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In this section, steps are provided for creating a Change Request in ServiceNow.

Open a browser and navigate to [https://yale.service-now.com](https://yale.service-now.com) and login using your NetID and Password. The ServiceNow homepage displays. Access the Change section via the Navigation bar [on left].

- **Complete all fields with an (*) or marked in red.**

1. Choose **Create New** from the Change section.

2. Select **Type** from drop down. (**Standard/Normal**)
   a. Most changes fall into the type of **Normal**. See details below:
   b. If selecting a **Standard Change**, you are required to choose from the **Standard Change** list.

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal Change</td>
<td>For a non-routine change requiring approval by a Change Manager and/or the Change Advisory Board (CAB). Categorized by the Risk Assessment.</td>
</tr>
<tr>
<td></td>
<td>• Low, Medium or High Risk</td>
</tr>
<tr>
<td>Standard Change</td>
<td>Must complete a successful Normal change cycle prior to making a Standard Change request. Note: A pre-approved Change type is either low risk/impact, frequently occurring or a routine change. (If implemented successfully it will be considered for a future standard change).</td>
</tr>
</tbody>
</table>
3. Choose **Change Category** from drop down. Additional information can be found in the **Change Category and Types** Quick Guide located at http://its.yale.edu/about/it-service-management/servicenow-and-itil-training/training-resources.

4. Select **Business Service** using 3-tier Service Taxonomy
   a. Hint: Start typing the **Service Name** and options will be provided.
   b. Once Service is populated the **Assignment Group** defaults.

5. **Configuration Item** is not required, if the application is known please add it (you can add more than one).
   Note: To add a CI to ServiceNow CMDB, please put in a service ticket to have it considered.

6. **Risk** is a read-only field that auto-populates based on **Risk Assessment**.
   a. It is calculated after the **Change Request** is submitted for approval. For more details see the **Risk Assessment** document.
   Note: The Risk Assessment does not become available until the Change Request is saved, and the **Fill Out Risk Assessment** is completed.

7. In **Short Description** enter brief summary of the Change.

8. In **Description** provide detailed information for what you want accomplish.
   a. Refrain from using hyperlinks or abbreviations. The description should be easily understood by a wide audience.

9. Enter **Requested by date and time** located in **Schedule** tab and click **Save** (green check in calendar).

   **Process Note:** You can **Submit** the ticket at this point. This typically happens when the information to complete the change request is in progress. Submitting places the request in an “**Open**” state, holds the date in the queue and renders it viewable by others.

   At this point, you can assign specific change tasks. When assigning tasks, note that assigned individuals will receive email notifications and a task will be visible in their Assignment Queue (see more details on Change tasks in this document).
In this section, steps are provided for Requesting Approval. Once the initial change request is created, you can request approval and/or create tasks. For more information on task creation, see future sections of this document.

1. Enter **Planned start date** and time. They are often the same as the **Requested by date**.

2. Enter **Planned end date** and time when Change will be fully implemented in Production.

   Note: The option to submit an **Emergency** change has been removed from the **Type** drop-down. The system sets the change **Type** to **Emergency** based on the **Risk Assessment** and **Planned start date**. It is determined to be an **Emergency** after the change is submitted for approval.

3. Complete **Planning** tab and **Save**.

   a. To understand **Planning** fields, read the **Change Scheduling and Planning Definitions** Quick Guide, located on the ITS website at http://its.yale.edu/about/it-service-management/servicenow-and-itil-training/training-resources.

   Note: In these fields, you can attach reference documents and hyperlinks to external sites that do not require login. To do so, scroll to the top right and click on the **Attachment** icon.

4. If this is a **Normal** Change fill out the **Risk Assessment** and **Submit**.

   a. To learn more about **Risk Assessment** reference the **Risk Assessment and Priority Quick Guide** located on the ITS website at http://its.yale.edu/about/it-service-management/servicenow-and-itil-training/training-resources.

   b. The answers provided ultimately calculate the change risk after Approval is requested.
5. Enter **Assigned To**. This field is required to Request Approval. **Assigned To** can be changed by the Approving Manager/Service Offering Manager.

6. Once required information is complete, **Request approval** for the Change by clicking [Request Approval]

7. A notification box is triggered specifying the **Risk Assessment** Calculation. See sample below.

![Risk Assessment Calculation](image)

**Process:** The following information is provided to assist in understanding approval.

**Approval Process Details:**

Approval Managers review the **Change Request** ensuring the appropriate information is provided, particularly the **Planning Dates, Tasks** and other **Categorizations**.

**Risk Assessment Details:**

- If Change is **Low Risk**, one level of approval is required from Service Offering Managers or delegate.
- If Change is **Medium or High Risk** it requires approval from Service Offering Managers and a Change Manager.

**Approval Details:**

- Once all **Approvals** are completed the Change Request moves to **Pending Start**. This triggers a message to the requester. In addition, **Planned start** and **Planned end dates** are locked down so no further changes can be made.
- If **Cancelled**, the Change Request is marked Closed.
- If **Rejected**, a message is triggered stating that the Change is rejected and why.
In this section, steps are provided for managing the Change Request while in **Pending Start** state. In this state, you are able to capture actual work on the Change Request. The next state is **Work in Progress** that happens when the **Work Start Date** and time are due.

1. Enter the **Work Start Date** and **time**. Click **Save**.
   a. **Work Start Date** and **time** should indicate the actual work on the change.

2. Continue to update **Work Notes** and close task as appropriate until the Change is completed.
   a. Keep accurate Work Notes and Start and End Dates/Times. These are important to determine current and future work effort.

3. Ensure all open **Tasks** are completed.

4. Enter **Work End Date**. Click **Save**.
   a. This moves the Change to a **Work Concluded** state.
   b. You must complete all work notes and tasks otherwise the ticket cannot be closed.

5. Review and Complete the Change Task to **Review and Close the Ticket**.
   a. If the ticket is Low Risk, it is closed by the Service Offering Manager.
   b. If the ticket is Medium or High Risk, it is closed by Change Manager.

6. Complete the **Change Outcome** field. Select **Save** or **Update**.
Change - How to Add Tasks

In this section, we review how to create tasks. Tasks can be assigned at any point. Once tasks are created you can add **time worked** as you work through the Change Request ticket.

1. Scroll to the **Change Tasks** tab (bottom of page) and **Select**.
   
a. The number is auto-populated.

2. **Assignment Group** defaults based on **Business Service** and can be changed.

3. **Assigned to** is not required, it is populated by Queue Manager or individual assuming the task.

4. Select **Change Task Type** from drop-down.

5. **Change Request** field auto-populates.

6. **Short Description** and **Description** auto-populates based on Change ticket. (can be changed)

7. Update **State** from drop-down. These fields are used to manage the tasks.
   
a. Tasks must be in Closed state to complete the Change Request.

8. Update **Priority** from drop-down. Defaults to Normal but can changed on a task by task basis.

9. Enter **Expected start**/time.

10. Enter **Expected end**/time.

11. Enter **Configuration item (if known).**
12. Enter **Order**. Used to sort tasks.

13. Enter **Time Worked**.

14. Enter **Work Notes**. Click **Submit**.

**Process:** When a task is assigned the **Assigned To** receives a notification and a task in their queue. In addition, the **Assigned To** and the **Queue members** (members of the assigned group) receive a notification.
In this section, steps are provided for copying a Change Request. We recommend this option is used for a Change Request that closely aligns to a previous Change Request with like tasks and assignment groups. It is important to know that notifications are initially triggered based on the information in the original Change Request.

**Note:** In copying a Change Request, be prepared to update all associated assignment groups/to fields. You are required to populate any required information just like in a Normal change. In particular, dates for Change, Change Tasks and are not copied. A Change can be copied in any state however, it will Change the copy to a state of Open.

1. Navigate to Section Header at the top of the page and right click, per screenshot.

2. Select **Copy Change** from the drop-down.

3. Review the Change Request and update fields as appropriate.
In this section, steps are provided for how to **Request More Information** regarding an existing Change Request in ServiceNow.

1. Navigate to Section Header at the top of the page and right click, per screenshot.

2. Select **Request More Information** from drop-down.

3. Enter text in Information Requested field and select **OK**.

**Process:** The Request for More Information generates a task and prompts a notification to the **Assigned To**. See sample of the new task below.