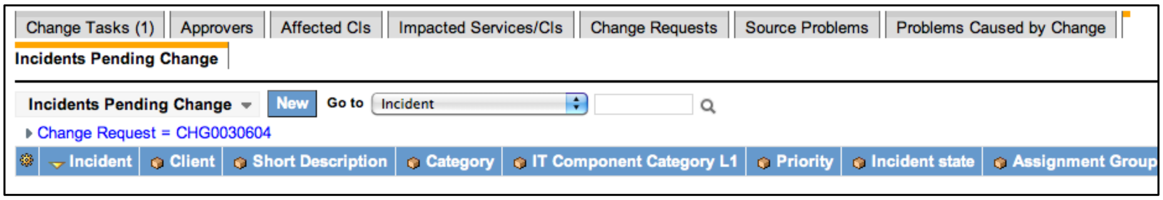
The Source Problems tab will show any problems that are linked to this change via the "Source Problem" Field on the related records form.

Problems Caused by Change Tab



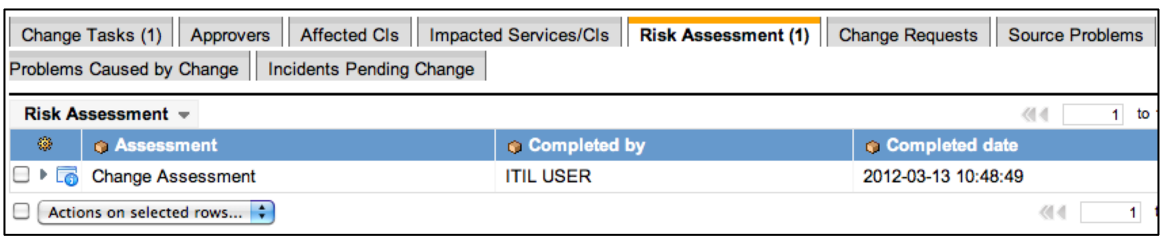
On the problem form, there is a field called "Caused by change" on its related records tab. This tab will show any problems that reference the change on the problem form.

Incidents Pending Change Tab



On the incident form is a field called "Change Request" under its related records tab. Any incidents that reference the change in that field will be found in this tab.

Risk Assessment Tab

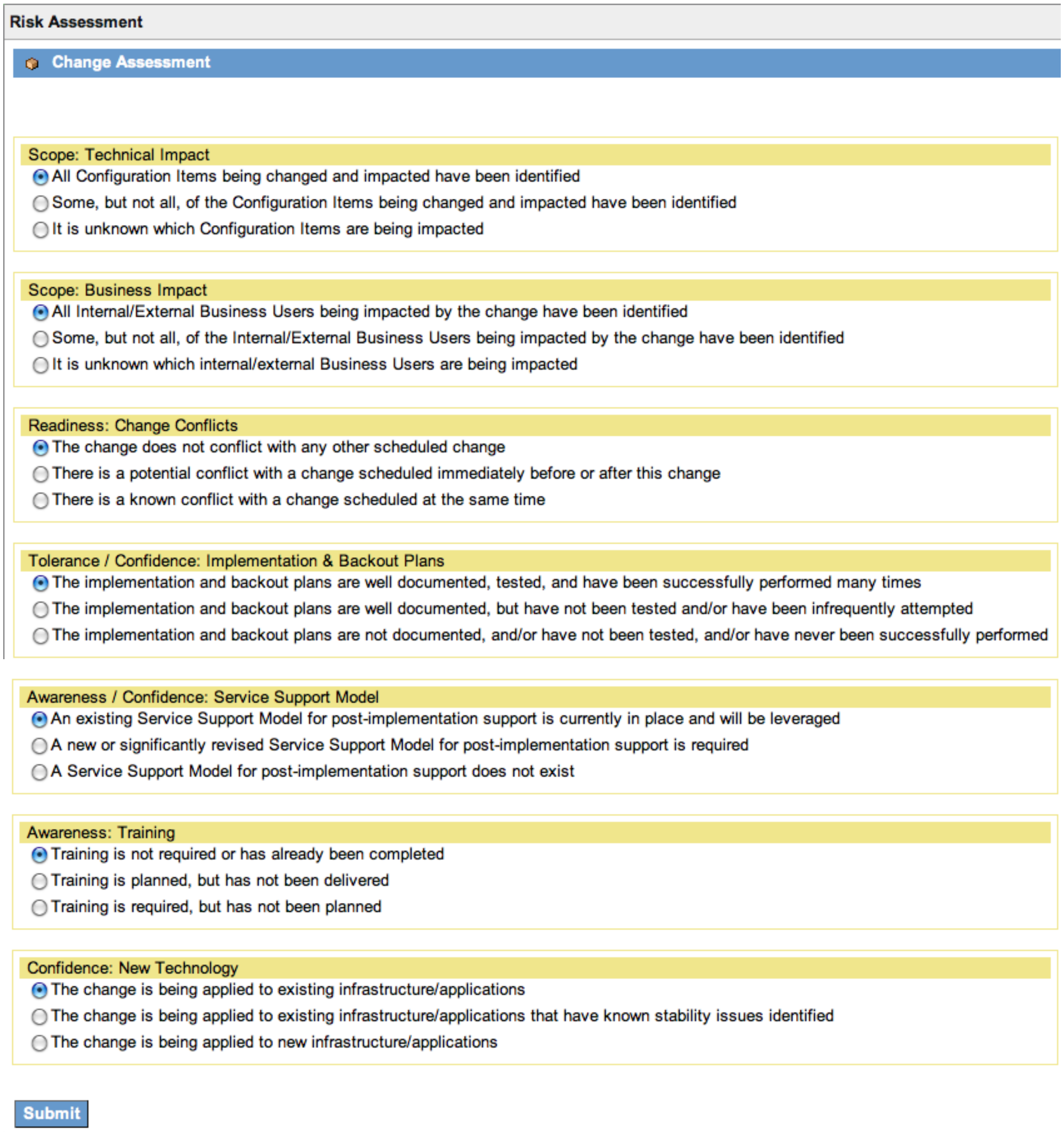


The risk assessment tab will only appear once a risk assessment form has been filled out. The tab will show who filled out the assessment and when.

Fill Out Risk Assessment Button

Part of the Change Process is to fill out A risk assessment. To do this, there are risk assessment buttons located at the top and bottom of the change form.

Clicking the button will pop out the Change Risk Assessment form:


Risk Assessment

Change Assessment

Scope: Technical Impact
- (•) All Configuration Items being changed and impacted have been identified
- ( ) Some, but not all, of the Configuration Items being changed and impacted have been identified
- ( ) It is unknown which Configuration Items are being impacted

Scope: Business Impact
- (•) All Internal/External Business Users being impacted by the change have been identified
- ( ) Some, but not all, of the Internal/External Business Users being impacted by the change have been identified
- ( ) It is unknown which internal/external Business Users are being impacted

Readiness: Change Conflicts
- (•) The change does not conflict with any other scheduled change
- ( ) There is a potential conflict with a change scheduled immediately before or after this change
- ( ) There is a known conflict with a change scheduled at the same time

Tolerance / Confidence: Implementation & Backout Plans
- (•) The implementation and backout plans are well documented, tested, and have been successfully performed many times
- ( ) The implementation and backout plans are well documented, but have not been tested and/or have been infrequently attempted
- ( ) The implementation and backout plans are not documented, and/or have not been tested, and/or have never been successfully performed

Awareness / Confidence: Service Support Model
- (•) An existing Service Support Model for post-implementation support is currently in place and will be leveraged
- ( ) A new or significantly revised Service Support Model for post-implementation support is required
- ( ) A Service Support Model for post-implementation support does not exist

Awareness: Training
- (•) Training is not required or has already been completed
- ( ) Training is planned, but has not been delivered
- ( ) Training is required, but has not been planned

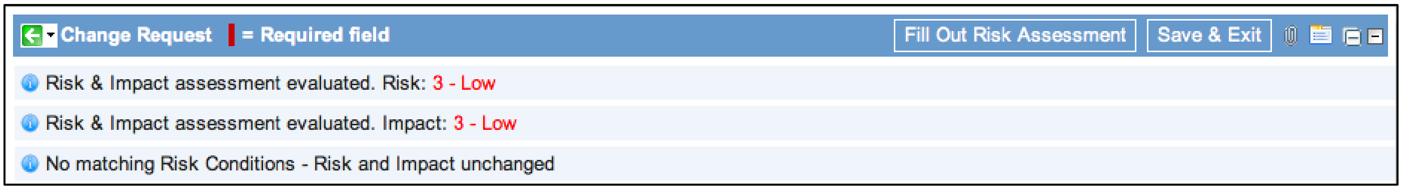
Confidence: New Technology
- (•) The change is being applied to existing infrastructure/applications
- ( ) The change is being applied to existing infrastructure/applications that have known stability issues identified
- ( ) The change is being applied to new infrastructure/applications

Submit

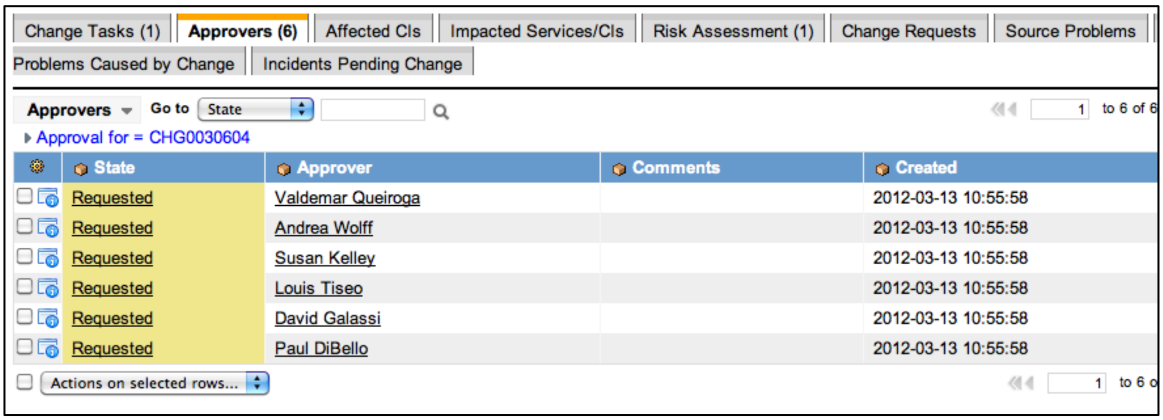
Users must diligently fill out all questions, as answering questions incorrectly could cause the risk to be evaluated incorrectly. Once the user has answered all the questions to the best of their ability, they should hit the "submit" button at the bottom of the form.

Submit for Acceptance Button

At the top and bottom of the page, next to the "Fill out Risk Assessment" button, is the Submit for Acceptance button. This button will cause the Risk and Impact to be evaluated, and move the Stage to Acceptance from Requested.



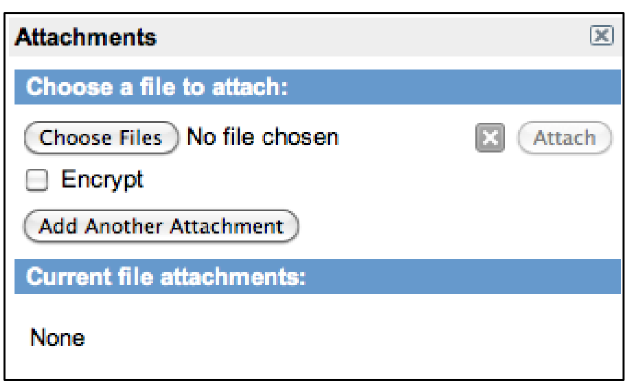
Clicking this button will also send all approvals. This is what the Approvals tab looks like after the "Submit for Acceptance" button is clicked:



Attachments

Users have the ability to add attachments to Changes. To do this:

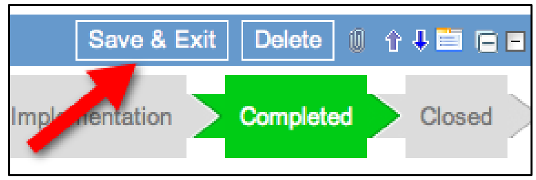
1. Find the paperclip icon in the upper-right corner of the screen
2. This will pop-up the add-attachment screen:

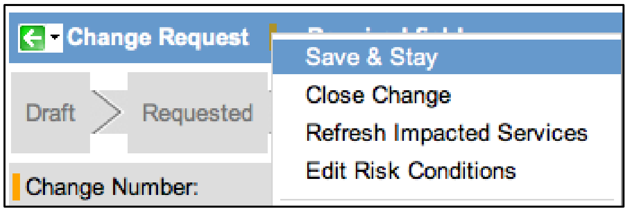


Users will be able to choose files local to their computer to add, and will have the ability to choose to encrypt it if they need to.

Saving Changes

To save updates to a ticket, users simply need to either click the Save & Exit button at the top of the form or right-click the header and select Save & Stay.



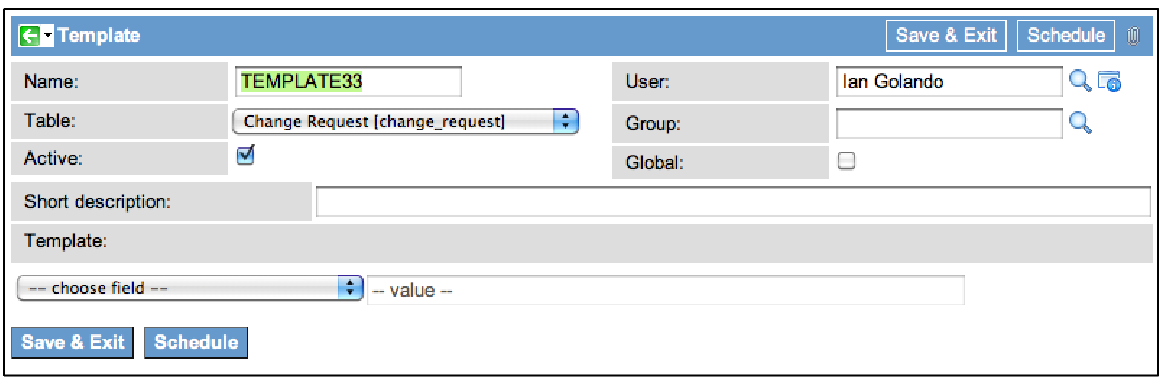


Creating Templates

Users have the ability to create "templates" for commonly created tickets. They can predefine what values they want various fields to have. To create a template:

1. Right-click the top header
2. Select Templates
3. Select Edit Templates

This will take the user to the list of templates. To create a new one, click the "New" button. This will take the user to the new template screen:



First, give the template a name. Do not change the table, and do not uncheck active. Under the "Template:" bar, select the fields you want to add.

Once you have added all fields and values you wish, click the "Save and Exit" button.

To apply a template:

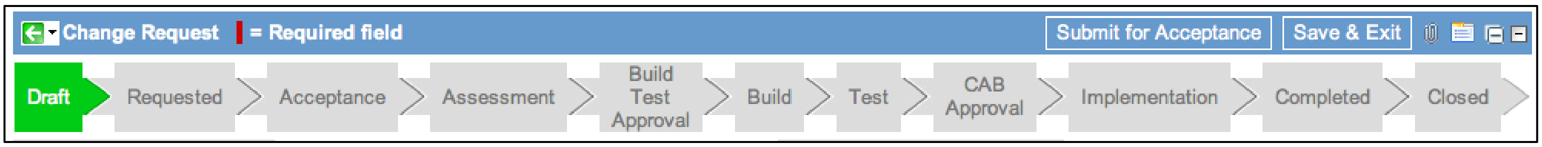
1. Right Click the change header
2. Select templates
3. Select Apply Template
4. Select the desired template

This will apply the templates settings to the change ticket

Moving Along the Change Lifecycle

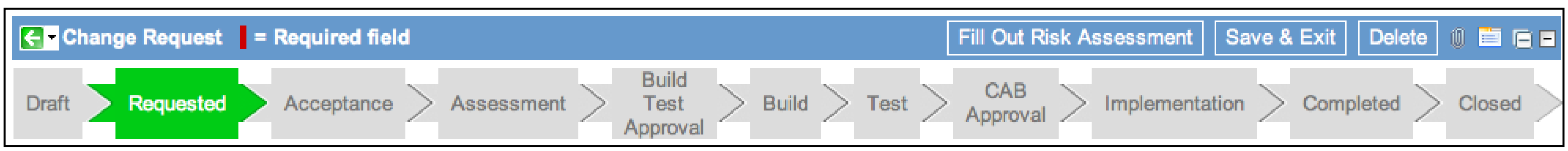
At the top of the change form is a visual display of the change status. This section will discuss how to move a change through those states within ServiceNow.

Draft



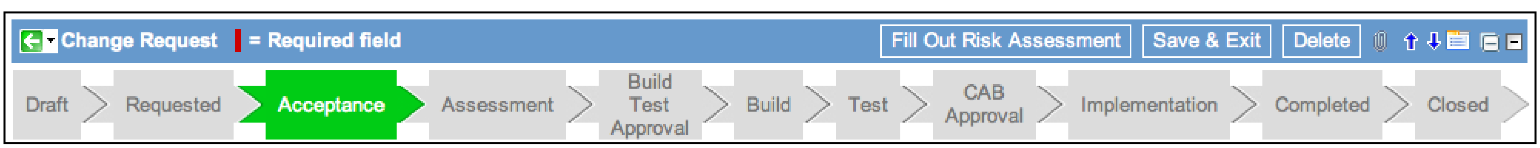
Changes are automatically set to the Draft state upon initial creation. This is the default state, similar to "new" for an incident.

Requested



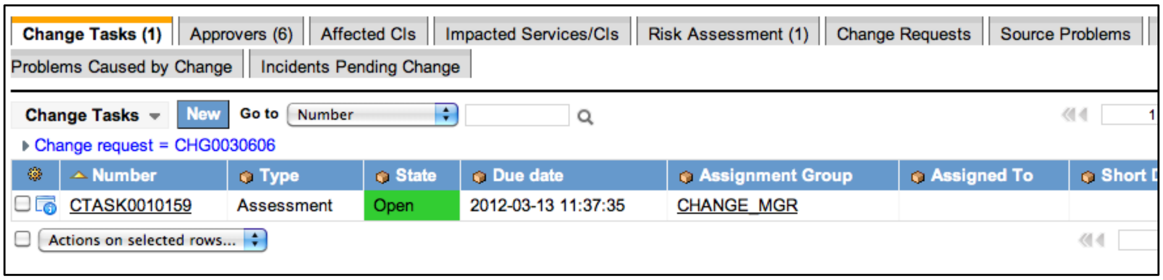
To move from the Draft to Requested state, the user needs to click the "Submit for Acceptance" button, when the ticket has already been saved in the "Draft" State. If the user clicks the Submit for Acceptance button without having saved the change, it will move directly to the Acceptance stage.

Acceptance

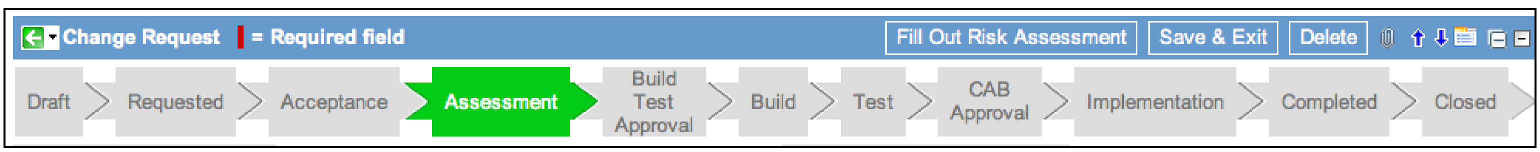


The user can move the ticket to the Acceptance state by clicking the "Submit for Acceptance" Stage. Complete the risk assessment form so the approver(s) can approve the change. Once the form has been filled out, the Approvers will be able to approve the change.

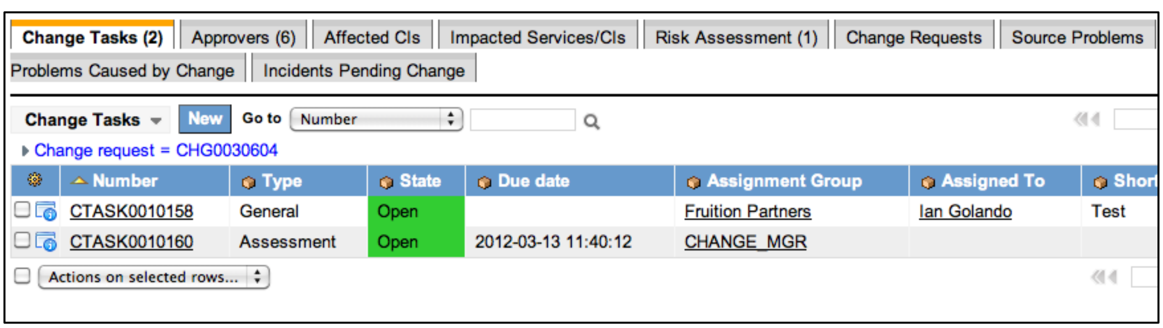
Upon Approval, a new change task will automatically be created, the "Assessment" task:



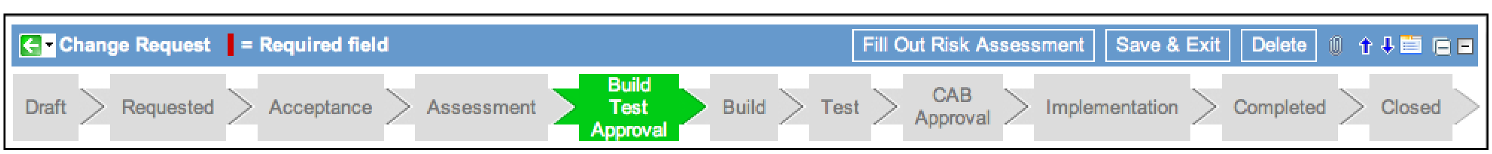
Assessment



Once a change has been approved, it will move to the assessment stage. An additional change task will be generated, the “General” task. It is automatically assigned to the Change Owner. Only one person needs to approve from the assessment stage.



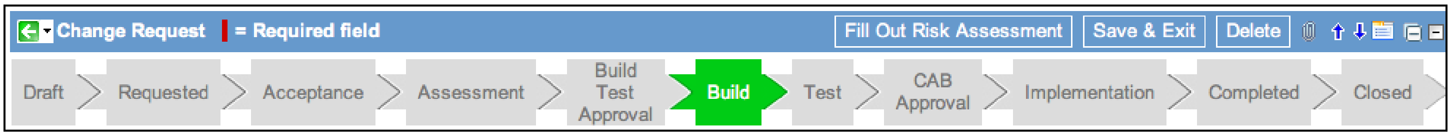
Build Test Approval



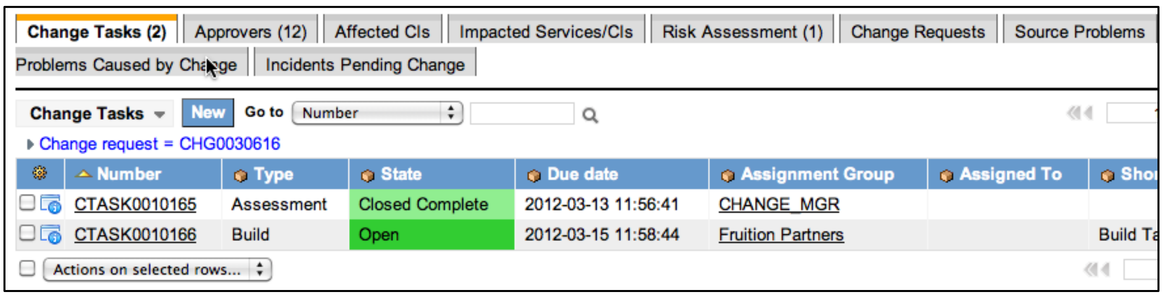
The change will move to the Build Test Approval Stage after the assessment task has been completed ONLY if the “Build-test Required” checkbox is checked. If it is not, the change will automatically skip to the CAB Approval Stage.

A new set of approvals will be sent out. Only one person needs to approve the build test stage.

Build



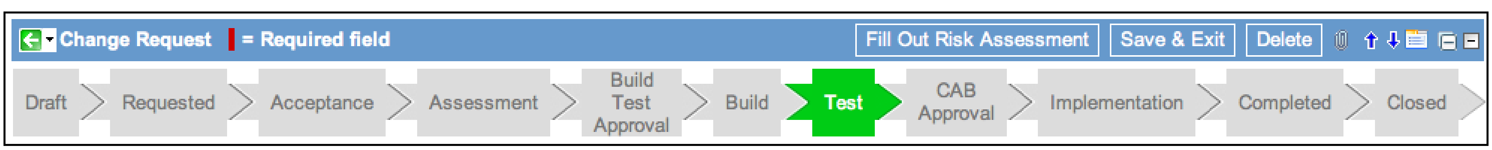
Once the Build Test approval has been accepted, the change will move to the build phase. A new task, Build, will be automatically generated and assigned to the change group.



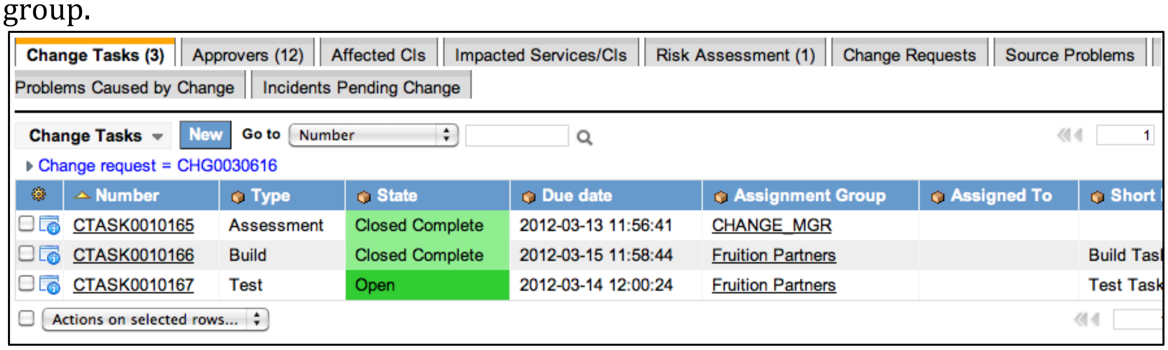
Number	Type	State	Due date	Assignment Group	Assigned To	Shor
CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
CTASK0010166	Build	Open	2012-03-15 11:58:44	Fruition Partners		Build Ta

Reminder: The change will only be in the "Build" stage if the Build-Test required checkbox is checked.

Test



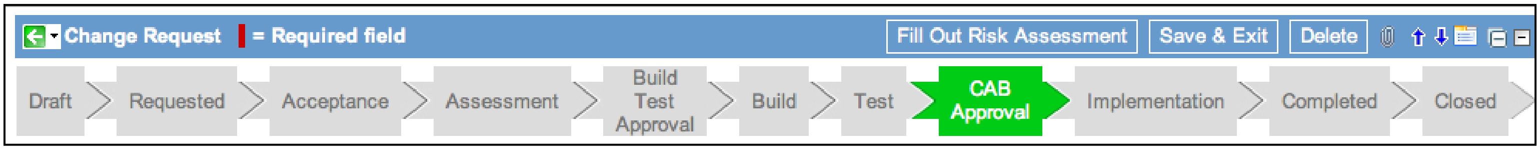
Once the Build task has been completed, the change will move to the Test stage. A new task will be generated, the Test task. It is automatically assigned to the change group.

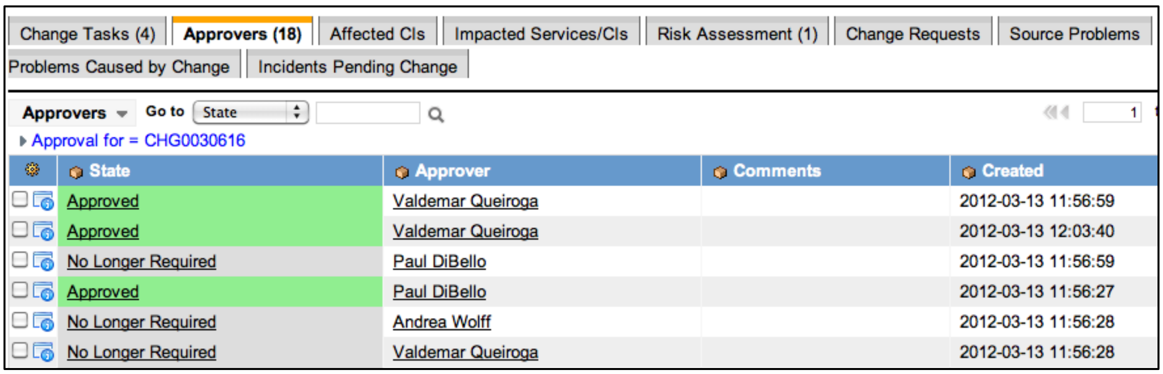


Number	Type	State	Due date	Assignment Group	Assigned To	Short
CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
CTASK0010166	Build	Closed Complete	2012-03-15 11:58:44	Fruition Partners		Build Tas
CTASK0010167	Test	Open	2012-03-14 12:00:24	Fruition Partners		Test Task

Reminder: The change will only be in the "Test" stage if the Build-Test required checkbox is checked.

CAB Approval




Change Tasks (4) | Approvers (18) | Affected CIs | Impacted Services/CIs | Risk Assessment (1) | Change Requests | Source Problems | Problems Caused by Change | Incidents Pending Change

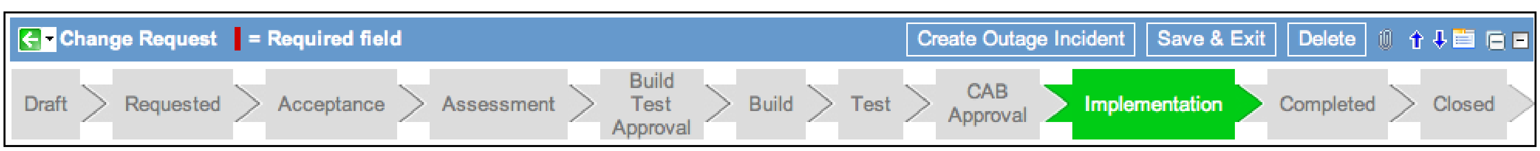
Approvers Go to State

Approval for = CHG0030616

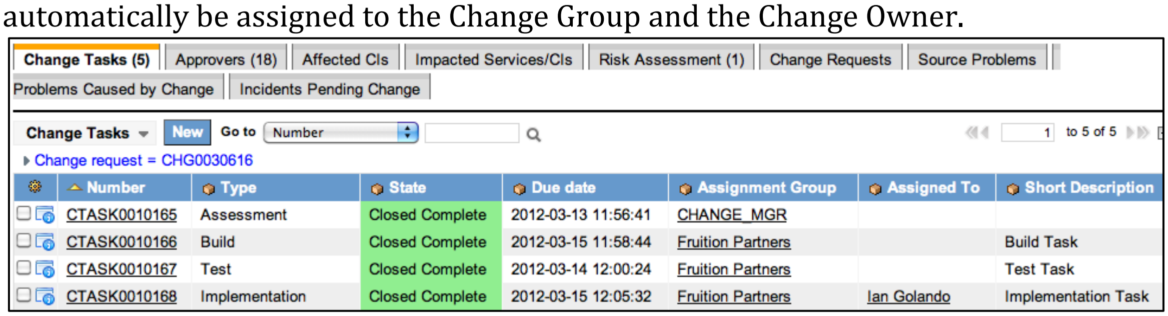
State	Approver	Comments	Created
Approved	Valdemar Queiroga		2012-03-13 11:56:59
Approved	Valdemar Queiroga		2012-03-13 12:03:40
No Longer Required	Paul DiBello		2012-03-13 11:56:59
Approved	Paul DiBello		2012-03-13 11:56:27
No Longer Required	Andrea Wolff		2012-03-13 11:56:28
No Longer Required	Valdemar Queiroga		2012-03-13 11:56:28

The change will move to the CAB Approval stage once the Test task has been completed. A new round of approvals will be sent out. Only 1 CAB member needs to approve for the change to advance. If there “Build-Test Required” checkbox was not checked, the change would have moved from this state from straight from the Assessment stage.

Implementation



Once the change has received CAB approval, it will move to the implementation stage. A new task will be generated, the Implementation Task. This task will automatically be assigned to the Change Group and the Change Owner.

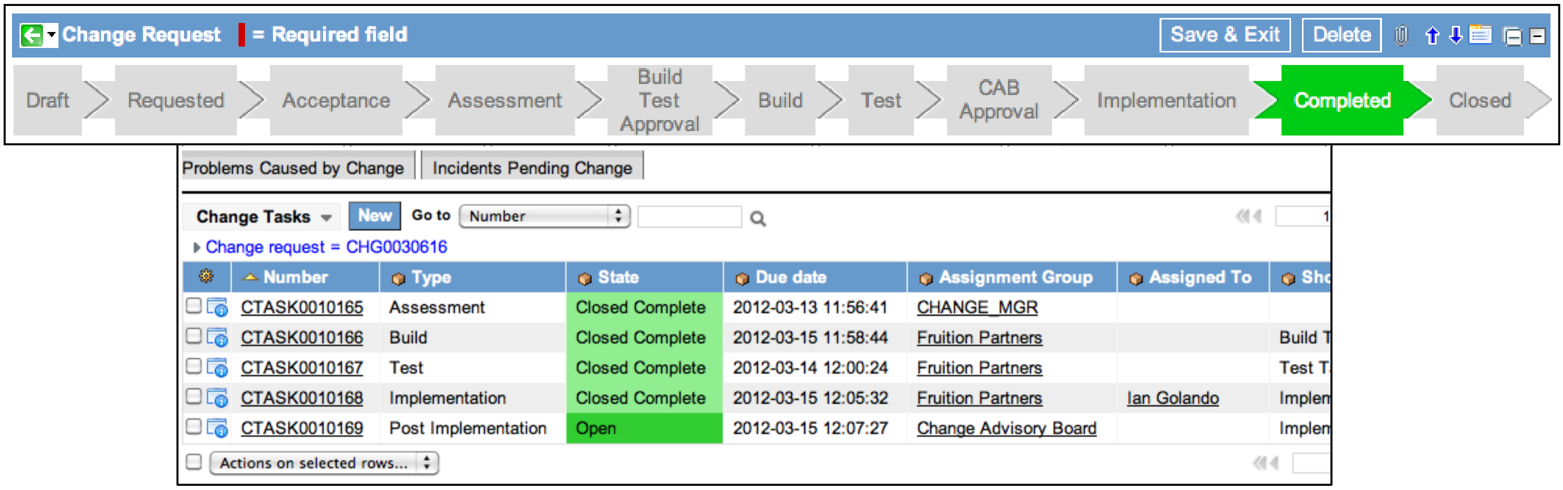

Change Tasks (5) | Approvers (18) | Affected CIs | Impacted Services/CIs | Risk Assessment (1) | Change Requests | Source Problems | Problems Caused by Change | Incidents Pending Change

Change Tasks New Go to Number 1 to 5 of 5

Change request = CHG0030616

Number	Type	State	Due date	Assignment Group	Assigned To	Short Description
CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
CTASK0010166	Build	Closed Complete	2012-03-15 11:58:44	Fruition Partners		Build Task
CTASK0010167	Test	Closed Complete	2012-03-14 12:00:24	Fruition Partners		Test Task
CTASK0010168	Implementation	Closed Complete	2012-03-15 12:05:32	Fruition Partners	Ian Golando	Implementation Task

Completed



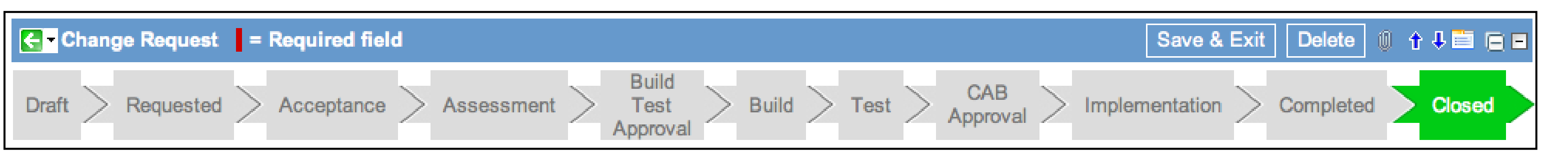
The change will move to the Completed stage once the Implementation task has been completed. This state will generate a new task, Post Implementation, that is assigned to the Change Advisory board group.

Closed

The change will move to the Closed stage once the Post Implementation task has been completed and all Tasks are closed.

Notifications

Users will receive notifications at various stages of the change process. Below is a table to describe when notifications will be created.



Trigger	Notification ID	Audience	Purpose
On requested change	Change Requested	Change Coordinator(s) and Change Manager	Identifies a new change has been requested for acceptance review.
On request for more information (state à draft)	Change Info Request	Change Requestor	Change requires more information and has been moved back to draft from requested.
On acceptance	Change Acceptance	Change Requestor	Notifies the change requestor that the requested change has been accepted.

On owner requested (assigned to assignment group)	Change Owner Requested	Queue Manager(s) of Assignment Group	Notifies queue managers of a specific group that a change owner is required from the group. Note, this is not anticipated to be used often.
On owner identified (assignment to individual)	Change Owner Identified	Change Owner	On assignment of the change to an individual when ownership of the change is identified.
On completion of all <Task Type> tasks	Change <Task Type> Tasks Completed	Change Owner	Notifies the owner that all tasks of <Task Type> are completed.
On task assignment to assignment group	Change Task Assigned to Group	Queue Manager(s)	Notifies the queue manager(s) that a task has been assigned and requires assignment to an individual.
On task assignment to individual	Change Task Assigned to Owner	Task Recipient (e.g. assessor, builder etc.)	Notifies an individual that they have been assigned a task.
On Build-Test approval	Change BT Approval	Change Owner	Notifies the change owner that a change has been approved for BT, including the Approval Code.
On Implementation approval	Change IMPL Approval	Change Owner	Notifies the change owner that a change has been approved for IMPL, including the Approval Code.
On reassessment (change state à accepted)	Change Reassessment Request	Change Owner	The change owner is notified that the change requires reassessment, often during Build-Test and prior to implementation approval.
On re-assessment Task Assignment	Change Reassessment Task	Assessor	The change owner can reassess the change and, on approval of the assessors, the recipients will be notified of their re-assessment task.
On approval condition = not approved	Change Not Approved	Change Owner	The change owner is notified that the change was not approved. The last worklog entry contains the criteria that is required for approval.
On change to the planned implementation date	Change Re-Schedule	Change Manager and Coordinator(s)	Change Owner/ Coordinator(s) are notified of a change in planned implementation date.
On change of detailed description	Change Description Change	Change Owner, Manager, Coordinator(s) and Task Recipients	Notifies change and task stakeholders of a change to the change's detailed description.
On task completion	Change Task Completion	Change Owner	The change owner is notified on a task completion, including the Task Outcome details and task closure code (Completed, Not Completed, Partially Completed).

On change implementation	Change Implementation State	Change Manager, Change Owner and Coordinator(s). On Major and Significant Changes: Service Desk Manager, Site Leads, Incident Manager	On update to the change as implemented, the change manager and coordinator(s) are notified of the date/time and the condition code.
On "requested" assessment code selection and save	Change CAB Requested	Change Manager and Coordinator(s)	Notifies the change manager and coordinator(s) that a change is ready for CAB agenda scheduling.
On "scheduled" assessment code selection and save	Change CAB Scheduled	Change Owner	Notifies the change owner that the change has been scheduled for an upcoming CAB with CAB Date/Time populated.
On Change Closure	Change Closure	Change Owner	On closure of the change, the change owner is notified of the date/time and the final closure code.
On Task Due Date	Change Task Due	Task Assignee	The task assignee is notified when the task is still open and is past the task due date.
A Task is manually closed by the Change Manager/ Coordinator (note, this is triggered automatically on advance of a change to an approved state if there are still outstanding BT or assessment tasks).	Change Task Closed By Manager	Task Assignee	The task assignee is notified that their task was closed by the change manager / coordinator. The change manager / coordinator is encouraged to update the work notes with the rationale so the task assignee can review the change notes for details.

Viewing Work

There are multiple different ways to view change-related work assigned to the user.

Homepage

Users can see changes and change tasks assigned to them on the ITIL homepage.
Changes and change tasks assigned to the logged in user's groups will be seen in the "My Groups Work" content block.
Changes and change tasks assigned to the logged in user will be seen in the "My Work" content block.

Change Application

The change application on the left hand toolbar has a variety of lists that will help the user manage their work.

Change

- **Create New**
- Open
- Assigned to me
- Assigned to My Group
- Tasks Assigned to me
- Tasks Assigned to My Group
- Closed
- All
- Overview
- Maintenance Schedules
- Change Schedule

"Open" List

The Open list will display a list of all changes that are not in the completed or closed state.

Change Requests New Go to Change Number

All > Active = true

	Change Number	Short Description	Change State	Approval Condition Codes
	CHG0030615	Testing States	Implementation	Approved
	CHG0030609	Testing states	CAB Approval	Approved
	CHG0030608	Test	Assessment	Requested
	CHG0030607	Test for test	CAB Approval	Requested
	CHG0030606	Test	CAB Approval	Requested

"Assigned To me" List

Assigned to me will display a list of all changes not in a closed state assigned to the logged in user.

All > Owner = Ian Golando > Active = true

	Change Number	Short Description	Change State	Approval Condition Codes
	CHG0030615	Testing States	Implementation	Approved
	CHG0030609	Testing states	CAB Approval	Approved
	CHG0030608	Test	Assessment	Requested
	CHG0030607	Test for test	CAB Approval	Requested
	CHG0030604	Test	CAB Approval	Requested

"Assigned to My Groups" List

The assigned to my groups list will display a list of all changes that are assigned to any of the logged in user's assignment groups.

Change Requests | New | Go to | Change Number

All > Owner Group = Fruition Partners > Active = true

Change Number	Short Description	Change State	Approval Condition Codes
CHG0030615	Testing States	Implementation	Approved
CHG0030609	Testing states	CAB Approval	Approved
CHG0030608	Test	Assessment	Requested
CHG0030607	Test for test	CAB Approval	Requested
CHG0030606	Test	CAB Approval	Requested

"Tasks Assigned to Me" List

Tasks assigned to me will display a list of open (not closed) Change Tasks that are assigned to the logged in user.

Change Tasks | New | Go to | Number

All > Assigned To = Ian Golando > Active = true

Number	Type	State	Assigned To	Due date
CTASK0010159	Assessment	Open	Ian Golando	2012-03-13 11:37:35

Actions on selected rows...

"Tasks Assigned to My Groups" List

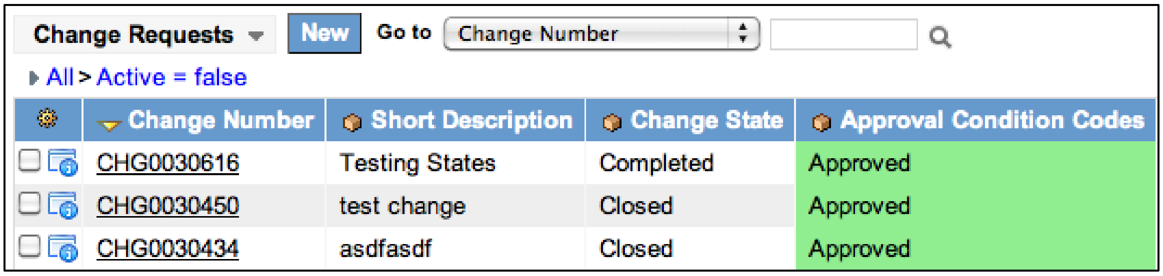
Tasks assigned to my groups will display a list of open (not closed) Change Tasks that are assigned to all the logged in user's assignment groups.

All > Assignment Group = Fruition Partners > Active = true

Number	Type	State	Assigned To	Due date
CTASK0010051		Open		2012-03-13 12:19:24
CTASK0010075		Open		2012-03-06 16:13:41
CTASK0010077		Open		
CTASK0010082		Open		
CTASK0010083		Open		2011-02-16 15:16:46

“Closed” List

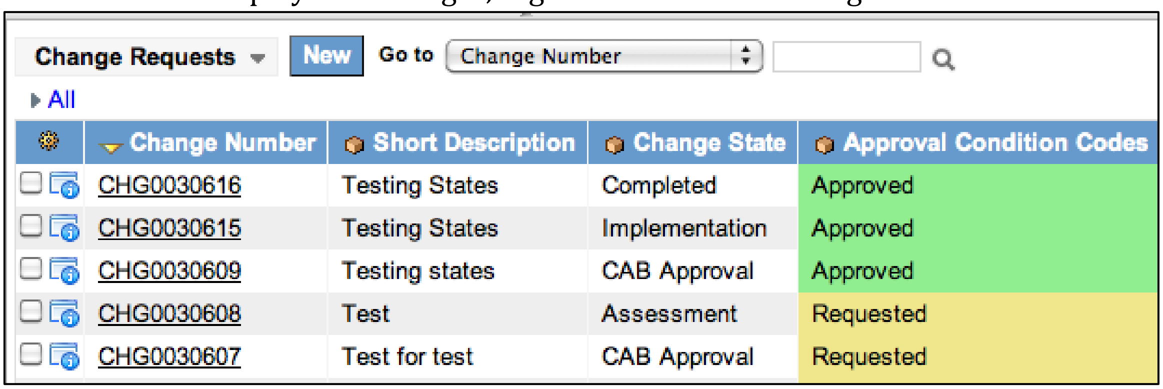
The closed list will display a list of all changes that are in either the completed or closed state. It will display ALL changes in this state, not only ones assigned to the user.



Change Number	Short Description	Change State	Approval Condition Codes
CHG0030616	Testing States	Completed	Approved
CHG0030450	test change	Closed	Approved
CHG0030434	asdfasdf	Closed	Approved

“All” List

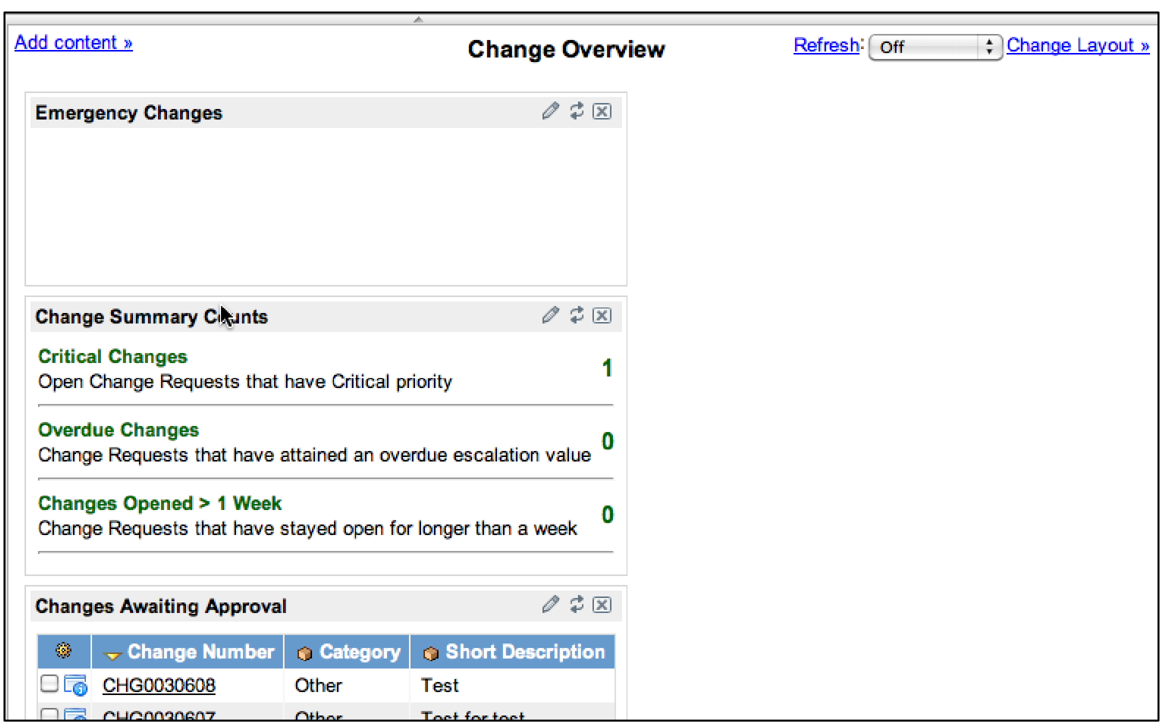
The All list will display ALL changes, regardless of state or assignment.



Change Number	Short Description	Change State	Approval Condition Codes
CHG0030616	Testing States	Completed	Approved
CHG0030615	Testing States	Implementation	Approved
CHG0030609	Testing states	CAB Approval	Approved
CHG0030608	Test	Assessment	Requested
CHG0030607	Test for test	CAB Approval	Requested

Overview

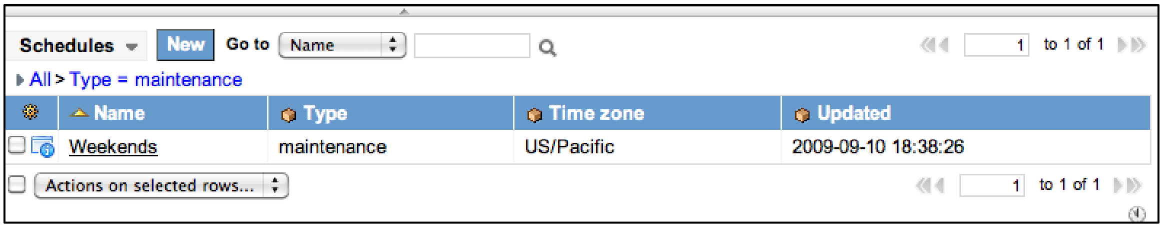
The overview link will take the user to a Change Overview Homepage.



This homepage has several graphs and content blocks with relevant change information that can give the user a quick snapshot of the current state of the change process.

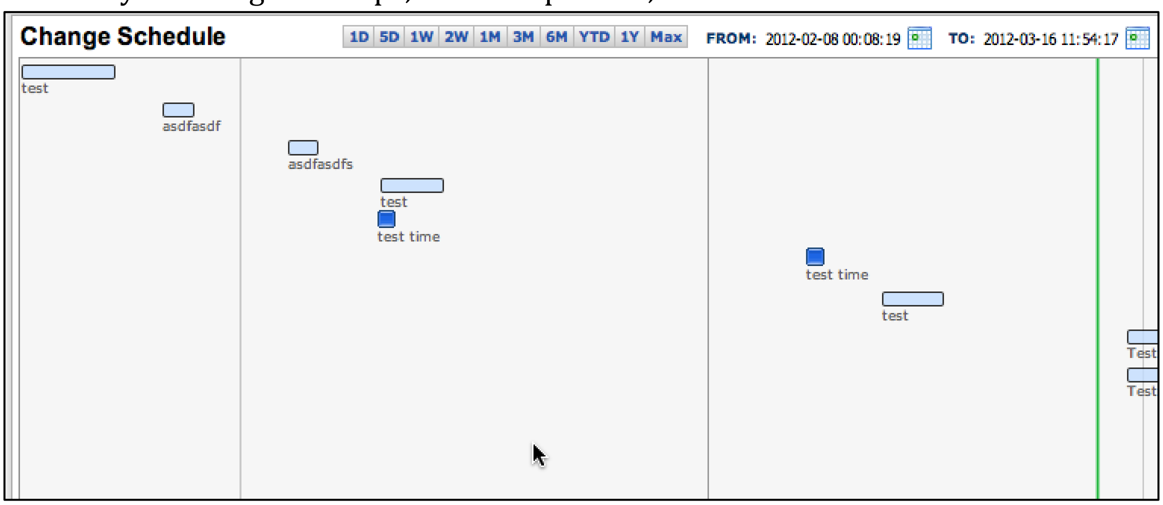
Maintenance Schedules

Maintenance schedules will allow the user to see all schedules that have been created for change. The user will be able to click into the schedules to see when they run.



Change Schedule

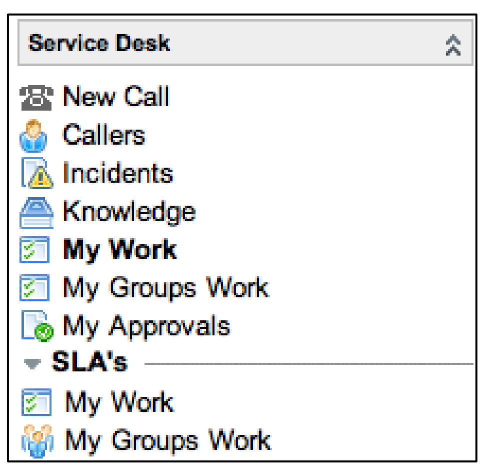
The change schedule link will take the user to a calendar that displays where all changes currently in the change process fall. Users can view this to help plan where there may be change overlaps, blackout periods, etc.



On the calendar users have the ability to change what time period they are viewing by modifying the dates at the top. This will allow the user to view a specific window to see what changes are occurring. This will be particularly useful when checking for conflicting changes.

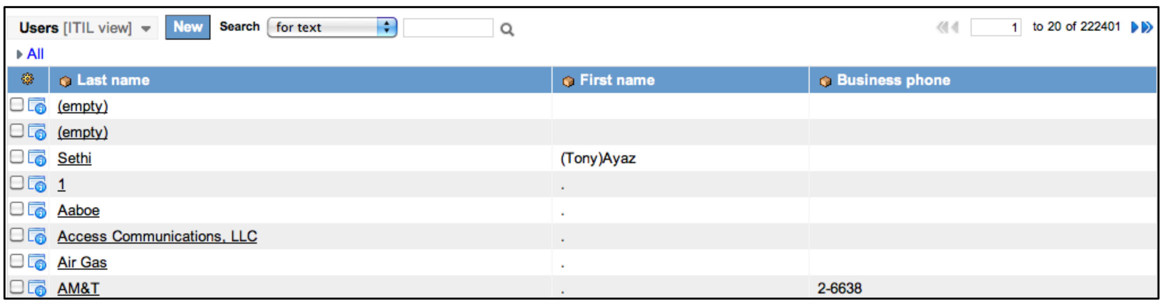
Service Desk

The Service Desk application is its own application but applies to all processes. Essentially, it provides quick access to many different items that will be very useful to the users.



New Call: Will take the user to the new call form, as described in the incident section

Callers



Users [ITIL view] New Search for text 1 to 20 of 222401

All

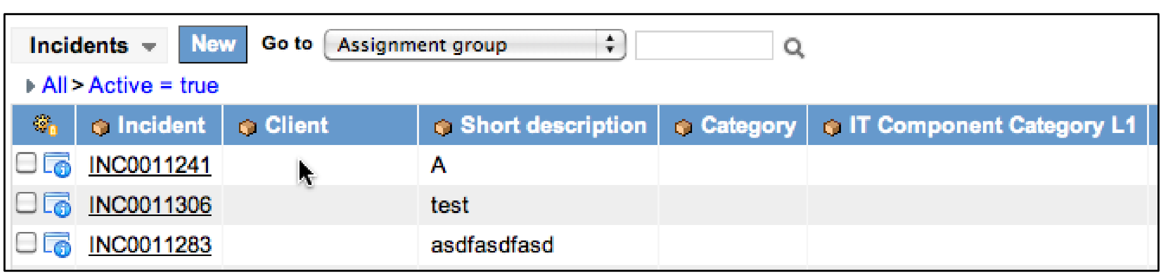
Last name	First name	Business phone
(empty)		
(empty)		
Sethi	(Tony)Ayaz	
1	.	
Aaboe	.	
Access Communications, LLC	.	
Air Gas	.	
AM&T	.	2-6638

The callers link will take the user to a list that contains all users within ServiceNow. Like any other list, the users can run filters and personalize lists from here. Users will be able to click into user records.

On the user records they will be able to see open incidents and configuration items associated to the user

Incidents

This will simply display a list of all active/open incidents.



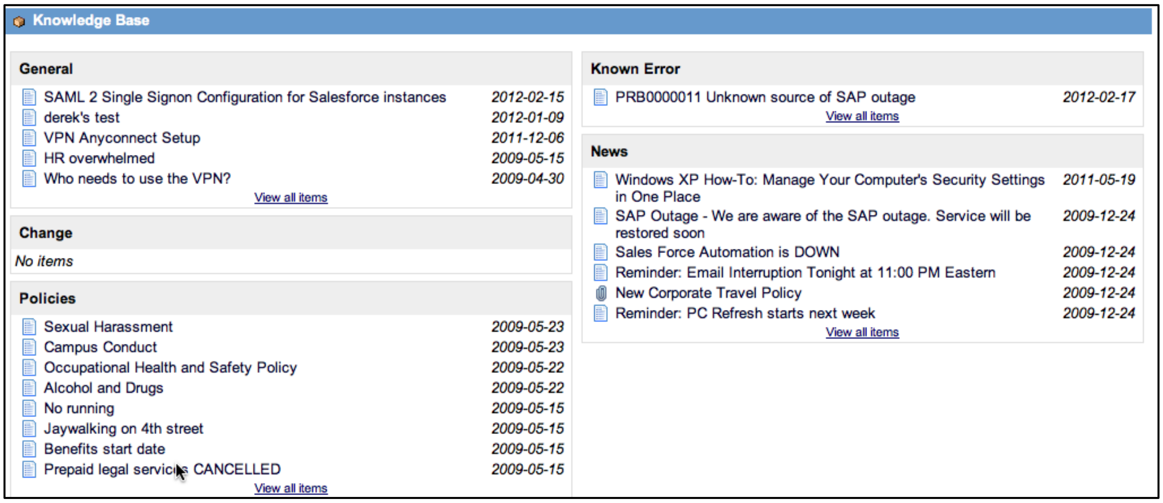
Incidents New Go to Assignment group

All > Active = true

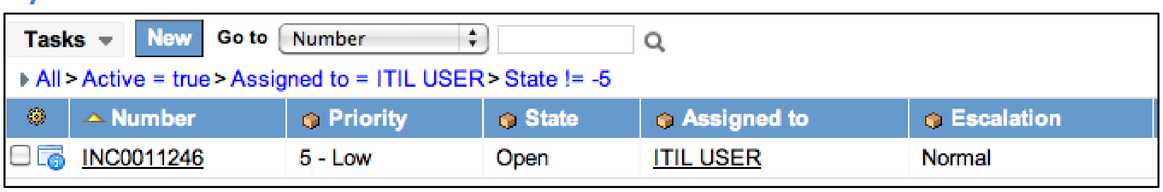
Incident	Client	Short description	Category	IT Component Category L1
INC0011241		A		
INC0011306		test		
INC0011283		asdfasdfasd		

Knowledge

Knowledge will take the user to the Knowledge homepage, where they can view and search different knowledge items.

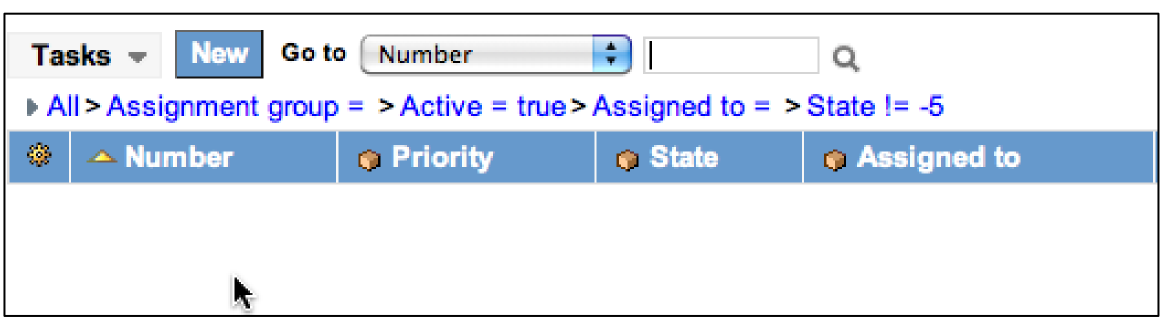


My Work



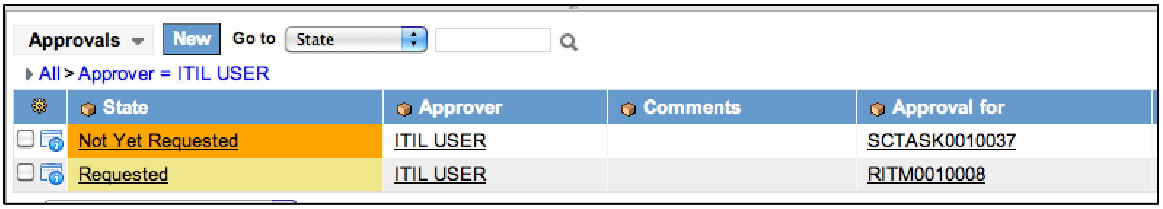
My work will take the user to a list of ALL items within ServiceNow that have the logged in user's name in the assigned to field. This can and will include changes, change tasks, incidents, request tasks, problems, etc.

My Groups Work



My groups work will take the user to a list of ALL items within ServiceNow that have the logged in user's assignment group in the assignment group field. This will be all items, including changes, change tasks, incidents, etc.

My approvals

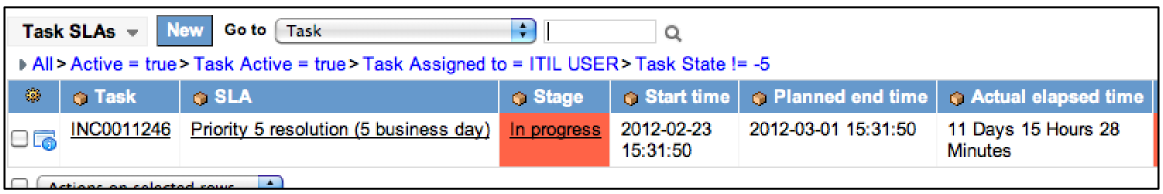


Approvals New Go to State

All > Approver = ITIL USER

State	Approver	Comments	Approval for
Not Yet Requested	ITIL USER		SCTASK0010037
Requested	ITIL USER		RITM0010008

Covered below



Task SLAs New Go to Task

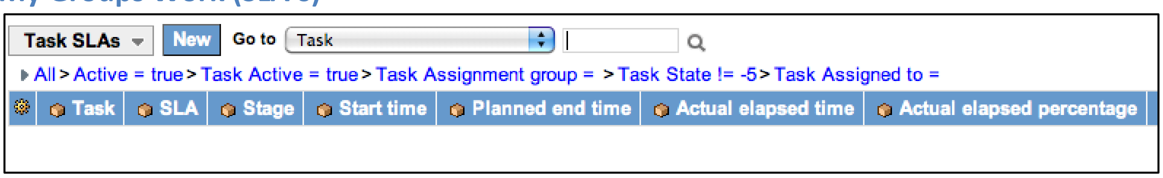
All > Active = true > Task Active = true > Task Assigned to = ITIL USER > Task State != -5

Task	SLA	Stage	Start time	Planned end time	Actual elapsed time
INC0011246	Priority 5 resolution (5 business day)	In progress	2012-02-23 15:31:50	2012-03-01 15:31:50	11 Days 15 Hours 28 Minutes

My Work (SLA's)

My work under the SLA's portion of service desk will show the user a list of all SLA's on work items that have been assigned to them. Users will be able to use this to see what work items are close to breaching SLA's and prioritizing accordingly.

My Groups Work (SLA's)



Task SLAs New Go to Task

All > Active = true > Task Active = true > Task Assignment group = > Task State != -5 > Task Assigned to =

Task	SLA	Stage	Start time	Planned end time	Actual elapsed time	Actual elapsed percentage

My groups work under the SLA portion of service desk will show the user a list of all SLA's on work items that have been assigned to their assignment groups. Users will be able to see the status of the SLA's and can prioritize their work accordingly.

Approvals

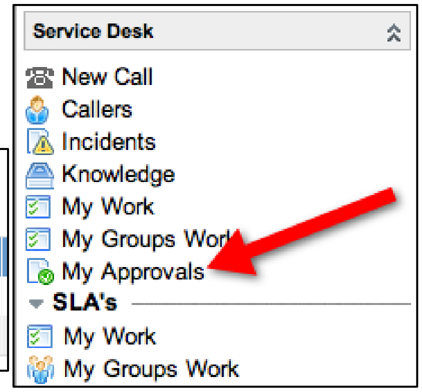
A large part of the change process is the approval process. There are approvals at various stages. Users can access their approvals two main ways.

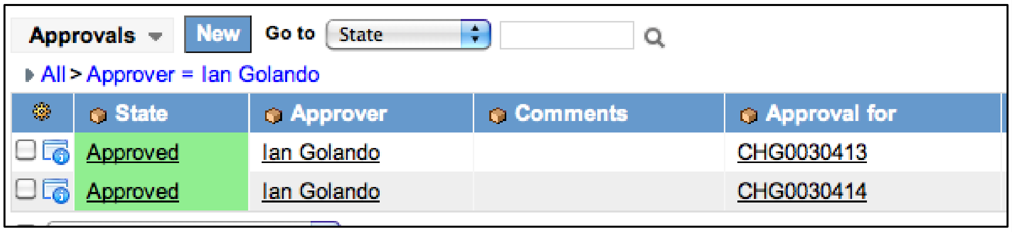
Email

Whenever an approval is requested from a user, they will receive an email notification. Users will have the ability to approve/reject straight from this email if they wish. Simply click the link for approve/reject.

Service Desk

Under the service desk application is a link for "My Approvals". This will display a list of all the approvals requested of the current user.

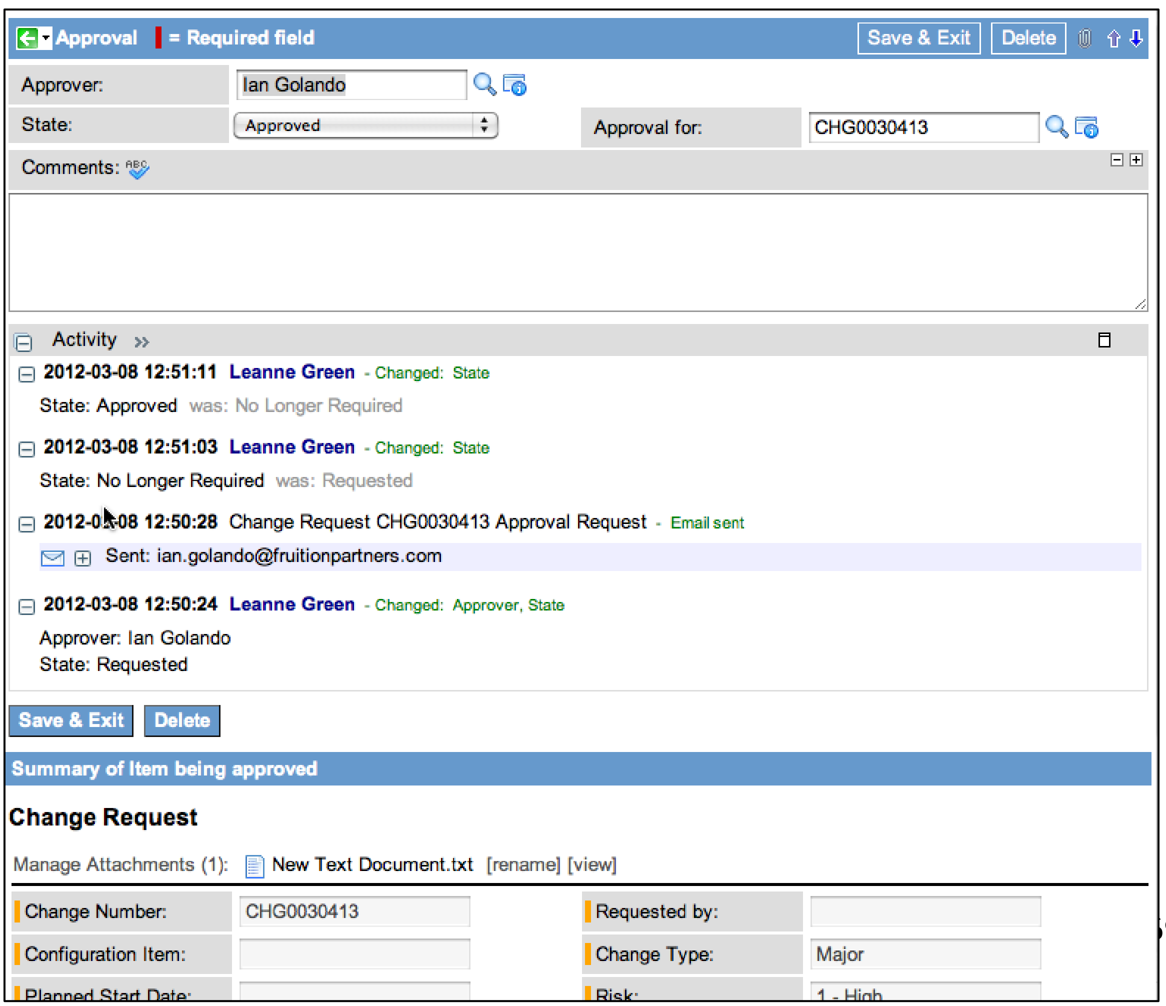




From here, users have 2 options:

Entering the Approval

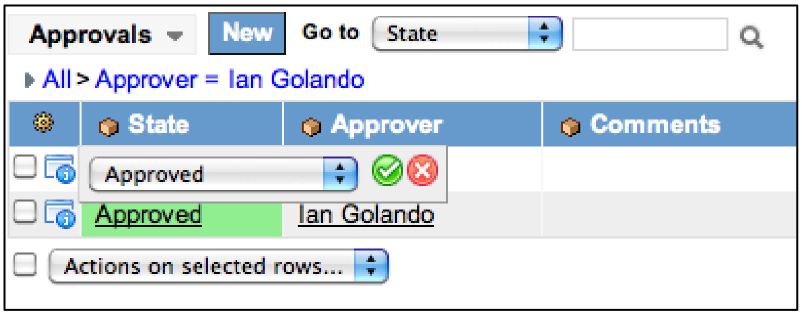
Users can click the "state" field to enter the approval screen:



On the approval screen the user can change the state field to approve/reject. Simply change the state field and then hit the Save & Exit button. At the bottom they can also see a summary of the item that needs to be approved.

In-Line Approval

From the Approvals list, the user can double-click the state field to change the field from there. Double-clicking opens up the drop down like this:



The user can then modify the approval state. Once changed, simply click the Green check to confirm or the red x to cancel.