ServiceNow

CHANGE MANAGEMENT

Version 2.0

Rowan University
INFORMATION RESOURCES & TECHNOLOGY

Definition of Commonly Used Terms

ITIL: An acronym for Information Technology Infrastructure Library, ITIL is a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business.

ITSM: IT service management refers to all activities that are performed by an organization to plan, design, deliver, operate, and control information technology (IT) services offered to customers. These activities are directed by policies, organized and structured in processes and supporting procedures.

Incident: An unplanned interruption to an IRT Service or a reduction in the quality of an IRT Service. For example, A user's email client stops working.

Problem: A cause of one or more incidents. The cause is not usually known at the time a Problem is created.

Task: Tasks are created by users who are requesting the task to be performed, and are then updated as the task moves along the workflow. A task is created, work is performed upon it, and eventually, it moves to a resolved state. Tasks allow users to request tasks, and track how they are being fulfilled by the appropriate parties

Service Request: A request submitted by a user for some type of service, software, or hardware. Service requests generally refer to something the user wants and/or needs but does not already have, such as a printer or laptop.

Change: The addition, modification or removal of anything that could affect IRT Services.

Change Initiator: The person initiating the change request in the "Requested by" field. This field will automatically be filled in for the person logged into ServiceNow entering the change, but can be updated if the change is entered on behalf of someone else. The change initiator is typically the Change Owner themselves if they are requesting the change.

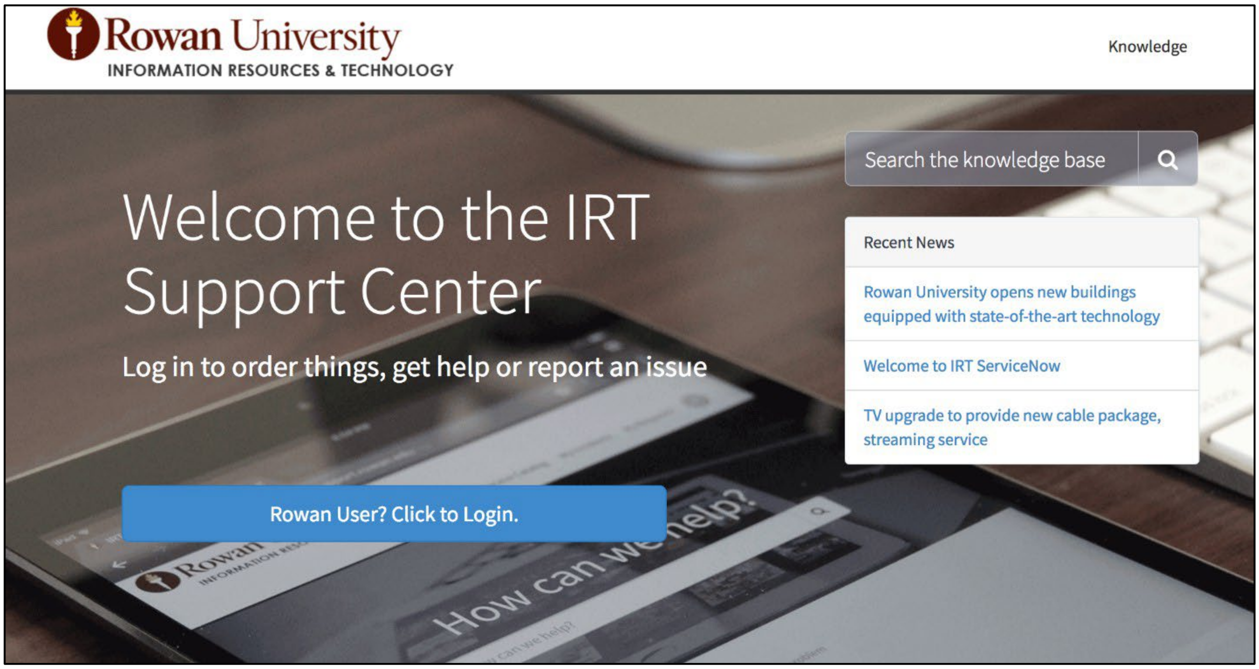
Change Manager: The IT Manager responsible for the service to be changed. In most cases, this is the supervisor of the individual entering the change.

CAB Coordinator: Responsible for reviewing the requests for change and noting the CAB acceptance or rejection of a change.

To learn more about ITIL, please download this overview of ITIL: https://www.servicenow.com/content/dam/servicenow/documents/ebook/ebk-it-infrastructure-library-overview.pdf

ServiceNow Glossary of Terms: http://wiki.servicenow.com/index.php?title=Glossary_of_Terms

Log into ServiceNow



Go to http://support.rowan.edu and, once **l**ogged into the Web Portal, click "**Technician**" at the top and you will be redirected to the full ServiceNow application.

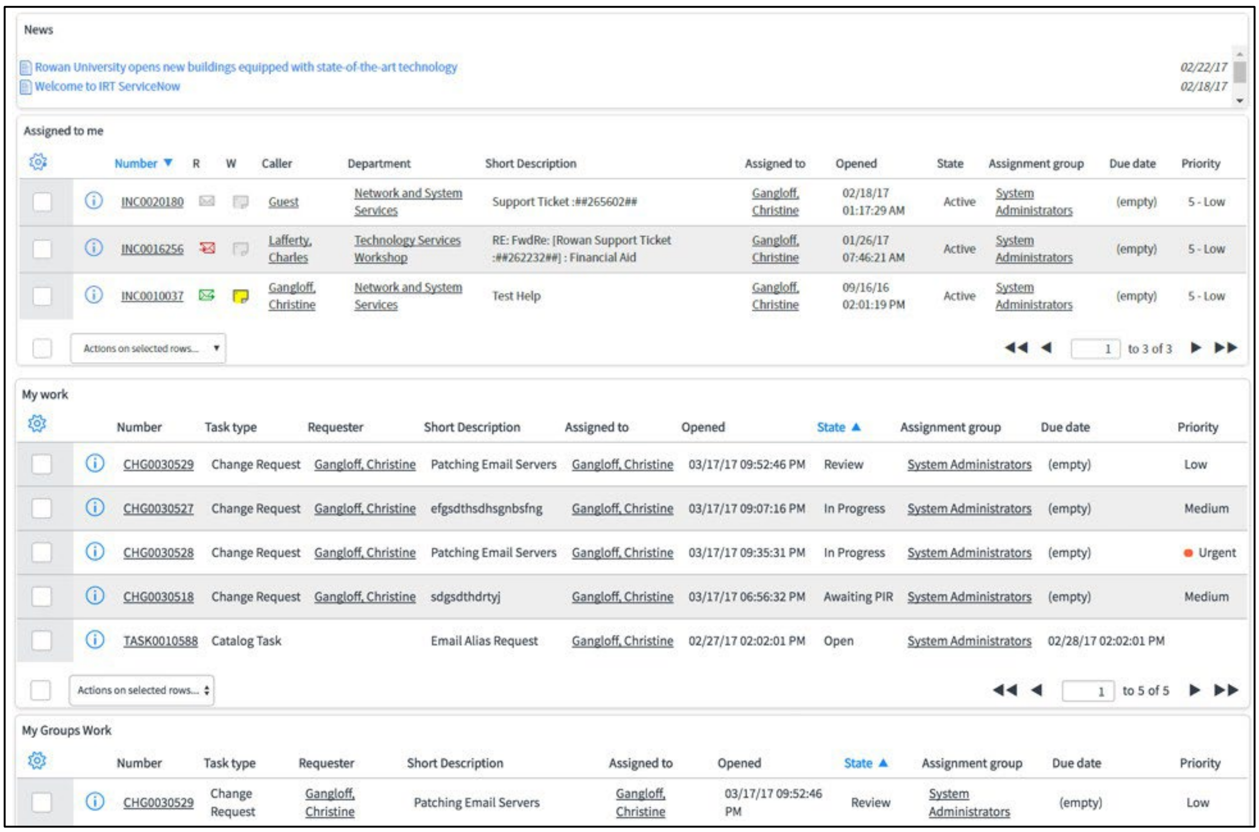
ITIL Homepage

Once logged in, you will be presented with a homepage initially tailored to your role. If you do not see the ITIL homepage, you can always access it by clicking the Rowan University logo in the top left corner of the ServiceNow application.

You can add content to your homepage by clicking the + icon in the upper left of the content pane.

You can also remove content by hovering over the content box and clicking on the ⊗ icon that appears in the upper right of the item. This will allow you to create a personalized homepage.

The default homepage is the ITIL Homepage and includes the following content:
News (Announcements), **Assigned to me** (incidents), **My Work** (incidents, task and changes assigned to you) and **My Groups Work** (incidents, tasks and changes assigned to your groups).



News

Rowan University opens new buildings equipped with state-of-the-art technology	02/22/17
Welcome to IRT ServiceNow	02/18/17

Assigned to me

Number	Caller	Department	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
INC0020180	Guest	Network and System Services	Support Ticket :##265602##	Gangloff, Christine	02/18/17 01:17:29 AM	Active	System Administrators	(empty)	5 - Low
INC0016256	Lafferty, Charles	Technology Services Workshop	RE: FwdRe: [Rowan Support Ticket :##262232##] : Financial Aid	Gangloff, Christine	01/26/17 07:46:21 AM	Active	System Administrators	(empty)	5 - Low
INC0010037	Gangloff, Christine	Network and System Services	Test Help	Gangloff, Christine	09/16/16 02:01:19 PM	Active	System Administrators	(empty)	5 - Low

Actions on selected rows... 1 to 3 of 3

My work

Number	Task type	Requester	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
CHG0030529	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:52:46 PM	Review	System Administrators	(empty)	Low
CHG0030527	Change Request	Gangloff, Christine	efgsdthsdhsgnbsfng	Gangloff, Christine	03/17/17 09:07:16 PM	In Progress	System Administrators	(empty)	Medium
CHG0030528	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:35:31 PM	In Progress	System Administrators	(empty)	Urgent
CHG0030518	Change Request	Gangloff, Christine	sdgsdthdrtyj	Gangloff, Christine	03/17/17 06:56:32 PM	Awaiting PIR	System Administrators	(empty)	Medium
TASK0010588	Catalog Task		Email Alias Request	Gangloff, Christine	02/27/17 02:02:01 PM	Open	System Administrators	02/28/17 02:02:01 PM	

Actions on selected rows... 1 to 5 of 5

My Groups Work

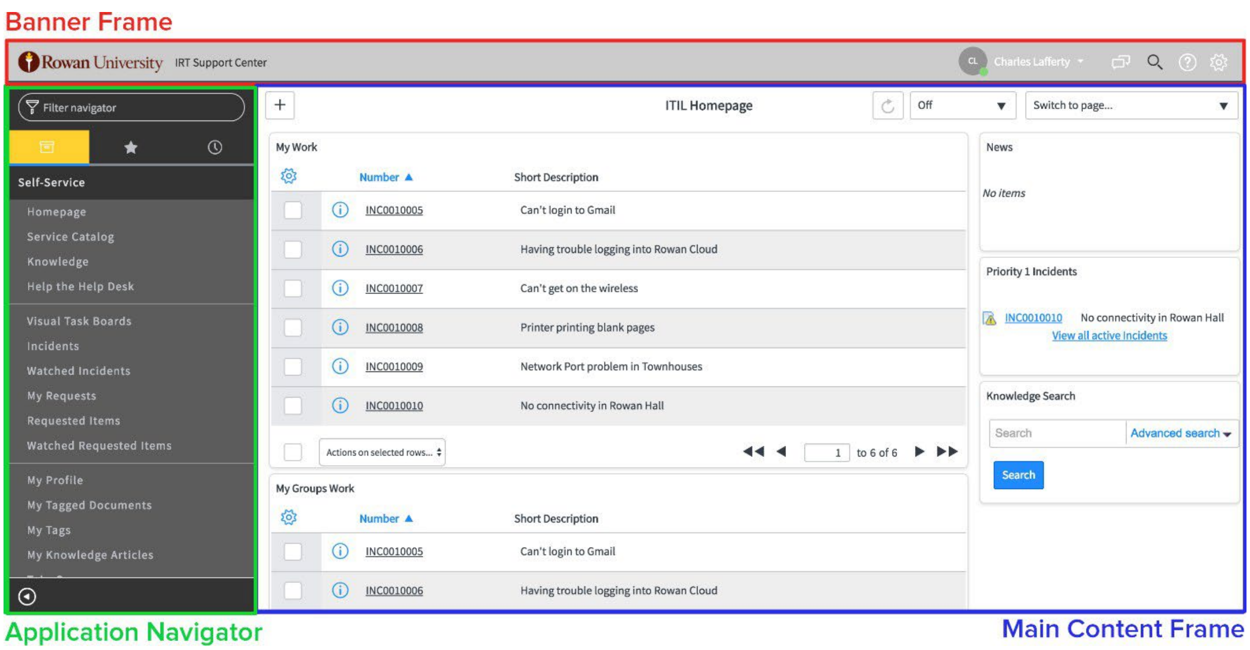
Number	Task type	Requester	Short Description	Assigned to	Opened	State	Assignment group	Due date	Priority
CHG0030529	Change Request	Gangloff, Christine	Patching Email Servers	Gangloff, Christine	03/17/17 09:52:46 PM	Review	System Administrators	(empty)	Low

Navigation Overview

User Interface

The user interface is divided into the following areas:

• **Banner frame:** Runs across the top of every page and contains the Rowan logo, global text search, help and a gear icon which displays the system menu with additional settings and controls.
• **Application navigator or left-navigation bar**: Provides links to all applications and modules.
• **Main Content frame**: Displays information such as lists, forms and homepages.



Applications and Modules

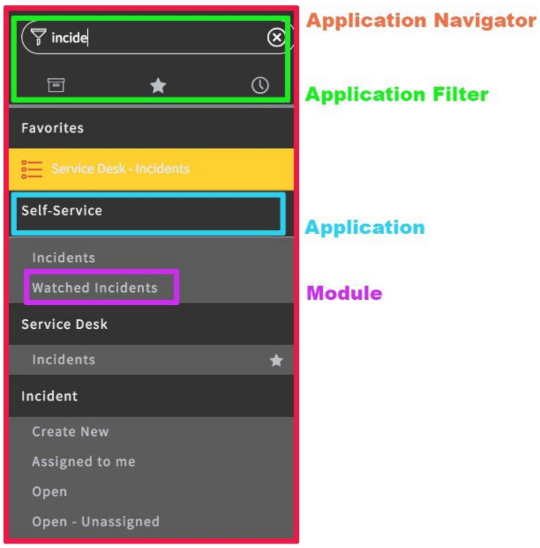
An application is a group of modules, or pages, that provide related information and functionality in ServiceNow. For example, the Incident application contains modules for creating and viewing incidents; the Change application contains modules for creating and viewing changes etc.

Application Navigator

The application navigator, or left-navigation bar, provides links to all applications and the modules they contain, enabling users to quickly find information and services.

In the application navigator, you will see black rectangular boxes. These boxes represent "**Applications**" within ServiceNow. The number of Applications available to you will vary according to your role. Click on any of the black rectangular boxes to expand and collapse the Application area.

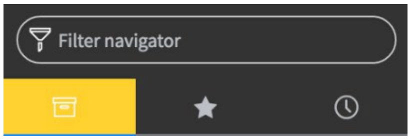
Upon expanding an Application, it will be highlighted yellow and you will see a number of links related to that Application. These links are referred to as "**Modules**" within ServiceNow. To have a module open in the main content frame, click the module name.



Application Navigator Header

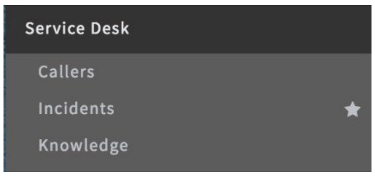
The application navigator header provides the following tools:

The Application Filter: Filters the applications and modules that appear in the navigator based on the filter text. The easiest way to find what you are looking for is to type a search term into the navigator describing the application or module you are looking for, such as "incident," to filter the items containing that word.

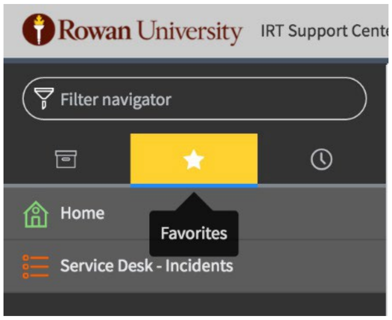


The Favorites Filter (the star icon): Filters the modules displayed in the application navigator to show modules marked as favorites.

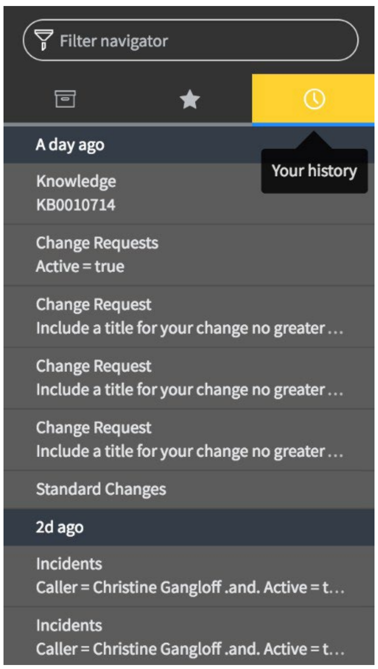
Each module has a **star icon** beside its name when you hover over it.



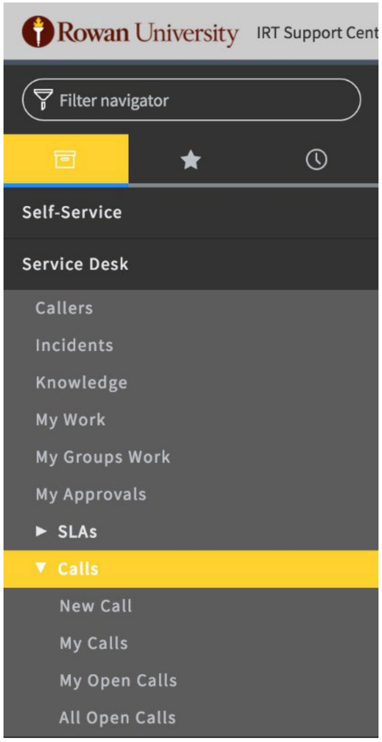
The star icon for each module can be selected to designate a frequently-used module that will then display under **Favorites** in the application navigator.



Your History (the clock icon): Displays items you have recently accessed in chronological order.



The Service Desk Application



The Service Desk application groups together many commonly-used modules.

Callers: A list of university users and affiliates. (Formerly called "Requesters" in Service Desk)

Incidents: Active incidents listed in your assignment groups.

Knowledge: The University knowledge base that contains support documentation, procedural documentation and customer-specific documentation.

My Work: Active incidents, tasks and changes that are assigned to you.

My Groups Work: An extension of the My Work view that shows all of your work as well as your group's active incidents, tasks and changes.

My Approvals: Used for Change Managers, Knowledge Admins and some Service Catalog Requests.

SLAs: This module will show you what incidents assigned to you or your group are nearing targeted completion time. An **SLA** is an agreement between IRT and our customers that describes the service and documents service level targets.

SLA Target Times:

- Low: Resolved within 5 days
- Moderate: Resolved within 3 days
- High: Resolved within 6 hours
- Critical: Resolved within 4 hours

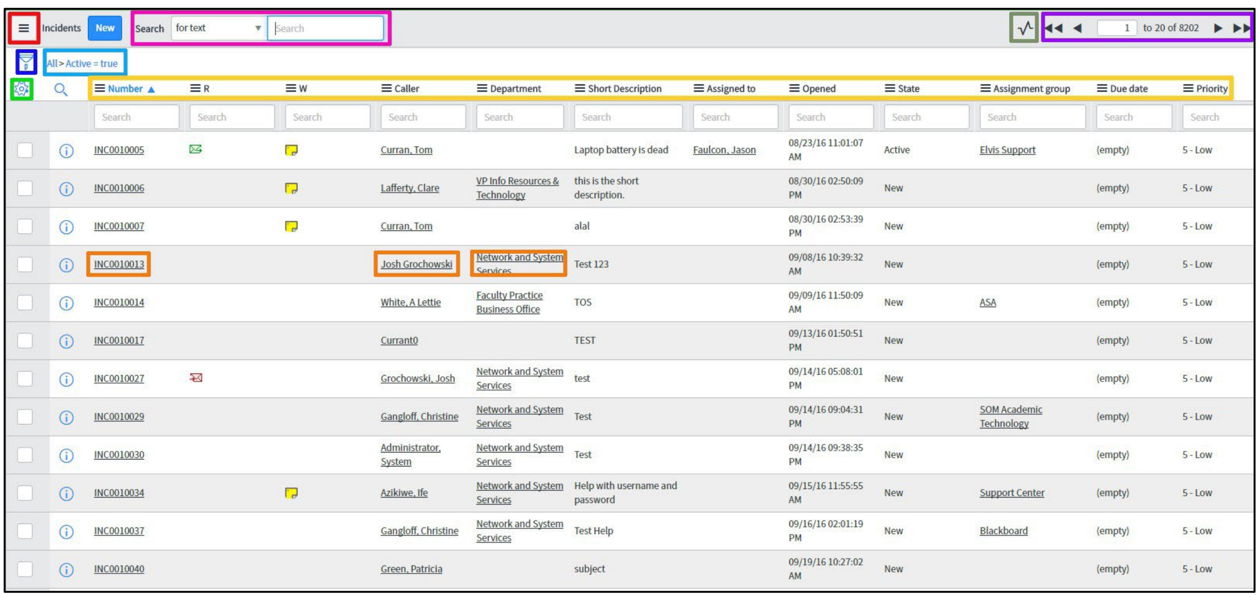
Working with Lists

Most data in ServiceNow; incidents, changes, tasks, users etc., is viewed in lists.

This section will explain how to search, sort and filter records.

The following functions help navigate and define lists:

- Title Menu
- Go to / Search
- Activity Stream
- List Navigation
- Filter
- Breadcrumb Navigator
- Personalize List Gear
- Hyperlinked Fields
- Column Headings



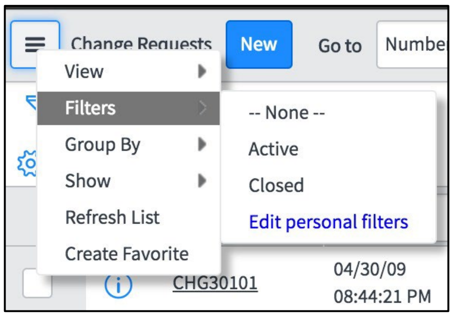
Default List View: *If you don't see all of the fields or columns you should on a list, check to make sure you are in the "**Default**" view. The other views, such as the "Self-Service" view, are limited and what the end user would typically see. Change your view back to the Default view from the Title Menu.*

Title Menu

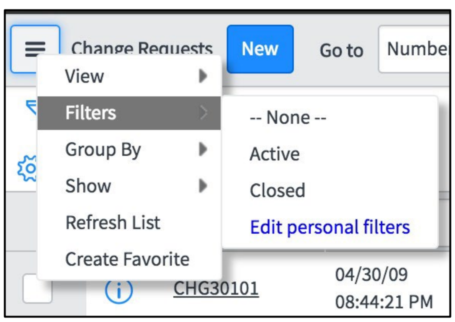
Clicking the hamburger icon (☰) in the top left of the main content frame will bring up the title menu.

From the Title Menu, you can perform the following functions:

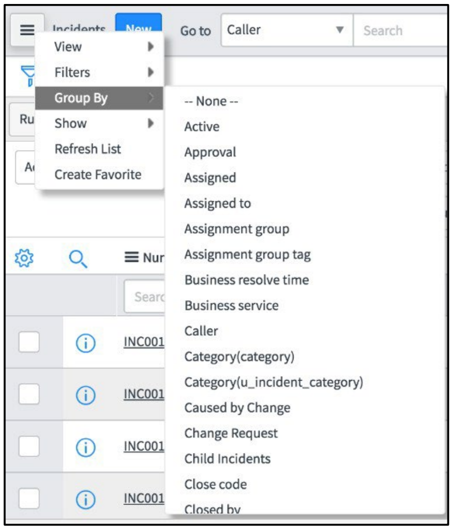
View: Changes the view of your list. You may not see all views as some are restricted by role.
If you don't see all of the fields or columns you should in a list, change your view to "Default view." Some other views are limited and only show what the end user would typically see (the Self-Service view, for example).



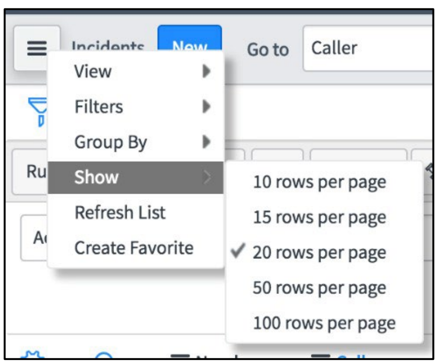
Filters: Applies a saved filter or allows you to edit a personal filter.



Group By: Groups records by a specific field.

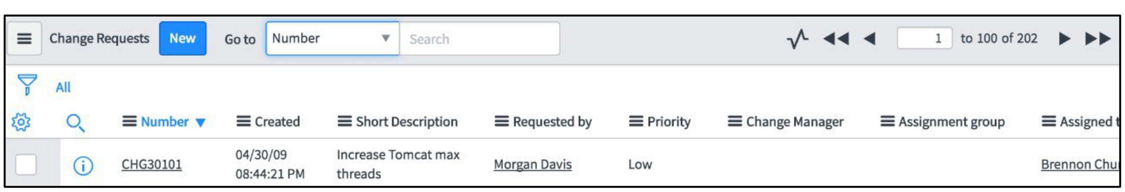


Show: changes the maximum number of records per page.



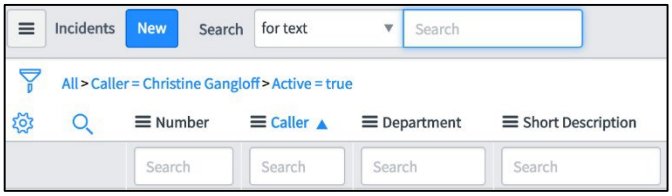
Search (Go to)

A "Go to" search option is available in list view that allows you to filter and search by column name. For example, you can enter a specific Change Number to filter the Number field or change the dropdown to "Change Manager" and enter a name.



You also have the option to perform a general text search on the list you are working with.

Change the drop-down to "for text" and the "Go to" designation changes to "Search." You can then search by more general terms.



The “Go to” search works on a specific list but there is also a Global Search icon in the far upper right corner of the application.

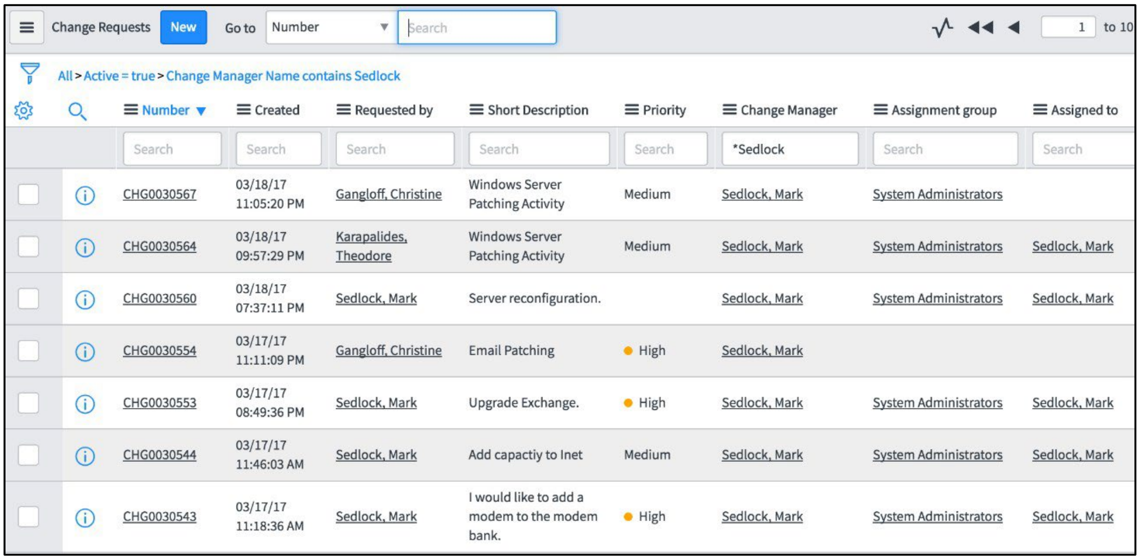
The global search looks through all of ServiceNow for your query. For example, you can search for a particular record, whether it be an incident, change or request, by typing the record’s exact number in the global search bar.

Using Wildcard Searches

The following wildcards can be used when searching in ServiceNow to refine search results.

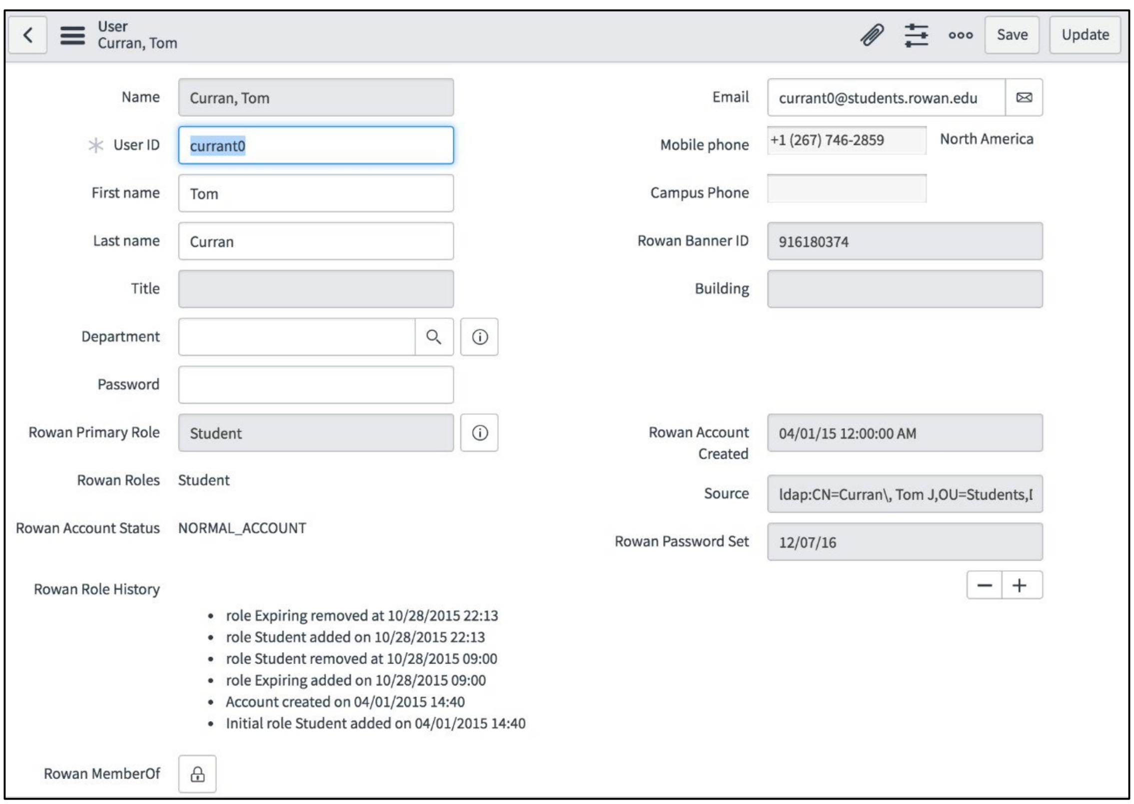
Wildcard	Search Results
*searchterm	Contains
searchterm%	Starts With
%searchterm	Ends With
!*searchterm	Does Not Contain
=searchterm	Equals
!=searchterm	Does Not Equal

For example, searching the Change Manager column for ***sedlock** will show only records that contain the word sedlock in the Change Manager field.



Hyperlinked Fields

Within a list, underlined (hyperlinked) fields represent a reference to a record in another table. For example, clicking on a hyperlinked user's name will open that user's record from the user table.



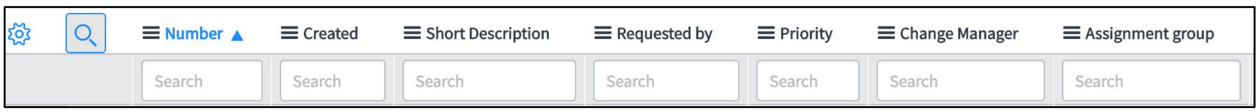
Column Headings

Clicking on a column name gives you the following capabilities:

Sorting: Click the column name to sort the list in ascending order.

Click again to sort in reverse order.

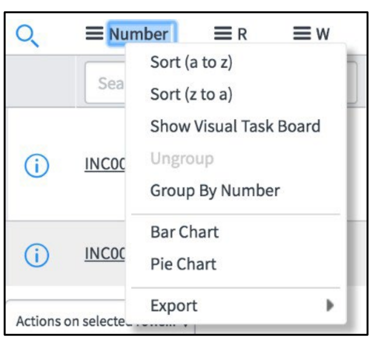
Search: Click the search icon at the left of the column headings to add individual search boxes for each column.



Begin your query with an asterisk "*" to find all records containing your search string, or begin the query with a "%" to find records that end with the input.

Right clicking a column name or clicking the hamburger icon (☰) to the left of the column name opens these controls:

Sort: Arranges the column alphabetically from (a to z) or (z to a).
Group By: Aggregates records by field.
Bar and Pie Chart: Create quick bar and pie chart reports based on the filter criteria of the list. Technicians can then modify these reports or create gauges.
Export: Exports data to Excel, CSV, or PDF.



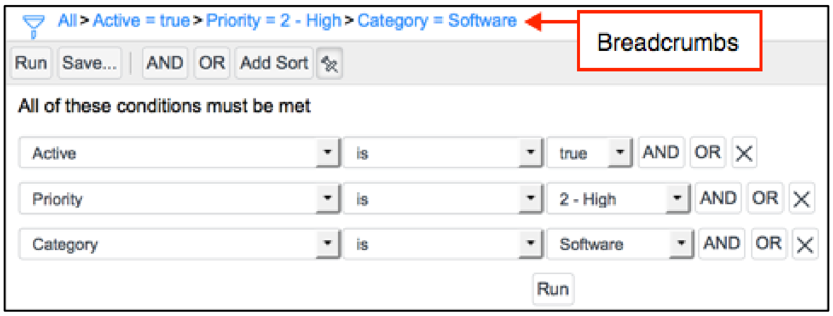
Using Filters and Breadcrumbs

A filter is a set of conditions applied to a list. Users can apply, modify, create and save filters. The current filter is indicated by a hierarchical list of conditions—or breadcrumbs—at the top of the list.

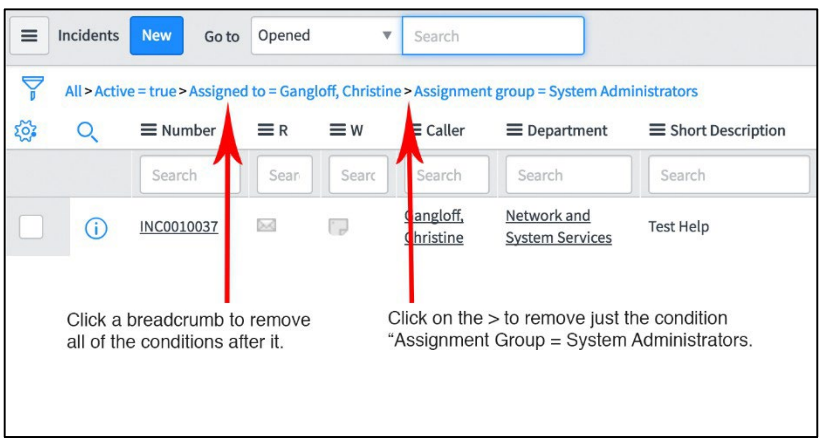
Breadcrumbs

As you search, a set of blue hyperlinks, called Breadcrumbs, will appear showing your search criteria.

Breadcrumbs offer a quick form of filter navigation. The breadcrumbs are ordered from left to right, from most general to most specific.



Clicking a breadcrumb removes all of the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.

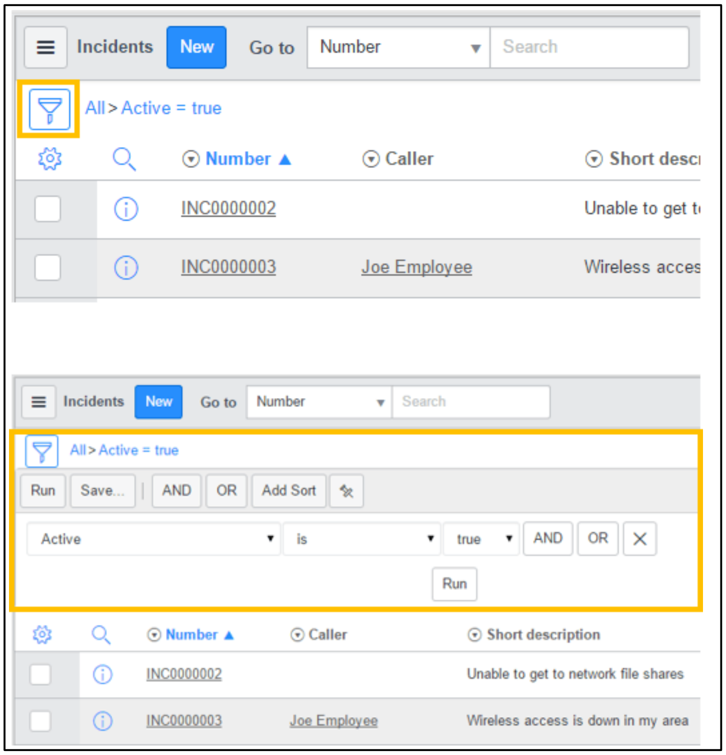


Filters

There are two ways to filter lists

Use the Filter icon.

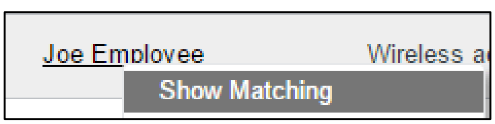
- Click the filter icon to display the filter logic builder
- Use this method if you know the logic that you want to use to filter your list
- After you have your filter created, click "Run"



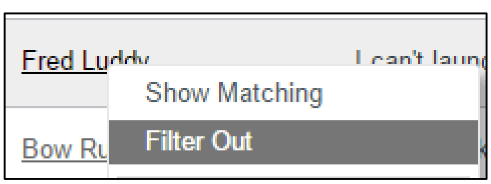
Use Show Matching and Filter Out

Right-click on a field in any column that is displayed in a list

"**Show matching**" will filter on that specific field



"**Filter out**" will remove the field from view



Change Form Icons and Indicators

Within change form, you may see some of the following icons and indicators:

 **Magnifying Glass:** Some fields have a magnifying glass icon next to them indicating that they are a reference fields. Reference fields can be filled in by clicking on the magnifying glass icon and searching for the desired item. Change the search option to "**for text**" to get the widest search results. Another option is to start typing text in the field, which will then attempt to auto-complete your entry and find the desired item.

 **Read-Only:** When a field cannot be edited the field will appear with a gray background.

 **Tombstone:** Hover over this icon to reveal additional information about the field the icon appears next to. For example, once the "Requested by" field is filled in, hovering over the tombstone will show you that user's record in a pop-up window. Clicking the tombstone will leave the form and take you to that user's record in the user table.

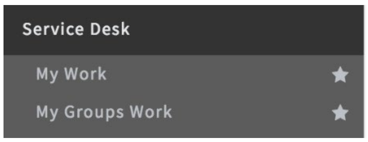
 **Red Asterisk:** Designates a required field. You will not be able to submit the form until an accepted value is entered.

Invalid entry: When a field's background color turns red it indicates that the field has an invalid value entered and cannot be saved until the value is corrected.

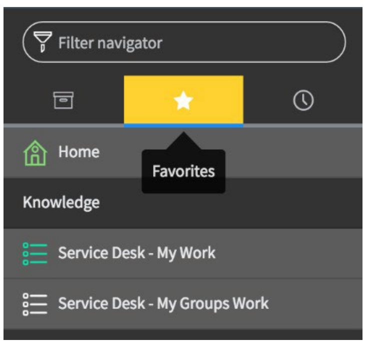
Managing Your Work

The "**My Work**" and "**My Groups Work**" modules show all incidents, tasks, requests and changes assigned to you or your group. If you are just looking at the Incident module, for example, you may miss other tasks assigned to you.

Search the Application Navigator for "**My Work**" and "**My Groups Work**" and add those modules to your Favorites by clicking the Star Icon next to their name.



This will make them available from the Favorites menu.



My Work: Active incidents, tasks and changes that are assigned to you.
My Groups Work: Active incidents, tasks and changes that are assigned to all groups you are a member of.

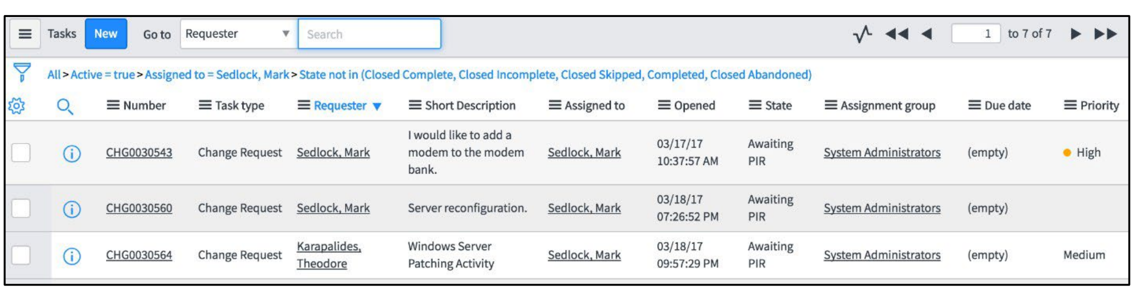
These modules are also available on the ITIL homepage. You can always access the ITIL homepage by clicking the Rowan University logo in the top left corner of the ServiceNow application.

My Work and My Groups Work

The **My Work** module shows any incidents, tasks and changes assigned to you.

The **My Groups Work** module shows any incidents, tasks and changes assigned to the groups you are a member of.

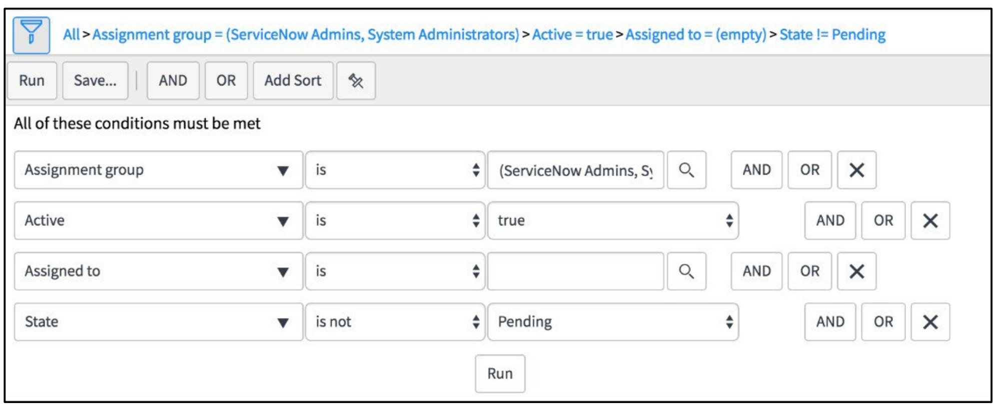
Across the top of the list in both "**Work**" views, you will see the following columns:



Number: Click this number to open the incident, change or task
Task Type: This shows whether the item is an incident, change or task.
Requester: If the task type is an incident, this will show the customer who reported it. If you click their hyperlinked name it will display their user information. If the task type is a change or catalog task, this will show the customer who requested it.
Short Description: The short description from the change form.
Assigned to: Displays the name of the technician the incident, change or task is assigned to.
Opened: The Date and time that the incident, change or task was opened.
State: The current status of the incident, change or task, such as "New", "Scheduled" or "Resolved."
Assignment Group: The group that the incident, change or task is assigned to.
Due Date: The date the incident, change or task should be resolved by in order to meet the configured SLA.
Priority: The level of priority assigned to the incident, change or task based on Impact and Urgency.

You can see at the top in blue it displays a "breadcrumb" that shows what Groups you are a member of and the States it is filtering.

You can change what is being displayed by clicking the filter icon on the left and adjusting the filter.



To open an incident, change or task, click on the hyperlinked number in the list view.

Change Management Overview

Change Management plans, organizes, controls, executes, and monitors changes that affect IT service delivery. Change Management encompasses all components and activities required to direct additions, modifications, and deletions to systems, network, and various IT processes.

The goal of the Change Management process is to ensure that standardized methods and procedures are used for efficient and prompt handling of technical changes, in order to minimize the impact of change- related incidents upon service quality, and consequently to improve the day-to-day operations of the organization.

Changes are classified as Normal (Major and Minor), Standard, and Emergency.

Change Roles

Change Initiator: The person initiating the change request in the “Requested by” field. This field will automatically be filled in for the person logged into ServiceNow entering the change, but can be updated if the change is entered on behalf of someone else. The change initiator is typically the Change Owner themselves if they are requesting the change.
Change Manager: The IT Manager is responsible for the service to be changed. In most cases, this is the supervisor of the individual entering the change.
Change Owner: The person responsible for making the change happen, ensuring the change ticket is updated and marked as completed. This includes designing the change. The Change Owner is the lead of the implementation team in the “Assigned to” field and is typically the person creating the initial change request.
The CAB Coordinator: Responsible for reviewing the requests for change and noting the CAB acceptance or rejection of a change
The Change Advisory Board meets twice per week and reviews and approves all changes except Normal Minor Changes.

Change Type Classifications

Classification	Type	Description	Risk	Submittal/Approval Requirements
Normal Change	Major **	Possibility of significantly disrupting essential business and/or student activities for numerous users	High	Change Request must be submitted at least 7 calendar days before the target implementation date. Requires review and approval by the Change Manager and the Change Advisory Board (CAB).
		Implementation of major new technologies on a large scale		
		Impacts a significant portion of the business-critical infrastructure		
		High likelihood of a long service outage with an extensive recovery plan		
		Complex or lengthy implementation process		
		Risk score is over 60		
		Not classified as a standard or emergency change		
	Minor	Short outage expected	Medium	No minimum submission requirement Review and Approval by the Change Manager
		High probability of success.		
		Relatively simple or quick implementation and back out.		
		Risk score is 20.1-60		
		Not a standard or emergency change.		
		No or limited outage expected	Low	No minimum submission requirement Review and Approval by the Change Manager
		Very High Probability of success		
		Relatively simple or quick implementation and back out.		
		Risk score is 20 and lower		
		Not a standard or emergency change.		
Standard Change **	A pre-authorized change with an established and proven implementation path, minimal business impact, and documented procedures, including a well-documented and successfully tested backout plan		Low	No minimum submission requirement.
				Initial review and approval by the Change Manager and CAB, valid for one year. Subsequent implementations do not require additional approval but must be documented in the work notes of the Standard Change.
Emergency Change	Critical service is down or severely impaired with disruption to business and/or student activities.		High	Change Request is submitted within one business day after the start of the triage.
	Change Request can be deferred until the issue is resolved or under control.			Change is reviewed at the next Change Advisory Board (CAB) meeting.

*** Requires Review/Approval by the Change Advisory Board (CAB)*

Standard and Emergency Approvals

Standard changes are pre-authorized by the CAB. They follow an approved change model and may be of any scope, but must be of low risk. Approvals for standard changes may be required during change freeze periods. Emergency changes are conducted in response to an incident. Emergency changes of any scope or risk may be documented retroactively, if necessary. The manager (or designated backup manager) in charge of the Incident is responsible for approving the change.

Priority Classifications

Priority	Description
Urgent	Requires immediate implementation (emergency change process). Causing loss of service or severe usability problems to a larger number of Users, a mission-critical system, or some equally serious problem. Immediate action required. Resources may need to be allocated immediately to build such authorized changes.
High	Requires implementation within 48 hours. Severely affecting some users, or impacting upon a large number of users. To be given highest priority for change building, testing and implementation resources. (Other than emergency).
Medium	Requires implementation within five days. No severe impact, but rectification cannot be deferred until the next scheduled release or upgrade. To be allocated medium priority for resources.
Low	Requires implementation by an indicated date. A change is justified and necessary but can wait until the next scheduled release or upgrade. To be allocated resources accordingly.

Risk Classifications

Change risk is calculated automatically when the change is submitted for review and is classified as Low, Medium, or High. The risk field is calculated based on several factors

Impacted Users: This refers to the number of users who may be affected by the change during its implementation. The numerical value and description are listed below. There is no weight to the values.

1 - Less than 10 Users
2 - 10 to 50 Users (ex. Floor, small application, etc)
3 - 51 to 100 Users (ex. small building, department, large application, etc)
4 - Over 100 Users (ex Faculty, Staff, Students, large building, campus, etc)
5 - Entire University

Outage Duration: This indicates the amount of time during which the service is unavailable and cannot be used. It considers the total downtime required to implement the change and restore full functionality. The numerical value and description are listed below. There is no weight to the values.

1 - None
2 - Under 5 minutes
3 - 5 minutes to 59 minutes
4 - 1 hour to 4 hours
5 - Over 4 hours

Impact Severity: This represents the broadest potential impact on the University in the event of a worst-case scenario failure. It considers the extent of disruption and the criticality of the affected services, assessing how significantly the failure could affect University operations. The numerical value and description are listed below. This is weight at 3x its value:

1 - No impact to the University
2 - Small number of users or building floor
3 - Building, large number of users affected
4 - Population (Faculty, Staff, or Students), Campus or business-critical applications are affected
5 - Entire University would be affected

Probability of Success: This incorporates the likelihood that the change will be successfully implemented. It considers factors such as thorough testing, the simplicity of the change, a high success rate in previous similar implementations, and the frequency with which this type of change has been executed successfully. The numerical value and description are listed below. There is no weight to the values.

1 - Reasonable Confidence - The change is expected to be successful, though some factors prevent absolute certainty.

1.5 - High Confidence - Multiple factors strongly indicate that the change will be successful with a high degree of certainty.

Considering these factors, we calculate a risk score that more accurately classifies the change and assesses the implementation risk. The formula is:

$$\text{Risk Score} = \frac{\text{Impacted Users x Outage Duration x Impact Severity}}{\text{Probability of Success}}$$

In addition, some factors are considered more important so they are weighted differently. Impact Severity is weighted 3 times higher in the risk calculation and the Probability of Success offers only a modest reduction in risk, with a confidence multiplier of 1.5.

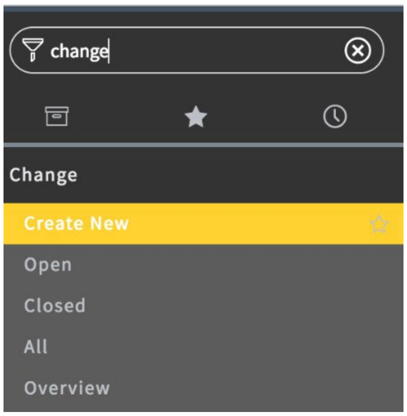
	Weight	Very Low	Low	Medium	High	Very High
Impacted Users	1	1	2	3	4	5
Outage Duration	1	1	2	3	4	5
Impact Severity	3	1	2	3	4	5
Probability of Success	1	N/A	1	N/A	1.5	N/A

To categorize the risk scores into low, medium, and high risk, we can establish thresholds based on the score distribution. The ranges are defined as follows:

Create a Normal Change Request

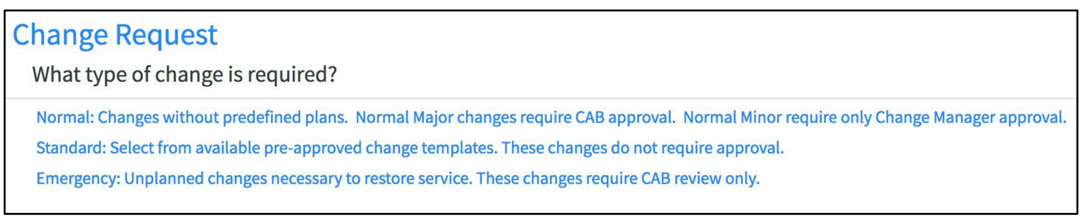
Normal change requests are typically created by the Change Owner or Change Initiator.

To start the Change Management process, the Change Initiator (or Change Owner on behalf of the Change Initiator) will complete a Request for Change (RFC) form by navigating to the **Change** application and selecting the **Create New** module.

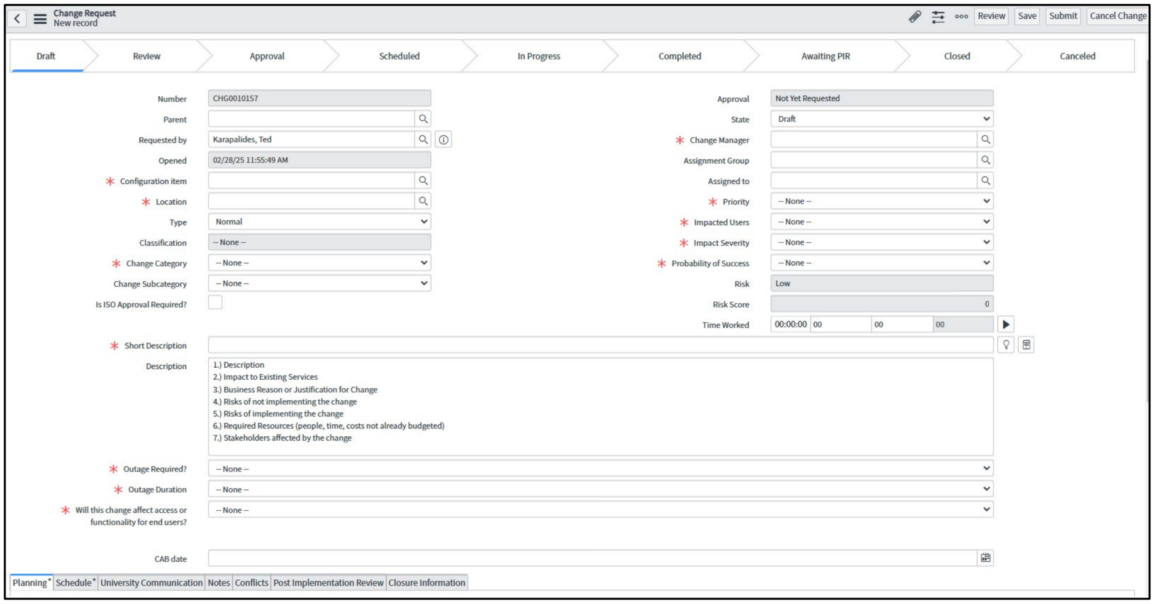


***Unless otherwise stated in the field descriptions, all fields mentioned below are mandatory.*

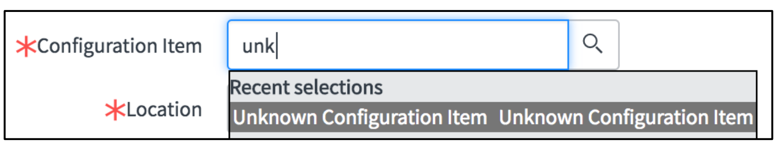
Select: "**Normal: Changes without predefined plans. Normal Major requires CAB approval. Normal Minor requires only Change Manager approval"** from the list.



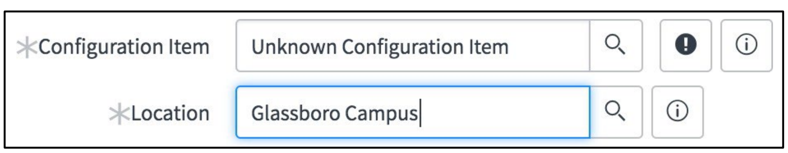
This will open the Normal Change request form:



Select the **Configuration Item** and **Location** fields. These fields can be entered by typing text in the field, which will then attempt to auto-complete your entry and find the desired item. You can also click the magnifying glass icon to the right of the field to search for the desired entry. If you have previously chosen a configuration item or location, you can click in the field to get a list of recent selections.

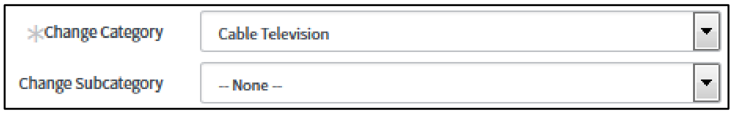


The "**Location**" field should be set to reflect the scope of impact the change and/or the resulting outage will affect.



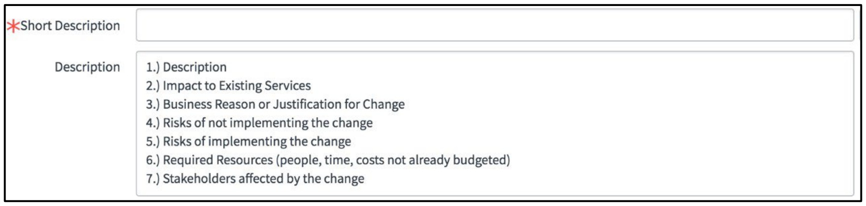
*The **Classification** field is read-only and is calculated based on the risk score*

Use the drop-down menus to select the **Change Category** and **Change Subcategory**. The Change Category field is mandatory, but the Change Subcategory field is not since every Change Category may not have a related Change Subcategory. However, it is required to check for a subcategory after selecting a category. If there is no related subcategory, then the subcategory can be left as None.

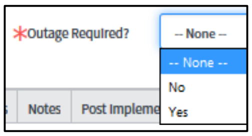


The ISO Approval field is a read-only field. This field will either be blank or have check mark indicating that the Information Security Office must approve the change. This field is calculated using the selections in the Change Category and Change Subcategory fields. Firewall requests and Security related group policy updates require ISO approval at this time.

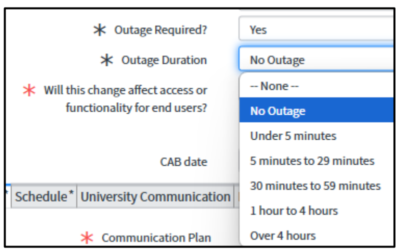
Enter a title for your change in the **Short Description** field and more detailed information in the **Description** field. The Description field is pre-populated with items to assist you.



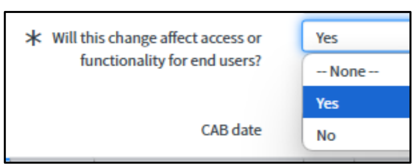
If an outage is required to perform the change tasks, choose **Yes** in the **Outage Required** field.



If outage is required, the **Outage Duration** will need to be selected



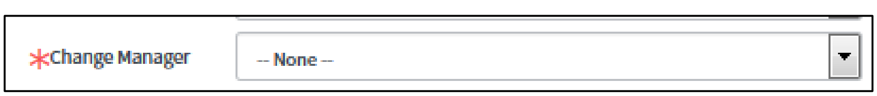
Select a choice for **Will this change affect access or functionality for end users?**



The **Approval** field is a read-only field indicating if approvals have been obtained or not.

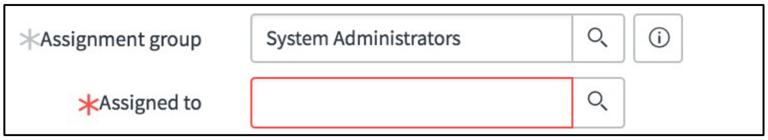
The **State** field contains the current state and any state that the change can be advanced to. This field is not mandatory as there are other means to advance the change state.

Select a **Change Manager** for the change. In general, the Change Manager will be the supervisor of the Change Owner or the Functional Manager responsible for the unit that manages the affected service.



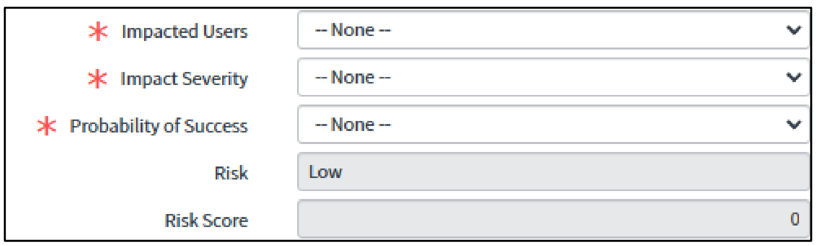
Choose the **Assignment group** that will be responsible for the change and add the Change Owner to the **Assigned to** field (*This is typically the technician submitting the change request*). If you do not know who the Change Owner will be, you should leave the **Assigned to** field blank and the Change Manager will assign the change during the Review process.

These fields can be entered by typing text in the field, which will then attempt to auto-complete your entry and find the desired item. You can also click the magnifying glass icon to the right of the field to search for the desired entry.

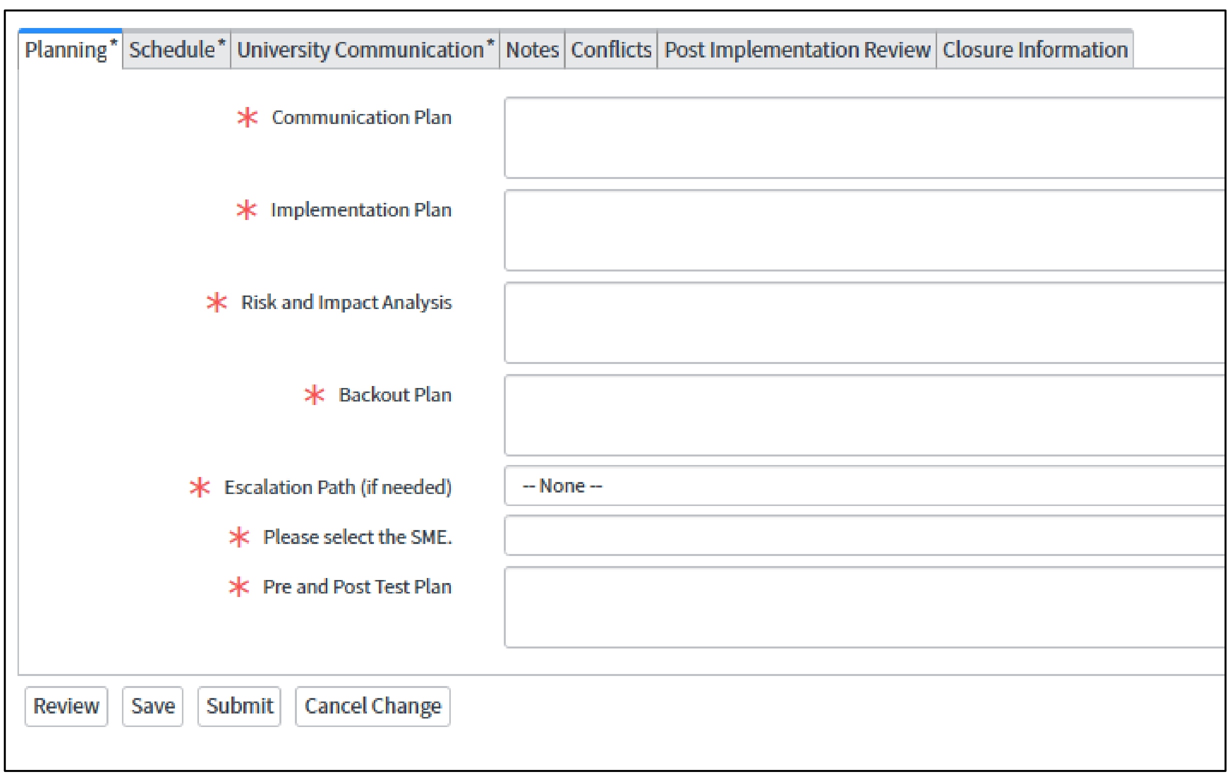


Select the change's priority from the **Priority** field drop-down menu. *Please see the previous section for a description of the different priority levels.*

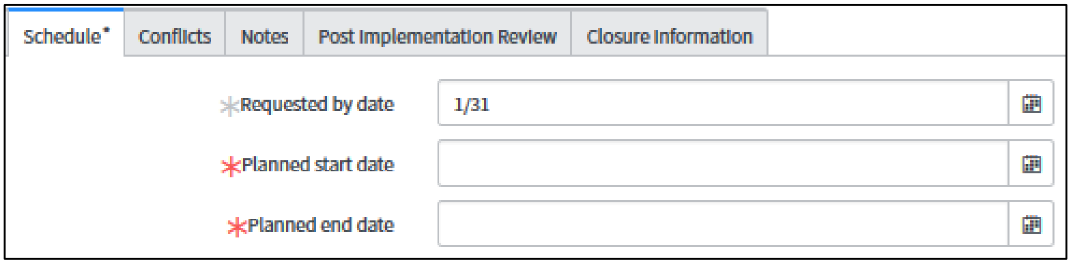
The **"Impacted Users", "Impact Severity"** and **"Probability of Success"** fields along with the already selected **"Outage Required"** and **"Outage Duration"** are used to calculate Risk. The Risk field and Risk Score will be updated after the change has advanced to the next state.



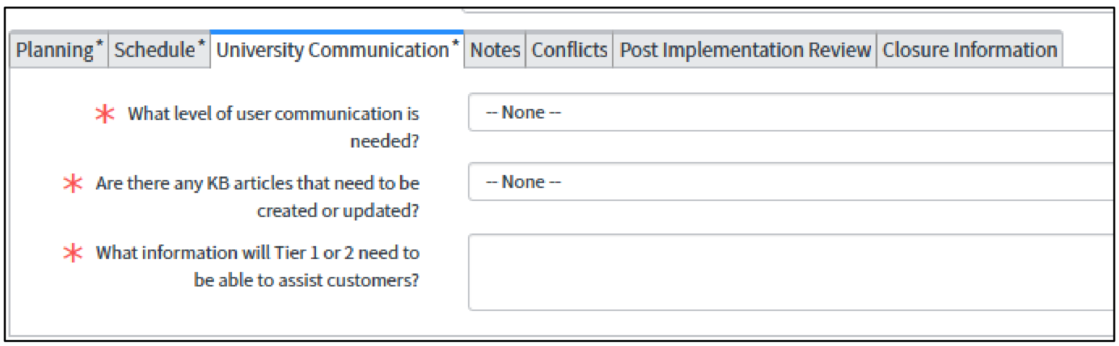
Under the "Planning" tab, the **Communication Plan**, **Implementation Plan, Risk and Impact Analysis, Backout Plan, Escalation Path, SME, and Pre and Post-Test Plan** fields must all be completed.



On the “Schedule” tab, the **Requested by date**, **Planned start date**, and **Planned end date** fields must be completed. A date can either be manually typed or selected using the calendar icon to the right of the field.

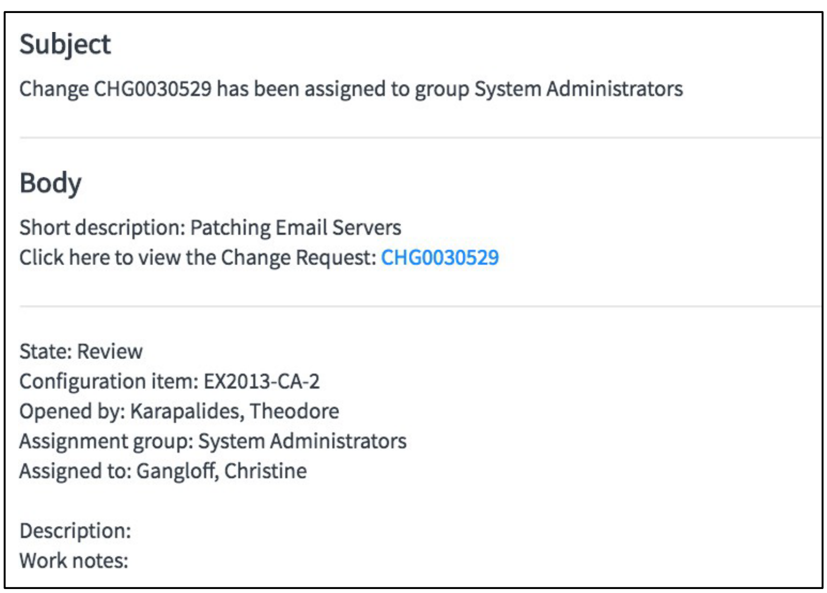


On the “University Communication Tab,” answers to questions will determine what communication is sent to the University.



Once all of the mandatory fields have been completed, click the **Review** button at the top or bottom of the form to advance the change state to REVIEW. The Change Initiator is done with the change at this point. If any required fields have been missed, an error message will appear indicating which fields still need to be completed.

The Assignment Group will receive the following email notification:


Subject

Change CHG0030529 has been assigned to group System Administrators

Body

Short description: Patching Email Servers
Click here to view the Change Request: CHG0030529

State: Review
Configuration item: EX2013-CA-2
Opened by: Karapalides, Theodore
Assignment group: System Administrators
Assigned to: Gangloff, Christine

Description:
Work notes:

At this point, the Change Request has been submitted and will be routed to the Change Manager for review. The Change Manager will be notified by email and will see a pending Approval under My Approvals within ServiceNow.

The Change Initiator/Owner's role is complete until the change is approved or rejected and returned to the DRAFT state for additional information.

Normal Request for Change Review

This step is executed by the Change Manager.

When the change has reached the REVIEW state, the Change Manager will need to approve the change. The Change Manager will receive the following email notification:

Subject

Change Request CHG0030580 - State set to Review

Body

Short description: Patching Exchange servers
Click here to view the Change Request: CHG0030580

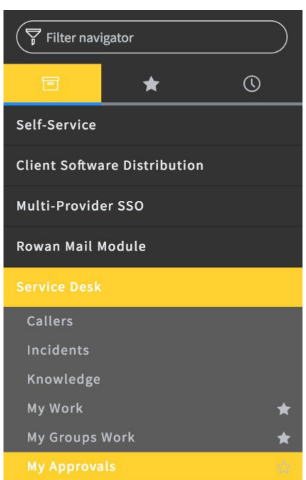
State: Review
Opened by: Gangloff, Christine
Assignment group:

Description:

1.) Description
2.) Impact to Existing Services
3.) Business Reason or Justification for Change
4.) Risks of not implementing the change
5.) Risks of implementing the change
6.) Required Resources (people, time, costs not already budgeted)
7.) Stakeholders affected by the change

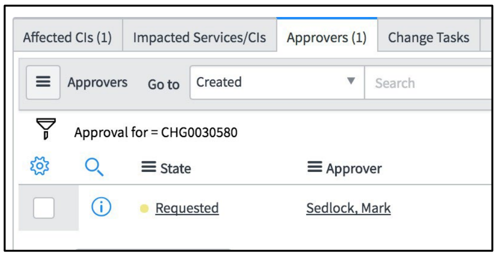
Work notes:

The Change Manager can either click the link in the notification email to open the change or navigate to the **Service Desk** application in the application navigator and click **My Approvals**.

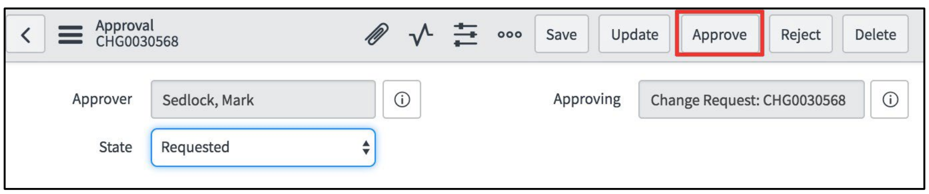


In the Approvals list, click the change number in the "Approval for" column to open it.

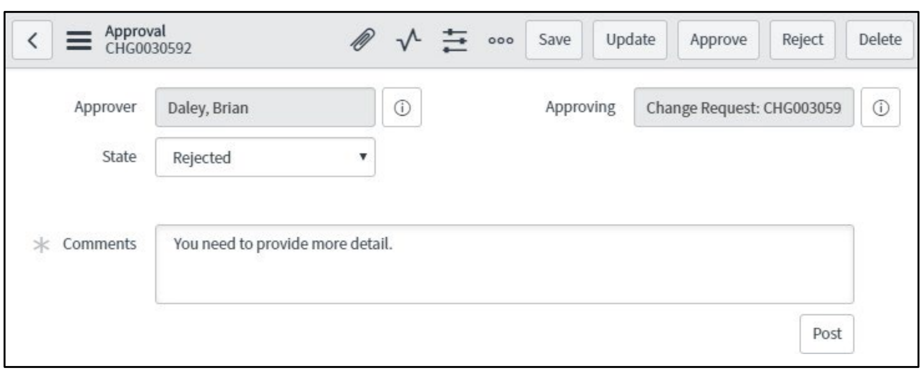
Once the change is open, review the change information at the top and middle of the form. If it is acceptable, scroll to the bottom of the change form and click the “Approvers” tab. The Change Manager should see their name listed.



Open the approval by clicking the hyperlinked "**Requested**" field under the State column. You can then click the **Approve** button to approve the change.



You also have the option of rejecting the change by entering a reason for the rejection in the **Comments** field and clicking the "**Reject**" button. This will put the change back into a DRAFT state and notify the Change Initiator (and Change Owner if one has been selected) that the change has been rejected. The Change Initiator can then address the reason for the rejection that was placed in the Comments field and re-submit the change for review.



If the change is approved and is a **minor change** (or if ISO approval is not needed), the change state will advance to SCHEDULED.

If ISO approval is required, the ISO group members can access the change by clicking the link in the change approval email notification. The ISO group will change the approval state in the same way that the Change Manger does. Once one of the ISO members has changed the state to "Approved," the change state will advance to SCHEDULED.

If the change is approved and is a **major change**, the CAB Coordinator will also need to give approval for the change along with the Change Manger. Once the Change Manager has given approval, the CAB Coordinator will get a notification to approve the major change. If required, the ISO group may need to provide approval as well. The same processes used to change the approval state for minor changes can be used for major changes.

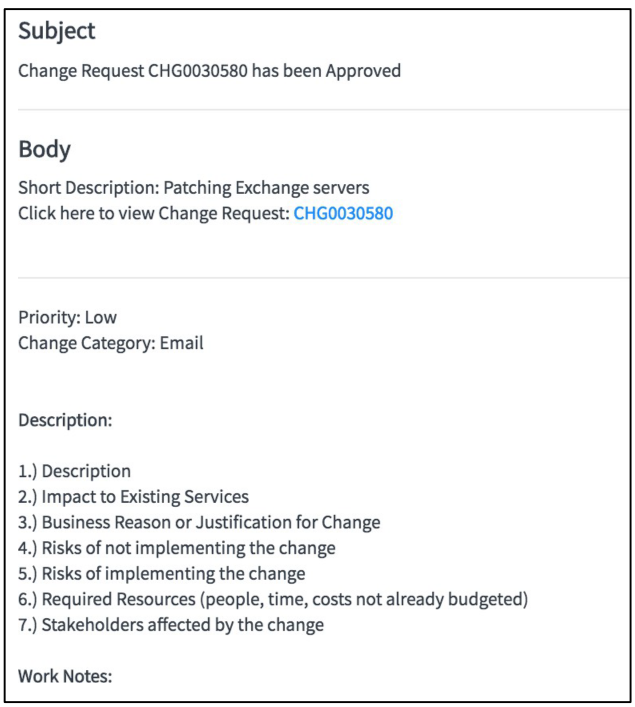
Once the Change Manager, ISO (if needed), and CAB Coordinator approvals have been obtained, the change state will advance to SCHEDULED.

Assigning a Change Owner

Once the change state has progressed to the SCHEDULED state, the Change Manager may need to assign a Change Owner in the **Assigned to** field if the Change Initiator did not assign one during the initial creation of the change.

This field can be entered by either typing some portion of the name and selecting from the auto-completed results or clicking the magnifying glass icon and selecting from a list.

Once the change has been assigned and approved, the Change Owner will receive the following email notification:


Subject

Change Request CHG0030580 has been Approved

Body

Short Description: Patching Exchange servers
Click here to view Change Request: CHG0030580

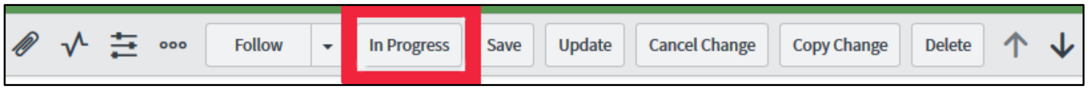
Priority: Low
Change Category: Email

Description:

1.) Description
2.) Impact to Existing Services
3.) Business Reason or Justification for Change
4.) Risks of not implementing the change
5.) Risks of implementing the change
6.) Required Resources (people, time, costs not already budgeted)
7.) Stakeholders affected by the change

Work Notes:

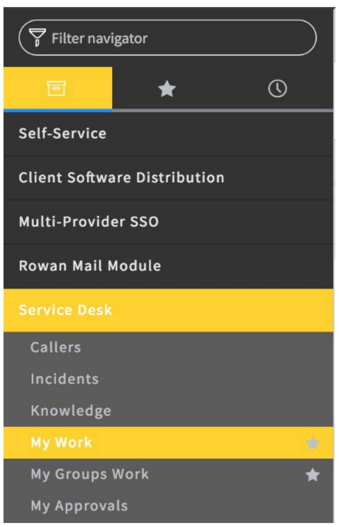
The Change Owner can click the link in the notification email to open the change and then select the **In Progress** button at the top of the form to begin completing the change tasks.



Performing the Change Tasks

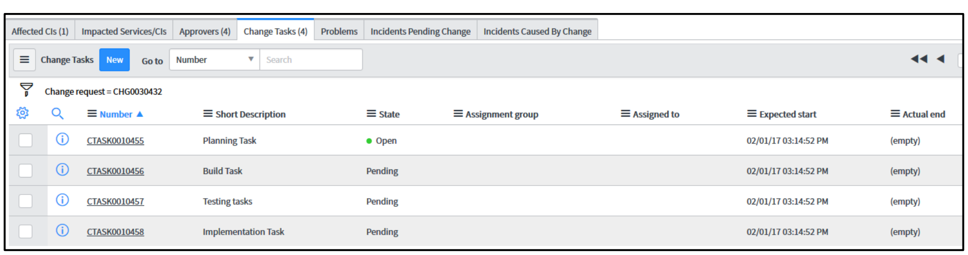
When the change has moved to the IN PROGRESS state, the Change Owner in the "Assigned to" field will need to perform the pre-defined change tasks.

The Change Owner can access the change by either clicking the link in the notification email or expanding the **Service Desk** application within ServiceNow and selecting **My Work**. The **My Work** list is also displayed on the ITIL homepage.

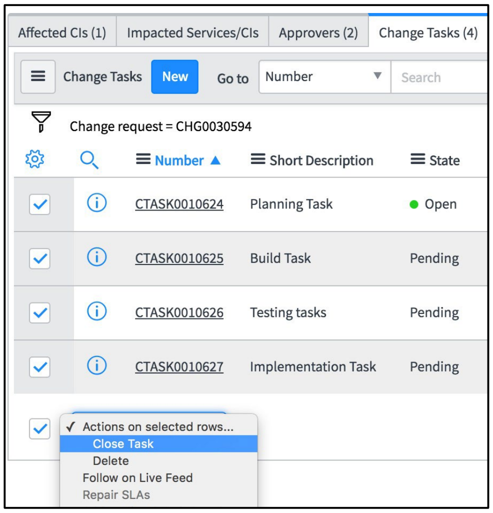


Click the change number in the **Number** column to open it.

Scroll down to the bottom of the form and click the **Change Tasks** tab. Four tasks will have been automatically generated.



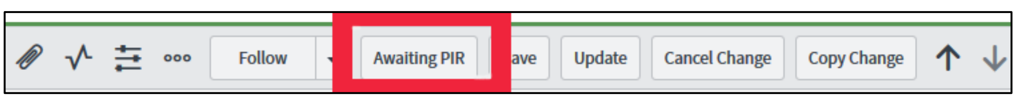
Once the tasks have been completed, the Change Owner will need to update the state of each task to "Closed Complete." You can close all four tasks at once by clicking the check box next to the “**Actions on selected rows**“ menu and changing the drop-down to “**Close Task**.”



When all four tasks have been set to the CLOSED COMPLETE state, click the **Completed** button.

The change will advance to the COMPLETED state.

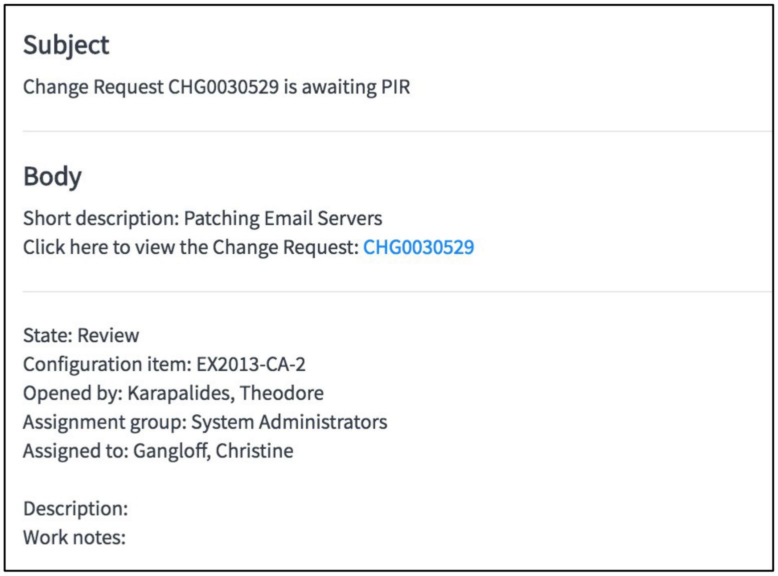
The Change Owner will then need to set the state to AWAITING PIR by clicking the **Awaiting PIR** button at the top of the form.



PIR, or 'Post Implementation Review' is equivalent to the Review phase in ServiceDesk, where the Change Manager reviews the completed change and approves the change as complete.

Post Implementation Review (PIR)

Once the change state is set to AWAITING PIR, the Change Manger will receive an email stating that the change is ready for the Post Implementation Review.



Subject

Change Request CHG0030529 is awaiting PIR

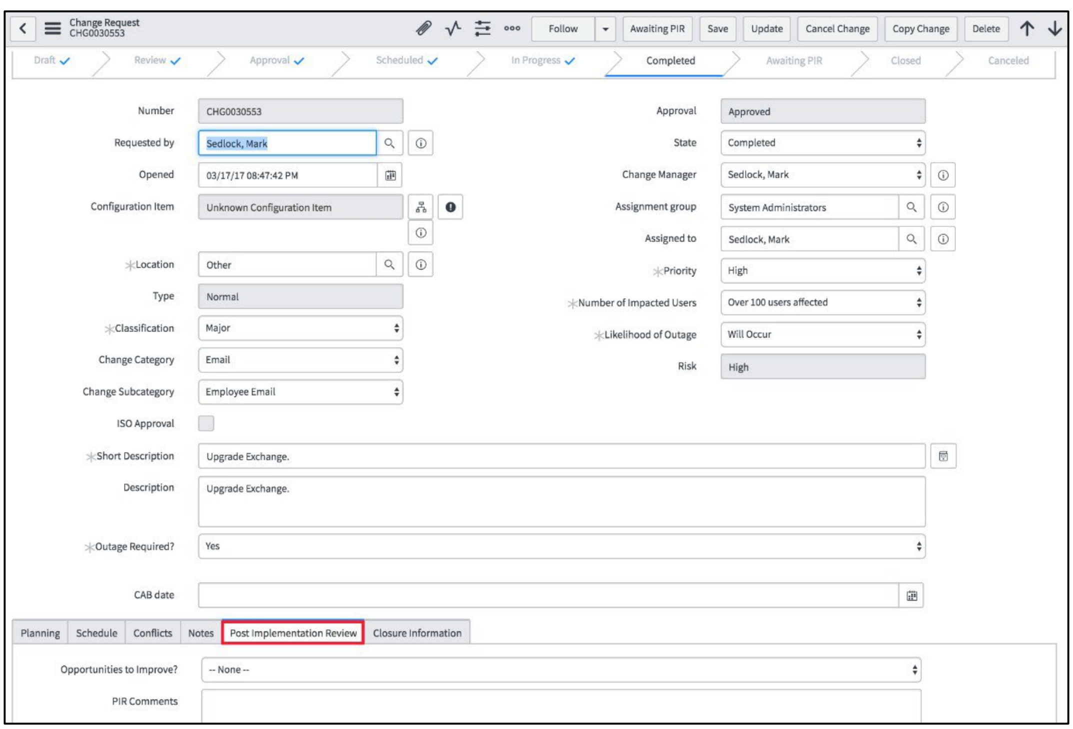
Body

Short description: Patching Email Servers
Click here to view the Change Request: CHG0030529

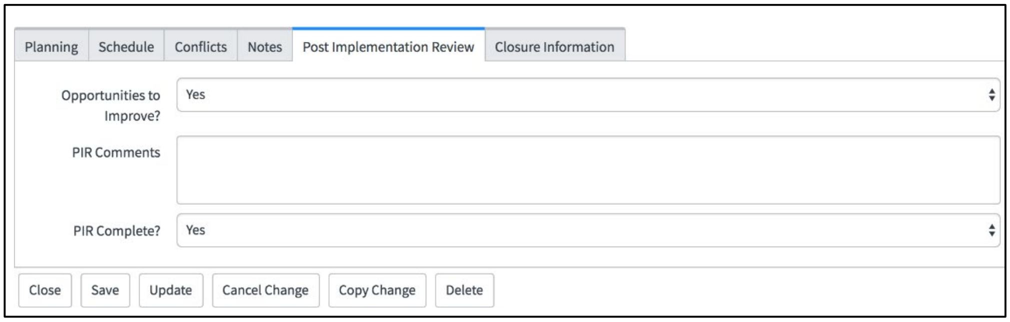
State: Review
Configuration item: EX2013-CA-2
Opened by: Karapalides, Theodore
Assignment group: System Administrators
Assigned to: Gangloff, Christine

Description:
Work notes:

The Change Manger can open the change by clicking the Change Request link in the email notification or from within the My Approvals module. Once the change is open, click the "Post Implementation Review" tab at the bottom of the form and complete the **Opportunities to Improve?** and the **PIR Complete?** fields.



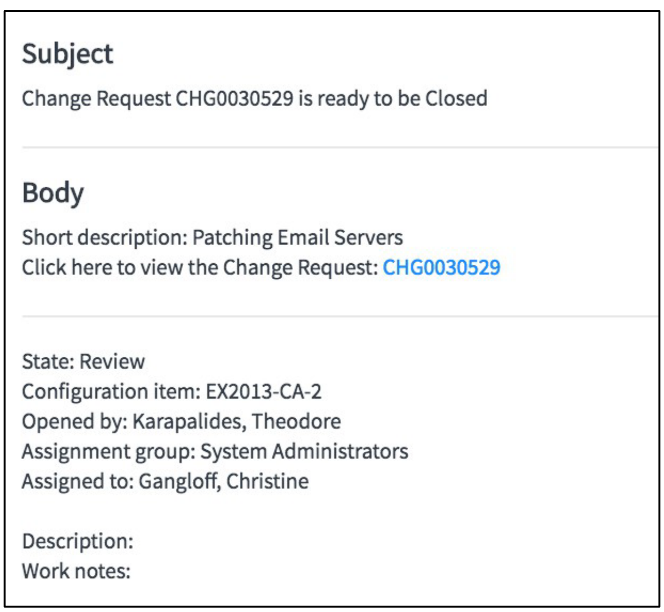
Both of these fields are Yes/No drop-down menus. The PIR Comments text box is not mandatory, but a comment can be left if desired. These fields are restricted so that only a Change Manger can complete them.



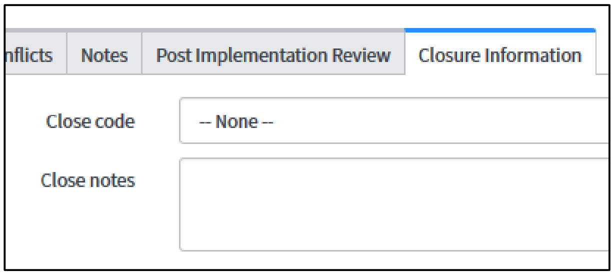
Once these fields have been completed, click either **Save** to save and stay on the change form or **Update** to save and close the form.

Change Closure

After the Post Implementation Review has been completed, the CAB Coordinator will receive an email notifying them that a change is ready to be closed.



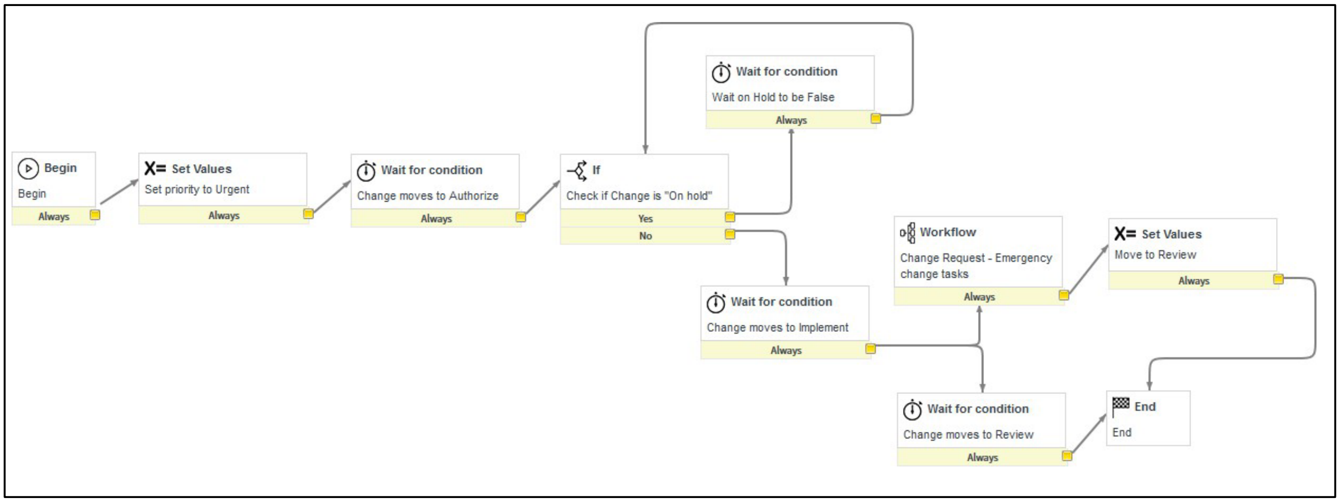
The CAB Coordinator can open the change by clicking the Change Request link in the email notification or from within the My Approvals module. Once the change is open, choose a **Close code** on the “Closure Information” tab at the bottom of the form.



The **Close code** field is a mandatory drop-down field. The **Close Notes** field is not required, but a comment can be left if desired. These fields are restricted so that only the CAB Coordinator can complete them. Once the Close code field has been selected, click the **Close** button to close the change.

Emergency Change Process

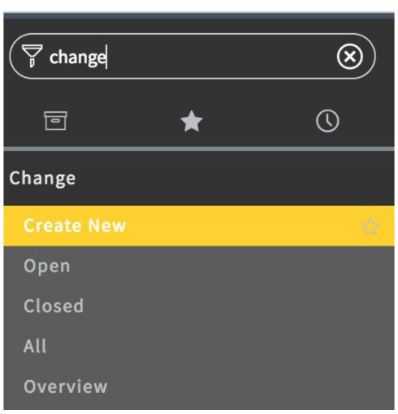
The intent of the Emergency Change Process is to allow the triage/implementation team to resolve issues in a timely manner, however, all aspects of the emergency process, including the initial notification for awareness, problem resolution specifics and root cause analysis need to be documented. This will ensure that the entire IRT staff is communicated with on a frequent basis regarding the emergency until it has been resolved.



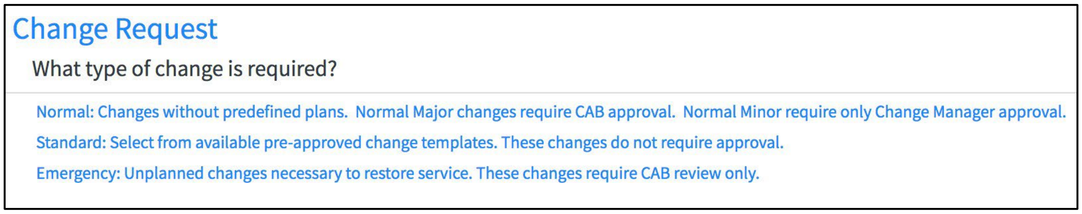
Create an Emergency Change Request

The Emergency Change Process begins once the problem has been identified by the triage team. Emergency change requests may be submitted before, during or after (retrospectively) the implementation of the change.

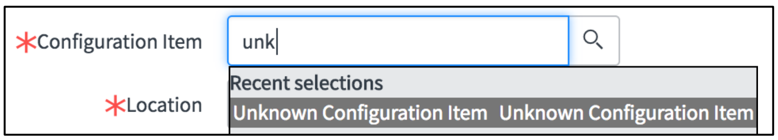
To start the Emergency Change Management process, the Change Initiator will complete a Request for Change (RFC) form by navigating to the Change application and selecting **Create New**.



Select “**Emergency: Unplanned changes necessary to restore service. These changes require CAB review only**.” from the list of change requests.

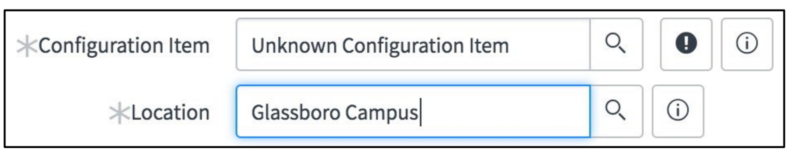


Select the **Configuration Item** and **Location** fields. These can be chosen by typing text in the field, which will then attempt to auto-complete your entry and find the desired item. You can also click the magnifying glass icon to the right of the field to search for the desired entry. If you have previously chosen a configuration item or location, you can click in the field to get a list of recent entries.

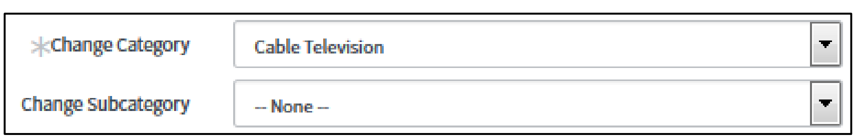


As with ServiceDesk, the Configuration Item database will not be fully populated. This effort is included in a future phase of the ServiceNow project. Change Initiators should assign the "Unknown Configuration Item" value to this assigned field.

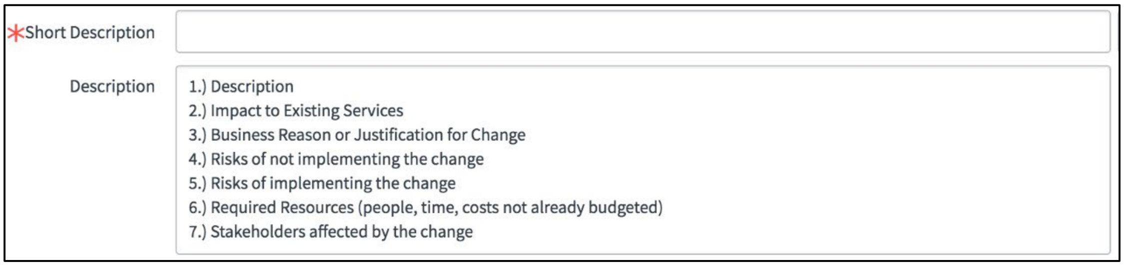
The "**Location**" field should be set to reflect the scope of impact the change and/or the resulting outage will affect (or had affected).



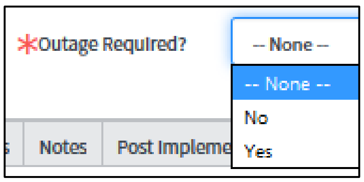
Use the drop-down menus to select the **Change Category** and **Change Subcategory**. The Change Category field is mandatory, but the Change Subcategory field is not since every Change Category may not have a related Change Subcategory. However, it is required to check for a subcategory after selecting a category. If there is no related subcategory, then the subcategory can be left as None.



Enter a title for the change in the **Short Description** field and more detailed information into the **Description** field. The Description field is pre-populated with items to assist you.



If an outage is (or was) required to perform the change tasks, choose **Yes** in the **Outage Required** field.

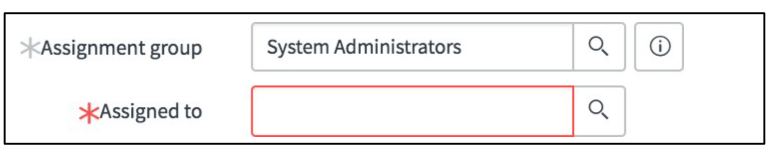


The **Approval** field is a read-only field indicating if approvals have been obtained or not.

The **State** field contains the current state and any state that the change can be advanced to. This field is not mandatory as there are other means to advance the change state.

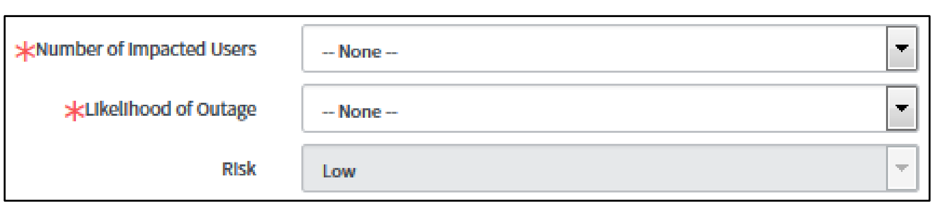
Select a **Change Manager** for the change.

Choose the **Assignment group** that will be responsible for the change and add the Change Owner to the **Assigned to** field (*This is typically the technician submitting the change request*). These fields can be chosen by typing text in the field, which will then attempt to auto-complete your entry and find the desired item, or by clicking the magnifying glass icon to the right of the field to search for the desired entry. Both fields are required for an emergency change.

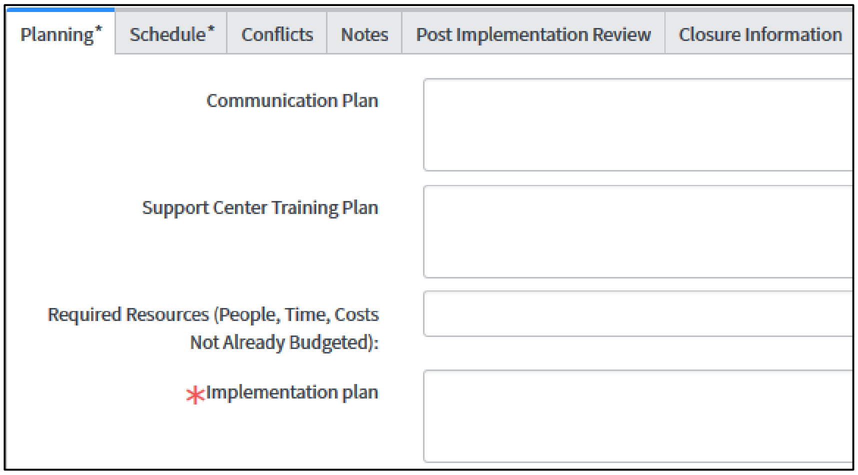


The **Priority** field for an Emergency Change is read-only and is preset to "Urgent".

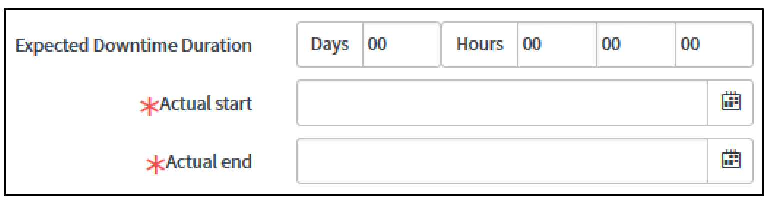
The **"Number of Impacted Users"** and **"Likelihood of Outage"** fields are used to calculate Risk. The Risk field will update after the change has been either saved, updated or advanced to the next state.



Under the “Planning” tab, the **Implementation Plan** field must be completed.



Under the “Schedule” tab, the **Actual Start** and **Actual End** fields must be completed. A date can either be manually typed or selected using the calendar icon to the right of the field. If the **Outage Required** field is set to Yes, then the **Expected Downtime Duration** field must be filled in as well.

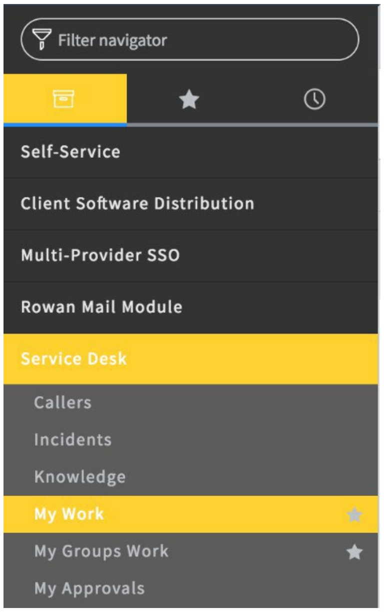


Once all of the mandatory fields have been completed, click the **In Progress** button to advance the change state. If any required fields have been missed, a notification will appear indicating which fields still need to be completed.

Performing the Change Tasks

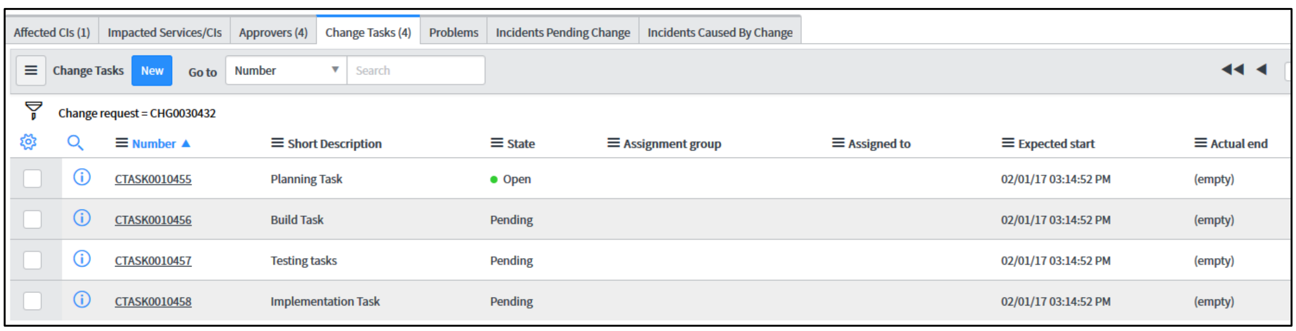
When the change has progressed to the IN PROGRESS state, the Change Owner in the **Assigned to** field will need to perform the change tasks.

The Change Owner can access the change by clicking the link in the notification email they receive or by expanding the **Service Desk** application in the application navigator and selecting **My Work**. The **My Work** list is also displayed on the ITIL homepage.



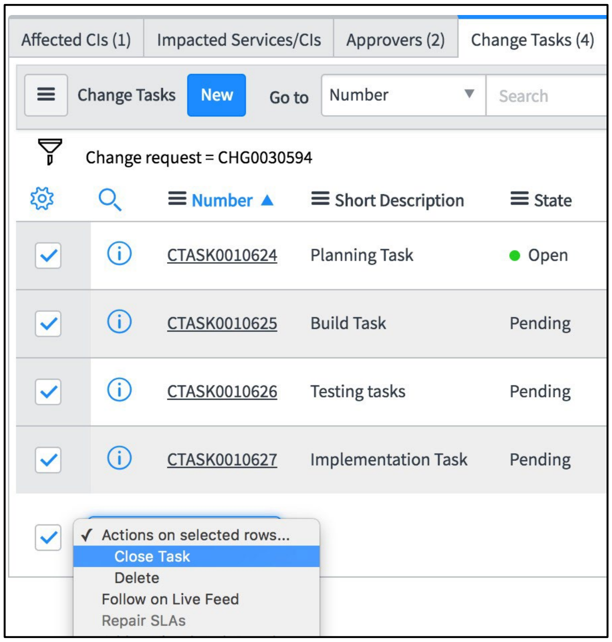
Click the change number in the **Number** column to open it.

Scroll down to the bottom of the form and click the “Change Tasks” tab. Four tasks will have been automatically generated.

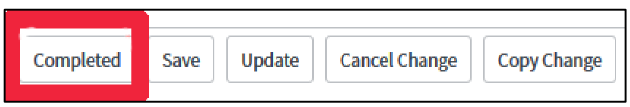


Once the tasks have been completed, the Change Owner will need to update the state of each task to "Closed Complete."

You can do this by clicking the check box next to the "**Actions on selected rows**" menu and changing the drop-down to "**Close Task**."



When all four tasks have been set to CLOSED COMPLETE, click the **Completed** button.

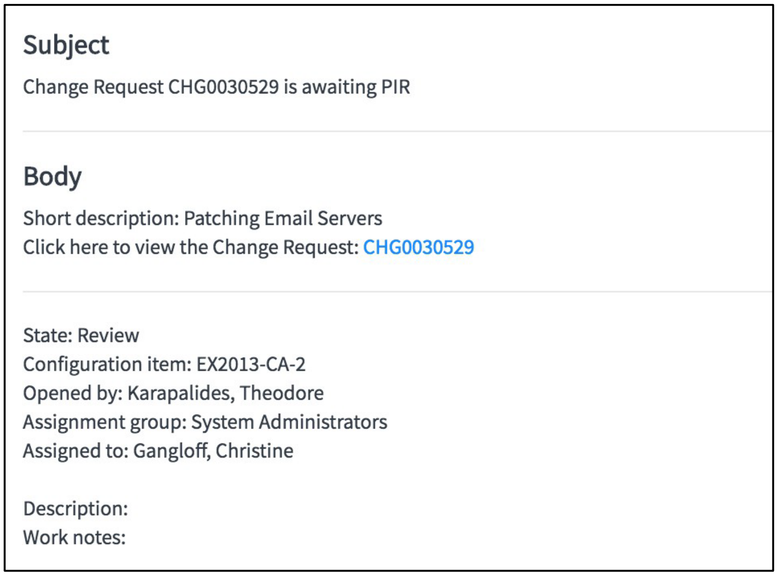


The change will advance to the COMPLETED state.

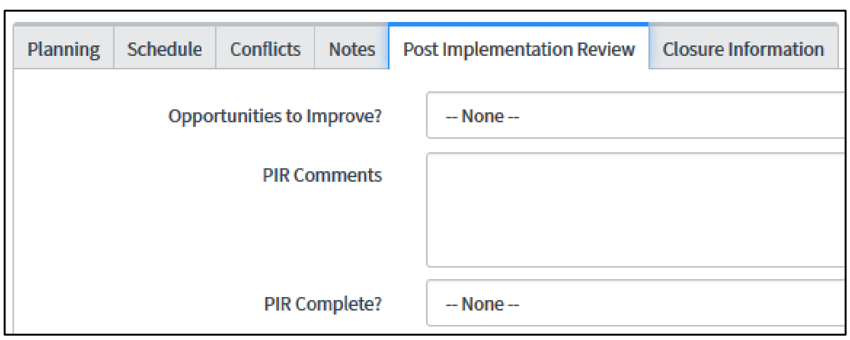
The Change Owner will then need to set the state to AWAITING PIR by clicking the **Awaiting PIR** button at the top of the form.

Post Implementation Review (PIR)

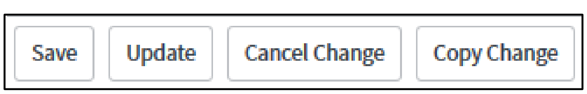
When the change state is set to AWAITING PIR, the Change Manger will receive an email stating that the change is ready for the Post Implementation Review.



The Change Manger can open the change by clicking the Change Request link in the email notification or from within the My Approvals module. Once the change is open, select the "Post Implementation Review" tab at the bottom of the form and complete the **Opportunities to Improve?** and the **PIR Complete?** fields. Both of these fields are Yes/No drop-down menus. The PIR Comments text box is not mandatory, but a comment can be entered if desired. These fields are restricted so that only a Change Manger can complete them.

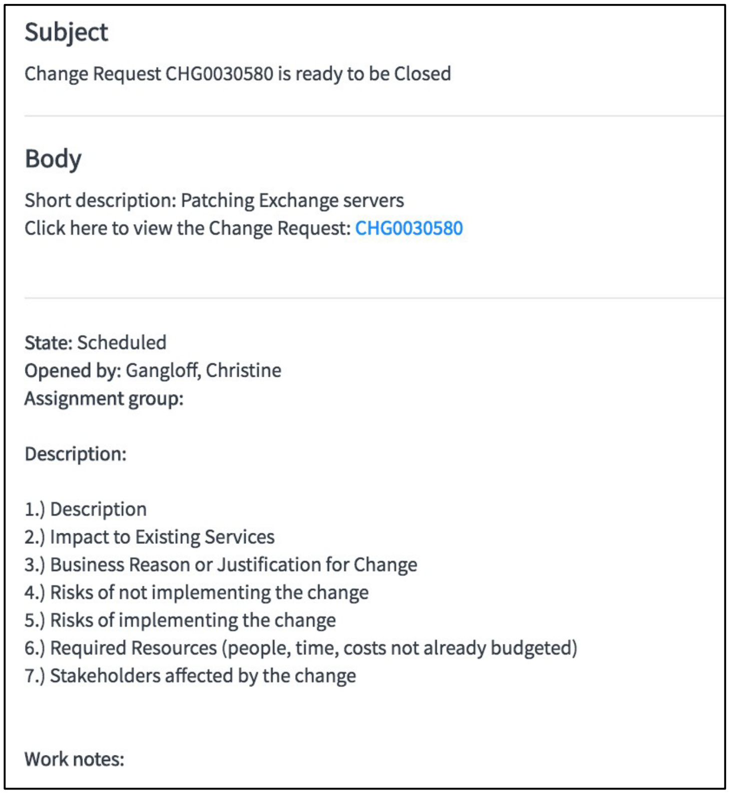


Once these two fields have been completed, click either **Save** to save and stay on the change form or **Update** to save and close the form.

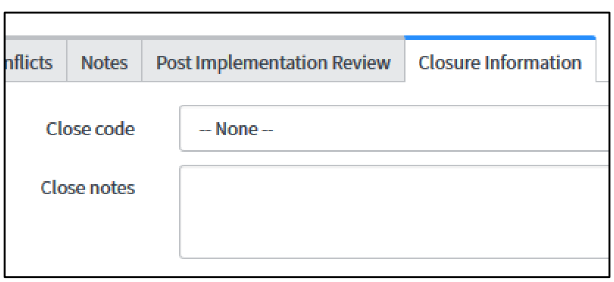


Change Closure

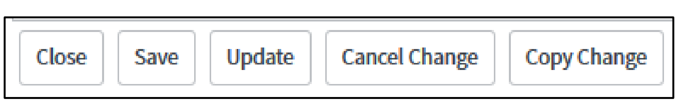
After the PIR has been completed, the CAB Coordinator will receive an email notifying them that a change is ready to be closed.



The CAB Coordinator can open the change by clicking the Change Request link in the email notification or from within the My Approvals module. Once the change is open, choose a **Close code** on the "Closure Information" tab at the bottom of the form.

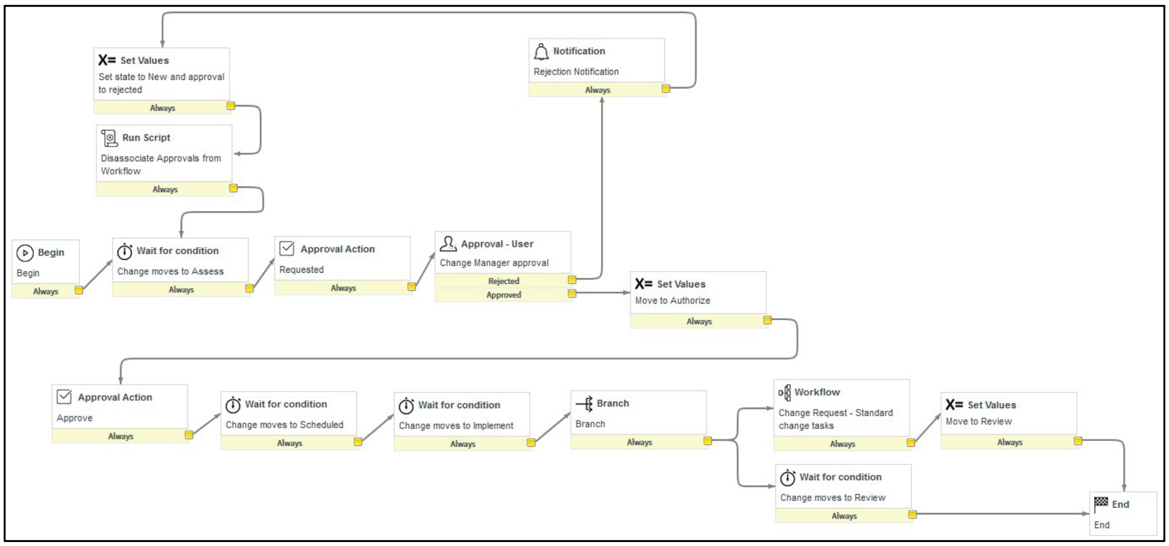


The **Close code** field is a mandatory drop-down menu. The **Close Notes** field is not required, but a comment can be left if desired. These fields are restricted so that only the CAB Coordinator can complete them. Once the Close code field has been selected, click the **Close** button to close the change.

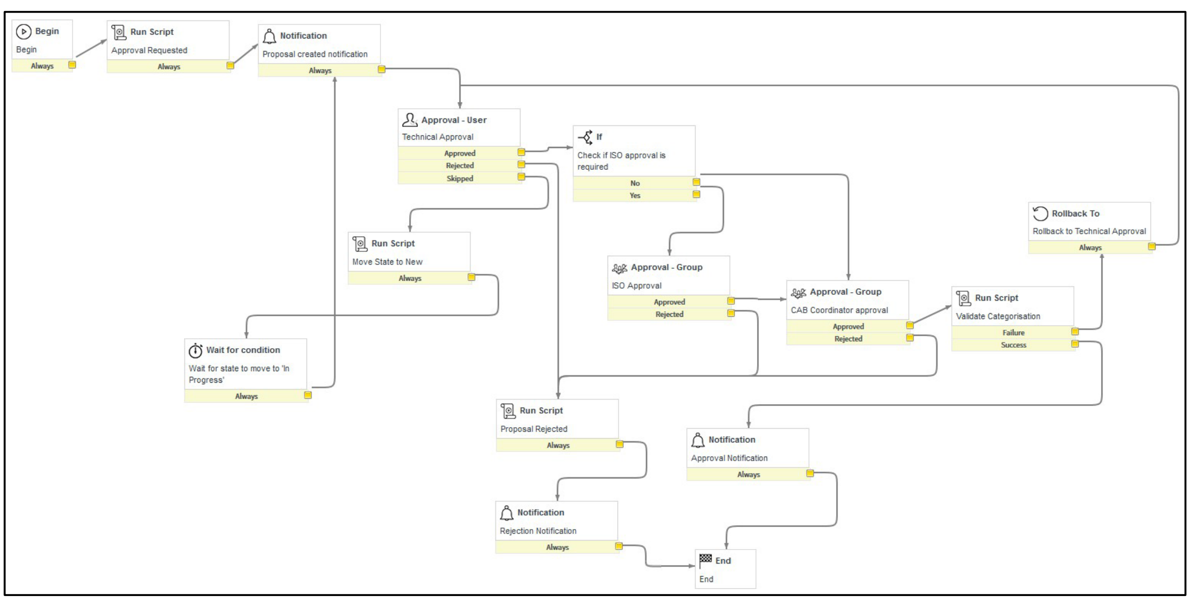


Standard Change Process

The Standard Change Process is used for a change that will be repeated on a number of occasions. A standard change has a low impact, must have thorough implementation documentation and a proven backout plan. The CAB will assess the change with the option to make it a standard change using a pre-authorized procedure. Once accepted, the standard change will not require a new RFC or acceptance from the Change Manager/CAB.



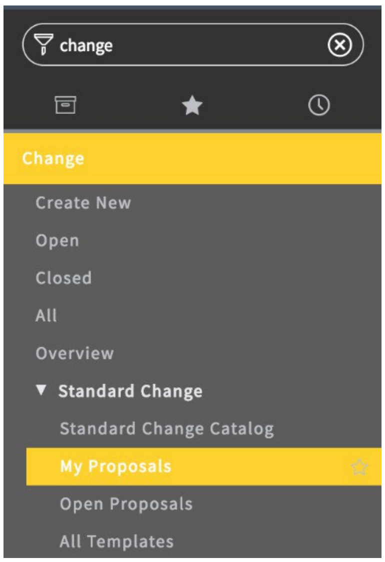
A standard change uses a template that has the majority of the information already entered into the template. Generally, there are only a few fields that needed to be completed. These standard change templates have been pre-approved by the Change Manger, an ISO group member and/or the CAB Coordinator. If a template does not exist in the Standard Change Catalog, then a new template will need to be created and approved.



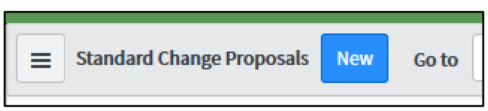
Create a Standard Change Template

Standard Change Templates are created, approved and then re-approved on an annual basis. Once approved, all future instances of a standard change can be executed more efficiently using the template, which will already be populated with values in order to expedite the process. Once the template is approved, these low-risk standard changes do not require any additional approvals from either the Change Manager or the CAB.

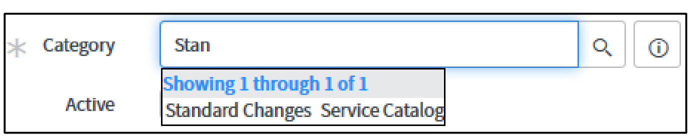
To create a new template, expand **Change** in the application navigator, expand **Standard Change** and then click **My Proposals**.



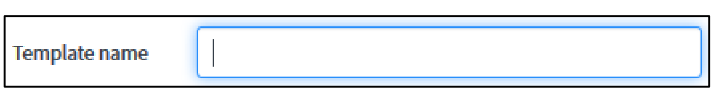
Click the **New** button at the top of the form.



In the Category field, begin typing "Standard Changes" and then select **Standard Changes Service Catalog** in the resulting list.



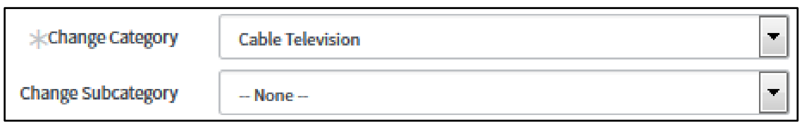
Enter a name for the new template in the **Template Name** field. For example, "Windows Server Patching," "Access Network Switch Replacement" or "SAN Storage Provisioning."



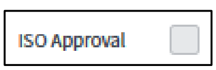
Enter a brief description of the standard change into the **Proposal Short Description** field. This text will be visible in all future actions related to this standard change. The short description should be generic enough to include these future actions, and should not include detail regarding a specific instance of this standard change activity.

Enter the Change Manger into the **Change Manager** field. You can enter a Change Manger by typing some portion of the Change Manger's name and choosing from the auto-completed results or by clicking the magnifying glass icon and searching through the list of Change Mangers. The Change Manger is typically the Change Initiator's supervisor.

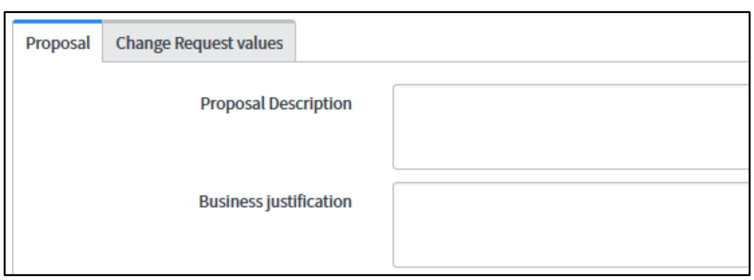
Use the drop-down menus to select a **Change Category** and a **Change Subcategory** (if applicable).



The ISO Approval field is a read-only field. This field will either be blank or have check mark indicating that the Information Security Office must approve the change. This field is calculated using the selections in the Change Category and Change Subcategory fields.

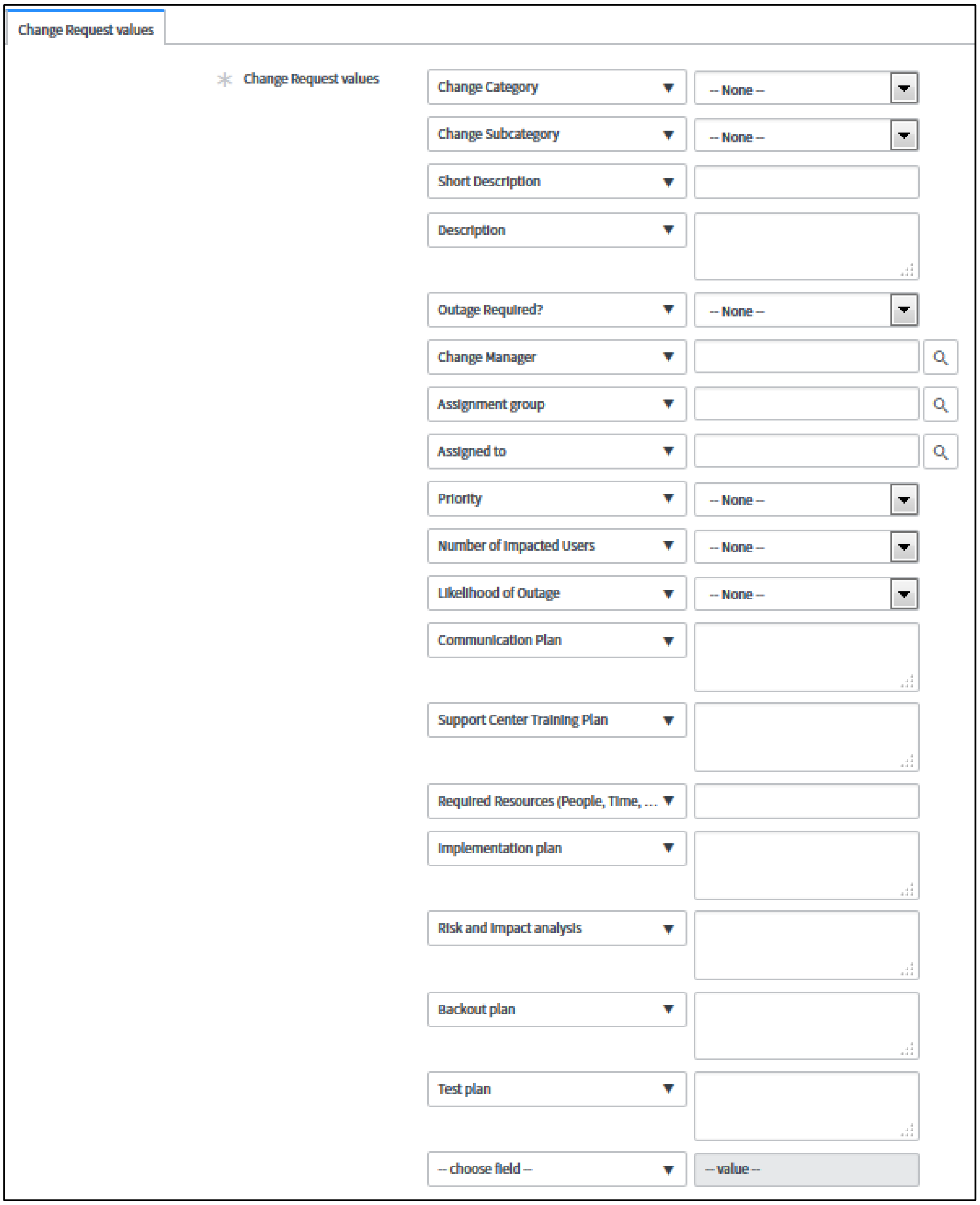


Under the **Proposal** tab, the Proposal Description and the Business Justification fields are not required but encouraged to be completed.



Under the **Change Request values** tab, enter all of the information that will be used for the template into the available fields. All of the information entered here will automatically appear in the template when the template is used for a standard change. If an additional field needs to be added, use the **–choose field–** drop-down menu located at the bottom of the form and either type or select the value for that new field.

Note: *Once the template has been approved, the Change Request values cannot be modified.*

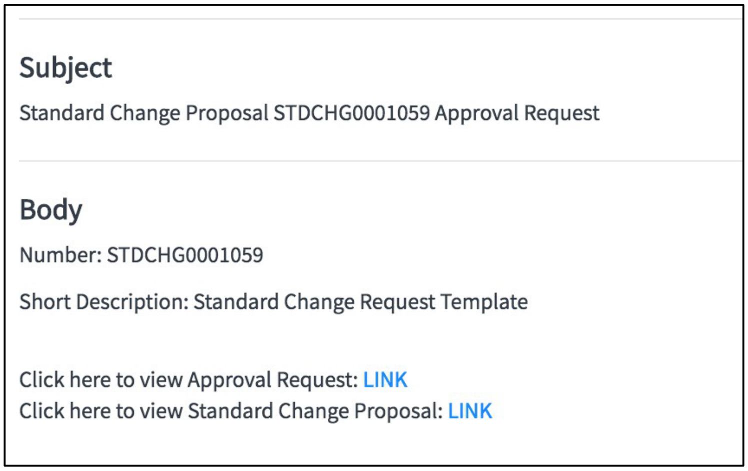


The **Change Category, Change Subcategory, Change Manager** fields and all other Change Request values should match the information entered previously at the top of the form. The "Assigned to" field does not need to be completed unless the same person will be completing the change tasks every time this template is used.

When all of the required template proposal fields have been completed, click the **Request Approval** button.

Standard Change Template Proposal Review

The Change Manger selected in the Change Manager field at the top of the change template proposal will be the first to review and approve the template. They will receive the following email notification:


Subject

Standard Change Proposal STDCHG0001059 Approval Request

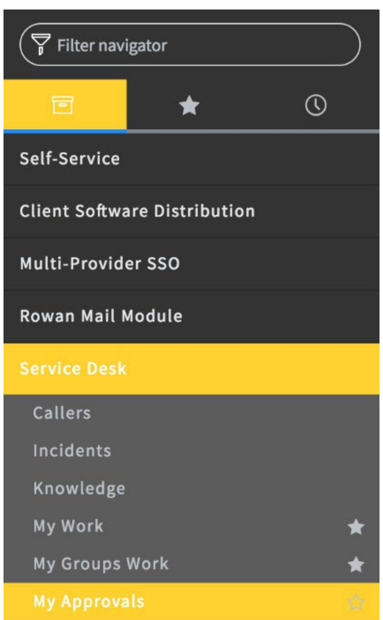
Body

Number: STDCHG0001059

Short Description: Standard Change Request Template

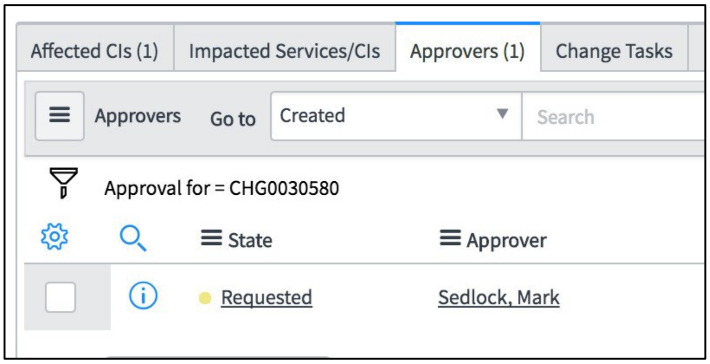
Click here to view Approval Request: LINK
Click here to view Standard Change Proposal: LINK

To approve the template proposal, the Change Manager can either click the link in the email to open the change proposal or expand the **Service Desk** application from within ServiceNow and select **My Approvals**.



Click the number for the standard change in the "Approval for" column. The typical format for a standard change listing begins with **STDCHG**.

Review the change information at the top and middle of the form. If it is acceptable, scroll to the bottom of the change form and click the **Approvers** tab. The Change Manger should see their name listed.



Open the approval by clicking the hyperlinked "Requested" field under the State column. You can then click the **Approve** button to approve the change.

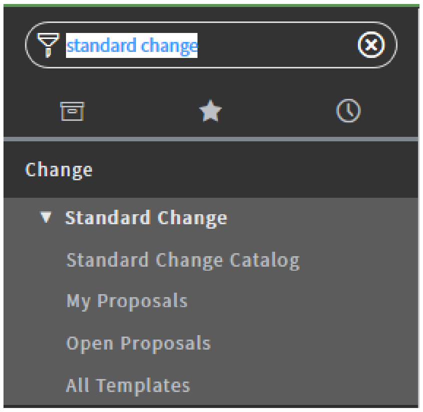
If ISO approval is required (as indicated by the ISO Approval field at the top of the form), the ISO group will be notified and can approve the proposal in the same way as the Change Manger. Lastly, the CAB Coordinator will need to approve the proposal. The CAB Coordinator can approve the proposal in the same manner as the Change Manger.

After the CAB Coordinator has given approval, the proposed standard change template will be available in the **Standard Change Catalog**.

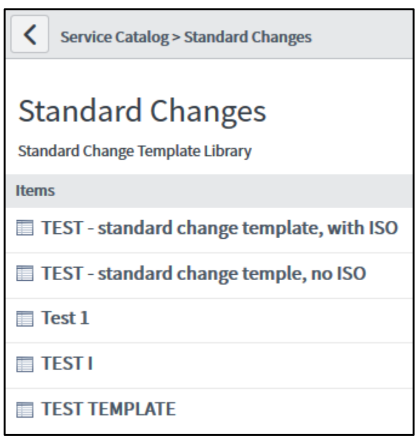
Once a Standard Change is available in the catalog, all future instances of this standard change can be processed through the catalog similar to Normal Minor, Normal Major, and Emergency Changes.

Create a Standard Change

To create a standard change from a template, the Change Initiator will need to select the **Change** application, expand **Standard Change** and then click **Standard Change Catalog**.



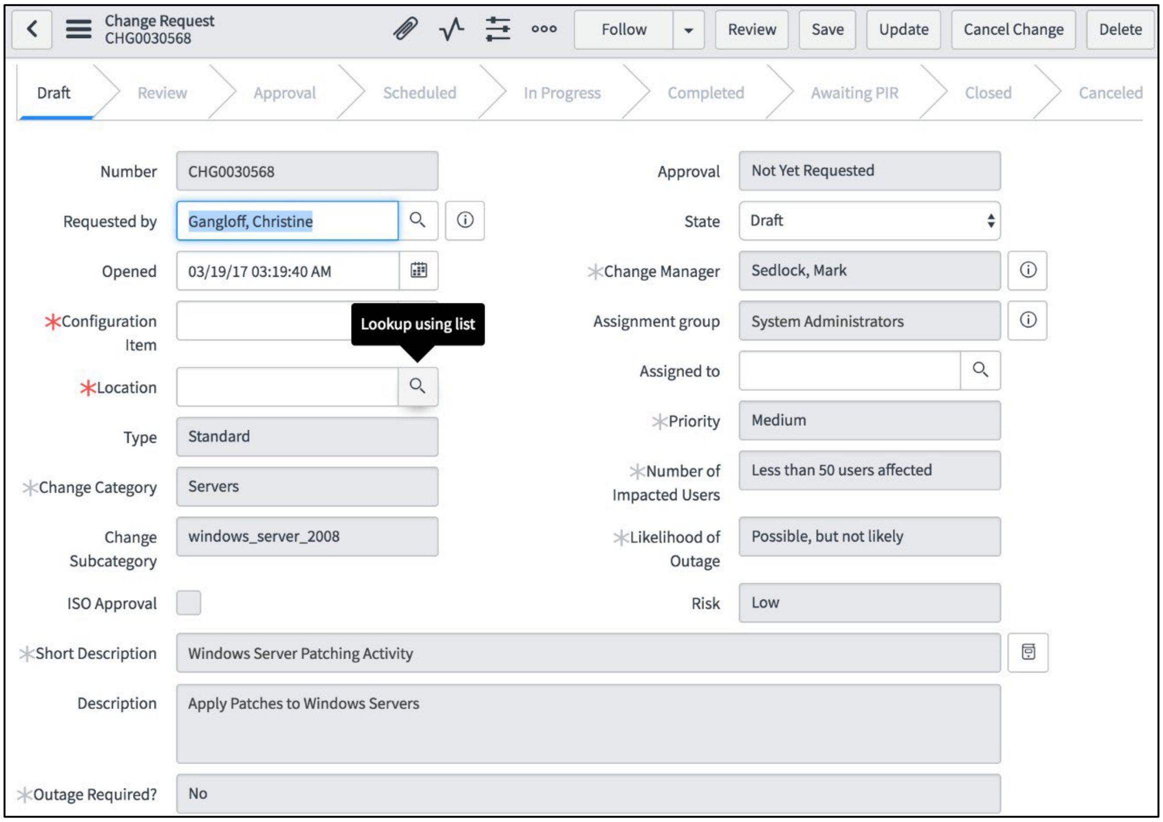
Select the desired template from the list.



The template will then open in the DRAFT state and only the empty required fields will need to be completed. All of the fields populated by the template will be read only.

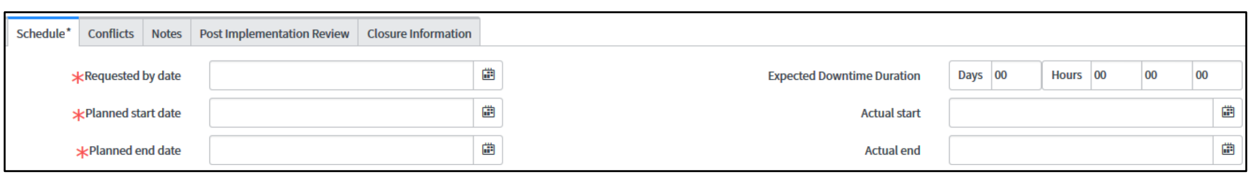
Generally, the **Configuration Item** and **Location** fields at the top of the form may need to be completed.

The "**Assigned to**" field can be completed at this time if the Change Initiator will also be the Change Owner. If not, leave the “Assigned to” field blank and the Change Manager will assign it when advancing the change to the SCHEDULED state later on in the process.

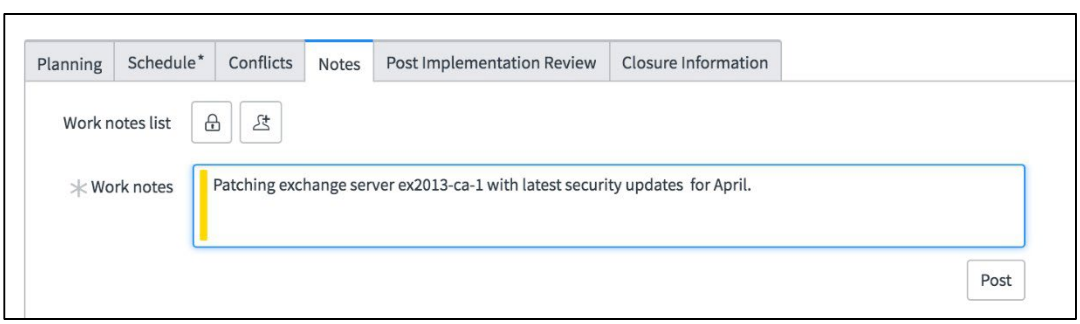


Click the “Schedule tab” at the bottom of the form. The **Requested by**, **Planned start date**, and **Planned end date** fields need to be entered.

The **Expected Downtime Duration** will need to be entered only if the **Outage Required** field is set to **Yes**.



Next, click the "Notes" tab and enter information in the **Work notes** field that contains all of the details that differentiate this instance of the Standard Change from the default values (other than the Configuration Item, which will be noted in the CI field on the main form). If the target piece of network equipment or server is not available as a CI, please note the target item here.



Once the work note is entered, click **Post** to add the note to the Activity Log**.**

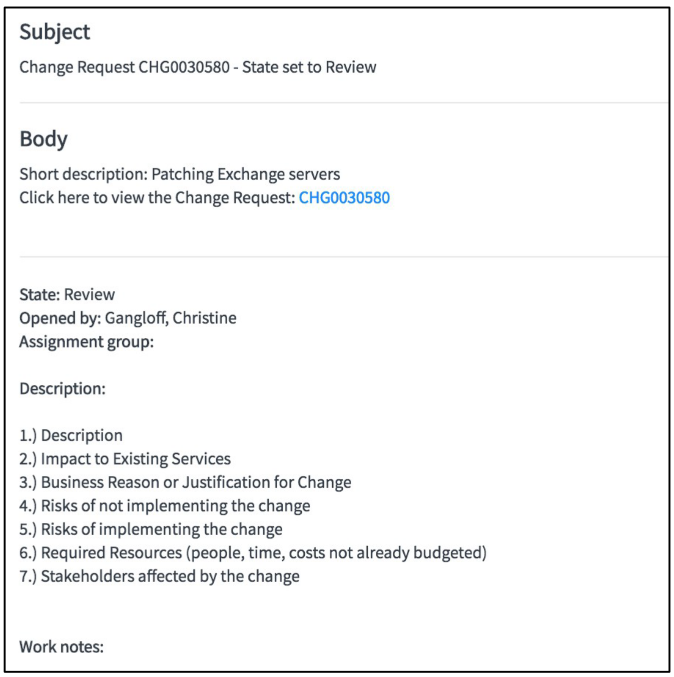
When all of the required fields have been completed, click the **Review** button.

If a required field is missed, an error message will appear stating which field needs to be completed.

Standard Changes will then require review and approval from the Change Manager.

Standard Change Review

Since standard change templates have been given prior approval, only the assigned Change Manger will need to approve the standard change. The purpose of this is to let the Change Manger know that a standard change has been submitted. The Change Manger will receive the following email:


Subject

Change Request CHG0030580 - State set to Review

Body

Short description: Patching Exchange servers
Click here to view the Change Request: CHG0030580

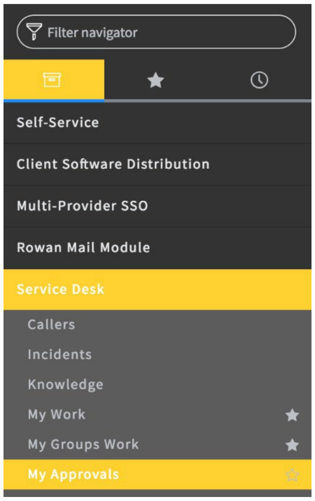
State: Review
Opened by: Gangloff, Christine
Assignment group:

Description:

1.) Description
2.) Impact to Existing Services
3.) Business Reason or Justification for Change
4.) Risks of not implementing the change
5.) Risks of implementing the change
6.) Required Resources (people, time, costs not already budgeted)
7.) Stakeholders affected by the change

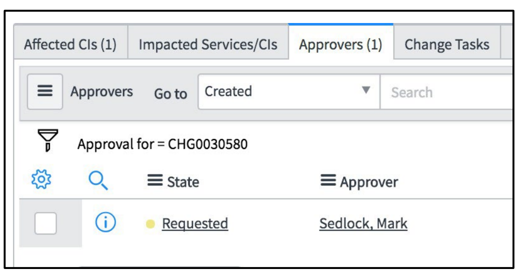
Work notes:

To approve the change, the Change Manager should click the link in the notification email to open the change or navigate to the **Service Desk** application in the application navigator and click **My Approvals**.



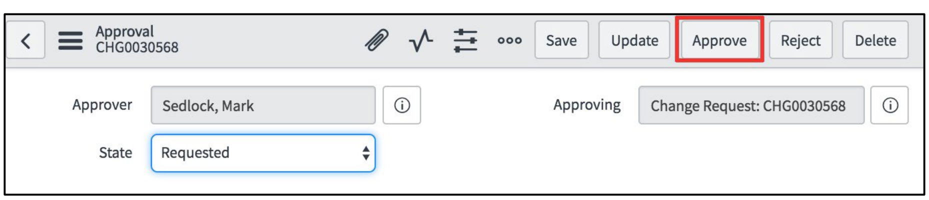
In the **Approvals** list, click the change number in the "**Approval for**" column to open it.

Scroll to the bottom of the change form and click the **Approvers** tab. The change manager should see their name listed.



Open the approval by clicking the hyperlinked "**Requested**" field under the State column.

Click the **Approve** button to approve the change.



Once you click **Approve** you will be taken back to the change request.

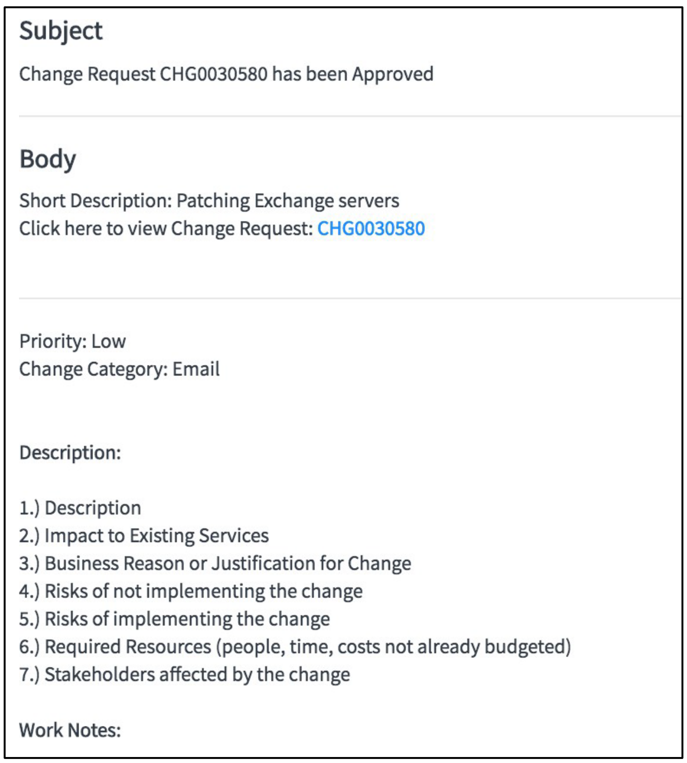
Click the **Schedule** button to advance the change to the SCHEDULED state.

Assigning a Change Owner

Once the change state has progressed to the SCHEDULED state, the Change Manger may need to assign a Change Owner in the **Assigned to** field if the Change Initiator did not assign one during the initial creation of the change.

This field can be entered by either typing some portion of the technician's name and selecting from the auto-completed results or clicking the magnifying glass icon and selecting from a list.

Once the change has been assigned and approved, the Change Owner will receive the following email notification:



Subject

Change Request CHG0030580 has been Approved

Body

Short Description: Patching Exchange servers
Click here to view Change Request: CHG0030580

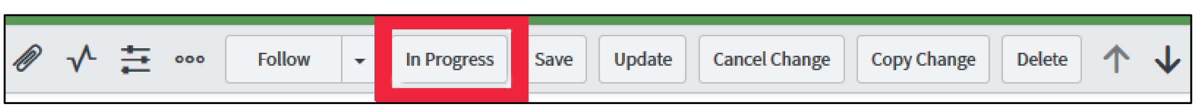
Priority: Low
Change Category: Email

Description:

1.) Description
2.) Impact to Existing Services
3.) Business Reason or Justification for Change
4.) Risks of not implementing the change
5.) Risks of implementing the change
6.) Required Resources (people, time, costs not already budgeted)
7.) Stakeholders affected by the change

Work Notes:

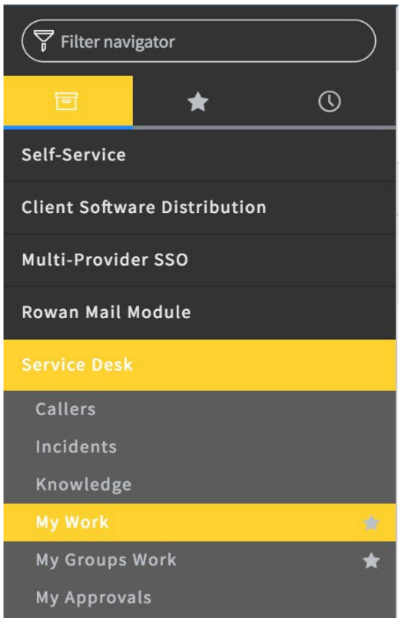
The Change Owner can click the link in the email to open the change and click the **In Progress** button at the top of the form to advance the change to the next state.



Performing the Change Tasks

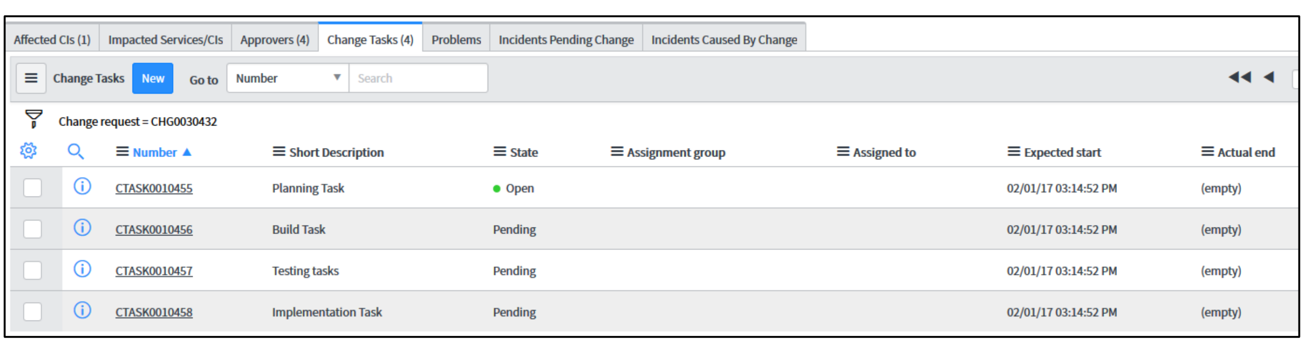
When the change has moved to the IN PROGRESS state, the Change Owner in the "**Assigned to**" field will need to perform the change tasks.

The Change Owner can access the change by expanding the **Service Desk** application in the application navigator and selecting **My Work**. The **My Work** list is also displayed on the ITIL homepage.



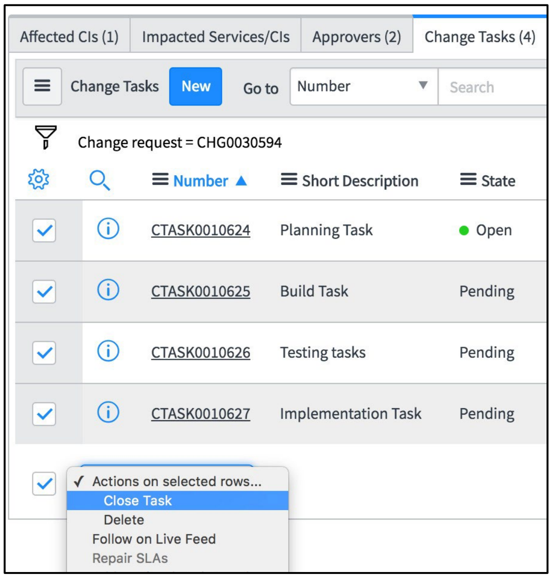
Click the change number in the **Number** column to open it.

Scroll down to the bottom of the form and click the **Change Tasks** tab. Four tasks will be automatically generated.



Once the tasks have been completed, the Change Owner will need to update the state of each task to "Closed Complete."

You can close all of the tasks at once by clicking the check box next to the "**Actions on selected rows**" menu and changing the drop-down to "**Close Task**."

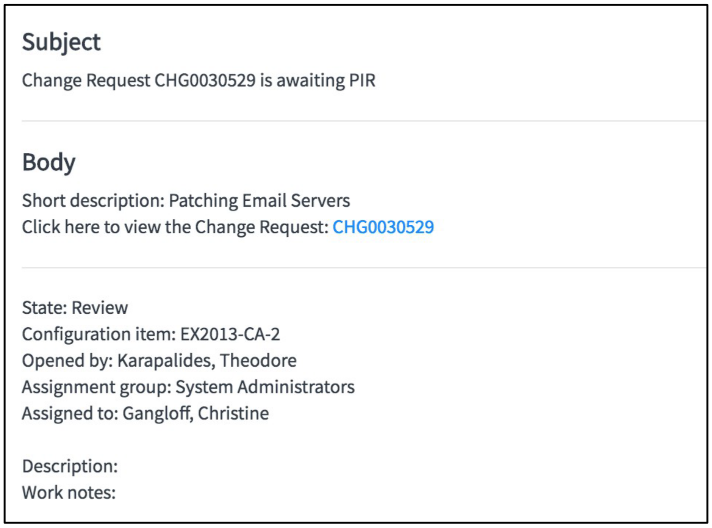


When all four tasks have been set to CLOSED COMPLETE, click **Save**.

This will advance the change to the COMPLETED state. The Change Owner will then need to set the state to AWAITING PIR by clicking the **Awaiting PIR** button at the top of the form.

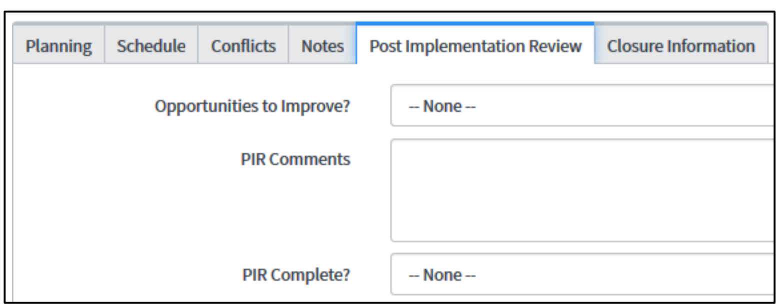
Post Implementation Review (PIR)

When the change state is set to AWAITING PIR, the Change Manger will receive an email stating that the change is ready for the Post Implementation Review.

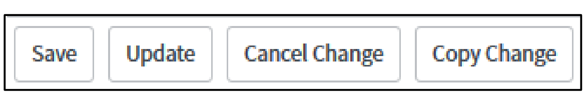


The Change Manger can open the change by clicking the Change Request link in the email notification or from within the My Approvals module. Select the "Post Implementation Review" tab near the bottom of the form and complete the **Opportunities to Improve?** and the **PIR Complete?** fields.

Both of these fields are Yes/No drop-down menus. The PIR Comments text box is not mandatory, but a comment can be left if desired. These fields are restricted so that only a Change Manger can complete them.

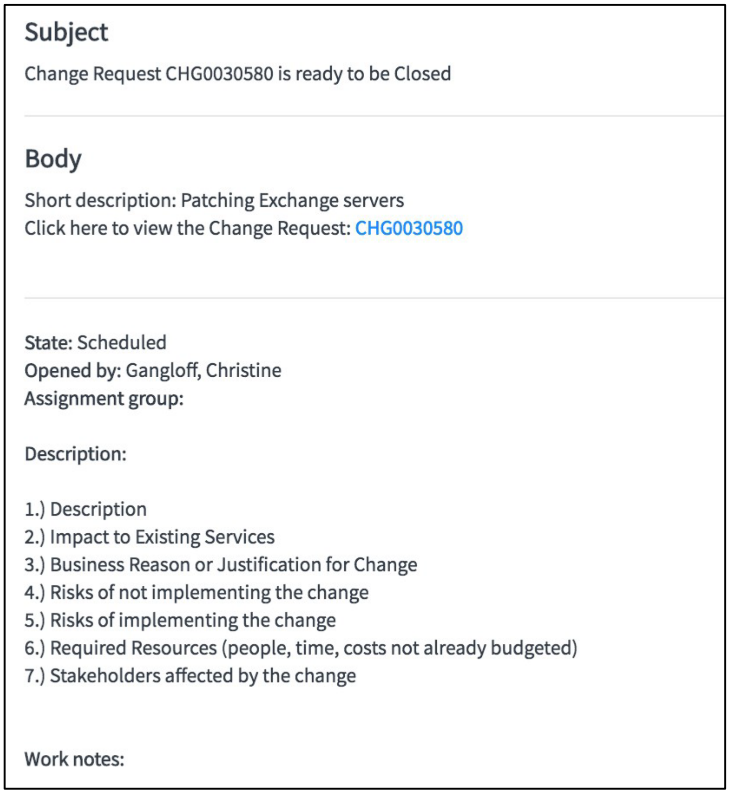


Once these two fields have been completed, click either **Save** to save and stay on the change form or **Update** to save and close the form.

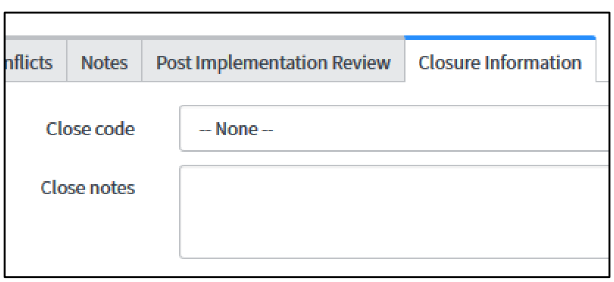


Change Closure

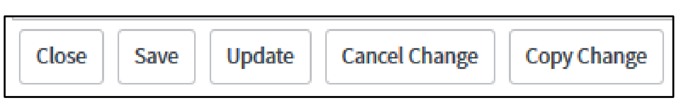
After the PIR has been completed, the CAB Coordinator will receive an email notifying them that a change is ready to be closed.



The CAB Coordinator can open the change by clicking the Change Request link in the email notification or from within the My Approvals module and choose a **Close code** on the "Closure Information" tab at the bottom of the form.



The **Close code** field is a mandatory drop-down menu. The **Close Notes** field is not required, but a comment can be left if desired. These fields are restricted so that only the CAB Coordinator can complete them. Once the Close code field has been selected, click the **Close** button to close the change.



Tips and Tricks

Reference Fields: Hover over a reference field icon to see a preview of the information in that related record.
Viewing Lists: Quickly change which columns are displayed in lists by using the gear icon at the left of the header bar. Return to original default view by using the gear and select the "**Reset to column defaults**" box.
Right click on a column name to see options related to that column, such as sorting, charting or exporting.
Quick Filters: Easily filter lists by right-clicking on a field value and select "**Show Matching**" or "**Filter Out**."
Default List View: If you don't see all of the fields or columns you should on a list check to make sure you are in the "**Default**" view. The other views, such as the "Self-Service" view, are limited and what the end user would typically see. Change your view back to the Default view from the Title Menu.
Group a list: Right click on the column header and select Group By from the context menu. Examples: "Group By Severity," "Group By Assignment Group."
The Number field must always be present and must **ALWAYS** be the first column in any list. If you move or remove this column the list will not display correctly.
Save versus Submit: Select **Save** to save the record and stay where you are. Select **Submit** (or Update in some cases) to save the record and return to the list.
Logout: Make sure to close your internet browser completely to end your ServiceNow session.

Quick Reference for Change Steps

Normal Change		
Step	**Action**	**Role**
1	Under Change - Selects "New" Normal Change	Change Initiator
2	Completes Request for Normal Change (RFC)	Change Initiator
3	Selects Review Button	Change Initiator
4	Receives Email Change is Ready for Approval, Selects Link	Change Manager
5	Reviews the Change	Change Manager
6	Approves the Change (Approvals tab)	Change Manager
7	Select Save	Change Manager
8	Receives Email Change is Ready for Approval, Selects Link (if needed)	ISO
9	Approves the Change (if needed based on category)	ISO
10	Select Save (if needed)	ISO
11	Receives Email Change is Ready for Approval, Selects Link	CAB Coordinator
12	Approves the Change (If Major change)	CAB Coordinator
13	Change is now in the Scheduled State	
14	Assigns a Change Owner (if needed)	Change Manager
15	Clicks on Link from email, Selects “In Progress” button at top of form	Change Owner
16	Or selects My Work under Service Desk, Opens Change	Change Owner
17	Selects Change Tasks Tab	Change Owner
18	Changes the Task States to Closed Complete	Change Owner
19	Selects Save Button	Change Owner
20	Selects Awaiting PIR Button	Change Owner
21	Receives Email Change is Ready for PIR, Select Link	Change Manager
22	Selects Post Implementation Review (PIR) Tab	Change Manager
23	Enters PIR Information	Change Manager
24	Selects Save or Update	Change Manager
25	Receives Email that change is ready to be closed, select link	CAB Coordinator
26	Selects Closure Information Tab	CAB Coordinator
27	Enters Close Code	CAB Coordinator
28	Selects Close	CAB Coordinator

Emergency Change		
Step	**Action**	**Role**
1	Incident is Resolved by Implementation Team	Change Owner
2	Under Change - Selects "New" Emergency Change	Change Initiator
3	Completes Request for Emergency Change (RFC)	Change Initiator
4	Select the Review button to advance state to REVIEW	Change Initiator
4	Assigns a Change Owner	Change Initiator
5	Selects the "In Progress" Button	Change Initiator
6	Selects My Work under Service Desk, Opens Change, or click link from email	Change Owner
7	Selects Change Tasks Tab	Change Owner
8	Changes the Task States to Complete	Change Owner
9	Selects Save Button	Change Owner
10	Selects Awaiting PIR Button	Change Owner
11	Receives Email Change is Ready for PIR, Select Link	Change Manager
12	Selects Post Implementation Review (PIR) Tab	Change Manager
13	Enters PIR Information	Change Manager
14	Selects Save or Update	Change Manager
15	Receives email change is ready to be closed, Clicks on Link from email	CAB Coordinator
16	Selects Closure Information Tab	CAB Coordinator
17	Enters Close Code	CAB Coordinator
18	Selects Close	CAB Coordinator

Standard Change Template		
Step	**Action**	**Role**
1	Under Change - Standard Change - My Proposals, Selects "New"	Change Initiator
2	Completes New Standard Change Proposal	Change Initiator
3	Selects Request Approval Button	Change Initiator
4	Receives Email Change is Ready for Approval, Selects Link	Change Manager
5	Reviews the Change	Change Manager
6	Approves the Change (Approvals tab)	Change Manager
7	Receives Email Change is Ready for Approval, Selects Link (if needed)	ISO
8	Approves the Change (if needed) (Approvals tab)	ISO
9	Receives Email Change is Ready for Approval, Selects Link	CAB Coordinator
10	Approves the Change (Approvals tab)	CAB Coordinator
11	Standard Change Template is now available in Standard Change Catalog	

Standard Change		
Step	**Action**	**Role**
1	Under Change - Standard Change - Standard Change Catalog - Selects from Template Library	Change Initiator
2	Completes Request for Standard Change (RFC)	Change Initiator
3	Selects "Review" Button	Change Initiator
4	Receives Email Change is Ready for Approval, Select Link	Change Manager
5	Reviews the Change	Change Manager
6	Approves the Change (Approvals tab)	Change Manager
7	Select "Schedule" button to advance state to Scheduled	Change Manager
8	Assigns a Change Owner (if needed)	Change Manager
9	Clicks on Link from email, Selects “In Progress” button at top of form	Change Owner
10	Selects Change Tasks Tab	Change Owner
11	Changes the Task States to Complete	Change Owner
12	Selects Save Button	Change Owner
13	Selects Awaiting PIR Button	Change Owner
14	Receives Email Change is Ready for PIR, Select Link	Change Manager
15	Selects Post Implementation Review (PIR) Tab	Change Manager
16	Enters PIR Information	Change Manager
17	Selects Save or Update	Change Manager
18	Receives email change is ready to be closed, Clicks on Link from email	CAB Coordinator
19	Selects Closure Information Tab	CAB Coordinator
20	Enters Close Code	CAB Coordinator
21	Selects Close	CAB Coordinator