Yale

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

Course Agenda

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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

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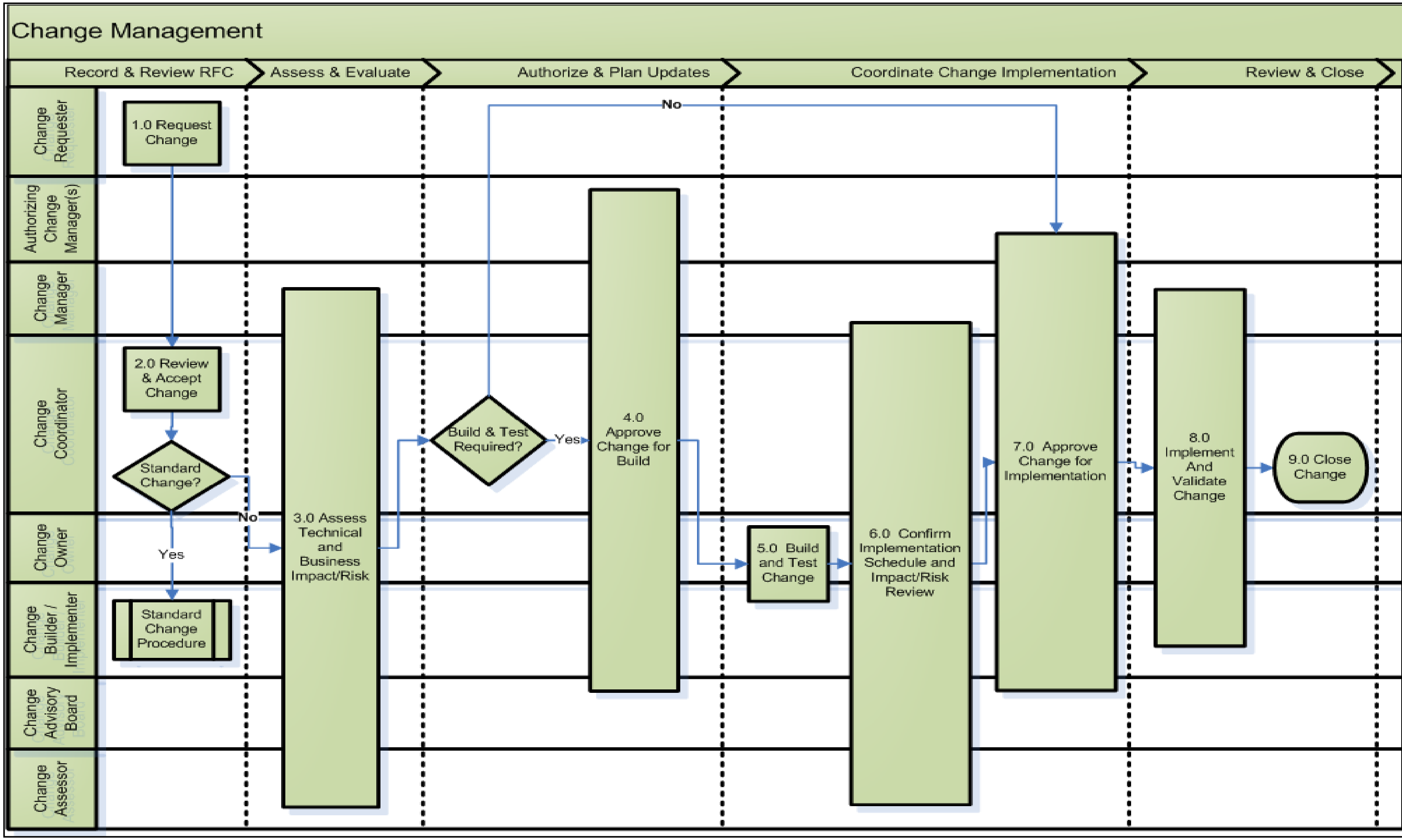

Roles

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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*

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After completing this module, you will be able to:

Objectives

- View Changes
- Manage the available views for each queue

Viewing Changes

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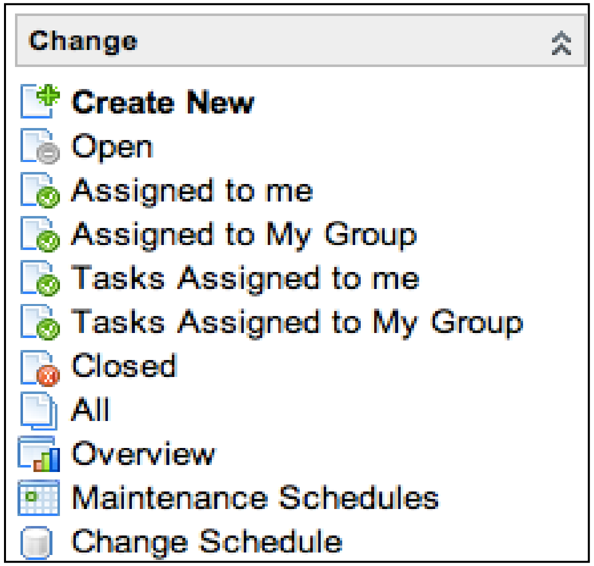
The incident application has various lists that will help the user view incidents.



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 Rules

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- 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.

Standard Change

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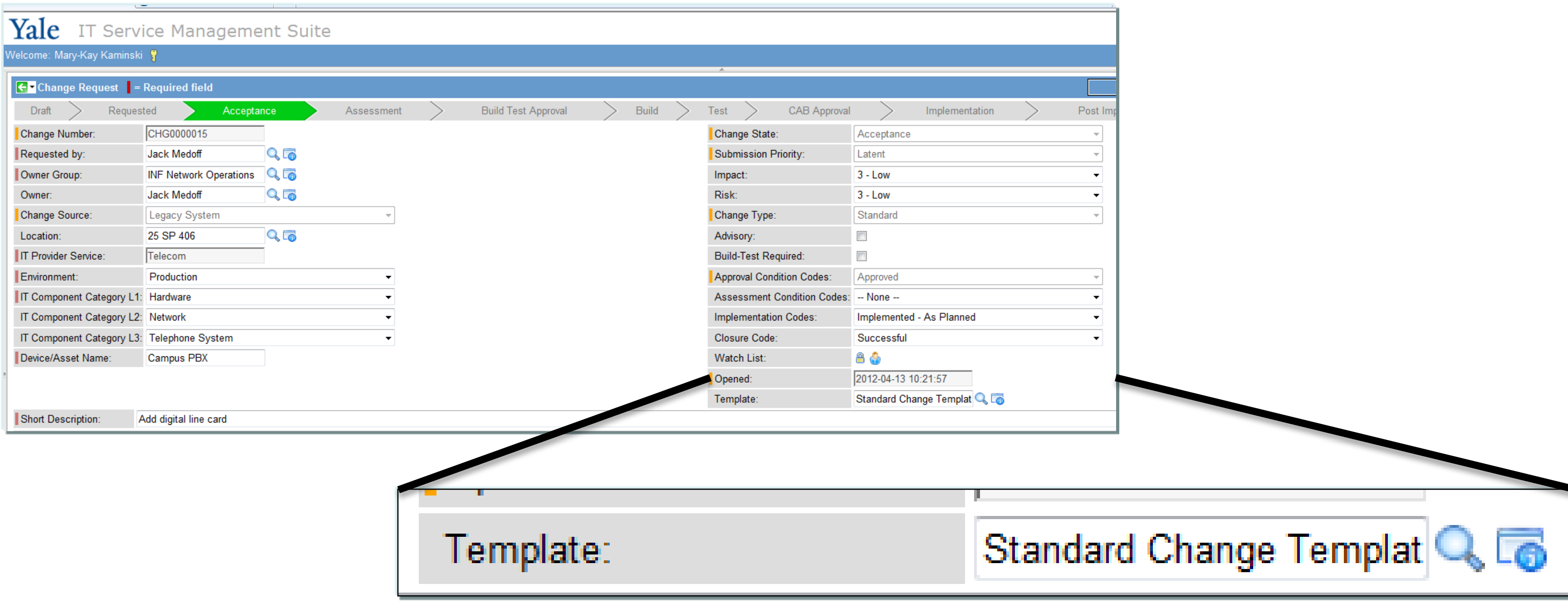
- Search in template field (right side Above Short Description) for standard change and click save and stay



- Bug in standard change cannot close at this time.

Viewing Changes

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Example of a list of changes: The All list

Change Requests | New | Go to | Change Number

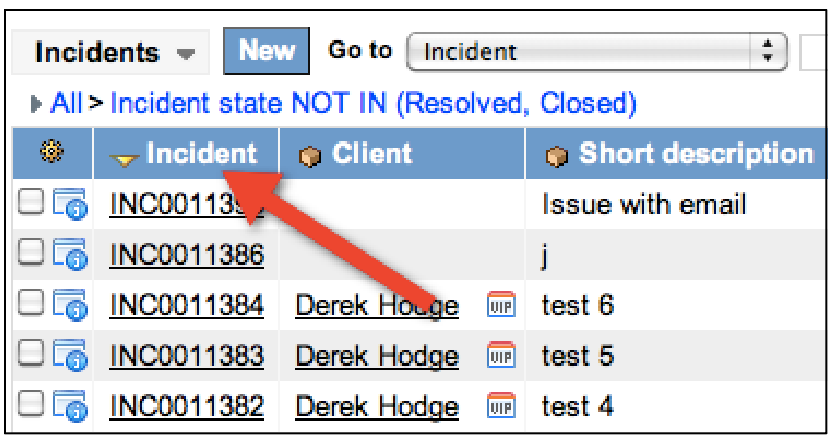
All

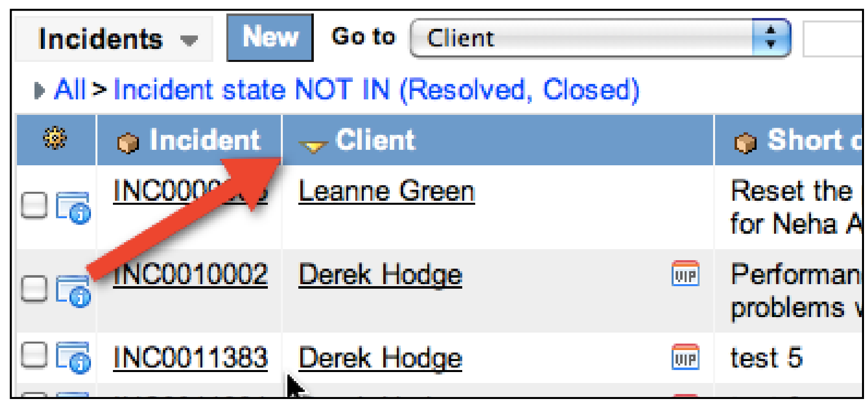
	Change Number	Short Description	Change State	Approval Condition Codes
	CHG0030616	Testing States	Completed	Approved
	CHG0030615	Testing States	Implementation	Approved
	CHG0030609	Testing states	CAB Approval	Approved
	CHG0030608	Test	Assessment	Requested
	CHG0030607	Test for test	CAB Approval	Requested

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

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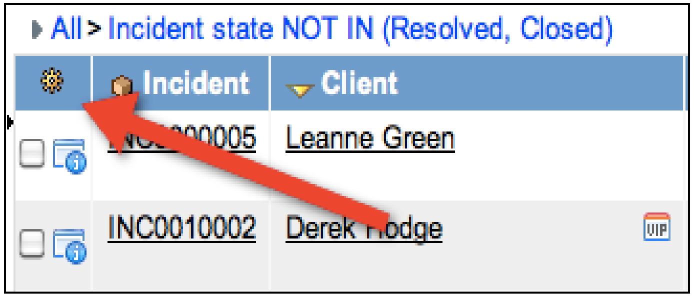
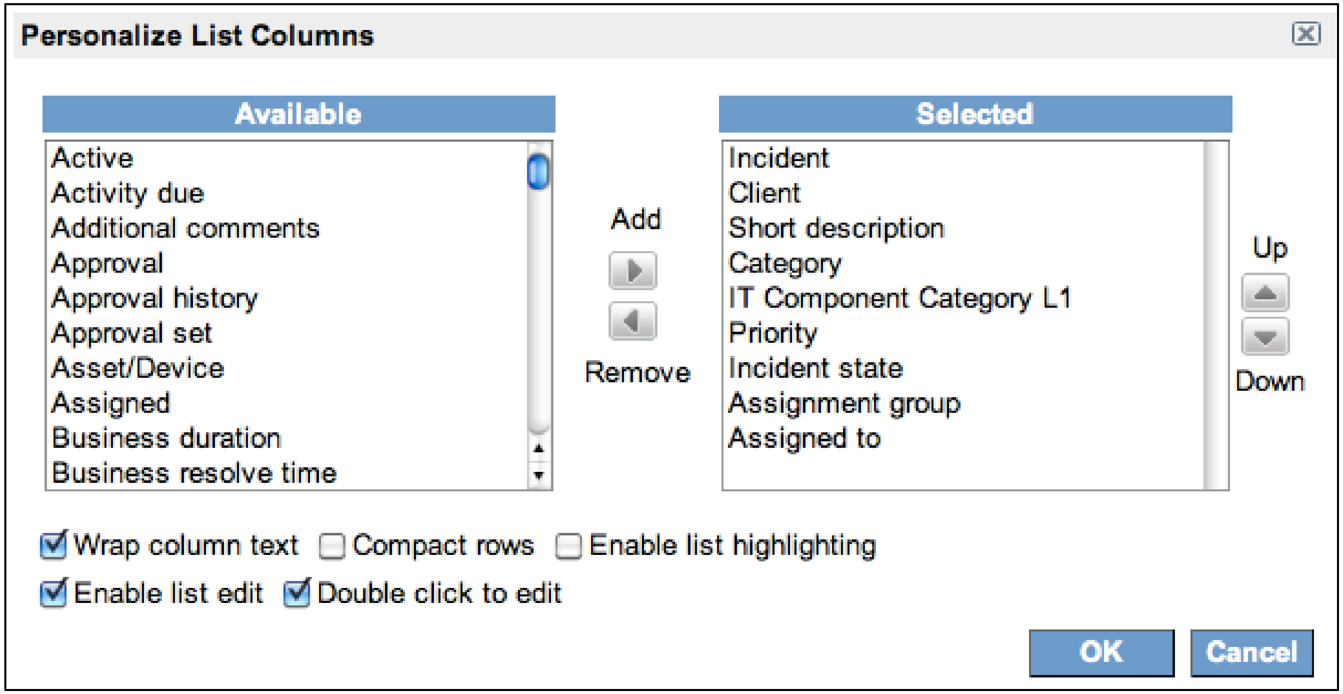
All lists, in the upper left corner, have a gear button. Pressing this brings about the personalized list options screen:



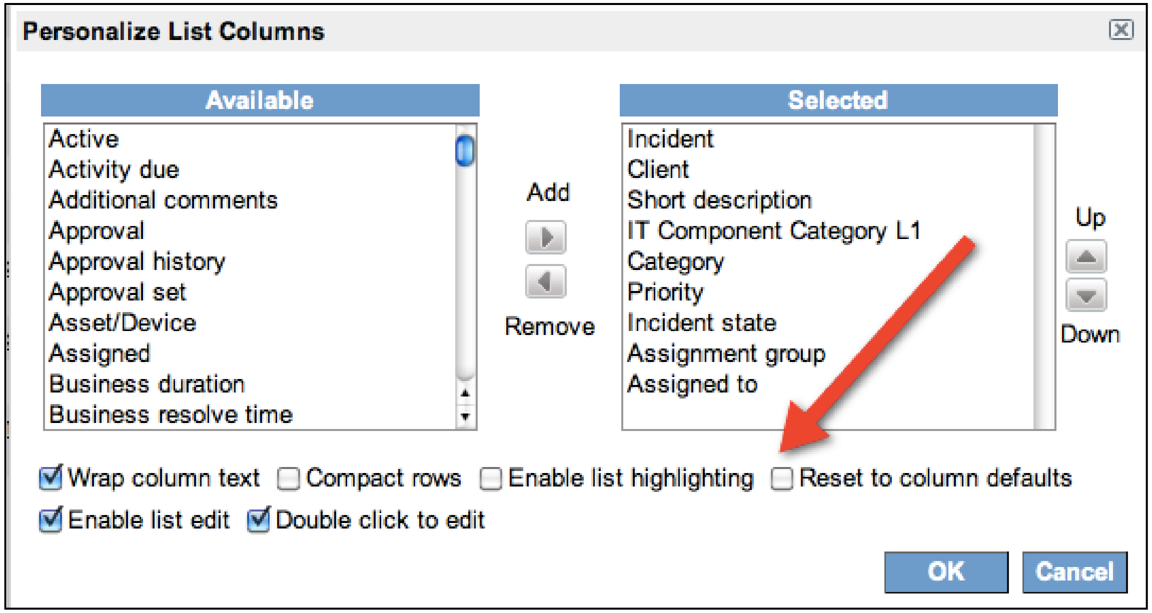


Personalized Lists

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



Filters

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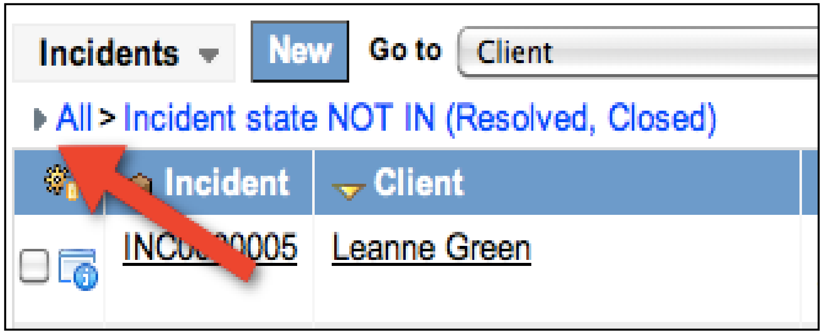
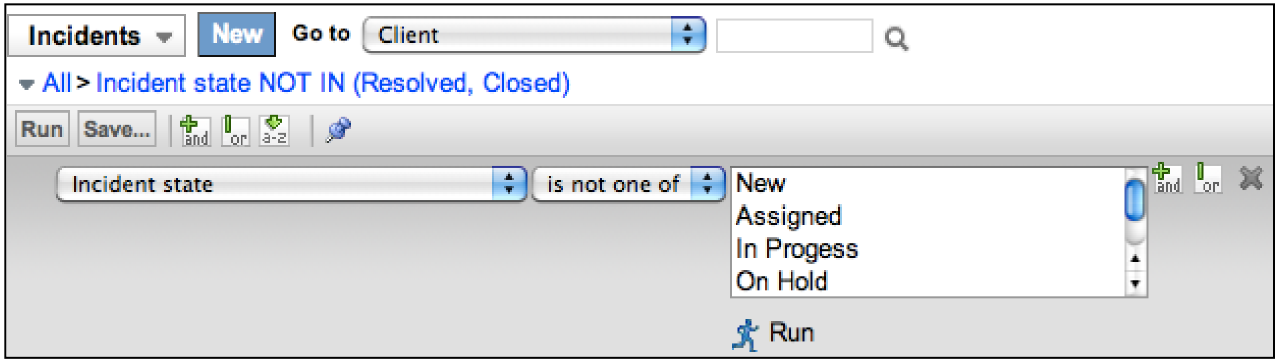
Users can run filters on ANY list. To do this:

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

Try it!

Now it's your turn!

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<u>ServiceNow Navigation (~ 5 Minutes)</u>

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

Course Agenda

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Working With Changes

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After completing this module, you will be able to:

Objectives

- Create a new Change
- Understand Form Fields

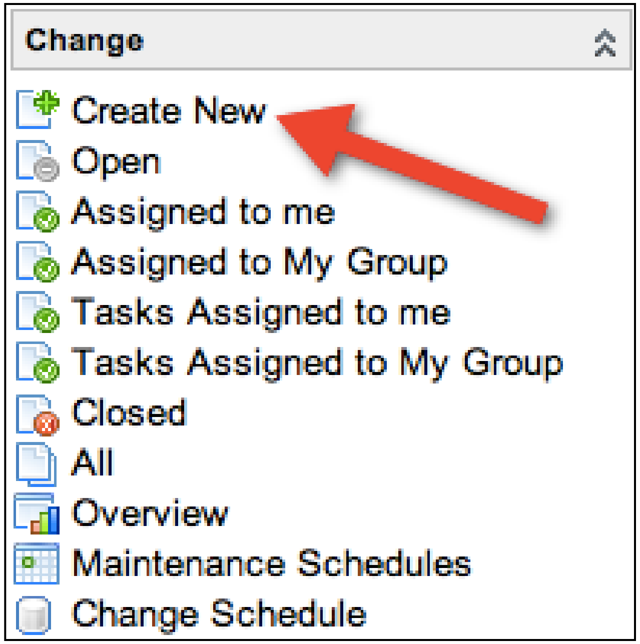
Creating New Changes

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



Creating New Changes

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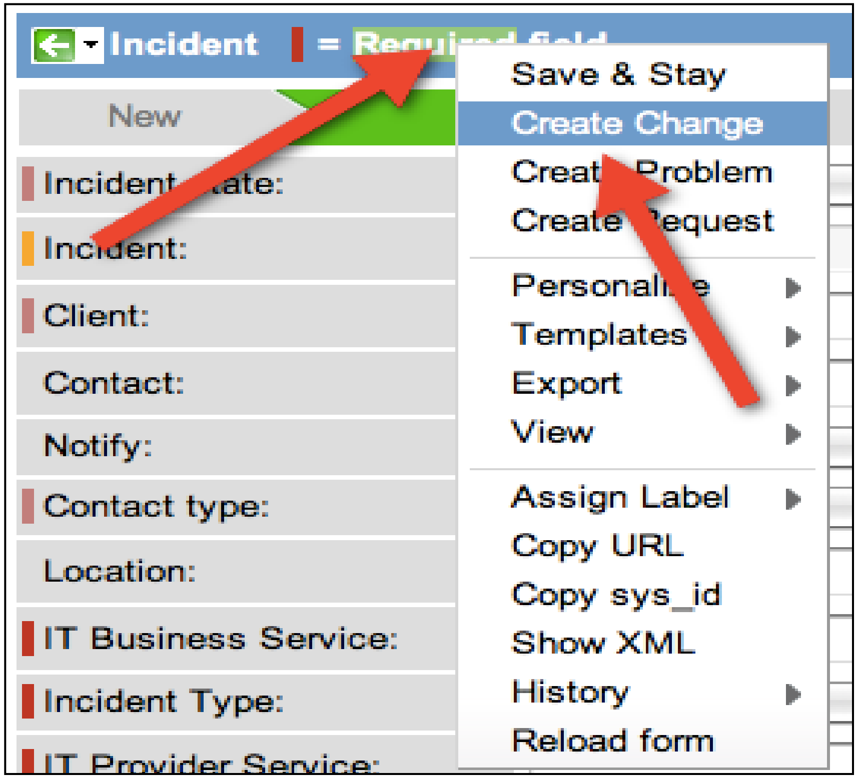
Users can create changes directly from other forms. To create a change from another form (in this example, incident):

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



New Change Form

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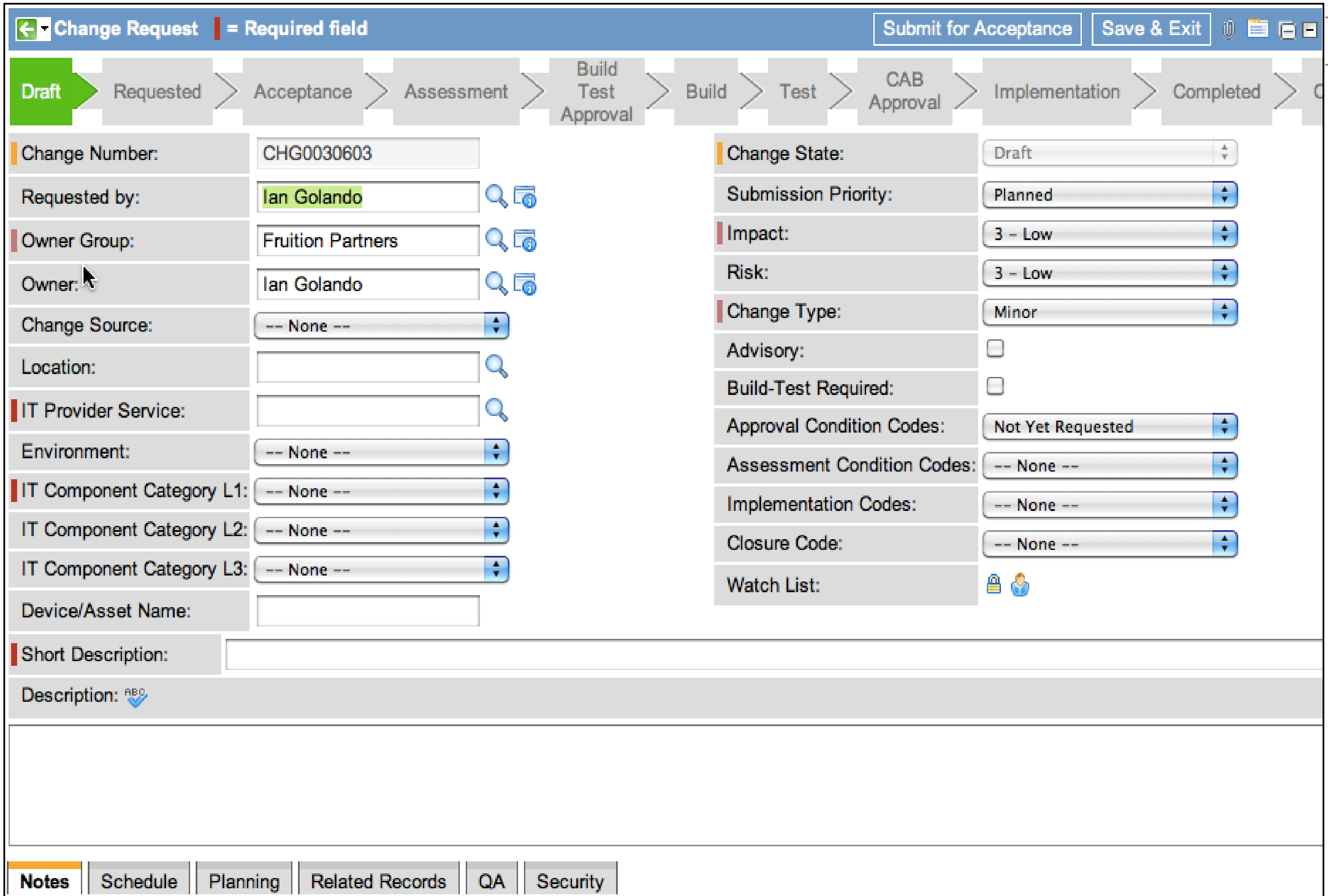
TOOL DEMO



Try it! Now it's your turn!

Incident Scenario – 10 minutes

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- Steps to be Performed:

1. Create a change from an incident
2. Categorize the change
3. Find the change in the open change list

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Working With Tasks

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After completing this module, you will be able to:

Objectives

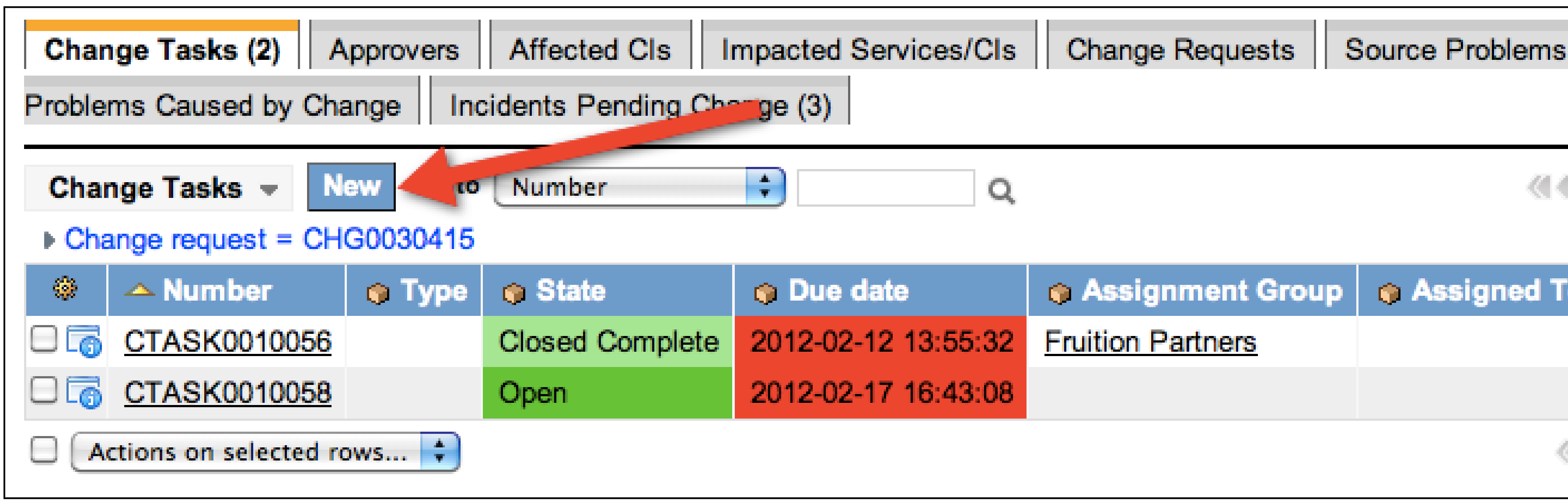
- Understand the two ways tasks can be created
- How to work a task
- How to manage task queues

Creating Tasks

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:



Creating Tasks

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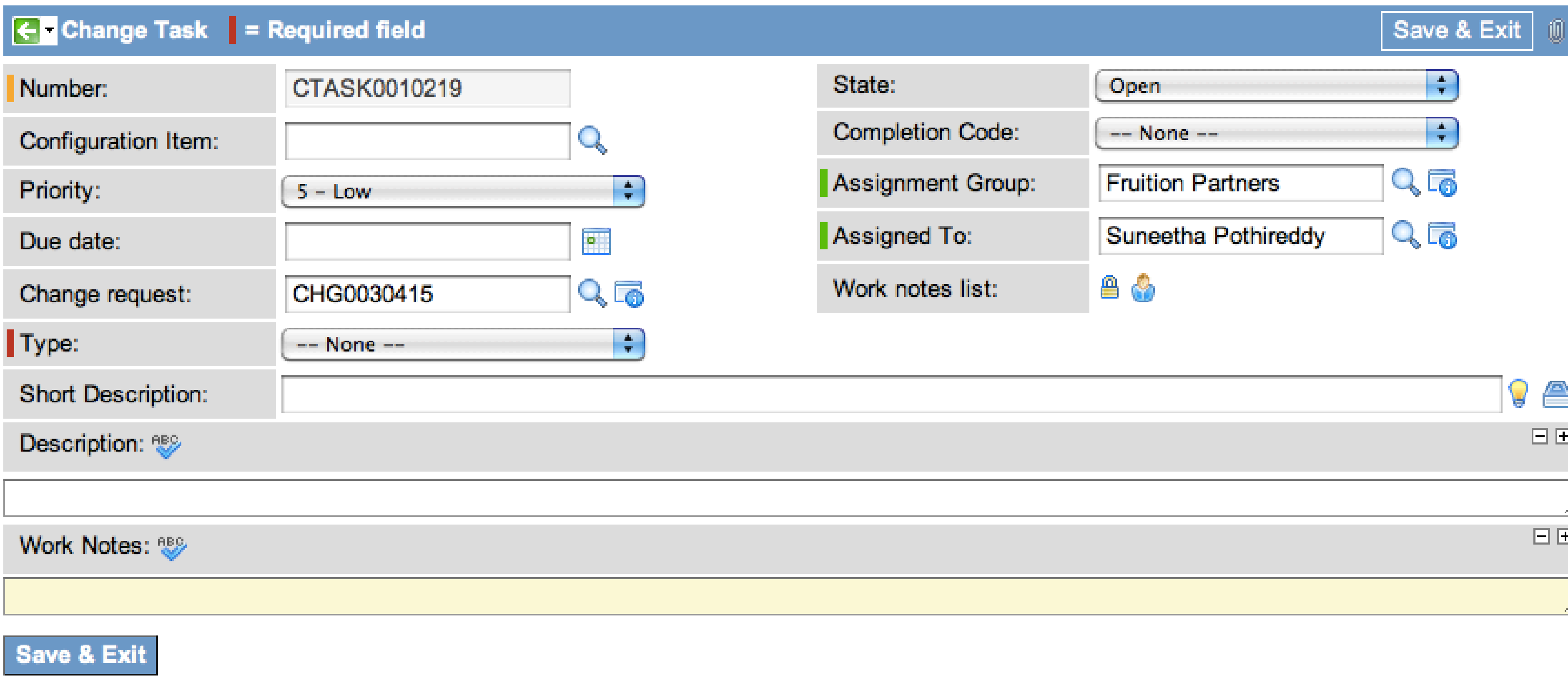
New Task Form



Creating Tasks

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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

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 Work

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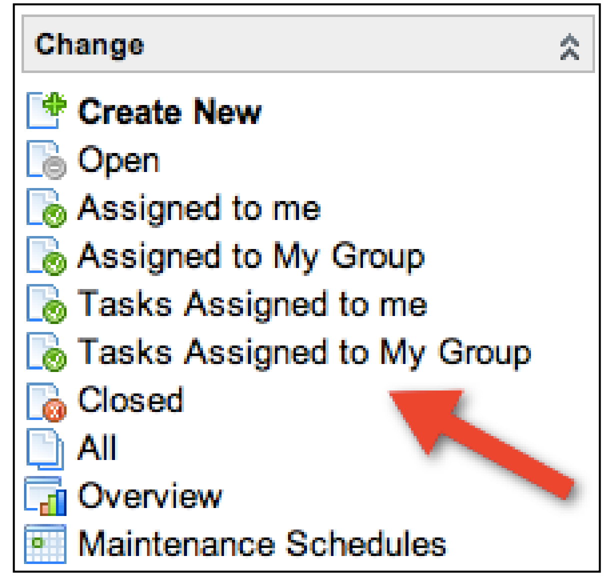
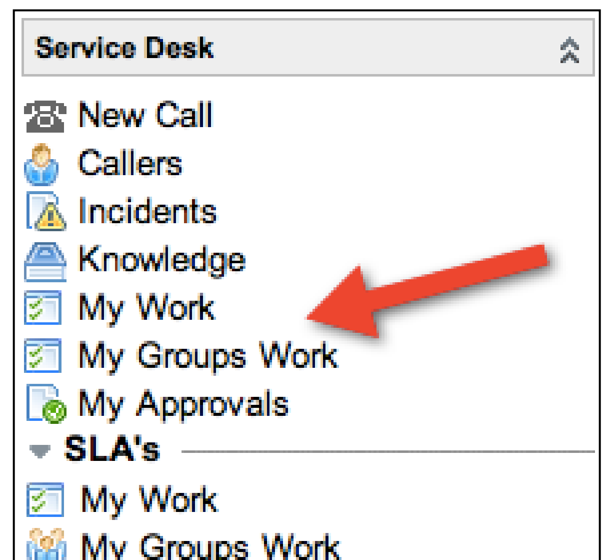
Finding task to work on:

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





Now you try!

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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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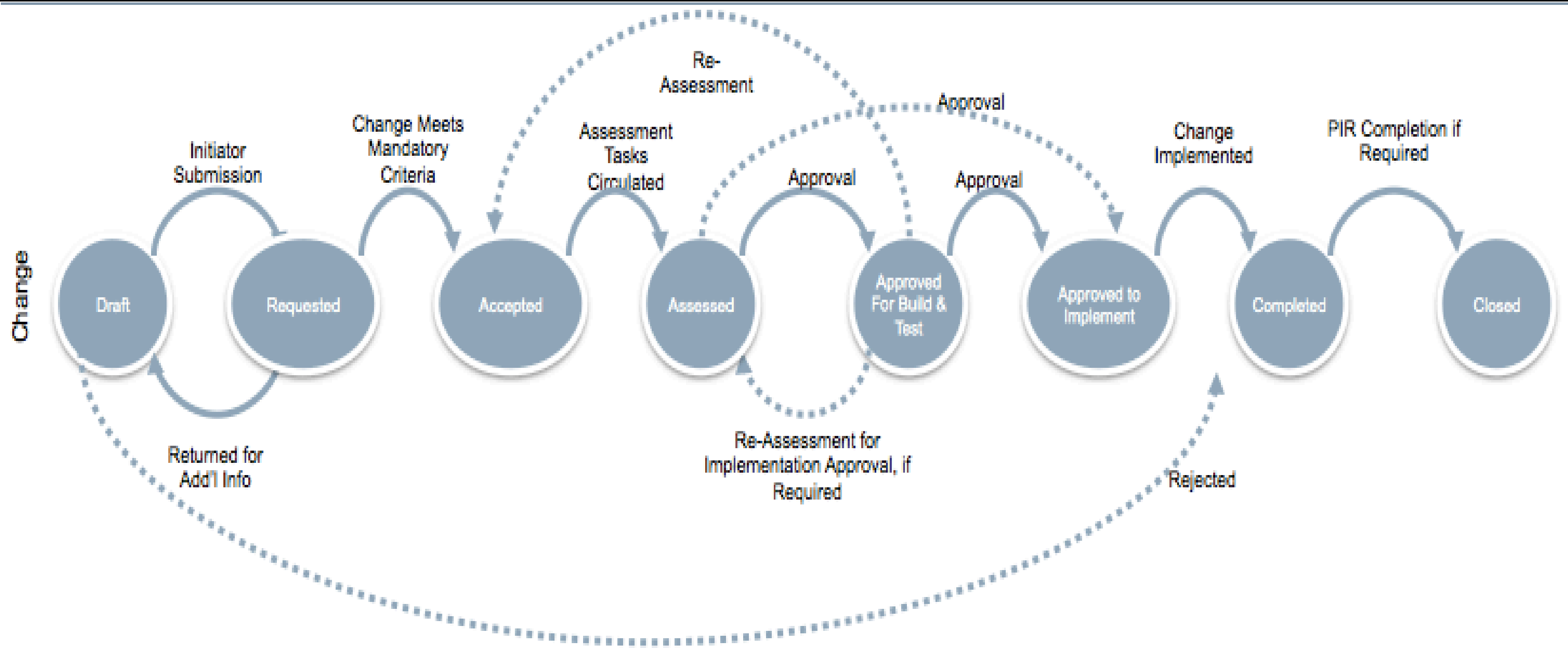
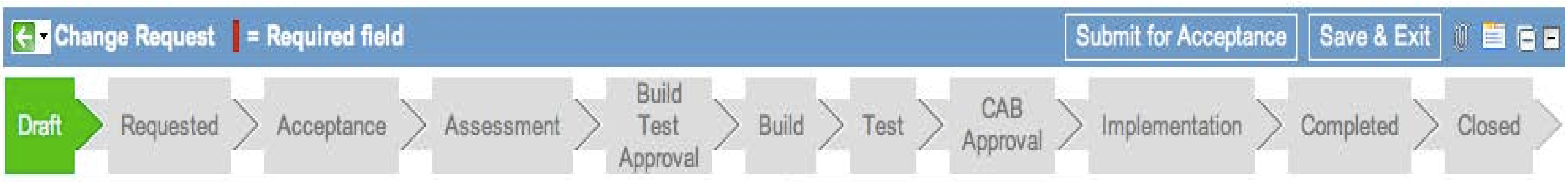
Change States

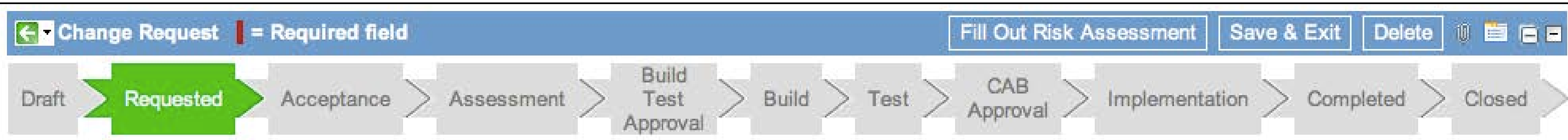


Draft



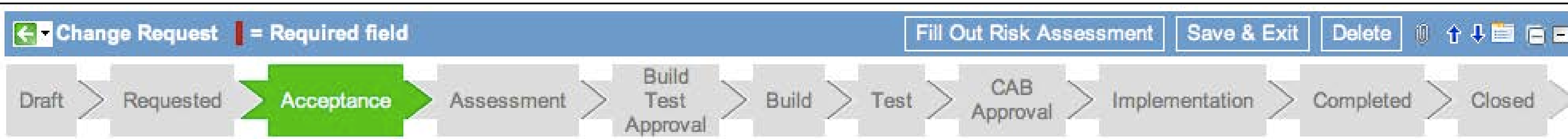
Changes are automatically set to the Draft state upon initial creation. This is the default state, similar to “new” for an incident.

Requested



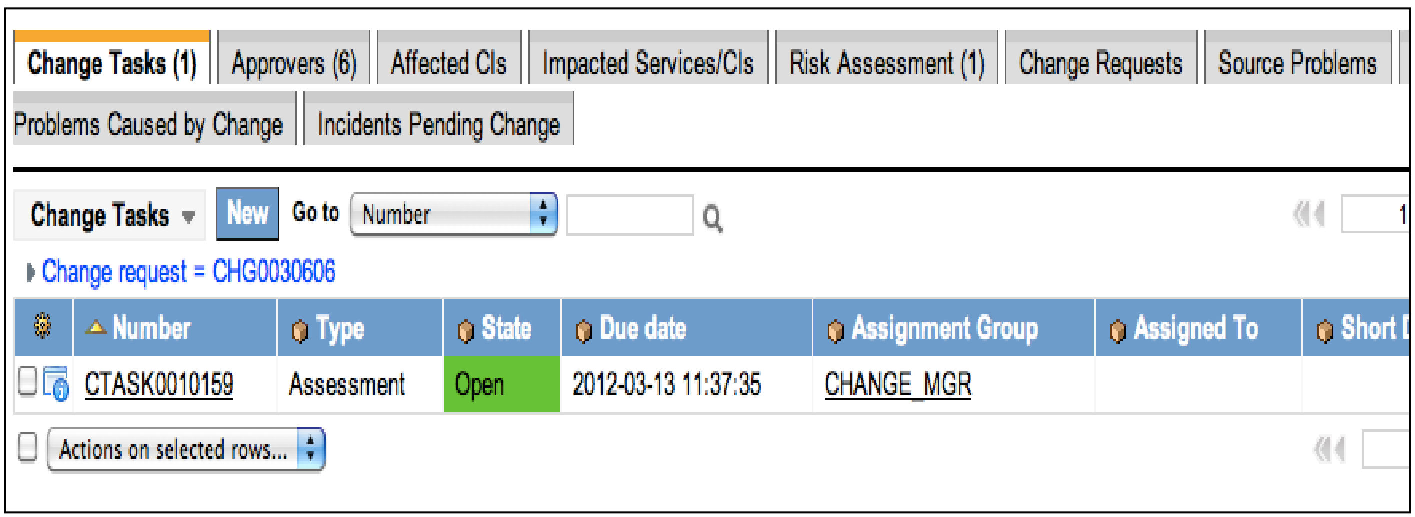
To move from the Draft to Requested state, the user needs to hit the “Submit for Acceptance” button, when the ticket has already been saved in the “Draft” State. If the user hits the Submit for Acceptance button without having saved the change, it will move directly to the Acceptance stage.

Acceptance



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:



Assessment

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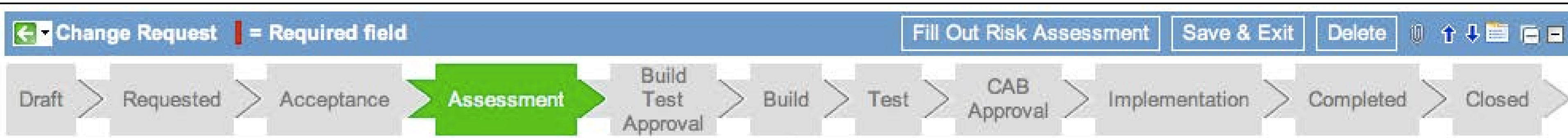
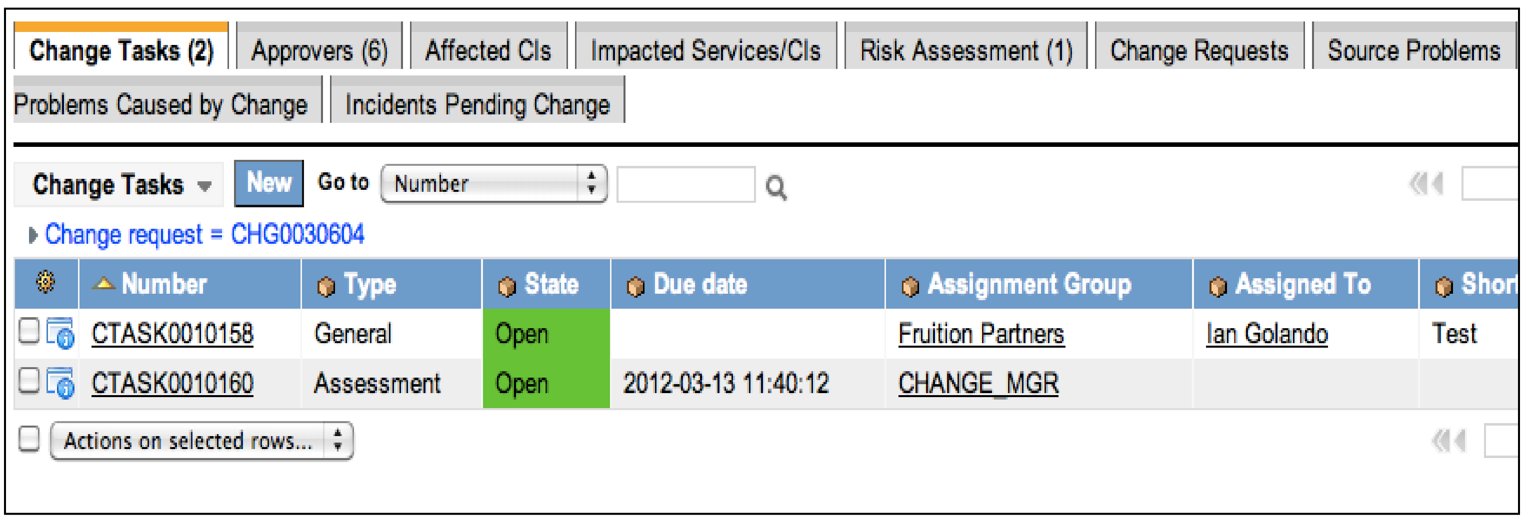
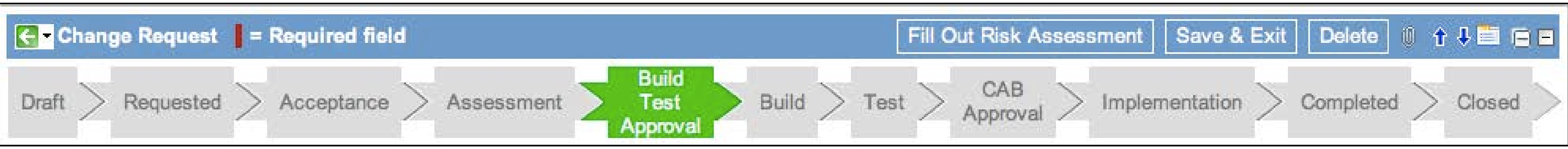


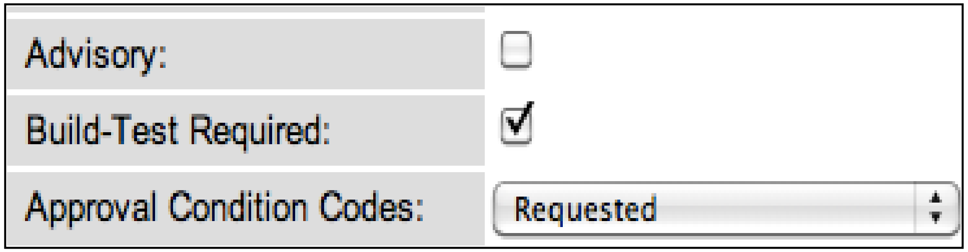
Once a change has been approved, it will move to the assessment stage. An additional change task will be generated, the “General” task. It is automatically assigned to the Change Owner. Only one person needs to approve from the assessment stage.



Build Test Approval



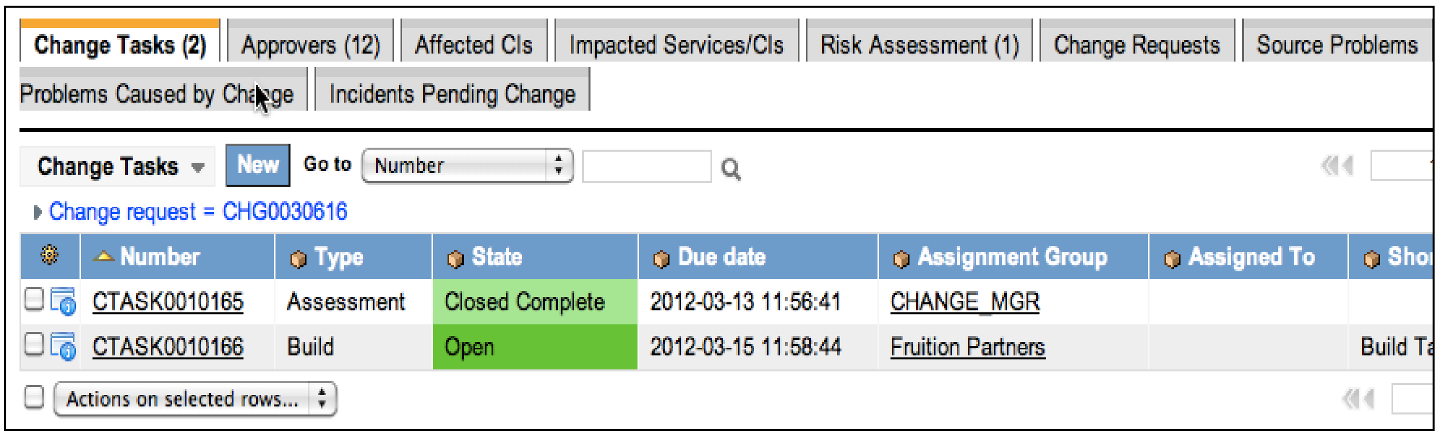
The change will move to the Build Test Approval Stage after the assessment task has been completed ONLY if the “Build-test Required” checkbox is checked. If it is not, the change will automatically skip to the CAB Approval Stage.



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

Build

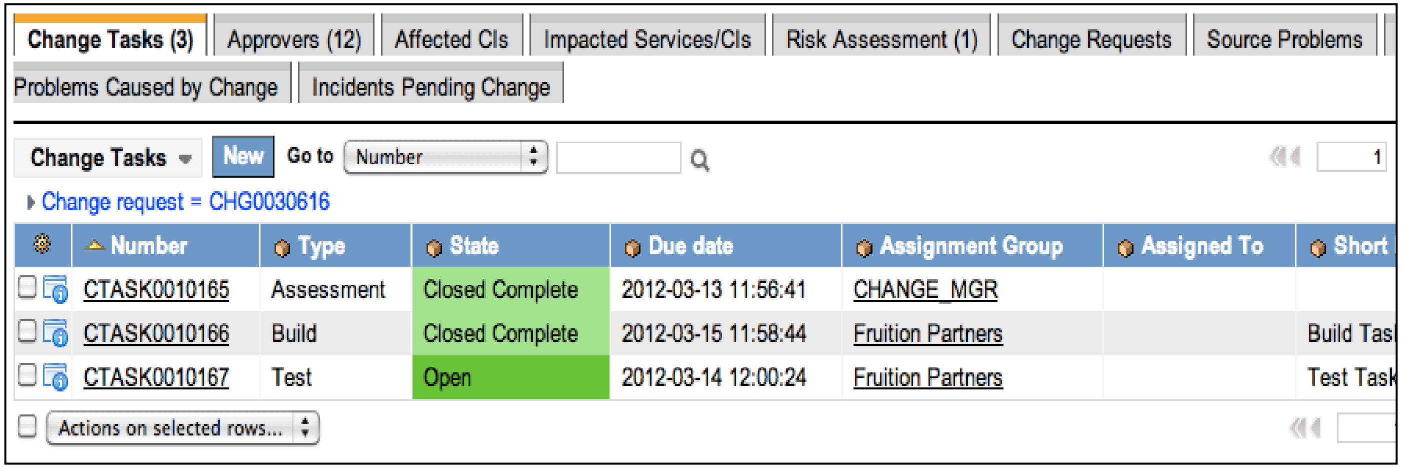
Once the Build Test approval has been accepted, the change will move to the build phase. A new task, Build, will be automatically generated and assigned to the change group.



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

Test

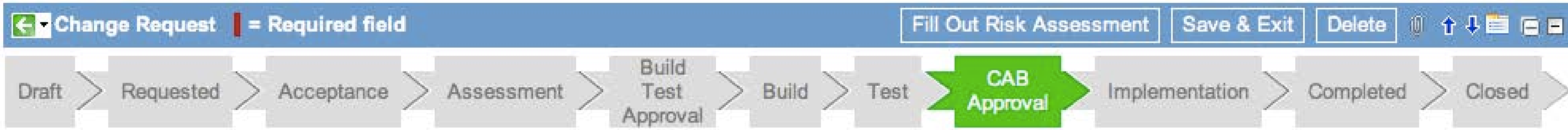
Once the Build task has been completed, the change will move to the Test stage. A new task will be generated, the Test task. It is automatically assigned to the change group.



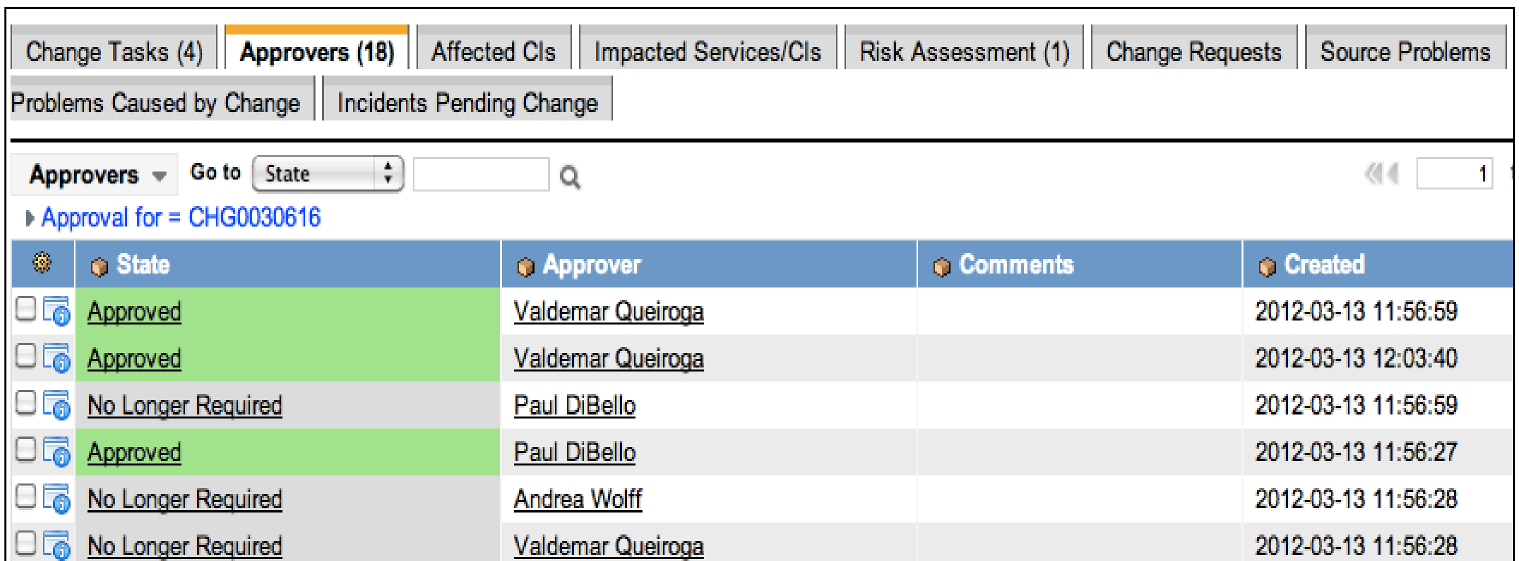
Number	Type	State	Due date	Assignment Group	Assigned To	Short
CTASK0010165	Assessment	Closed Complete	2012-03-13 11:56:41	CHANGE_MGR		
CTASK0010166	Build	Closed Complete	2012-03-15 11:58:44	Fruition Partners		Build Tas
CTASK0010167	Test	Open	2012-03-14 12:00:24	Fruition Partners		Test Task

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

CAB Approval

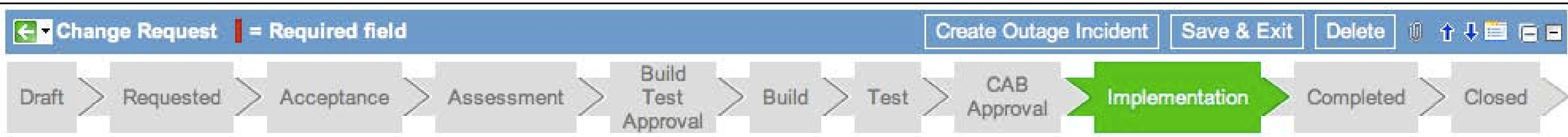


The change will move to the CAB Approval stage once the Test task has been completed. A new round of approvals will be sent out. Only 1 CAB member needs to approve for the change to advance. If the “Build-Test Required” checkbox was not checked, the change would have moved from this state straight from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



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

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

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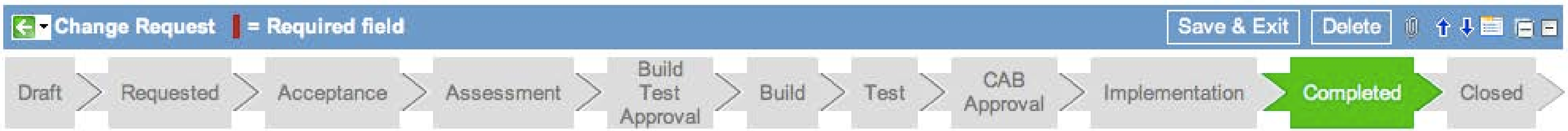
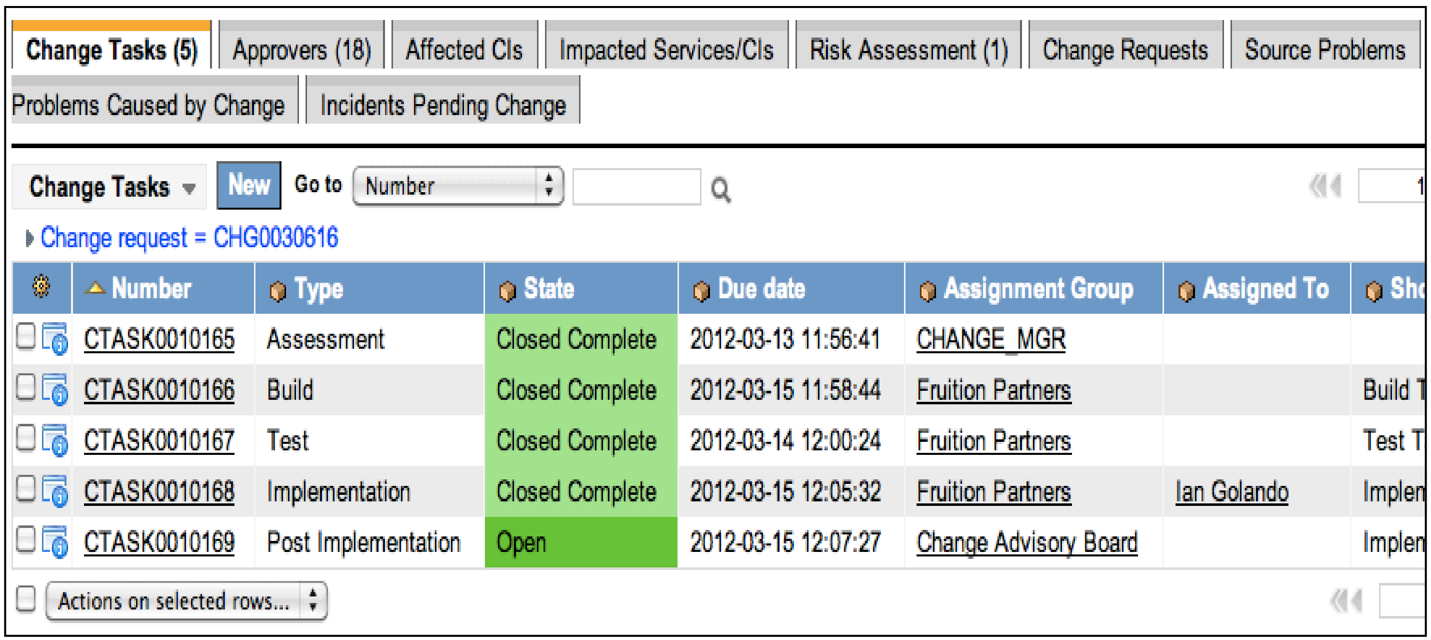


The change will move to the Completed stage once the Implementation task has been completed. This state will generate a new task, Post Implementation, that is assigned to the Change Advisory board group.



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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	Implen
CTASK0010169	Post Implementation	Open	2012-03-15 12:07:27	Change Advisory Board		Implen

Closed

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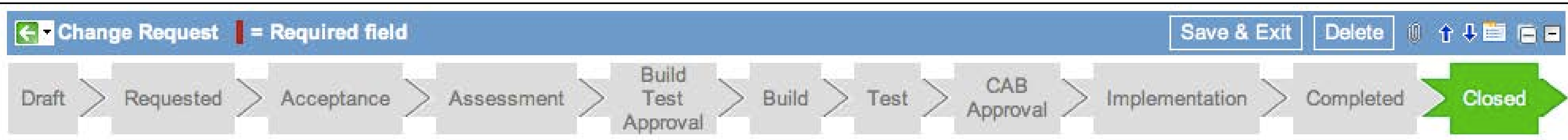

The change will move to the Closed stage once the Post Implementation task has been completed and all Tasks are closed.

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Change Overview	10 minutes
ServiceNow Navigation	15 minutes
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Creating Templates	15 minutes

Approvals

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After completing this module, you will be able to:

Objectives

- Find/View Approvals
- Approve/Deny a Change

Email Approvals

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

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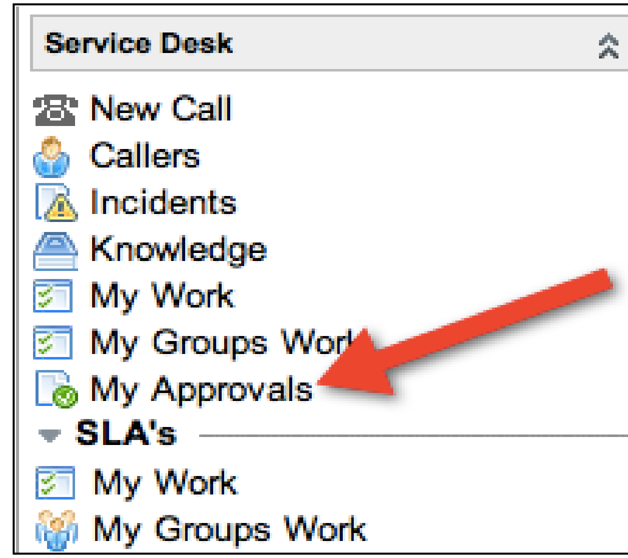
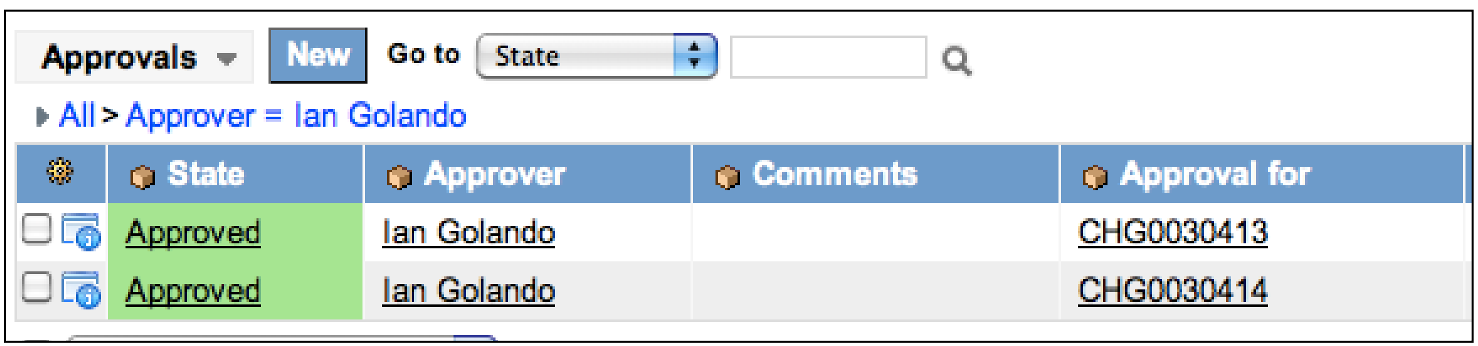
Under the service desk application is a link for “My Approvals”. This will display a list of all the approvals requested of the current user.





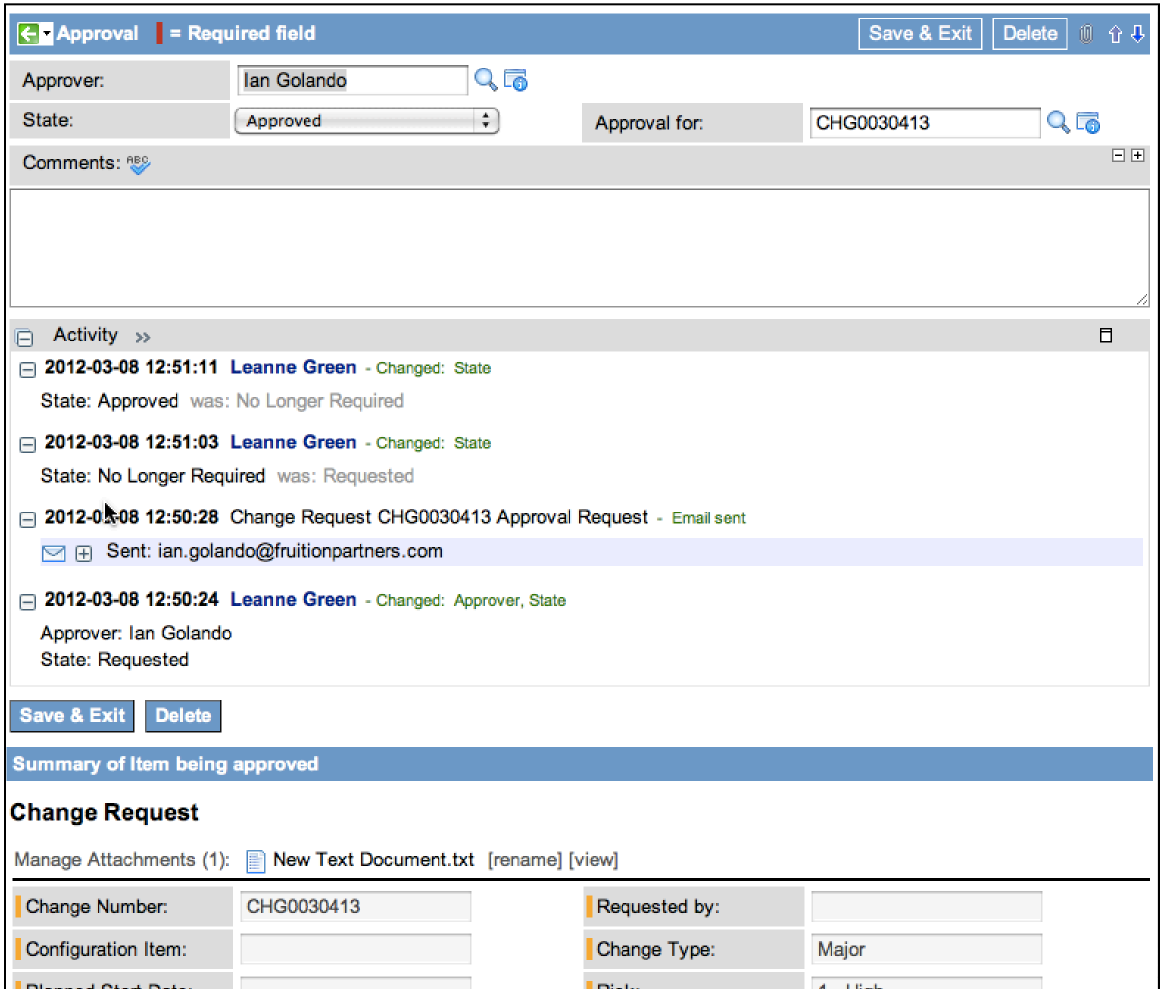
Entering an Approval

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.

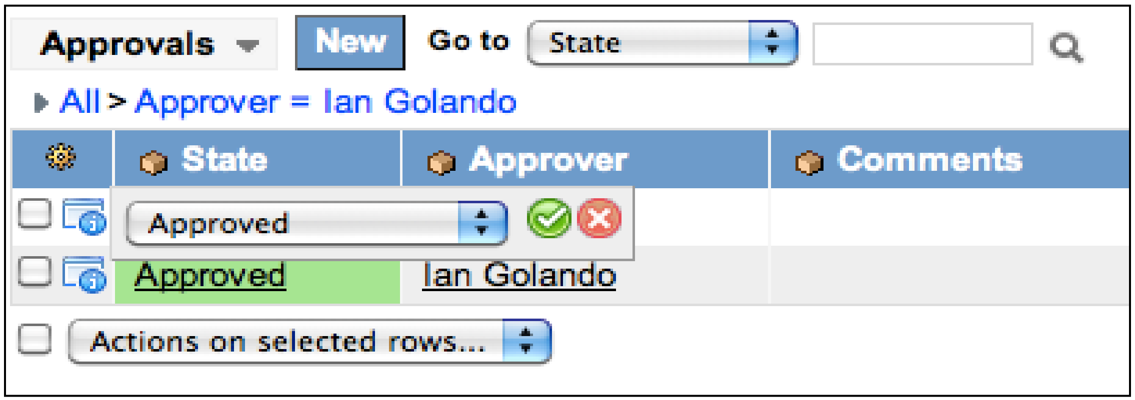
At the bottom they can also see a summary of the item that needs to be approved.



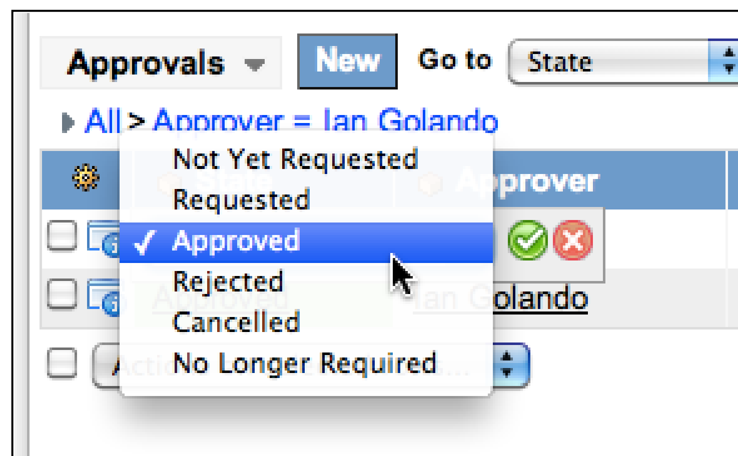
In-Line Approval

Yale

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.



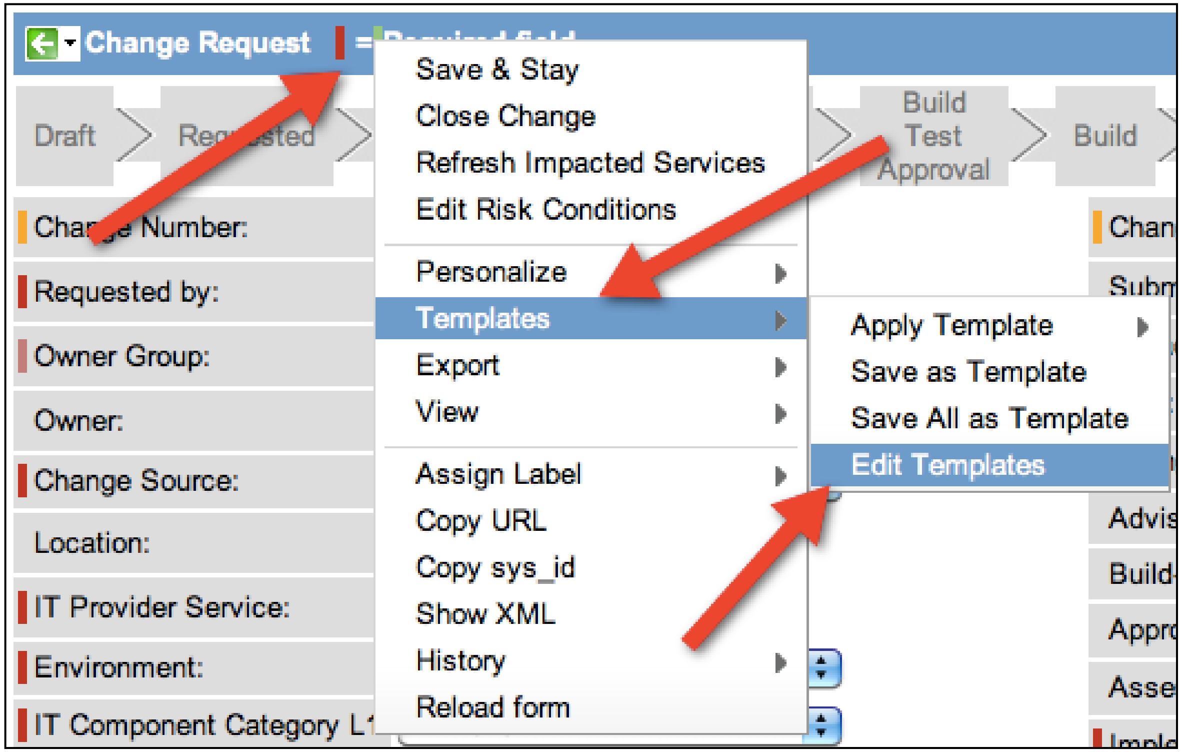
Change Overview	10 minutes
ServiceNow Navigation	15 minutes
Working with Changes	30 minutes
Working with Tasks	20 minutes
Break	10 minutes
Moving a Change Through the Lifecycle	25 minutes
Approvals	10 minutes
Creating Templates	**15 minutes**

Creating Templates

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

To do this:

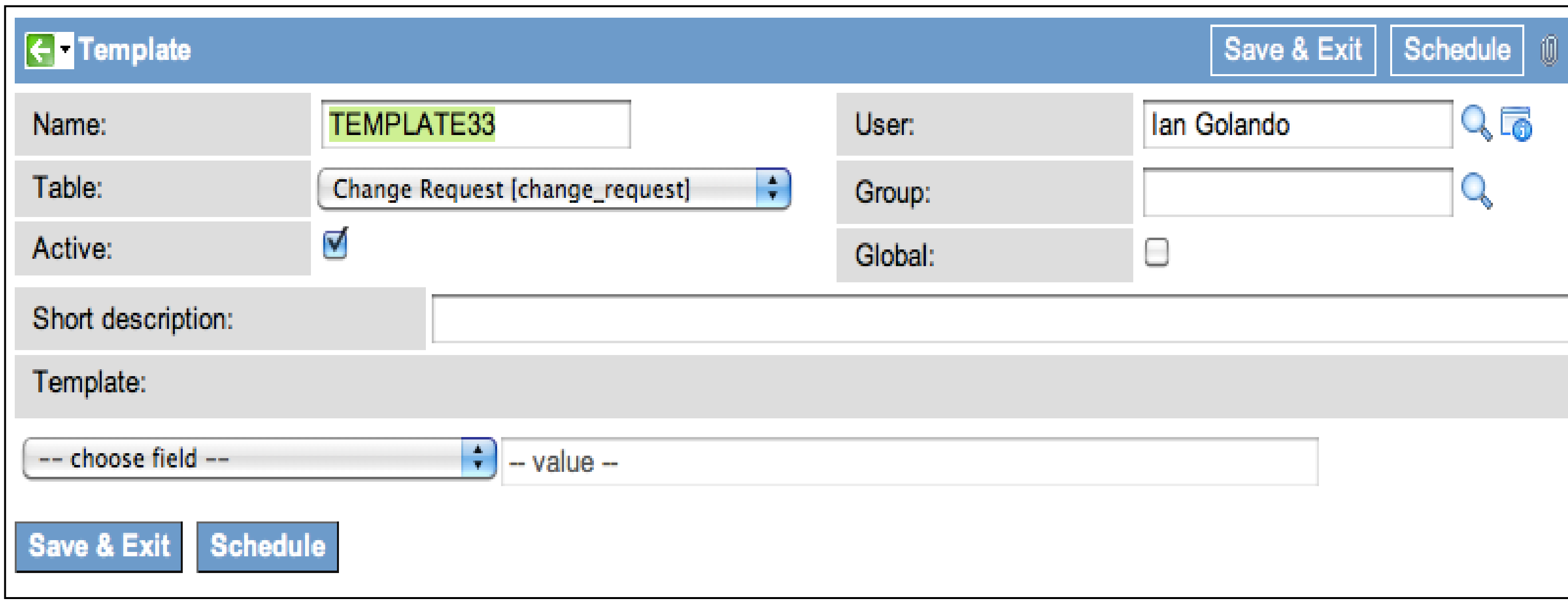
1. Right-click the top header
2. Select Templates
3. Select Edit Templates



Creating Templates

Yale

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



Creating Templates

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”

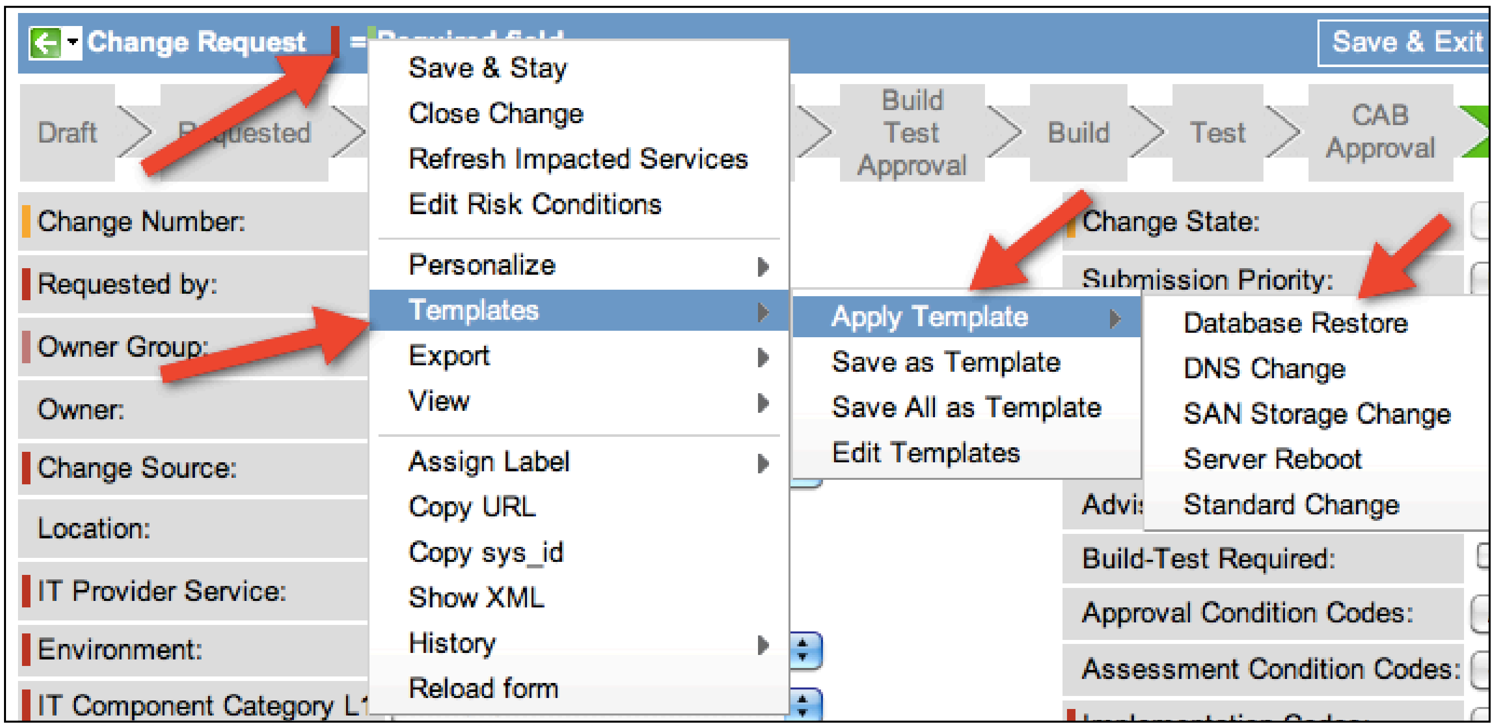
NOTE: Do not change the table, and do not uncheck active. Changing the table will change what fields you have access to (meaning not the change fields). Unchecking active will cause it to not appear in the template list (taking it out of “production”, in a sense).

Creating Templates

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



Now its your turn!

Yale

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

ServiceNow IT Service Management Suite - Windows Internet Explorer

https://yaletraining.service-now.com/navpage.do

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IT Service Management Suite — Switch to the c

Welcome: Michael Okrent

Change Request = Required field

IT Provider Service:	Data Warehouse Soluti	Build-Test Required:	
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:	