ServiceNow

CHANGE MANAGEMENT

Version 2.0



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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: <u>https://www.servicenow.com/content/dam/servicenow/documents/ebook/ebk-it-infrastructure-library-overview.pdf</u>

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

Log into ServiceNow



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

Technician	Knowledge	Service Catalog	My Incidents	My Requests	CG

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 $\frac{1}{2}$ icon in the upper left of the content pane.

You can also remove content by hovering over the content box and clicking on the \bigotimes 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).

	e to IR	T ServiceNow													02/18/1
ssigned	to me														
(i):		Number 🔻	R	w	Caller	Department	Short De	scription	Assigned to	Opened	State	Assignm	ient group	Due date	Priority
	(INC0020180	53	ED.	Guest	Network and Services	System Support	t Ticket :##265602##	Gangloff, Christine	02/18/17 01:17:29 AM	Active	<u>System</u> Admini	istrators	(empty)	5 - Lo
	(j)	INC0016256	2		Lafferty Charles	<u>Technology</u> <u>Workshop</u>	ervices RE: Fw :##262	Re: [Rowan Support Ticket [32##] : Financial Aid	Gangloff, Christine	01/26/17 07:46:21 AM	Active	<u>System</u> Admin) Istrators	(empty)	5 - Lo
	(j)	INC0010037	Ø	Ģ	<u>Ganglof</u> Christin	ff. <u>Network and</u> e <u>Services</u>	System Test He	lp	<u>Gangloff</u> <u>Christine</u>	09/16/16 02:01:19 PN	Active	<u>System</u> Admini) istrators	(empty)	5 - Lo
	Action	is on selected row	s_ •									44	•	1 to 3 of 3	
y work															
<u>چ</u>		Number	Tas	sk type	e 3	Requester	Short Description	Assigned to	Opened	State 🔺	Assignment gn	oup	Due date		Priorit
	(CHG003052	<u>9</u> C	hange	Request	Gangloff, Christine	Patching Email Se	rvers Gangloff, Christine	03/17/17 09:52:46 PM	Review	System Admin	nistrators	(empty)		Low
	()	CHG003052	<u>7</u> c	hange	Request	Gangloff, Christine	efgsdthsdhsgnbsf	ng <u>Gangloff, Christine</u>	03/17/17 09:07:16 PM	In Progress	System Admin	nistrators	(empty)		Mediu
	()	CHG003052	<u>8</u> C	hange	Request	Gangloff, Christine	Patching Email Se	rvers Gangloff, Christine	03/17/17 09:35:31 PM	In Progress	System Admi	nistrators	(empty)		e Urj
	(j)	CHG003051	<u>8</u> C	hange	Request	Gangloff, Christine	sdgsdthdrtyj	Gangloff, Christine	03/17/17 06:56:32 PM	Awaiting PIR	System Admin	nistrators	(empty)		Media
	1	TASK00105	<u>88</u> C	atalog	Task		Email Alias Reque	st <u>Gangloff, Christine</u>	02/27/17 02:02:01 PM	Open	System Admir	nistrators	02/28/17	02:02:01 PM	
	Actions	s on selected row	s ¢]									••	•	1 to 5 of 5	•
y Group	s Work	¢													
23		Number	Tas	k type	Re	equester Sh	ort Description	Assigned to	Opened	State 🔺	Assignmen	it group	Due dat	e	Priorit
	(CHG003052	9 Cl	hange	9	Sangloff, P	atching Email Serve	rs Gangloff,	03/17/17 09:52:4 PM	6 Review	System Administr	rators	(empty	n	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.

Rowan University IRT Support Cent	ter	(a Charles Lafferty + ्रि 🔍 🕐 🔅
Filter navigator	+	ITIL Homepage Off	▼ Switch to page ▼
🗉 ★ 🕓	My Work		News
Self-Service	🐼 Number 🔺	Short Description	- No itame
Homepage	(i) <u>INC0010005</u>	Can't login to Gmail	Nonema
Service Catalog Knowledge	(i) <u>INC0010006</u>	Having trouble logging into Rowan Cloud	
Help the Help Desk	(i) <u>INC0010007</u>	Can't get on the wireless	Priority 1 Incidents
Visual Task Boards	(j) <u>INC0010008</u>	Printer printing blank pages	INC0010010 No connectivity in Rowan Hall View all active Incidents
	(i) <u>INC0010009</u>	Network Port problem in Townhouses	
My Requests Requested Items	(j) <u>INC0010010</u>	No connectivity in Rowan Hall	Knowledge Search
Watched Requested Items	Actions on selected rows \$	◄ ◄ 1 to 6 of 6 ▶ ▶	Search Advanced search -
	My Groups Work		Search
My Tagged Documents	Ki Number ▲	Short Description	
My Knowledge Articles	(i) <u>INC0010005</u>	Can't login to Gmail	
· · · · · · · · · · · · · · · · · · ·	(i) <u>INC0010006</u>	Having trouble logging into Rowan Cloud	
Application Navigato	r		Main Content Frame

Banner Frame

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.

[♥ incide]	Application Navigator
⊡ ★ ©	Application Filter
Favorites	
Service Desk - Incidents	
Self-Service	Application
Incidents	
Watched Incidents	Module
Service Desk	
Incidents 🔶	
Incident	
Create New	
Assigned to me	
Open	
Open - Unassigned	

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.

Service Desk	
Callers	
Incidents	*
Knowledge	

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.

Filter navigator	
ē 🛧	O
A day ago	
Knowledge KB0010714	Your history
Change Requests Active = true	
Change Request Include a title for your change	no greater
Change Request Include a title for your change	no greater
Change Request Include a title for your change	no greater
Standard Changes	
2d ago	
Incidents Caller = Christine Gangloff .and	I. Active = t
Incidents Caller = Christine Gangloff .and	I. Active = t

The Service Desk Application



The Service Desk application groups together many commonlyused 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

=	Incidents	New Search f	or text	▼ Search							√ 44 4	1 to 20	of 8202 🕨 🕨
2	All > Activ	e = true											
٤Ŏ	Q	■ Number ▲	≡R	≡w	≡ Caller	Department	■ Short Description	■ Assigned to	■ Opened	≡ State	■ Assignment group	≡ Due date	≡ Priority
		Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search
	(j)	INC0010005		-	Curran, Tom		Laptop battery is dead	Faulcon, Jason	08/23/16 11:01:07 AM	Active	Elvis Support	(empty)	5 - Low
	(j)	INC0010006		-	Lafferty, Clare	VP Info Resources & Technology	this is the short description.		08/30/16 02:50:09 PM	New		(empty)	5 - Low
	(i)	INC0010007		-	Curran, Tom		alal		08/30/16 02:53:39 PM	New		(empty)	5 - Low
	(j)	INC0010013			Josh Grochowski	Network and System Services	Test 123		09/08/16 10:39:32 AM	New		(empty)	5 - Low
	(i)	INC0010014			White, A Lettie	Faculty Practice Business Office	TOS		09/09/16 11:50:09 AM	New	ASA	(empty)	5 - Low
	(i)	INC0010017			Currant0		TEST		09/13/16 01:50:51 PM	New		(empty)	5 - Low
	()	INC0010027	2		Grochowski, Josh	Network and System Services	test		09/14/16 05:08:01 PM	New		(empty)	5 - Low
	0	INC0010029			Gangloff, Christine	Network and System Services	Test		09/14/16 09:04:31 PM	New	SOM Academic Technology	(empty)	5 - Low
	()	INC0010030			<u>Administrator,</u> <u>System</u>	Network and System Services	Test		09/14/16 09:38:35 PM	New		(empty)	5 - Low
	(i)	INC0010034		;;;	Azikiwe, Ife	Network and System Services	Help with username and password		09/15/16 11:55:55 AM	New	Support Center	(empty)	5 - Low
	(i)	INC0010037			Gangloff, Christine	Network and System Services	Test Help		09/16/16 02:01:19 PM	New	Blackboard	(empty)	5 - Low
	(i)	INC0010040			Green, Patricia		subject		09/19/16 10:27:02 AM	New		(empty)	5 - Low

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.

	Incidents View	Now/	Go to	Caller		Search
F	Filters	\rightarrow				
	Group By	>	Non	ie		
Ru	Show	•	Active	í.		
	Refresh Li	st	Appro	val		
A	Create Fav	vorite	Assign	ned		
			Assign	ned to		
			Assign	nment group		
203	Q	≡ Nur	Assign	nment group tag		
		-	Busin	ess resolve time		
		Searc	Busin	ess service		
		INCOOL	Caller			
	U		Categ	ory(category)		
		INCOOL	Categ	ory(u_incident_	categor	y)
	U	1110001	Cause	d by Change		
		INC001	Chang	ge Request		
	U	1146001	Child	Incidents		
		INC001	Close	code		
	U	1140001	Closed	d bv		

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.

	Change Re	equests New	Go to Number	▼ Search			√ ◄◀	 to 100 of 2 	02 🕨 🕨
P	All								
ক্ষ	Q	E Number V	Created	Short Description	Requested by	Priority	■ Change Manager	Assignment group	■ Assigned t
	i	CHG30101	04/30/09 08:44:21 PM	Increase Tomcat max threads	Morgan Davis	Low			Brennon Chu

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.

	Change Re	equests New	Go to Number	▼ Şearch				√ ◄◀ ◀	1 to 10
	All > Activ	ve = true > Change M	lanager Name cor	ntains Sedlock					
ক্ট্য	Q	E Number V	\equiv Created	\equiv Requested by	≡ Short Description	Priority	≡ Change Manager	■ Assignment group	\equiv Assigned to
		Search	Search	Search	Search	Search	*Sedlock	Search	Search
	(j)	CHG0030567	03/18/17 11:05:20 PM	Gangloff, Christine	Windows Server Patching Activity	Medium	Sedlock, Mark	System Administrators	
	i	CHG0030564	03/18/17 09:57:29 PM	<u>Karapalides,</u> <u>Theodore</u>	Windows Server Patching Activity	Medium	Sedlock, Mark	System Administrators	Sedlock, Mark
	(i)	CHG0030560	03/18/17 07:37:11 PM	Sedlock, Mark	Server reconfiguration.		Sedlock, Mark	System Administrators	Sedlock, Mark
	(i)	CHG0030554	03/17/17 11:11:09 PM	Gangloff, Christine	Email Patching	• High	Sedlock, Mark		
	(j)	CHG0030553	03/17/17 08:49:36 PM	Sedlock, Mark	Upgrade Exchange.	🗕 High	Sedlock, Mark	System Administrators	Sedlock, Mark
	(j)	CHG0030544	03/17/17 11:46:03 AM	Sedlock, Mark	Add capactiy to Inet	Medium	Sedlock, Mark	System Administrators	Sedlock, Mark
	(j)	CHG0030543	03/17/17 11:18:36 AM	Sedlock, Mark	I would like to add a modem to the modem bank.	• High	Sedlock, Mark	System Administrators	Sedlock, Mark

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.

i <u>INC0010007</u>	$\boxtimes \qquad \qquad \overleftarrow{\ } \rightarrow \underline{\operatorname{Curran, Tom}}$	Can't turn on lap	top
< E User Curran, Tor	n		Over the second seco
Name	Curran, Tom	Email	currant0@students.rowan.edu
∦ User ID	currant0	Mobile phone	+1 (267) 746-2859 North America
First name	Tom	Campus Phone	
Last name	Curran	Rowan Banner ID	916180374
Title		Building	
Department	Q (i)		
Password			
Rowan Primary Role	Student	Rowan Account	04/01/15 12:00:00 AM
Rowan Roles	Student	Source	Idap:CN=Curran Tom J,OU=Students,I
Rowan Account Status	NORMAL_ACCOUNT	Rowan Password Set	12/07/16
Rowan Role History	 role Expiring removed at 10/28/2015 22:13 role Student added on 10/28/2015 22:13 role Student removed at 10/28/2015 09:00 role Expiring added on 10/28/2015 09:00 Account created on 04/01/2015 14:40 Initial role Student added on 04/01/2015 1 	4:40	- +
Rowan MemberOf	۵		

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.

袋 Q	■ Number ▲ ■ Created		■ Short Description	Requested by	\equiv Requested by \equiv Priority		■ Assignment group
	Search	Search	Search	Search	Search	Search	Search

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 (\equiv) 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.

All > Assignment group = (ServiceNow Admins, System Administrators) > Active = true > State not in (Closed Complete, Closed Incomplete, Closed Skipped, Completed, Closed Abandoned)

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

$\underset{\emptyset}{\rightleftharpoons} All > Active = true > Priority = 2 - H$	High	Category = Software	•	Bread	dcrumbs	
Run Save AND OR Add Sort	*					
All of these conditions must be met						
Active	•	is	• tr	rue 🔸 A	ND OR X	
Priority	•	is	• 2	- High	- AND O	RX
Category	•	is	• s	Software	- AND C	RX
			Run			

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

	Incidents	New Go t	Opened	٣	Search						
	All > Active = true > Assigned to = Gangloff, Christine > Assignment group = System Administrators										
ξζε	Q	≡ Number	≡R	≡w	E Caller	Department	E Short Description				
		Search	Sear	Searc	Search	Search	Search				
	í	INC0010037		7	<u>Cangloff,</u> Christine	Network and System Services	Test Help				
	Click a all of the	breadcrumb e conditions	to remove after it.	click on the Assignmen	> to remove just t t Group = System	he condition Administrators.					

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"

	ncidents	New	Go to	Number	,	Search			
All>Active = true									
\$	Q	⊙ Num	ber 🔺	. ⊂ Cal	ller		Short desci		
	(j)	INC0000	002				Unable to get to		
	(j)	INC0000	003	Joe Er	<u>mployee</u>		Wireless acces		
	■ Incidents New Go to Number ▼ Search Image: Search Search Search Search Search								
Run	Save	ANDOR	Add Sort	*					
Active			▼ is		▼ true Run	e V AND	ORX		
\$	Q ©	Number 🔺	⊙Ca	aller	0) Short descrip	tion		
	<u>i</u> <u>IN</u>	C0000002			U	nable to get to n	network file shares		
	<u>()</u> <u>IN</u>	C0000003	Joe E	Employee	W	/ireless access	is down in my area		

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

Joe Emplovee	Wireless a
Show Matching	

"Filter out" will remove the field from view

Fred Lu	ddv	L can't laung
	Show Matching	
Bow Ru	Filter Out	

Change Form Icons and Indicators

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

A 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.

Service Desk	
My Work	*
My Groups Work	*

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:

	Tasks	New Go to	Requester	' Search					√ ◀◀ ◀	1 to 7 of 7	• ••
	All>Act	ive = true > Assigr	ed to = Sedlock, Mark	> State not in (Close	d Complete, Closed Incomp	lete, Closed Skipped	, Completed, Clos	ed Abandoned)			
۲ <u>ت</u>	Q	≡ Number	≡ Task type	■ Requester ▼	■ Short Description	\equiv Assigned to		≡ State	■ Assignment group	≡ Due date	\equiv Priority
	(j)	CHG0030543	Change Request	Sedlock, Mark	I would like to add a modem to the modem bank.	Sedlock, Mark	03/17/17 10:37:57 AM	Awaiting PIR	System Administrators	(empty)	• High
	(i)	CHG0030560	Change Request	Sedlock, Mark	Server reconfiguration.	Sedlock, Mark	03/18/17 07:26:52 PM	Awaiting PIR	System Administrators	(empty)	
	i	CHG0030564	Change Request	<u>Karapalides,</u> <u>Theodore</u>	Windows Server Patching Activity	Sedlock, Mark	03/18/17 09:57:29 PM	Awaiting PIR	System Administrators	(empty)	Medium

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.

All > Assignment group = (ServiceNow Admins, System Administrators) > Active = true > State not in (Closed Complete, Closed Incomplete, Closed Skipped, Completed, Closed Abandoned)

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

All > Assignment group =	= (ServiceNov	ort	n Administra	ntors) > Active = true > Assigned to	= (empty) >	State != Pending
Il of these conditions must b	e met					
Assignment group	▼	is	\$	(ServiceNow Admins, S) Q	AND	ORX
Active	•	is	\$	true	\$	AND OR X
Assigned to	▼	is	\$	Q	AND	OR X
State	•	is not	\$	Pending	\$	AND OR 🗙

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

Ó	INC0010649	Incident	Josh Grochowski	Test From Rowan
\bigcirc	114C0010049	incluent	JUSH GIOCHOWSKI	Account

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	Туре	Description	Risk	Submittal/Approval Requirements			
	Major **	Possibility of significantly disrupting essential business and/or student activities for numerous users 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	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).			
Normal		Short outage expected					
Change		High probability of success. Relatively simple or quick implementation	Medium	No minimum submission requirement			
		and back out.	·	Review and Approval by the			
		Risk score is 20.1-60	_	Change Manager			
	Minor	Not a standard or emergency change.					
		No or limited outage expected					
		Very High Probability of success		No minimum submission			
		Relatively simple or quick implementation and back out.	Low	Review and Approval by the			
		Risk score is 20 and lower	-	Change Manager			
		Not a standard or emergency change.					
Standard Change **	A pre-auth proven im and docun document	norized change with an established and plementation path, minimal business impact, nented procedures, including a well- red 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	Critical ser disruption	rvice is down or severely impaired with to business and/or student activities.	High	Change Request is submitted within one business day after the start of the triage.			
Change	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:

Risk Score =	Impacted Users x Outage Duration x Impact Severity
	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.

(♥ change		\otimes
ē	*	Q
Change		
Create New		章
Open		
Closed		
All		
Overview		

**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.

Change Request What type of change is required?	
Normal: Changes without predefined plans. Normal Major changes require CAB approval. Normal Minor require only Change Manager approva Standard: Select from available pre-approved change templates. These changes do not require approval. Emergency: Unplanned changes necessary to restore service. These changes require CAB review only.	l.

This will open the Normal Change request form:

t Review	Approval	Scheduled		In Progress	Completed	Awaiting PIR		Closed		Cancele
Number	CHG0010157				Approval	Not Yet Requested				
Parent		Q			State	Draft		~		
Requested by	Karapalides, Ted	٩	1)		* Change Manager			Q		
Opened	02/28/25 11:55:49 AM				Assignment Group			Q		
* Configuration item		Q			Assigned to			Q		
* Location		Q			* Priority	- None -		~		
Туре	Normal	~			* Impacted Users	- None -		~		
Classification	- None -				* Impact Severity	- None -		*		
* Change Category	- None	~			* Probability of Success	- None -		~		
Change Subcategory	- None -	~			Risk	Low				
Is ISO Approval Required?					Risk Score			0		
					Time Worked	00:00:00 00	00	00		
* Short Description									8	8
Description	 Description Impact to Existing Services Business Reason or Justification for 4, Risks of not implementing the chanse Risks of miphementing the change Required Resources (people, time, e 7, Stakeholders affected by the change 	Change ge oosts not already budgeter 2	D							
* Outage Required?	- None							~		
* Outage Duration	- None							~		
Will this change affect access or functionality for end users?	- None -							¥		
CAB date								(B)		

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.

*Configuration Item	unk	Q]
* Location	Recent selections Unknown Configuration Item Unknow	wn Coi	nfiguration Item

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

*Configuration Item	Unknown Configuration Item	Q	0	i
*Location	Glassboro Campus	Q	í	

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.

*Change Category	Cable Television	•
Change Subcategory	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.

ISO Approval

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.

Description
Impact to Existing Services
Business Reason or Justification for Change
Risks of not implementing the change
Risks of implementing the change
Required Resources (people, time, costs not already budgeted)
Stakeholders affected by the change

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

★ Outage Required?	Yes
* Outage Duration	No Outage
★ Will this change affect access or	None
functionality for end users?	No Outage
	Under 5 minutes
CAB date	5 minutes to 29 minutes
Schodule* University Communication	30 minutes to 59 minutes
Schedule Oniversity communication	1 hour to 4 hours
* Communication Plan	Over 4 hours

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

★ Will this change affect access or	Yes
functionality for end users?	None
	Yes
CAB date	No

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.

None	•
	None

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.

*Assignment group	System Administrators	Q	í
*Assigned to		Q	

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.*

*Priority	None	•
-		

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.

* Impacted Users	None	~
★ Impact Severity	None	~
* Probability of Success	None	*
Risk	Low	
Risk Score		0

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.

Planning*	Schedule*	University Communication*	Notes	Conflicts	Post Implemen	ntation Review	Closure Information	
		* Communication Plan						
		* Implementation Plan						
	*	Risk and Impact Analysis						
		★ Backout Plan						
	* 1	Escalation Path (if needed)	No	ne				
		✤ Please select the SME.						
		✤ Pre and Post Test Plan						
Review	Save Su	bmit Cancel Change						

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.

Schedule*	Conflicts	Notes	Post Implementation Review		Closure Information	
	;	*Reques	ted by date	1/31		
	:	*Planne	d start date			
		*Planne	ed end date			

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

Planning* Schedule* University Communication	Notes	Conflicts	Post Implementation Review	Closure Information
* What level of user communication is	No	ne		
needed? Are there any KB articles that need to be	No	ne		
created or updated?				
★ What information will Tier 1 or 2 need to be able to assist customers?				

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:
 Description Impact to Existing Services Business Reason or Justification for Change Risks of not implementing the change Risks of implementing the change Required Resources (people, time, costs not already budgeted) 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.

	Approvals	New Go to	Created v Search						
	Image: Second								
ক্ট্য	Q	\blacksquare Approval for	≡ State	■ Approver	■ Created ▼	■ Created by			
	í	CHG0030582	Requested	Sedlock, Mark	03/23/17 01:25:50 AM	sedlock			

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.

< = Approva	əl 0568	P	\checkmark	1:1	000	Save	Update	Approve	Reject	Delete
Approver	Sedlock, Mark		D			Appro	ving	hange Request:	CHG0030568	0
State	Requested	\$								

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.

Approver	Daley, Brian		(i)	Approving	Change Request: CHG003059	(
State	Rejected	¥				
- Commonte	You need to provid	le more deta	il.			

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.

Assigned to	Zeits, Mark	Q
-------------	-------------	---

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

Change Request CHG0030580 has been Approved Body Short Description: Patching Exchange servers Click here to view Change Request: CHG0030580
Body Short Description: Patching Exchange servers Click here to view Change Request: CHG0030580
Short Description: Patching Exchange servers Click here to view Change Request: CHG0030580
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.

Filter navigator							
■ ★ (1)							
Self-Service							
Client Software Distribution							
Multi-Provider SSO							
Rowan Mail Module							
Service Desk							
Callers							
Incidents							
Knowledge							
My Work 🔶							
My Groups Work 🔶 🛧							
My Approvals							

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.

Affected	l Cls (1)	Impacted Services/CIs	Approvers (4) Change Tasks (4) Problem	ns Incidents Pendin	g Change Incidents Caused By Change	e		
	Change T	asks New Go to	Number Search					44 4
7	Change	request = CHG0030432						
4	Q	Number 🔺	≡ Short Description	≡ State	≡ Assignment group	≡ Assigned to	Expected start	\equiv Actual end
	(j)	CTASK0010455	Planning Task	• Open			02/01/17 03:14:52 PM	(empty)
	()	CTASK0010456	Build Task	Pending			02/01/17 03:14:52 PM	(empty)
	(i)	CTASK0010457	Testing tasks	Pending			02/01/17 03:14:52 PM	(empty)
	(i)	CTASK0010458	Implementation Task	Pending			02/01/17 03:14:52 PM	(empty)

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."

Affecte	d CIs (1)	Impacted Se	rvices/CIs	Approvers (2)	Cł	nange Tasks (4)
=	Change T	asks New	Go to	Number	۳	Search
Ţ	Change	request = CHG	0030594			
ক্ট্য	Q	Numbe	r 🔺 =	Short Descriptio	n	≡ State
~	í	CTASK0010	1 <u>624</u> Pl	anning Task		 Open
~	i	CTASK0010	1 <u>625</u> Bi	uild Task		Pending
	(j)	CTASK0010	1 <u>626</u> Te	esting tasks		Pending
	í	CTASK0010	1 <u>627</u> In	plementation Ta	sk	Pending
~	✓ Action Clos	ns on selected r se Task	ows			
	Follow	r on Live Feed r SLAs				

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

-				
Completed	Save	Update	Cancel Change	Copy Change

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.

Change Request CHG0030553		Ø	^ ‡	• ••• Follow	Awaiting PIR	Save Update Cancel Change	Copy C	hange	Delete
Draft 🗸 📄 Review 🗸	Approval 🗸 🔶 Sch	eduled 🗸	\geq	> In Progress 🗸	Completed	Awaiting PIR	Closed)	Canceled
Number	CHG0030553				Approval	Approved			
Requested by	Sedlock, Mark Q				State	Completed	\$		
Opened	03/17/17 08:47:42 PM	9			Change Manager	Sedlock, Mark	¢	0	
Configuration Item	Unknown Configuration Item	8	0		Assignment group	System Administrators	Q	0	
		0			Assigned to	Sedlock, Mark	٩	0	
*Location	Other Q	0			*Priority	High	÷		
Туре	Normal			≭Nur	nber of Impacted Users	Over 100 users affected	¢		
*Classification	Major	•			KLikelihood of Outage	Will Occur	\$		
Change Category	Email	•			Risk	High			
Change Subcategory	Employee Email	•							
ISO Approval									
*Short Description	Upgrade Exchange.								
Description	Upgrade Exchange.								
- Outpre Required?	Vor								
* outage nequireur	103						•		
CAB date							æ		
Planning Schedule Conflicts	Notes Post Implementation Review Clos	ure Informa	tion						
Opportunities to Improve?	None						\$		
PIR Comments									

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.

Planning	Schedule	Conflicts	Notes	Post Implementation Review	Closure Information
Орр	ortunities to Improve?	Yes			
PI	R Comments				
PI	R Complete?	Yes			
Close	Save Up	date	incel Char	Copy Change Delete	

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.

Subject Change Request CHG0030529 is ready to be Closed				
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 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.

nflicts	Notes	Pos	st Implementation Review	Closure Information
Clo	ose code		None	
Clo	se notes			

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.

Close	Save	Update	Cancel Change	Copy 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**.

(♥ change		$\overline{\otimes}$
ē	*	©
Change		
Create New		¢
Open		
Closed		
All		
Overview		

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

Change Request
what type of change is required?
Normal: Changes without predefined plans. Normal Major changes require CAB approval. Normal Minor require only Change Manager approval.
Standard: Select from available pre-approved change templates. These changes do not require approval.
Emergency: Unplanned changes necessary to restore service. These changes require CAB review only.

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.

*Configuration Item	unk	Q
	Recent selections	
*Location	Unknown Configuration Item Unknow	vn Configuration Item

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).

*Configuration Item	Unknown Configuration Item	Q	0	i
*Location	Glassboro Campus	Q	i	

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.

*Change Category	Cable Television	•
Change Subcategory	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.

☆ Short Description	
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

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.

*Change Manager	None	•

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.

*Assignment group	System Administrators	Q	0
*Assigned to		Q	

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.

★ Number of Impacted Users	None	•
*Likelihood of Outage	None	•
Risk	Low	Ŧ

Planning*	Schedule*	Conflicts	Notes	Post Implementation Review	Closure Information
	Co	ommunicatio	n Plan		
	Support C	enter Trainin	g Plan		
Require	d Resources (F Not /	eople, Time Already Bud	, Costs geted):		
	≭ Im	plementatio	on plan		

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.

Expected Downtime Duration	Days	00	Hours	00	00	00
*Actual start						i
*Actual end						Ē

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.

Filter navigator	
	0
Self-Service	
Client Software Distribution	
Multi-Provider SSO	
Rowan Mail Module	
Service Desk	
Callers	
Incidents	
Knowledge	
	*
My Groups Work	*
My Approvals	

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.

Affected	Cls (1)	Impacted Services/CIs	Approvers (4) Change Tasks (4)	Problems Incidents Pending	g Change Incidents Caused By Chang	je		
	Change Ta	asks New Go to	Number Search					44 4
Y	Change r	equest = CHG0030432						
\$	Q	≡ Number ▲	≡ Short Description	≡ State	■ Assignment group	\equiv Assigned to	≡ Expected start	\equiv Actual end
	i	CTASK0010455	Planning Task	• Open			02/01/17 03:14:52 PM	(empty)
	i	CTASK0010456	Build Task	Pending			02/01/17 03:14:52 PM	(empty)
	í	CTASK0010457	Testing tasks	Pending			02/01/17 03:14:52 PM	(empty)
	i	CTASK0010458	Implementation Task	Pending			02/01/17 03:14:52 PM	(empty)

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."

Affected	Cls (1)	Impacted Service	s/Cls	Approvers (2)	C	nange Tasks (4)
	hange T	asks New Go	oto	Number	۳	Search
Ţ	Change	request = CHG0030	594			
ক্ট্য	Q	Number 🔺		Short Descripti	on	≡ State
✓	(j)	CTASK0010624	Pl	anning Task		 Open
✓	í	CTASK0010625	Вι	uild Task		Pending
	i	CTASK0010626	Те	esting tasks		Pending
	i	CTASK0010627	In	plementation Ta	ask	Pending
	Action Clos	is on selected rows e Task				
	Follow Repair	on Live Feed SLAs				

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

Completed	Save	Update	Cancel Change	Copy Change

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.

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: FX2013-CA-2
Opened by: Karapalides, Theodore
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, 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.

Planning	Schedule	Conflicts	Notes	Post Implementation Review	Closure Information
	Орро	rtunities to I	mprove?	None	
		PIR Co	mments		
		PIR Co	omplete?	None	

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.

Subject
Change Request CHG0030580 is ready to be Closed
Body
Short description: Patching Exchange servers Click here to view the Change Request: CHG0030580
State: Scheduled Opened by: Gangloff, Christine Assignment group:
Description:
 Description Impact to Existing Services Business Reason or Justification for Change Risks of not implementing the change Risks of implementing the change Required Resources (people, time, costs not already budgeted) Stakeholders affected by the change
Work notes:

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.

nflicts	Notes	Pos	st Implementation Review	Closure Information
Clo	Close code		None	
Close notes				

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.

Close	Save	Update	Cancel Change	Copy 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**.

(₩ change	\otimes
	0
Change	
Create New	
Open	
Closed	
All	
Overview	
Standard Change	
Standard Change Catalog	
My Proposals	<u>\$</u> 2
Open Proposals	
All Templates	

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.

*	Category	Stan	Q	(i)
		Showing 1 through 1 of 1		
	Active	Standard Changes Service Catalog		

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."

Template name	
Template name	

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.

		1
Change Manager	Q	

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

*Change Category	Cable Television	•
Change Subcategory	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.



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

Proposal	Change Request values		
	Proposal Des	cription	
	Business just	ification	

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.

Change Request values								
anange nederat target								
	*	Change Reque	est values	Change Category	•	None	•	
				Change Subcategory	▼	None	•	
				Short Description	▼			
				Description	▼			
				Outage Required?	•	None	•	
				Change Manager	•			Q
				Assignment group	▼			Q
				Assigned to	▼			Q
				Priority	•	None	•	
				Number of Impacted Users	•	None	•	
				Likelihood of Outage	•	None	•	
				Communication Plan	•			
				Support Center Training Plan	•			
				Required Resources (People, Time, .	🔻			
				Implementation plan	•			
				Dick and impact analysis	_	[
				RISK and impact analysis	•		.:	
				Backout plan	•			
							ьŧ	
				Test plan	•			
				choose field	•	value		

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:



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.

Affected	d Cls (1)	Impacted	l Services/Cls	Approvers (1)	Change Tasks
	Approvers	Go to	Created	T	Search
Ţ	Approva	l for = CHG	0030580		
ক্ষ	Q	≡ State	9		er
	i	e <u>Requ</u>	<u>ested</u>	Sedlock, M	ark

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

< Approva	al 0568	P	\checkmark	1:1	000	Save	Upda	te Approv	e Reject D	Delete
Approver	Sedlock, Mark		(i)			Approv	ving	Change Reque	est: CHG0030568	0
State	Requested	\$								

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**.

Standard o	8	
ē	*	O
Change		
▼ Standard	l Change	
Standard	l Change Catal	og
My Propo	osals	
Open Pro	posals	
All Temp	lates	

Select the desired template from the list.

Service Catalog > Standard Changes
Standard Changes Standard Change Template Library
Items
TEST - standard change template, with ISO
TEST - standard change temple, no ISO
Test 1
TEST I
TEST TEMPLATE

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.

Change Re CHG00305	equest 668	Ø	√ -	1 000	Follow	•	Review	Save	Update	Cance	l Change	Delete
Draft Revie	ew Approval S	chedul	ed	> In Pro	gress	Complete	ed	Awaiti	ng PIR	Close	d >	Canceled
Number	CHG0030568				8	Approval	Not Ye	t Request	ed			
Requested by	Gangloff, Christine	Q	i			State	Draft			\$		
Opened	03/19/17 03:19:40 AM				*Change	Manager	Sedloo	k, Mark			i	
*Configuration	Lool	kup usii	ng list		Assignme	ent group	System	n Adminis	trators		i	
*Location		Q			As	signed to				Q		
Туре	Standard				>	Priority	Mediu	m				
*Change Category	Servers				₩N Impact	umber of ted Users	Less th	nan 50 use	ers affected			
Change Subcategory	windows_server_2008				≭Like	lihood of Outage	Possib	le, but no	t likely			
ISO Approval						Risk	Low					
*Short Description	Windows Server Patching Activ	vity									ē	
Description	Apply Patches to Windows Ser	vers										
*Outage Required?	No											

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.

Schedule*	Conflicts	Notes	Post Implementation Review	Closure Information								
k	Requested	by date			æ	Expected Downtime Duration	Days	00	Hours	00	00	00
>	*Planned start date				æ	Actual start						
*Planned end date			*	Actual end						Ē		

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.

	Closure Information	Post Implementation Review	Notes	Conflicts	Schedule*	Planning	
				8 B	otes list	Work no	
* Work notes Patching exchange server ex2013-ca-1 with latest security updates for April.							
Post					_		

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.

Review Save	Update	Cancel Change
-------------	--------	---------------

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:
 Description Impact to Existing Services Business Reason or Justification for Change Risks of not implementing the change Risks of implementing the change Required Resources (people, time, costs not already budgeted) 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**.

\bigtriangledown Filter navigator	l					
🗉 🛨 O						
Self-Service						
Client Software Distribution						
Multi-Provider SSO						
Rowan Mail Module						
Service Desk						
Callers						
Incidents						
Knowledge						
My Work 🔶	r					
My Groups Work	r					
	6					

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

	Approvals	New Go to	Created Search								
	P All > Approver = Sedlock, Mark										
ফ্ট	Q	■ Approval for	≡ State	■ Approver	■ Created ▼						
	(i)	CHG0030582	Requested	Sedlock, Mark	03/23/17 01:25:50 AM	sedlock					

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.

< Approva	Ø	\checkmark	1:1	000	Save	Update	Approve	Reject Dele	ete	
Approver	Sedlock, Mark		()			Appro	ving Cł	ange Request:	CHG0030568	í
State	Requested	÷								

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.

Schedule Save Update	Cancel Change	Delete
----------------------	---------------	--------

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 autocompleted results or clicking the magnifying glass icon and selecting from a list.

Assigned to	Zeits, Mark	Q

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:
 Description Impact to Existing Services Business Reason or Justification for Change Risks of not implementing the change Risks of implementing the change Required Resources (people, time, costs not already budgeted) 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.

Filter navigator						
⊡ ★ ©						
Self-Service						
Client Software Distribution						
Multi-Provider SSO						
Rowan Mail Module						
Service Desk						
Callers						
Incidents						
Knowledge						
My Work 🔶						
My Groups Work 🖌						
My Approvals						

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.

Affected	Cls (1)	Impacted Services/CIs	Approvers (4) Change Tasks (4	Problems	Incidents Pending Change	Incidents Caused By Change				
	hange Ta	asks New Go to	Number Search						44 4 (
$\mathbf{\nabla}$	Change request = CH60030432									
\$	Q	≡ Number ▲	\equiv Short Description		≡ State ≡ A	Assignment group	■ Assigned to	≡ Expected start	\equiv Actual end	
	i	CTASK0010455	Planning Task		• Open			02/01/17 03:14:52 PM	(empty)	
	i	CTASK0010456	Build Task		Pending			02/01/17 03:14:52 PM	(empty)	
	i	CTASK0010457	Testing tasks		Pending			02/01/17 03:14:52 PM	(empty)	
	i	CTASK0010458	Implementation Task		Pending			02/01/17 03:14:52 PM	(empty)	

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.

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
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. 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.

Planning	Schedule	Conflicts	Notes	Post Implementation Review	Closure Information
	Орро	rtunities to I	mprove?	None	
PIR Comments					
		PIR Co	omplete?	None	

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.

Subject
Change Request CHG0030580 is ready to be Closed
Body
Short description: Patching Exchange servers
Click here to view the Change Request: CHG0030580
State: Scheduled
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
6.) Required Resources (people, time, costs not already budgeted)
7.) Stakeholders affected by the change
Work notes:

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.

nflicts	Notes	Post Implementation Review		Closure Information
Clo	ose code	None	·	·
Close notes				

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.

Close	Save	Update	Cancel Change	Copy Change
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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		
		Change		
11	Receives Email Change is Ready for PIR, Select Link	Manager		
		Change		
12	Selects Post Implementation Review (PIR) Tab	Manager		
12		Change		
13	Enters PIR Information	Ivianager		
1/1	Selects Save or Lindate	Manager		
		CAB		
15	Receives email change is ready to be closed, Clicks on Link from email	Coordinator		
		САВ		
16	Selects Closure Information Tab	Coordinator		
		CAB		
17	Enters Close Code	Coordinator		
		CAB		
18	Selects Close	Coordinator		

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