

ServiceNow Change Management

Training
April/May

After completing this course, you will be able to:

Objectives

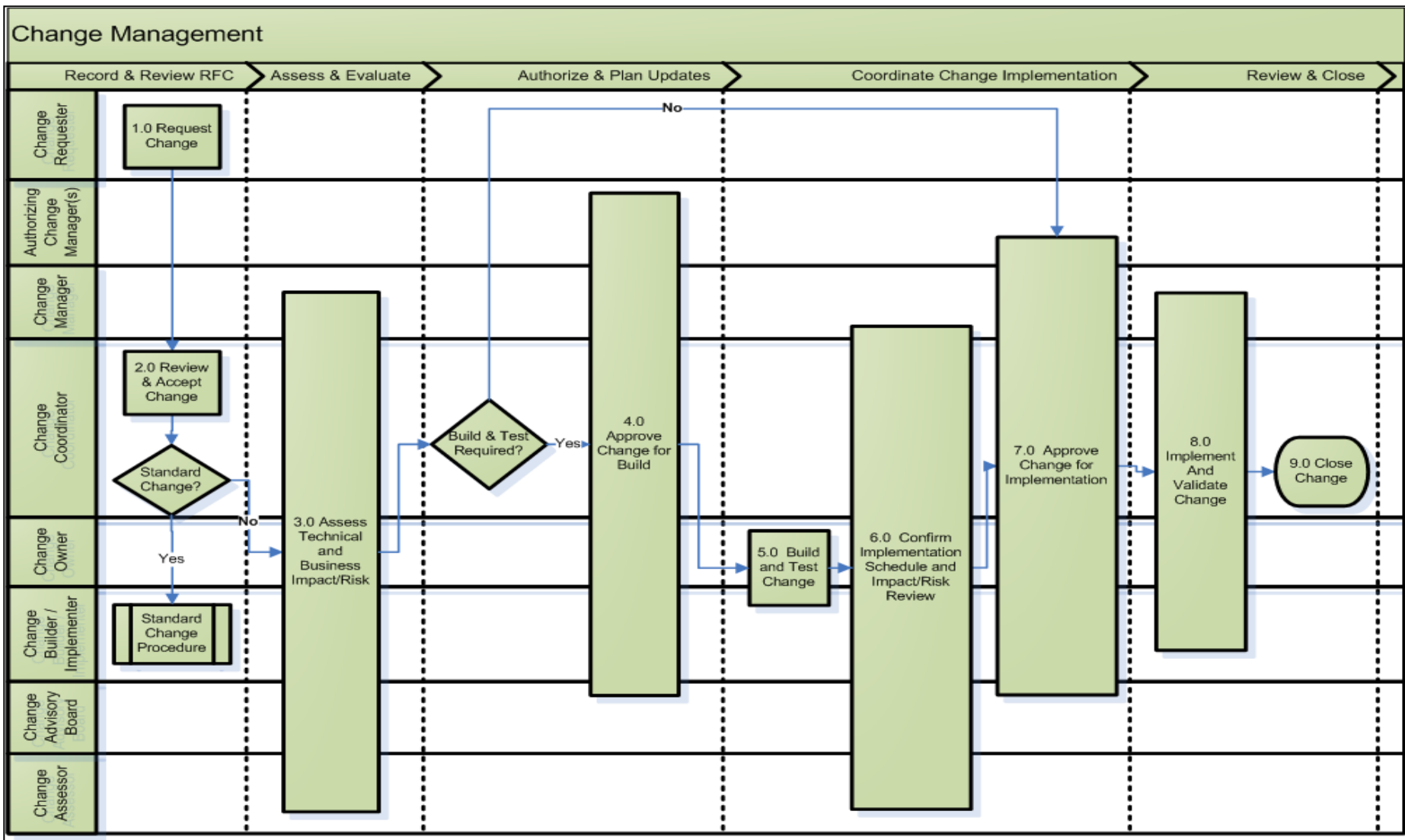
- Understand the fundamentals of ServiceNow navigation for Change Management
- Understand basic Change Management Process
- Search and manage Change Queues
- Create and complete a Change

Change Overview	10 minutes
ServiceNow Navigation	15 minutes
Working with Changes	30 minutes
Working with Tasks	20 minutes
Break	10 minutes
Moving a Change Through the Lifecycle	25 minutes
Approvals	10 minutes
Creating Templates	15 minutes

Objectives

- High-level overview of the change process
- Roles and responsibilities

Change Lifecycle Overview



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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Facilitates changes process • Assists the Change Manager and Change Owner throughout the change process
Change Assessor	<ul style="list-style-type: none"> • Responsible for contributing to the business and technical risk and impact assessment of a change for their domain
Change Builder / Implementer	<ul style="list-style-type: none"> • Individual responsible for performing the build/test and/or implementation
<i>Authorizing Change Manager(s)</i>	<ul style="list-style-type: none"> • <i>Authorizes changes where their jurisdiction is impacted</i> • <i>Participates in CAB meetings as required</i>

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After completing this module, you will be able to:

Objectives

- View Changes
- Manage the available views for each queue

The incident application has various lists that will help the user view incidents.

Open: A list of all open (non-resolved or closed) changes

Assigned to me: a list of all changes assigned to the logged in user

Assigned to My Group: A list of all changes assigned to the logged in user's assignment groups

Tasks Assigned to me: A list of change tasks assigned to the logged in user

Tasks Assigned to My Group: A list of change tasks assigned to the logged in user's assignment groups

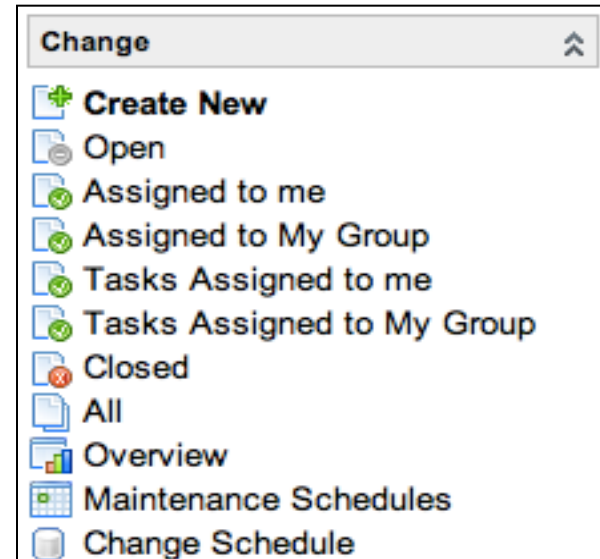
Closed: A list of all changes that have been closed

All: A list of all changes, regardless of state

Overview: A change homepage with various content blocks related to change

Maintenance Schedule: A list that allows the user to see all schedules that have been created for change

Change Schedule: a calendar that displays where all changes currently in the change process fall.



- Change Approval Rules
 - Standard Changes require no approval at all
 - Minor, Significant and Major changes all require approval by the Manager of the Owner Group at the acceptance stage
 - Significant and Major changes require approval at the CAB level as well
 - Changes with Build/Test box checked require approval of CAB at build/test phase in addition to the CAB approval phase
- Change Closure Rules
 - Only Change Manager, Change Coordinator and Owner of the Change request are allowed to Close the Change.
- Outlook calendar invites are sent by the system for CAB meetings.

- Search in template field (right side Above Short Description) for standard change and click save and stay

Yale IT Service Management Suite
Welcome Mary-Kay Kaminski

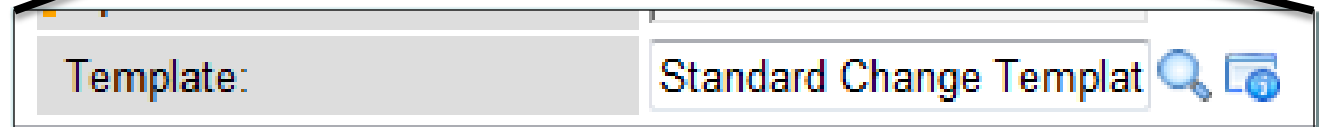
Change Request - Required field

Draft > Requested > **Acceptance** > Assessment > Build Test Approval > Build > Test > CAB Approval > Implementation > Post Imp

Change Number: CHG0000015
Requested by: Jack Medoff
Owner Group: INF Network Operations
Owner: Jack Medoff
Change Source: Legacy System
Location: 25 SP 406
IT Provider Service: Telecom
Environment: Production
IT Component Category L1: Hardware
IT Component Category L2: Network
IT Component Category L3: Telephone System
Device/Asset Name: Campus PBX

Change State: Acceptance
Submission Priority: Latent
Impact: 3 - Low
Risk: 3 - Low
Change Type: Standard
Advisory:
Build-Test Required:
Approval Condition Codes: Approved
Assessment Condition Codes: -- None --
Implementation Codes: Implemented - As Planned
Closure Code: Successful
Watch List:
Opened: 2012-04-13 10:21:57
Template: Standard Change Templat

Short Description: Add digital line card



- Bug in standard change cannot close at this time.

Example of a list of changes: The All list

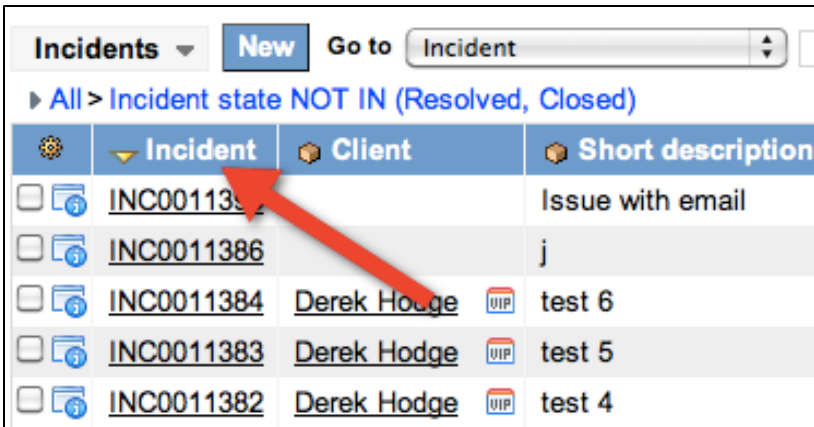
Change Requests **New** Go to

▶ All

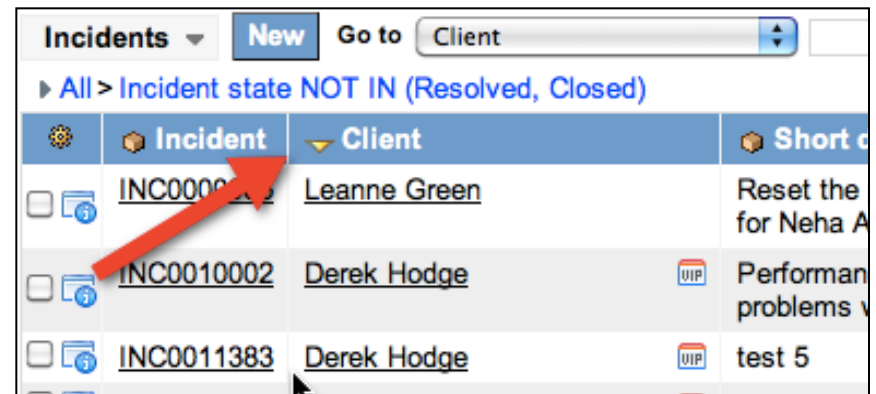
	▼ Change Number	Short Description	Change State	Approval Condition Codes
<input type="checkbox"/>	CHG0030616	Testing States	Completed	Approved
<input type="checkbox"/>	CHG0030615	Testing States	Implementation	Approved
<input type="checkbox"/>	CHG0030609	Testing states	CAB Approval	Approved
<input type="checkbox"/>	CHG0030608	Test	Assessment	Requested
<input type="checkbox"/>	CHG0030607	Test for test	CAB Approval	Requested

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.

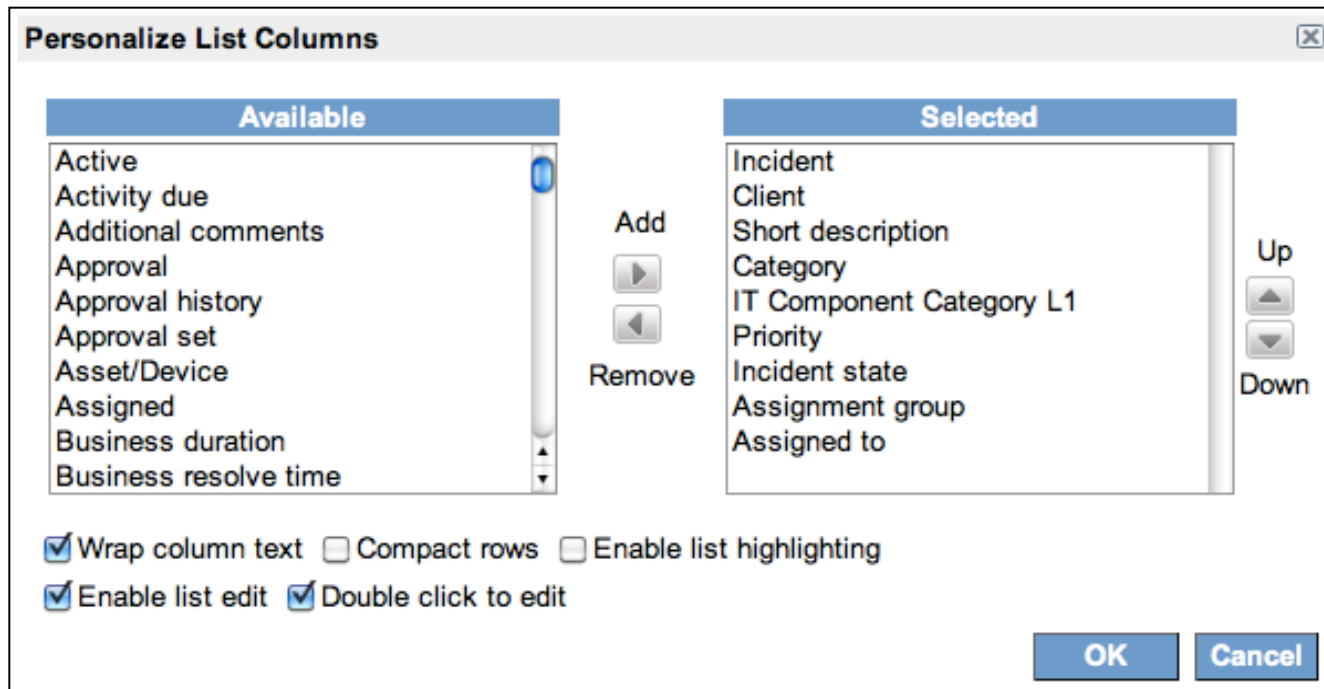
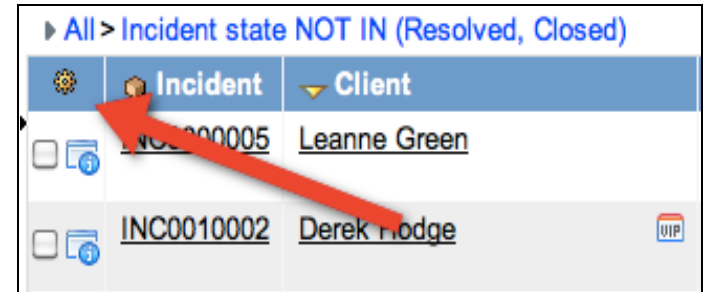


	Incident	Client	Short description
<input type="checkbox"/>	INC0011385		Issue with email
<input type="checkbox"/>	INC0011386		j
<input type="checkbox"/>	INC0011384	Derek Hodge VIP	test 6
<input type="checkbox"/>	INC0011383	Derek Hodge VIP	test 5
<input type="checkbox"/>	INC0011382	Derek Hodge VIP	test 4



	Incident	Client	Short c
<input type="checkbox"/>	INC0000000	Leanne Green	Reset the for Neha A
<input type="checkbox"/>	INC0010002	Derek Hodge VIP	Performan problems v
<input type="checkbox"/>	INC0011383	Derek Hodge VIP	test 5

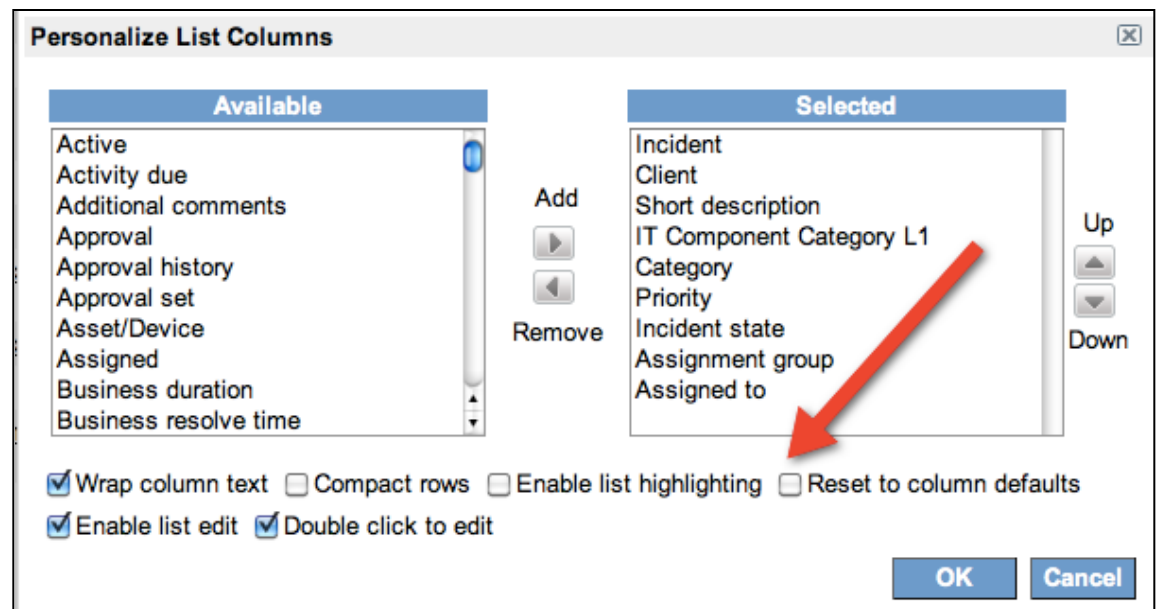
All lists, in the upper left corner, have a gear button. Pressing this brings about the personalized list options screen:



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

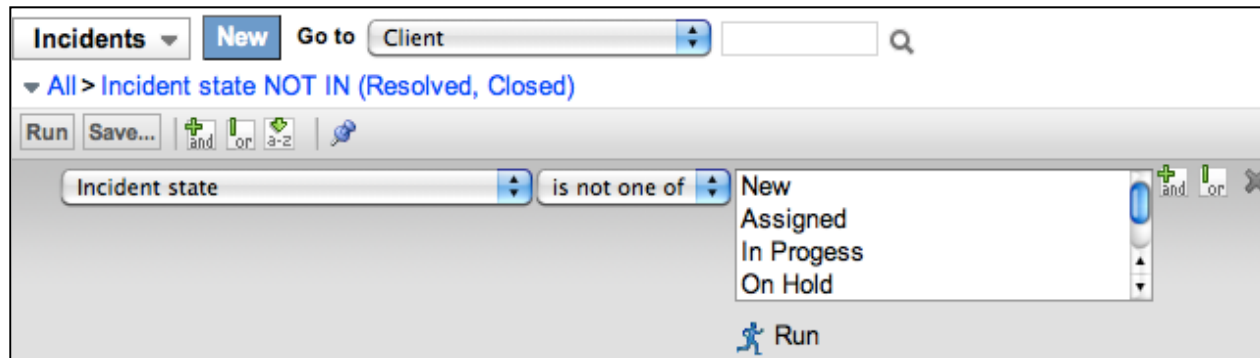
1. Find the field you want to add from the “Available” column on the left
2. Select it, and then click the “Add” button in the middle
3. The field will automatically be added to the bottom of the selected, meaning it will be the last column on your list. Select it and hit the up or down buttons to rearrange 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
6. This will change how that list appears to you, and will remain that way until the user changes it or an admin restores defaults

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



Users can run filters on ANY list. To do this:

1. Click the grey right-pointing triangle at the top of any list
2. This will bring up the run filter screen (and display any filters that are currently running)



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. Once the user is satisfied with the filter criteria, then click Run

ServiceNow Navigation (~ 5 Minutes)

- Personalize the Open list to remove the change number
- Create a filter to only show changes where the IT Component Category L1 is Data

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After completing this module, you will be able to:

Objectives

- Create a new Change
- Understand Form Fields

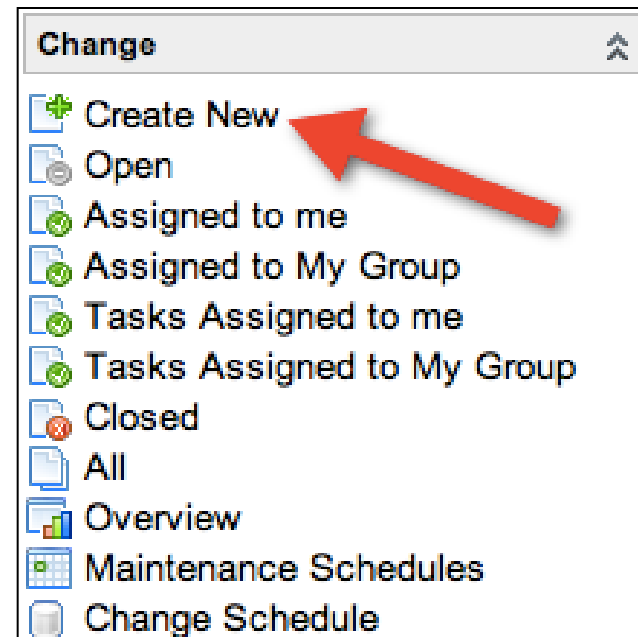
Creating New Changes

To create new changes:

Navigate to the left hand toolbar and find the change application

Click the "Create New" link

This will take the user to the new change form



Users can create changes directly from other forms. To create a change from another form (in this example, incident):

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



New Change Form

TOOL DEMO

Change Request | = Required field

Submit for Acceptance Save & Exit

Draft Requested Acceptance Assessment Build Test Approval CAB Approval Implementation Completed

Change Number:	CHG0030603	Change State:	Draft
Requested by:	Ian Golando	Submission Priority:	Planned
Owner Group:	Fruition Partners	Impact:	3 - Low
Owner:	Ian Golando	Risk:	3 - Low
Change Source:	-- None --	Change Type:	Minor
Location:		Advisory:	<input type="checkbox"/>
IT Provider Service:		Build-Test Required:	<input type="checkbox"/>
Environment:	-- None --	Approval Condition Codes:	Not Yet Requested
IT Component Category L1:	-- None --	Assessment Condition Codes:	-- None --
IT Component Category L2:	-- None --	Implementation Codes:	-- None --
IT Component Category L3:	-- None --	Closure Code:	-- None --
Device/Asset Name:		Watch List:	
Short Description:			
Description: <small>REQ</small>			

Notes | Schedule | Planning | Related Records | QA | Security

Try it! Now it's your turn!

Incident Scenario – 10 minutes

Yale

- Steps to be Performed:
 1. Create a change from an incident
 2. Categorize the change
 3. Find the change in the open change list

Course Agenda

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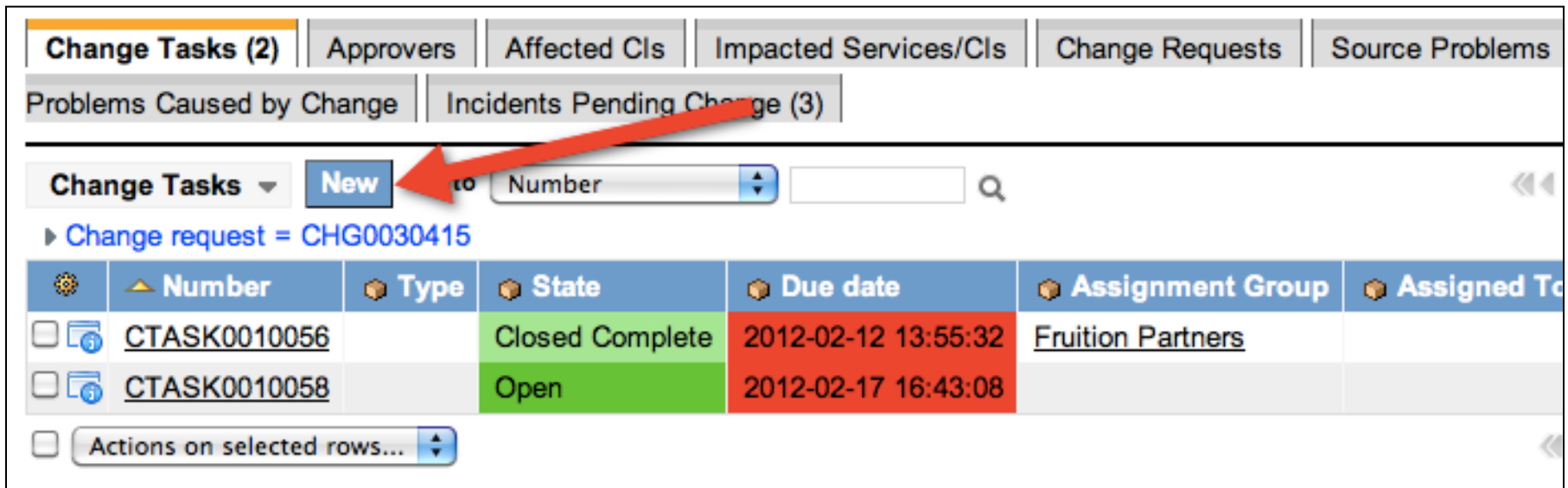
Objectives

- Understand the two ways tasks can be created
- How to work a task
- How to manage task queues

As part of the change management process, several different types of change tasks **will be automatically generated**. A majority of all change tasks will be auto-generated.

However, there may be times where additional work is needed for a change; work that is not covered by the pre-generated tasks. Users have the ability to create their own change tasks to be assigned. To do this:

At the bottom of the change form, under the change tasks tab, there is a “New” button. Click this:



The screenshot shows a web interface for change management. At the top, there are several tabs: 'Change Tasks (2)', 'Approvers', 'Affected Cls', 'Impacted Services/Cl s', 'Change Requests', and 'Source Problems'. Below these, there are two more tabs: 'Problems Caused by Change' and 'Incidents Pending Change (3)'. The 'Change Tasks' tab is active, showing a 'Change Tasks' dropdown menu with a 'New' button highlighted by a red arrow. Below the 'New' button, there is a search bar with the text 'to Number' and a search icon. Below the search bar, there is a link that says 'Change request = CHG0030415'. Below the link, there is a table with the following columns: 'Number', 'Type', 'State', 'Due date', 'Assignment Group', and 'Assigned To'. The table contains two rows of data:

Number	Type	State	Due date	Assignment Group	Assigned To
CTASK0010056		Closed Complete	2012-02-12 13:55:32	Fruition Partners	
CTASK0010058		Open	2012-02-17 16:43:08		

At the bottom of the table, there is a button that says 'Actions on selected rows...'.

New Task Form

Change Task | = Required field **Save & Exit**

Number:	<input type="text" value="CTASK0010219"/>	State:	<input type="text" value="Open"/>
Configuration Item:	<input type="text"/>	Completion Code:	<input type="text" value="-- None --"/>
Priority:	<input type="text" value="5 - Low"/>	Assignment Group:	<input type="text" value="Fruition Partners"/>
Due date:	<input type="text"/>	Assigned To:	<input type="text" value="Suneetha Pothireddy"/>
Change request:	<input type="text" value="CHG0030415"/>	Work notes list:	
Type:	<input type="text" value="-- None --"/>		
Short Description:	<input type="text"/>		
Description:	<input type="text"/>		
Work Notes:	<input type="text"/>		

Save & Exit

Notes about creating tasks:

- New tasks are automatically assigned to the **assignment group** and **assigned to** values of the change the task is coming from; these can be changed
- The only “required” field is the task **type** drop down. However, if additional information is not filled out the task will not be completed
- If the user creates tasks, they will prevent the change from closing at the end of the process, as all tasks must be closed
- Tasks can have their own CI’s

Working within tasks is very similar to working within changes.

Key factors of the task form:

Work notes: change tasks have their own work notes and activity fields. This will allow users to log their work onto the specific task, as opposed to logging it on the change record

Work notes list: Any users added this list will receive updates anytime updates are made to the work notes field. This will allow people to maintain visibility on the work being done to work a task.

State: The state field only has 3 values; Open, Work in Progress, Closed Complete. Once the user has accepted the task, they should move it to the Work in Progress state.

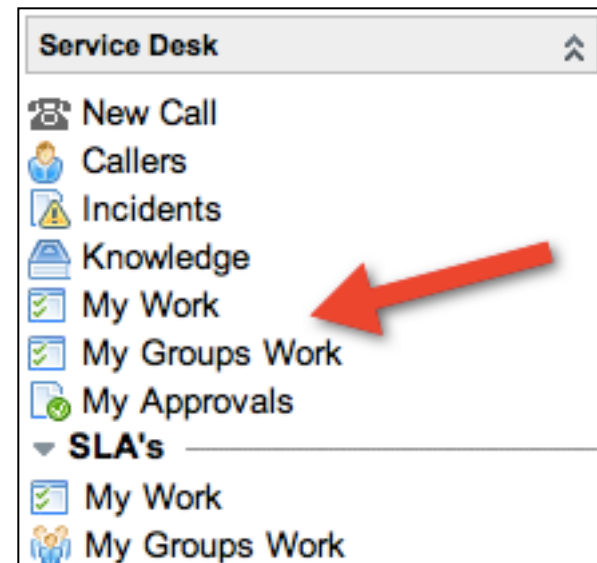
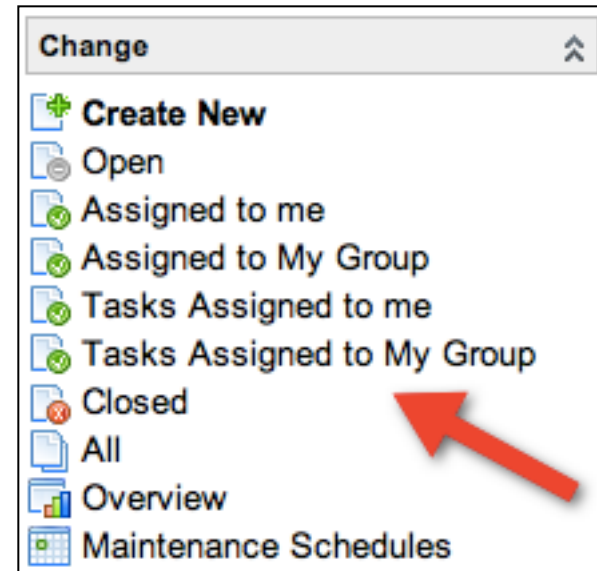
Completion Code: When moving to the closed state, the user needs to signify what level the task was completed. There are only 3 values: Complete, Partially Complete, Not Complete. The user should fill out the level the task was fulfilled.

Assignment Group/Assigned to: Users have the ability to (re)assign tasks as necessary.

Finding task to work on:

Users have 2 options to find tasks that are assigned to them and their assignment groups.

1. The change application has 2 lists, **Tasks assigned to me** (tasks assigned to the logged in user) and **Tasks assigned to My Group** (tasks assigned to the logged in user's assignment groups)
2. The Service Desk Module has 2 lists, **My Work** and **My Groups Work** which will show ALL records assigned to the user and the user's assignment groups, which will include change tasks



Steps to take:

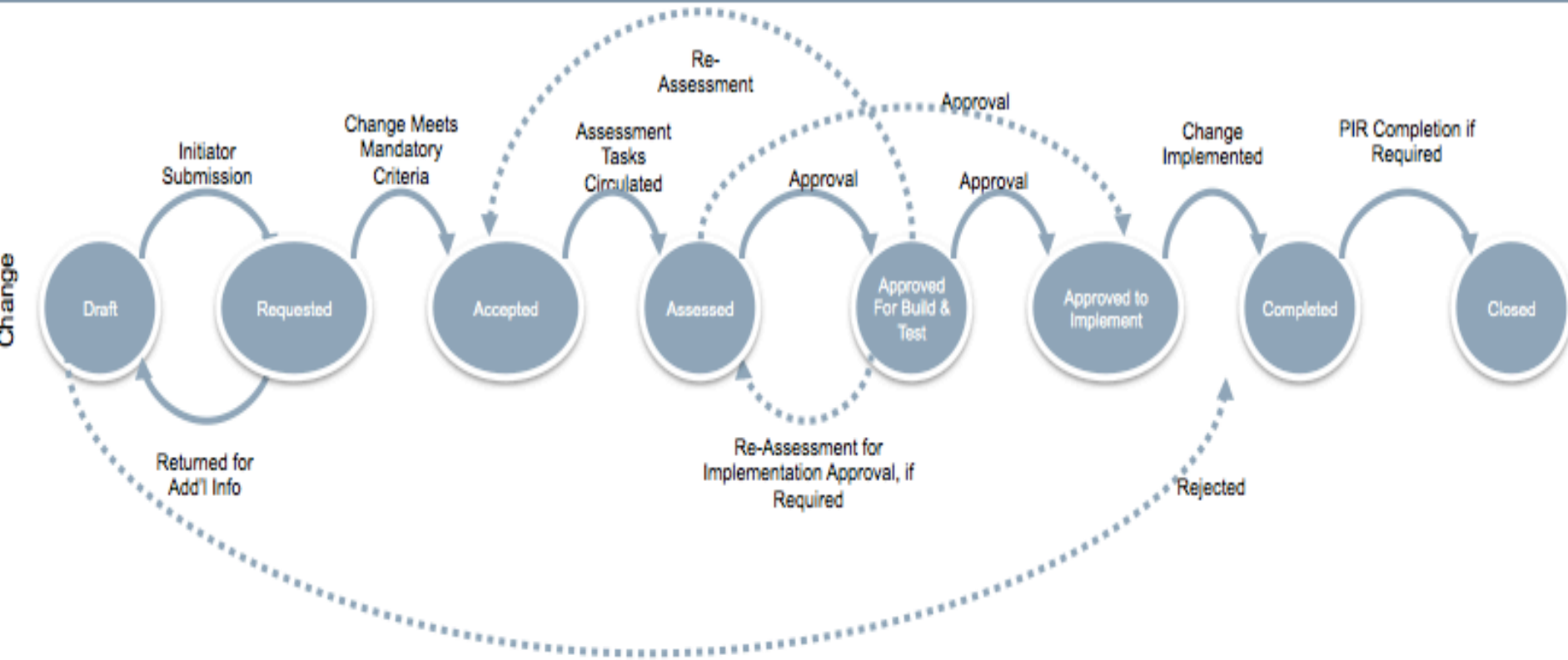
1. Create a new task on a change and assign it to the person sitting next to you
2. Create a new task and assign it to yourself
3. Find the task you have assigned to yourself using the Self-Service application and a filter

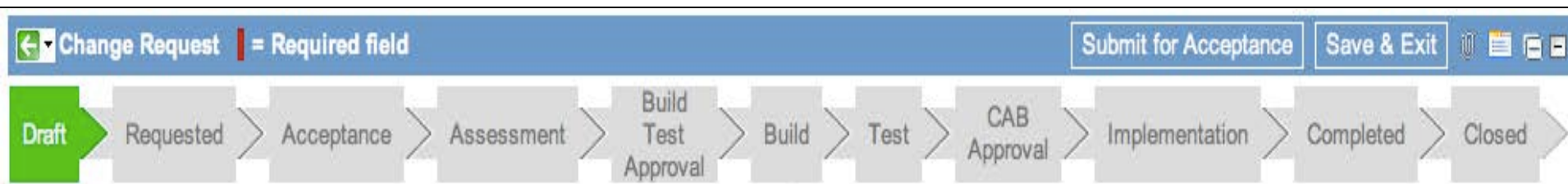
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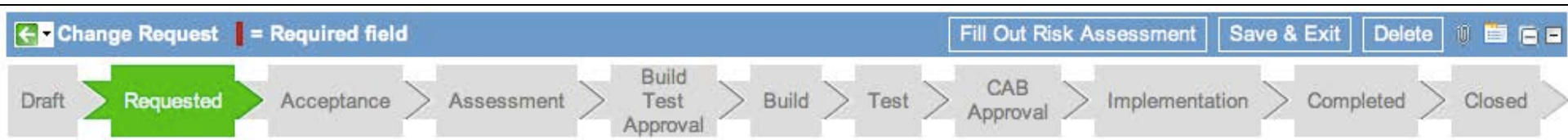
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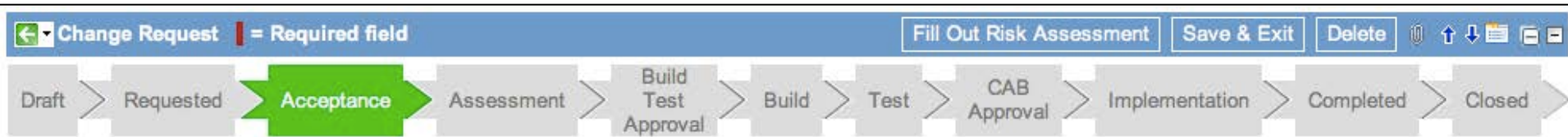




Changes are automatically set to the Draft state upon initial creation. This is the default state, similar to “new” for an incident.



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

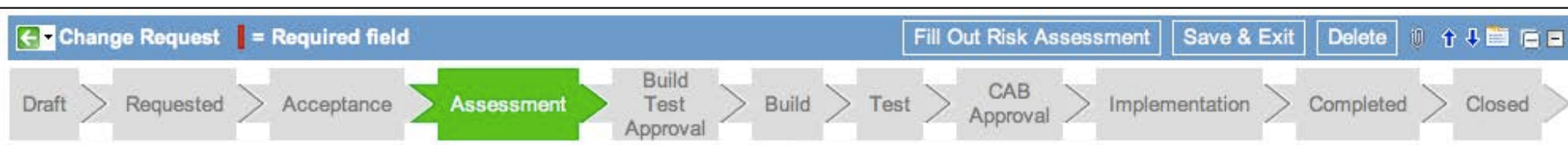


The user can move to the Acceptance state by hitting the “Submit for Acceptance” Stage. The user should fill out the risk assessment form after hitting this button. Once the form has been filled out, the Approvers will be able to approve the change.

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

A screenshot of a software interface showing a table of Change Tasks. The table has columns for Number, Type, State, Due date, Assignment Group, Assigned To, and Short I. One row is visible with the following data: CTASK0010159, Assessment, Open, 2012-03-13 11:37:35, CHANGE_MGR. Above the table are navigation and search options, including a 'Go to' field and a search icon. Below the table is an 'Actions on selected rows...' dropdown menu.

Number	Type	State	Due date	Assignment Group	Assigned To	Short I
CTASK0010159	Assessment	Open	2012-03-13 11:37:35	CHANGE_MGR		



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.

Change Tasks (2)	Approvers (6)	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				
▶ Change request = CHG0030604							
	Number	Type	State	Due date	Assignment Group	Assigned To	Short
<input type="checkbox"/>	CTASK0010158	General	Open		Fruition Partners	Ian Golando	Test
<input type="checkbox"/>	CTASK0010160	Assessment	Open	2012-03-13 11:40:12	CHANGE_MGR		
Actions on selected rows...							



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.

Advisory:	<input type="checkbox"/>
Build-Test Required:	<input checked="" type="checkbox"/>
Approval Condition Codes:	Requested

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



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.

A screenshot of a web application interface showing a table of Change Tasks. The table has columns for Number, Type, State, Due date, Assignment Group, and Assigned To. Two rows are visible: one for an Assessment task (CTASK0010165) in a 'Closed Complete' state, and one for a Build task (CTASK0010166) in an 'Open' state. The Build task is assigned to 'Fruition Partners'.

Change Tasks (2)	Approvers (12)	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			
▶ Change request = CHG0030616						
Number	Type	State	Due date	Assignment Group	Assigned To	Show
<input type="checkbox"/> CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
<input type="checkbox"/> CTASK0010166	Build	Open	2012-03-15 11:58:44	Fruition Partners		Build Ta
<input type="checkbox"/> Actions on selected rows...						

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

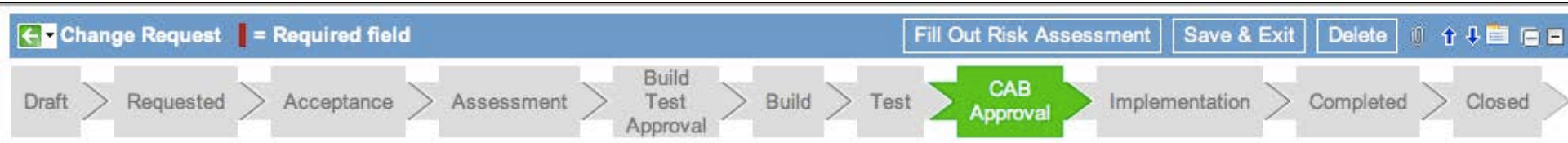


Once the Build task has been completed, the change will move to the Test stage. A new task will be generated, the Test task. It is automatically assigned to the change group.

A screenshot of a software interface showing a table of Change Tasks. The table has columns for Number, Type, State, Due date, Assignment Group, Assigned To, and Short. Three tasks are listed: CTASK0010165 (Assessment, Closed Complete), CTASK0010166 (Build, Closed Complete), and CTASK0010167 (Test, Open). The 'Test' task is highlighted in green.

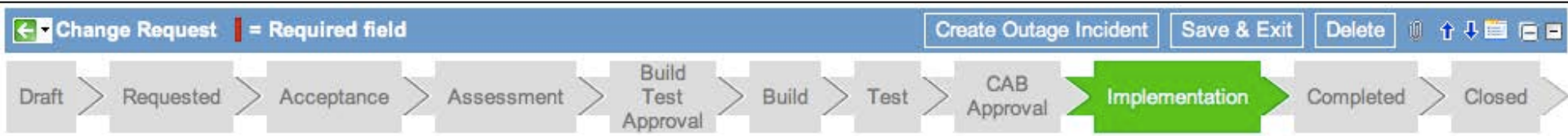
Change Tasks (3)	Approvers (12)	Affected CIs	Impacted Services/CIs	Risk Assessment (1)	Change Requests	Source Problems
Problems Caused by Change Incidents Pending Change						
Change Tasks	New	Go to	Number			1
▶ Change request = CHG0030616						
Number	Type	State	Due date	Assignment Group	Assigned To	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 Task
CTASK0010167	Test	Open	2012-03-14 12:00:24	Fruition Partners		Test Task
Actions on selected rows...						

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



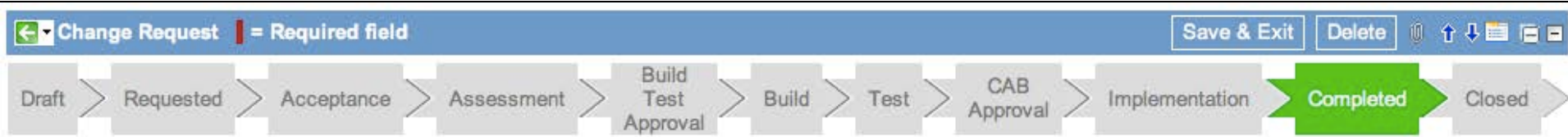
The change will move to the CAB Approval stage once the Test task has been completed. A new round of approvals will be sent out. Only 1 CAB member needs to approve for the change to advance. If the "Build-Test Required" checkbox was not checked, the change would have moved from this state straight from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

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		Q	1	
▶ 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			



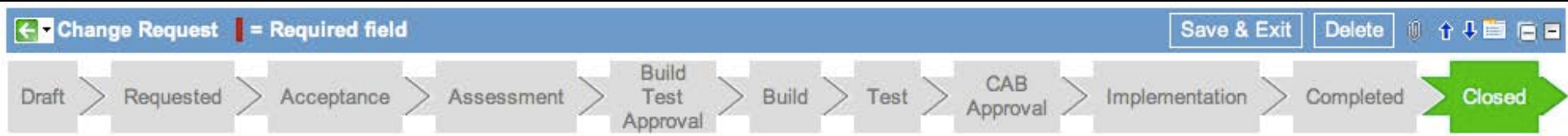
Once the change has received CAB approval, it will move to the implementation stage. A new task will be generated, the Implementation Task. This task will automatically be assigned to the Change Group and the Change Owner.

Change Tasks (5)	Approvers (18)	Affected Cls	Impacted Services/Clis	Risk Assessment (1)	Change Requests	Source Problems	
Problems Caused by Change		Incidents Pending Change					
Change Tasks ▾	New	Go to	Number	<input type="text"/>	Q	1 to 5 of 5	
▶ Change request = CHG0030616							
	▲ Number	Type	State	Due date	Assignment Group	Assigned To	Short Description
<input type="checkbox"/>	CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
<input type="checkbox"/>	CTASK0010166	Build	Closed Complete	2012-03-15 11:58:44	Fruition Partners		Build Task
<input type="checkbox"/>	CTASK0010167	Test	Closed Complete	2012-03-14 12:00:24	Fruition Partners		Test Task
<input type="checkbox"/>	CTASK0010168	Implementation	Closed Complete	2012-03-15 12:05:32	Fruition Partners	Ian Golando	Implementation Task



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.

Change Tasks (5)							
Approvers (18)		Affected CIs		Impacted Services/CIs		Risk Assessment (1)	Change Requests
Problems Caused by Change				Incidents Pending Change			
Change Tasks							
New							
Go to <input type="text" value="Number"/>							
Change request = CHG0030616							
Number	Type	State	Due date	Assignment Group	Assigned To	Sho	
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 T
CTASK0010167	Test	Closed Complete	2012-03-14 12:00:24	Fruition Partners			Test T
CTASK0010168	Implementation	Closed Complete	2012-03-15 12:05:32	Fruition Partners	Ian Golando		Implem
CTASK0010169	Post Implementation	Open	2012-03-15 12:07:27	Change Advisory Board			Implem



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

Course Agenda

Change Overview	10 minutes
ServiceNow Navigation	15 minutes
Working with Changes	30 minutes
Working with Tasks	20 minutes
Break	10 minutes
Moving a Change Through the Lifecycle	25 minutes
Approvals	10 minutes
Creating Templates	15 minutes

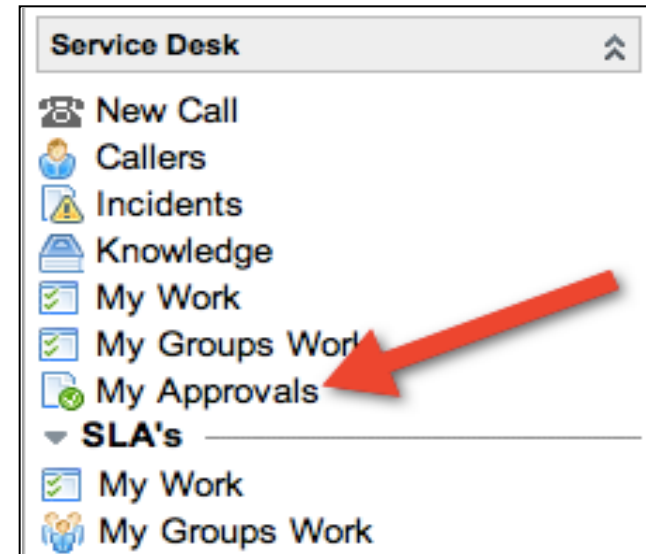
After completing this module, you will be able to:

Objectives

- Find/View Approvals
- Approve/Deny a Change

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.

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.



A screenshot of the "My Approvals" page in the Service Desk application. The page has a header with "Approvals" and a "New" button. Below the header, there is a breadcrumb trail: "All > Approver = Ian Golando". The main content is a table with the following columns: "State", "Approver", "Comments", and "Approval for". There are two rows of data, both with a "State" of "Approved" and an "Approver" of "Ian Golando". The "Approval for" values are "CHG0030413" and "CHG0030414".

State	Approver	Comments	Approval for
Approved	Ian Golando		CHG0030413
Approved	Ian Golando		CHG0030414

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.

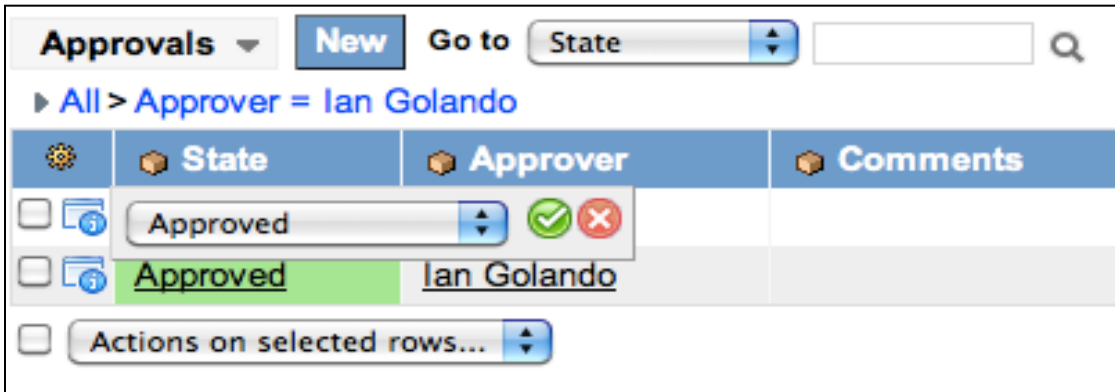
Simply change the state field and then hit the Save & Exit button.

At the bottom they can also see a summary of the item that needs to be approved.

The screenshot displays a web application interface for entering an approval. At the top, there is a navigation bar with a back arrow, the text "Approval", and a red indicator "= Required field". On the right side of the bar are buttons for "Save & Exit" and "Delete", along with icons for help and refresh. Below the bar, the form contains several fields: "Approver:" with a dropdown menu showing "Ian Golando"; "State:" with a dropdown menu showing "Approved"; and "Approval for:" with a text input field containing "CHG0030413". There is also a "Comments:" section with a text area. Below the form is an "Activity" section with a list of events, including state changes and email notifications. At the bottom, there is a "Summary of Item being approved" section with a "Change Request" and a table of attachments.

Summary of Item being approved	
Change Request	
Manage Attachments (1): New Text Document.txt [rename] [view]	
Change Number:	CHG0030413
Requested by:	
Configuration Item:	
Change Type:	Major
Planned Start Date:	
Risk:	1 - High

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.

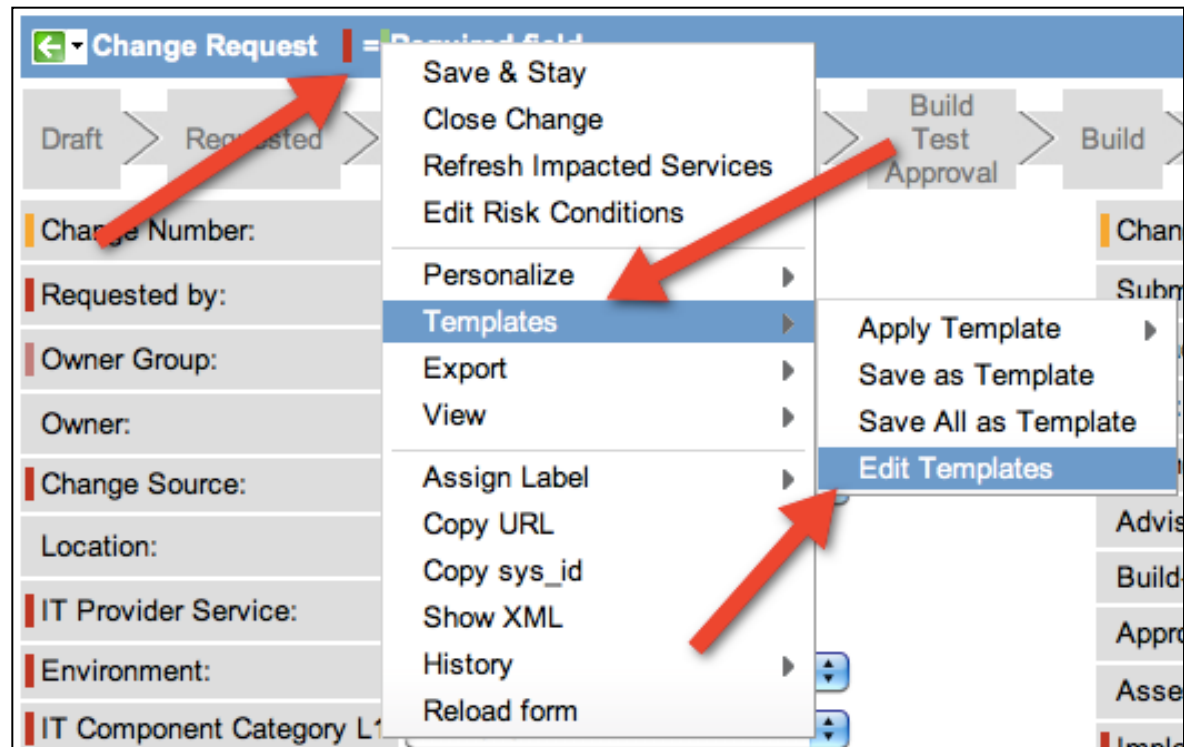


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Creating Templates	15 minutes

Users have the ability to create “templates” – commonly created tickets. They can predefine what values they want various fields to have.

To do this:

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

The screenshot shows a web application interface for creating a template. The form is titled "Template" and has a blue header bar with a back arrow and the title. In the top right corner of the header, there are two buttons: "Save & Exit" and "Schedule".

The form fields are as follows:

- Name:** A text input field containing "TEMPLATE33".
- Table:** A dropdown menu showing "Change Request [change_request]".
- Active:** A checkbox that is checked.
- User:** A text input field containing "Ian Golando".
- Group:** An empty text input field.
- Global:** An unchecked checkbox.

Below these fields is a "Short description:" label followed by an empty text area. Underneath is a "Template:" label followed by a large greyed-out area. At the bottom of the form is a dropdown menu with "-- choose field --" and a text input field with "-- value --".

At the bottom left of the form, there are two buttons: "Save & Exit" and "Schedule".

Users should give the template a name.

Under the "Template:" bar, the user will be able to select all fields available for the change form, and what they would like the value to be.

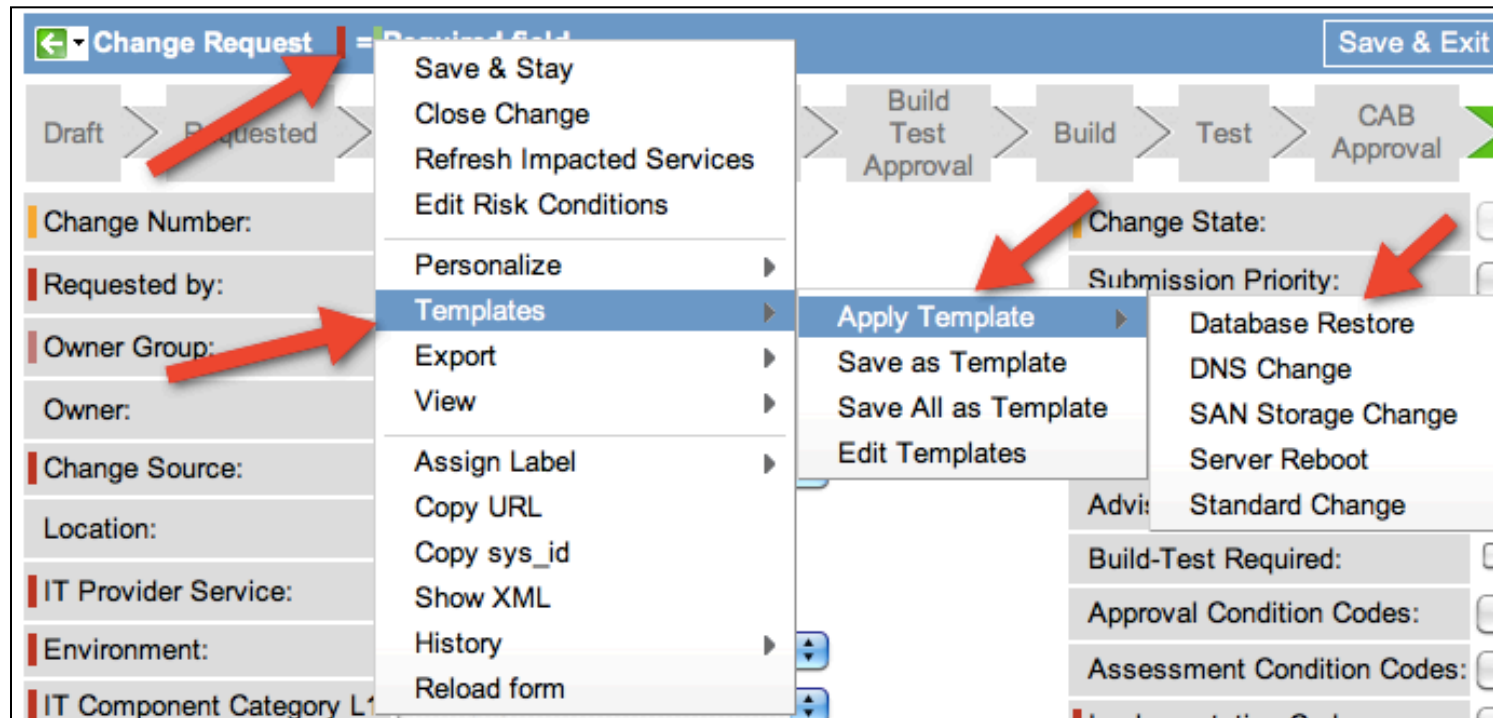
Once they have added all fields and values they wish, they simply need to click "Save and Exit"

NOTE: Do not change the table, and do not uncheck active. Changing the table will change what fields you have access to (meaning not the change fields). Unchecking active will cause it to not appear in the template list (taking it out of "production", in a sense).

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 template's settings to the change ticket



Steps to take:

1. Create your own template using the following fields:
 1. Change source
 2. IT Provider Service
 3. Environment
 4. IT Component Category L1
2. Apply the template you created to a change ticket to verify it works

Browser navigation bar with address: <https://yaletaining.service-now.com/navpage.do>

File Edit View Favorites Tools | x Share Browser WebEx | x Convert Select | x Google

★ Favorites | MakeHaven | Service Now Training Mat... | Home - Motley Fool Stoc... | ServiceNow - UAFS Servic... | SNCWiki | ITS050A - ServiceNow

ServiceNow IT Service ... | Deployment Coaches | ITS ...

IT Service Management Suite Switch to the c

Welcome: Michael Okrent

Change Request | = Required field

IT Provider Service:	Data Warehouse Solu...	Build Test Required:	<input type="checkbox"/>
Environment:	Production	Approval Condition Codes:	Approved
IT Component Category L1:	Data	Assessment Condition Codes:	Request for Impl CAB Agenda
IT Component Category L2:	Data Element	Implementation Codes:	-- None --
IT Component Category L3:	-- None --	Closure Code:	-- None --
Device/Asset Name:	dwh1	Watch List:	
		Opened:	2012-05-04 15:46:40
		Template:	

Short Description: add column x to dwh1

Description:

- Notes
- Schedule**
- Planning
- Related Records
- QA
- Security

Schedule

Requested Implementation Date:	
Planned Start Date:	2012-05-24 15:48:13
Planned End Date:	2012-05-24 15:48:17
Actual Start Date:	
Actual End Date:	
Assessments Due Date:	