ServiceNow

**Change Management**

**Quick Reference Card**

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| **Change Management** |
| Related LinksHeaderDetails | **Goal of Change Management** |
| **The goal of the change management process is to enable beneficial changes to be made with minimum disruption to business operations, thus ensuring that the best possible levels of service quality and availability are maintained.** |
| **Phases**The Change Workflow is visually represented at the top of the Change Record. Eight phases are associated with a Normal Change:Initial state of all changesPeer evaluation stageAuthorizations and approvalsCoordination to implement stageExecution of implementation planVerification stage of the changeSign-off to end the change activitiesFinal state for all changesFinal state if change is cancelled**New****Assess** **Authorize****Schedule****Implement****Review****Closed****Cancelled** |
| **Change Header Fields & Definitions** |
| The Change Request numberThe end-user the change is requested forThe environment the change will impactConfiguration Item the change applies to. Changes can be associated with any type of CI.How quickly the change should be addressedCalculated field showing the risk scoreCalculated field showing the effect the change has on the businessThe type of change request: Normal, Urgent, or StandardThe state of the change request. The default state is New.Check box indicating the Change has been paused Displays whether there is a conflict for this ChangeDisplays the date and the time when the conflict was last runThe group the change is assignedThe user who is assigned with managing the overall change processCheckbox to indicate a sensitive request with limited visibility Brief statement summarizing the change in 1 – 2 sentences.A detailed description of the change**Number****Requested by** **Category****Configuration item \*****Priority** **Risk****Impact****Type****State****On-Hold****Conflict status****Conflict last run****Assignment group \*****Assigned to \*****Sensitive** **Short Description \*****Description \*** |
| **Detail Tabs** |
| **The tabs on the Change Record contain the working details of the change. A Normal Change has five tabs:**Journal of all Notes & ActivitiesSummary fields to document the Change PlanPlanned and Actual Dates. This tab also is used to select a CAB approval groupChange calendar review section identifying conflicts with other changesClose code and descriptionNotesPlanningScheduleConflictsClosure Information |
| **Related Links** |
|  * Change Tasks
* Approvers
* Problems
* Affected CI’s
* Impacted Services
* Incidents Caused by Change
* Incidents Fixed by Change

The Related Links section provides access to the activities needed to process the change. This section of the Change Record includes: |

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| ang**Change Requests can come from a variety of areas in ServiceNow. The most common methods for creating Change Requests are:** 1. The Change Management application
2. The Incident Management application
3. The Problem Management application
4. A Service Catalog Request for Change

All of these methods result in a Change Request created in the New State of the workflow.  |
| **2. Advance to Authorize** |
| After saving the Change in the Assess Phase, approvals are initiated to review and approve/reject the Change Plan. When all approvals are received the state advances to Authorized. Requested approvals are found in the Approvers Related Link.**There are several activities to create and assess the change.** Enter all Header fields to start the change. On the Detail Tabs, enter planning details on the Planning Tab, Schedule planned dates, and Risk Assessment Tabs. Review and add Change Tasks as needed. Create Change Tasks for Planning, Implementation, Testing and Review. Each Assignment Group should review their tasks and, if they accept the work, move them to an Open state. Once all details of planning are created you can advance to the assessment phases.  |
| P**4. Schedule to Implement****3. Authorize to Schedule** |
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| **Advancing from Authorization to Schedule requires:**When all approvals are received from the technical reviewers and CAB approvals, the workflow advances to the Scheduled state. To view the workflow, use the Show Workflow button in the Related Links. This view updates as workflow activities are completed. **When the Implementation begins:**1. Click the Implement button below the Tabs section. The Actual Start Date on the Schedule Tab fills in.
2. Set any associated Change Tasks to Work In Progress and document task activities.
3. Create Work Notes and Additional Comments as needed to document progress.
4. When a Change Task is Complete enter a Closed Code, Closed Comment and close the Task.
5. When all Change Tasks are moved to a Closed Complete State, the Actual End Date fills in.

 **6. Close the Change****5. Implement to Review** |
| **Once activities are complete and the Change has been reviewed, on the Closure Information Tab, document the final outcomes.** |
| 1. In the Header section, move the State field to Closed
2. Then in the Details Enter a Close Code; and
3. Document the Close Note with final outcomes for the Change

**The final activity associated with the Change Record is to complete all Change Tasks and advance the change for Review****For More Information**1. Complete all required Tasks – Implementation Plan, Test Tasks, Review Task.
2. Attach any associated documentation using the paper clip icon in the Banner section of the record.
3. Advance the Change to Review.

Some changes require a Post Implementation Review (PIR). The PIR flag is found on the Closure Tab. If this is checked schedule and conduct all PIR activities and documentation: PIR Notes, PIR Summary, and PIR Lessons Learned. For more information about creating and processing Change Requests, contact:* [Chat Now](https://uncchdev.service-now.com/%24chat_support.do?queueID=073c493cdb4a3b00fcd1dc95ca96197a)
* [Walk-in](https://its.unc.edu/sd-walkin/)
* Call 919-962-HELP
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**1. Assess the Change**

**Initiating a Change Request**