HUIT Change Management with ServiceNow

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September 2013
Module 1: Basic Training - Change Requester/Implementer

Change Management with ServiceNow
Agenda

- Session Overview
- HUIT Change Management Process Review
- Introduction to ServiceNow Change Management
- Step-by-step instructions & Hands-on Exercises
- Q&A
Session Overview
ServiceNow Go Live Schedule

• Go Live date: **Tuesday evening, October 8\textsuperscript{th} 2013**

• How it is going to happen:
  
  – All new Change Request tickets in ServiceNow as of October 9th
  
  – CAB Meeting October 10\textsuperscript{th} will complete Remedy approvals (no new Remedy tickets after this date)
  
  – Existing tickets in Remedy should be worked through completion
  
  – ITSM team will assist with ticket transfer for changes scheduled beyond 2 weeks out
Session Overview
Ongoing Support and Documentation

Huit.harvard.edu/ITSM

Supporting Information

• The training, User Guide, and power points are posted to the HUIT website
• Training video clips will also be made available on the HUIT website
Session Overview
What you’ll get out of today’s session

- A review of the HUIT Change Management Process
- A demonstration of Change Management using ServiceNow
- A step-by-step guide to using ServiceNow
- Hands-on exercises using the ServiceNow tool
Agenda

✓ Session Overview

☐ HUIT Change Management Process Review

☐ Introduction to ServiceNow Change Management

☐ Step-by-step instructions & Hands-on Exercises

☐ Q&A
Change Requester

- The Change Requester is the person submitting and owning the Change Request:
  - Fills out the Change Request form and submits for approval as necessary
  - Communicates status back to the business
  - Secures appropriate business approval for the Change
## Change Assignee (Implementer)

- **The Change Assignee implements and monitors the change (Requester and Implementer can be same person):**
  - Build and test the change
  - Deploy the change during the time scheduled
  - Execute the back-out plan if required
  - Completes additional change Tasks as necessary
HUIT Change Management Process Review

Roles in the Process

Assignment Group Approver

• Directors or managers of all process participant groups will designate one or more Assignment Group Approver for each group:
  • Review, approve, and assign change requests submitted by their group
  • Coordinate the resources that implement the change (within their team as well as resources that may be outside their team)
  • Conduct Post Implementation Review (PIR), if required
Roles in the Process

Change Approver for Impacted Services

- Each Business Service Owner may identify whether an approver is required for LOW, MEDIUM, or HIGH risk changes for their services:
  - Review and approve change requests that impact their Business Services
  - Provide feedback when a change is rejected
CAB Member

- Responsible for reviewing and recommending actions regarding medium- and high-risk Normal changes, Major changes, and CM process improvement:
  - Take action on online approvals in a timely manner
  - Represent their team and their team’s changes at CAB meetings
  - Review changes prior to the CAB meeting
  - Communicate any concern when a change will impact their area
  - If they reject a change, explain why
  - Communicate back to their teams
HUIT Change Management Process Review
Roles in the Process

<table>
<thead>
<tr>
<th>Change Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The Change Manager is responsible for functional implementation and operation of the Change Management Process and its activities:</td>
</tr>
<tr>
<td>• Validate the type and risk of the Change</td>
</tr>
<tr>
<td>• Escalate approval delay issues</td>
</tr>
<tr>
<td>• Chair the CAB meeting</td>
</tr>
<tr>
<td>• Ensure post-implementation reviews are conducted</td>
</tr>
<tr>
<td>• Ensure CMDB updates are completed</td>
</tr>
<tr>
<td>• Report on Change Management activities</td>
</tr>
<tr>
<td>• Educate staff on the Change Management process</td>
</tr>
<tr>
<td>• Propose and implement improvements to the process</td>
</tr>
</tbody>
</table>
**HUIT Change Management Process Review**

**Change Types**

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STANDARD</strong></td>
<td>A pre-approved, low risk, frequently occurring, routine change that follows an established implementation procedure</td>
</tr>
<tr>
<td><strong>NORMAL</strong></td>
<td>A change that follows established review and approval workflow appropriate to its level of risk. Normal changes are further categorized into low, medium, and high risk.</td>
</tr>
<tr>
<td><strong>EMERGENCY</strong></td>
<td>A change to resolve an outage or a pending outage or to address a security or regulatory issue. Often the change is recorded after it is performed rather than before, but it is <em>always</em> recorded.</td>
</tr>
<tr>
<td><strong>MAJOR</strong></td>
<td>A change with sufficient institution-wide impact or risk that Senior Leadership Team sign-off and an increased lead-time for submission to the CAB are warranted. Typically scheduled during established major maintenance windows.</td>
</tr>
</tbody>
</table>
## HUIT Change Management Process Review

### Lead Time & Approval – Normal Changes

<table>
<thead>
<tr>
<th>Type</th>
<th>Lead Time</th>
<th>Approval Level</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal LOW Risk</td>
<td>1 Bus Day</td>
<td>• Assignment Group Manager</td>
<td>• Email sent to Approvers. Auto-approve timeout: 1 day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Change Approver for the Service impacted as necessary</td>
<td>• Approver’s home page contains a gauge listing changes they need to approve</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Others as requested by Assignment Manager or Requester</td>
<td></td>
</tr>
<tr>
<td>Normal MEDIUM Risk</td>
<td>1 Week</td>
<td>• Assignment Group Manager</td>
<td>• Email sent to Approvers. Auto-approve timeout: 2 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Change Approver for the Service impacted as necessary</td>
<td>• Email sent to CAB Members</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Others as requested by Assignment Manager or Requester</td>
<td>• CAB Member’s home page contains a gauge listing the changes they need to approve</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• CAB Members (via ServiceNow tool)</td>
<td></td>
</tr>
<tr>
<td>Normal HIGH Risk</td>
<td>2 Weeks</td>
<td>• Assignment Group Manager</td>
<td>• Email sent to Approvers. Auto-approve timeout: 3 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Change Approver for the Service impacted as necessary</td>
<td>• Change is included on upcoming CAB meeting agenda</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Others as requested by Assignment Manager or Requester</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• CAB approvals via CAB Meeting</td>
<td></td>
</tr>
</tbody>
</table>
# HUIT Change Management Process Review
## Lead Time & Approval

<table>
<thead>
<tr>
<th>Type</th>
<th>Lead Time</th>
<th>Approval Level</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>STANDARD</td>
<td>Same Day</td>
<td>• Pre-approved</td>
<td>• Select from Standard Change Library</td>
</tr>
<tr>
<td>MAJOR</td>
<td>6 Weeks</td>
<td>• CAB</td>
<td>• Peer review</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sr. Leadership Team</td>
<td>• SLT review</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Minimum 6-week advance CAB notice</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Enhanced communications plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Schedule during established major maintenance windows</td>
</tr>
<tr>
<td>EMERGENCY</td>
<td>N/A</td>
<td>• Manager and Emergency CAB (ECAB) review and approval, time permitting.</td>
<td>• Verbal/email/text approval by Assignment Group Manager and Service Owner(s).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Change record can be created after the fact.</td>
</tr>
</tbody>
</table>
Agenda

✓ Session Overview

✓ HUIT Change Management Process Review

☐ Introduction to ServiceNow Change Management

☐ Step-by-step instructions & Hands-on Exercises

☐ Q&A
Introduction to ServiceNow Change Management Demonstration

• This demonstration will focus on:
  – Interface
  – Shortcut bar
  – Overview page
  – Open Change list
  – Related lists
Agenda

✓ Session Overview
✓ HUIT Change Management Process Review
✓ Introduction to ServiceNow Change Management

☐ Step-by-step instructions & Hands-on Exercises

☐ Q&A
HUIT Change Management Process Review
HUIT Change Lifecycle Overview

- **Initiate**: Initiate a ServiceNow Change Request ticket.
- **Assess**: Determine change type and assess Risk as necessary.
- **Document**: Identify Services and Configuration Items potentially affected. Develop and document Communications, Testing, and Backout plans.
- **Assign**: Identify responsible support group and assignee.
- **Schedule**: Schedule or propose an implementation date and time.
- **Submit**: Submit the change request for approval as necessary.
- **Implement**: Initiate the communications plan as necessary and implement the change.
- **Complete**: Complete the Change Request ticket and additional tasks as necessary.
Step-by-step instructions & Hands-on Exercises
Initiating Change Requests

Initiate a ServiceNow Change Request ticket.
Step-by-step instructions & Hands-on Exercises
Initiating Change Requests

- Requesters can create new Changes within ServiceNow in several ways:
  
  - Click the “Create New” button on the short-cut bar
  - Click the “Create New” link in the application navigator
  - Click the “New” button in any change record list
When you open a new Change Request, the Change Request form appears.

‘Normal’ is selected by default

Enter mandatory data and Save or Submit to enable Risk Assessment
Step-by-step instructions & Hands-on Exercises
Assessing Risk (for Normal changes)

Assess Scope, Impact, and Probability of Success to determine Risk.
Assessing Risk

### Scope
What services depend on the item(s) being changed and how critical are those services?

### Impact
To what degree will services be interrupted or the user experience modified?

### Probability of Success
How well tested is the change? What is our history with changes of this type?

**Risk Level for Normal Changes** (Low, Medium, High)
Step-by-step instructions & Hands-on Exercises
Assessing Risk

• Saving a Normal Change Request makes new buttons available at the top of the form.
• Clicking the ‘Risk Assessment’ button will open the HUIT Risk Assessment pop-up window.

• The Change Requester must complete the Risk Assessment and click the ‘Submit’ button in order to categorize the Normal Change Request as ‘Low’, ‘Medium’ or ‘High’ risk.
Step-by-step instructions & Hands-on Exercises

Emergency Changes

• To create an Emergency Change, select a Change type of ‘Emergency’ (notice that the Risk field no long appears).

• Complete the Change Request as you would any Normal Change.
Step-by-step instructions & Hands-on Exercises
Hands-on Exercise #1

• Initiate 2 change requests: Normal & Emergency
  – Fill in initial mandatory fields only
  – Assess risk (Normal only)
  – Note Change Request numbers
  – Update and Return

• Changes should be listed in the Overview window
Identify Services and Configuration Items potentially affected. Develop and document Communications, Testing, and Backout plans.
Step-by-step instructions & Hands-on Exercises

Documenting Changes

- **Category**
  - All changes require selection of an appropriate category

- **Impacted Services and CI’s**
  - List any impacted CI’s and dependent Services

- **Implementation plan**
  - Information about staff or teams who will perform work
  - Implementation task workflow and timeline

- **Backout plan**
  - Allow time for rollback within change window
  - For higher risk changes, identify a backout trigger

- **Test plan**
  - Include both pre- and post-implementation testing

- **Communications plan**
  - Use existing methods
Step-by-step instructions & Hands-on Exercises

Documenting Changes

### Category
- All changes require selection of an appropriate category

### Impacted Services and CI’s
- List any impacted CI’s and dependent Services

### Implementation plan
- Information about staff or teams who will perform work
- Implementation task workflow and timeline

### Backout plan
- Allow time for rollback within change window
- For higher risk changes, identify a backout trigger

### Test plan
- Include both pre- and post-implementation testing

### Communications plan
- Use existing methods
Step-by-step instructions & Hands-on Exercises

Documenting Changes

- **Category**: All changes require selection of an appropriate category
- **Impacted Services and CI’s**: List any impacted CI’s and dependent Services
- **Implementation plan**: Information about staff or teams who will perform work, Implementation task workflow and timeline
- **Backout plan**: Allow time for rollback within change window, For higher risk changes, identify a backout trigger
- **Test plan**: Include both pre- and post-implementation testing
- **Communications plan**: Use existing methods

**Change Request**
- **Number**: CHG0030345
- **Requested by**: Brian Laishman
- **Change type**: Normal
- **Risk**: None
- **Category**: Non
- **Service**:

**Planning**
- **Implementation plan**
- **Backout plan**
- **Test plan**
- **Communications plan**

**Short description**
**Description**
Step-by-step instructions & Hands-on Exercises
Documenting Changes

**Category**
- All changes require selection of an appropriate category

**Impacted Services and CI’s**
- List any impacted CI’s and dependent Services

**Implementation plan**
- Information about staff or teams who will perform work
- Implementation task workflow and timeline

**Backout plan**
- Allow time for rollback within change window
- For higher risk changes, identify a backout trigger

**Test plan**
- Include both pre- and post-implementation testing

**Communications plan**
- Use existing methods

---

**Change Request**

- **Number:** CHG030345
- **Requested by:** Brian Lashman
- **Change type:** Normal
- **Risk:** None
- **Category:** None
- **Service:**

---

**Planning**

- **Implementation plan:**
  
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- **Communication plan:**

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**Notes**
Step-by-step instructions & Hands-on Exercises

Documenting Changes

- All changes require selection of an appropriate category
- List any impacted CI’s and dependent Services
- Information about staff or teams who will perform work
- Implementation task workflow and timeline
- Allow time for rollback within change window
- For higher risk changes, identify a backout trigger
- Include both pre- and post-implementation testing
- Use existing methods
Step-by-step instructions & Hands-on Exercises

Documenting Changes

- **Category**
  - All changes require selection of an appropriate category

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- **Communications plan**
  - Use existing methods
Step-by-step instructions & Hands-on Exercises
Documenting Changes

**Category**
- All changes require selection of an appropriate category

**Impacted Services and CI’s**
- List any impacted CI’s and dependent Services

**Implementation plan**
- Information about staff or teams who will perform work
- Implementation task workflow and timeline

**Backout plan**
- Allow time for rollback within change window
- For higher risk changes, identify a backout trigger

**Test plan**
- Include both pre- and post-implementation testing

**Communications plan**
- Use existing methods
Step-by-step instructions & Hands-on Exercises

Documenting Changes - Change Categories

- Application
- Data Center
- Database
- Network
- Server
- Storage
- Other

• Entering a value in the ‘Configuration item’ field is mandatory when the Category is ‘Server’
Step-by-step instructions & Hands-on Exercises
Affected CIs (Category -> Server only)

• Selecting a Category of ‘Server’ will reveal the mandatory ‘Configuration item’ field.

• You can use either the type-ahead or list lookup functions to select a server CI

• After saving, the bottom of the Change Request form will show an ‘Affected CIs’ related list tab with the CI you selected.

• To add multiple CIs, click the ‘Edit’ button.
Step-by-step instructions & Hands-on Exercises
Affected CIs (Category -> Server only)

- In the Edit Member form, use the Collection list to add servers to the Affected CI’s list.
Step-by-step instructions & Hands-on Exercises
Documenting Changes - Impacted Services

• All categories of change request have access to the Service field.

You can use either the type-ahead or list lookup functions to select an impacted Service.

After saving, the Change Request form will show an ‘Impacted Services’ related list tab with the Service you selected.

To related multiple services, click the ‘Edit’ button to use the Edit Members form.
Step-by-step instructions & Hands-on Exercises
Documenting Changes – Additional Documentation

- Existing change and project documentation can be easily attached to the change record.

<table>
<thead>
<tr>
<th>Request Approval</th>
<th>Copy Change</th>
<th>Cancel</th>
<th>Save</th>
<th>Update and Return</th>
<th>Assign to me</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status:</td>
<td>Open</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval:</td>
<td>Not Yet Requested</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Changes can be related to other Changes

- And new or existing Incidents
Step-by-step instructions & Hands-on Exercises
Hands-on Exercise #2

• **Update your draft Change Requests**
  – Fill in documentation fields
    • Category
    • Implementation plan
    • Backout plan
    • Test plan
    • Communications plan
  – Identify an Impacted Service
  – Category “Server” will require a related CI

• **Be brief; no need to attach files, etc.**
Step-by-step instructions & Hands-on Exercises Using a Template

- ServiceNow also allows you to use templates (pre-defined Change Models) to make it easier to create a Change Request

1) Right-click the title bar
2) Select ‘Template’
3) Select ‘Apply Template’
4) Choose template from list
Step-by-step instructions & Hands-on Exercises

Standard Changes

• To create a Standard change request, initiate a new change request and select Change Type ‘Standard’

• A new field “Standard Change” becomes available.

• Use the type-ahead or list lookup functions to select an existing entry from the Standard Change Library

• All fields will be pre-populated, except for Start and End dates
Hands-on Exercise #3

• Create two more Change Requests:
  – Create a Standard Change
  – Create a Change Request using a Template

• Both methods allow you to bypass multiple lifecycle stages
Step-by-step instructions & Hands-on Exercises
Assigning Changes

1. Initiate
2. Assess
3. Document
4. Assign
   - Identify responsible support group and assignee
5. Schedule
6. Submit
7. Implement
8. Complete
Step-by-step instructions & Hands-on Exercises
Assigning Changes

- Assignment group: Mandatory when requesting approval
- Assigned to: Mandatory at ticket completion
- Both fields have type-ahead and list lookup functionality
- Populating the ‘Assigned to’ field will auto-populate the ‘Assignment group’ field
Step-by-step instructions & Hands-on Exercises
Hands-on Exercise #4

• Update your draft Change Requests
  – Assign at least one to yourself
  – Assign at least one to a partner

• Do not request approval at this time
Step-by-step instructions & Hands-on Exercises

Scheduling Changes

- Initiate
- Assess
- Document
- Assign
- **Schedule**
- Submit
- Implement
- Complete

Schedule or propose an implementation date.
Step-by-step instructions & Hands-on Exercises

Scheduling Changes

- **Initiate**
- **Assess**
- **Document**
- **Assign**
- **Schedule**
- **Submit**
- **Implement**
- **Complete**

**Standard Maintenance Windows**

- 8:00pm Mon – 8:00am Tue
- 8:00pm Tue – 8:00am Wed
- 8:00pm Wed – 8:00am Thu
- 8:00pm Thu – 8:00am Fri
- 5:00am Sat – 12:00pm Sun

- Non-Standard changes should be scheduled during maintenance windows.
- Whenever possible, Emergency Changes should also be scheduled for outside business hours.
- Change windows should allow enough time for post-implementation testing and back-out.
Step-by-step instructions & Hands-on Exercises

Scheduling Changes

- The ‘Start date’ and ‘End date’ fields allow you to schedule the expected start and end dates of the Change Request. Use the calendar icons to help you select a date.

- Find the date you want, enter the time and click the green arrow to populate the ‘Start date’ and ‘End date’ fields.

- Note: ServiceNow will generate warning messages if the lead time for that change type and risk is not met.
Step-by-step instructions & Hands-on Exercises
Using the Change Schedule and Change Calendar

• To see the Change Schedule, click on ‘Change Schedule’ in the scheduling section of the Change application from the application navigator.

• To see the Change Calendar, click on ‘Change Calendar’ in the scheduling section of the Change application from the application navigator.
Step-by-step instructions & Hands-on Exercises
Checking for Conflicts

- ServiceNow has a conflict detector that checks whether planned changes conflict with other changes or have scheduling issues.
Step-by-step instructions & Hands-on Exercises
Checking for Conflicts

• Clicking the ‘Check Conflicts’ link in the Change Request form will display a message at the top of the form.

Related Links
- Personalize all
- Check Conflicts

or

- There are NO CONFLICTS
- There ARE CONFLICTS - See "Conflicts" related list
Step-by-step instructions & Hands-on Exercises

Hands-on Exercise #5

• **Update your Change Requests**
  – Select Start & End dates and times
  – Check for Conflicts
Submit the change request for approval as necessary.
Step-by-step instructions & Hands-on Exercises
Submitting Changes for Approval

Once all mandatory information on the Change Request form is completed, you may request approval for the change by clicking one of the ‘Request Approval’ buttons.
Step-by-step instructions & Hands-on Exercises
Submitting Changes for Approval

- Pending and completed approvals are displayed in the ‘Approvers’ related list at the bottom of the ticket.

- Additional ad-hoc approvers can be added as long as the change has not yet been approved.
Normal Change Approval

- The approval request will be displayed in the Approver’s ‘My Pending Approvals’ list. The Change Type and Risk level drive the approval workflow.

<table>
<thead>
<tr>
<th>Type &amp; Risk</th>
<th>Lead Time</th>
<th>Approval Stages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal - Low</td>
<td>1 Bus Day</td>
<td>1) Assignment Group &amp; Service Owner</td>
</tr>
<tr>
<td>Normal - Medium</td>
<td>1 Week</td>
<td>1) Assignment Group &amp; Service Owner 2) CAB Members</td>
</tr>
<tr>
<td>Normal - High</td>
<td>2 Weeks</td>
<td>1) Assignment Group &amp; Service Owner 2) CAB Meeting</td>
</tr>
</tbody>
</table>
Step-by-step instructions & Hands-on Exercises
Standard, Emergency, and Major Change Approval

Type & Risk
- Standard
- Emergency
- Major

Lead Time
- As necessary
- None
- 6 Weeks

Approval Stages
- Pre-Approved
- 1) Assignment Group & Service Owner
  2) ECAB
- 1) Assignment Group & Service Owner
  2) CAB Meeting
Step-by-step instructions & Hands-on Exercises
Change Advisory Board (CAB)

- Meets Thursdays 2pm – 3pm
- SC 300h, conference bridge available
- Includes representation from all HUIT change management participant groups
Step-by-step instructions & Hands-on Exercises
Emergency Change Advisory Board (ECAB)

- Takes place via conference call or e-mail
- Typically includes:
  - Change Manager
  - Incident Manager
  - Requester
  - Assignee
  - Manager or director of assigned group
  - Impacted service owners
  - Other CAB members as necessary
Step-by-step instructions & Hands-on Exercises
Hands-on Exercise #6

• Submit your Change Requests for approval
  – Note: Standard change is already approved

hands-on
Initiate the communications plan as necessary and implement the change.
Step-by-step instructions & Hands-on Exercises
Change Review

Initiate
Assess
Document
Assign
Schedule
Submit
Implement
Complete

Complete the Change Request ticket and update CI records or conduct a Post Implementation Review (PIR) as necessary.
Step-by-step instructions & Hands-on Exercises
Completing Changes

• Once the Change Implementer has completed the actual implementation work, click the ‘Work Complete’ button.

• The Notes tab now has the following mandatory fields that must be completed: ‘Change Outcome’, ‘Work start’, and ‘Work end’.

• Depending on the Change Outcome, the Work Notes field might also be required.
### Change Outcomes

<table>
<thead>
<tr>
<th>Criteria:</th>
<th>Successful</th>
<th>Problems Encountered</th>
<th>Change Failed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rollback Unnecessary</td>
<td>True</td>
<td>True</td>
<td>False</td>
</tr>
<tr>
<td>No Unplanned Service Interruption</td>
<td>True</td>
<td>Either is False</td>
<td>N/A</td>
</tr>
<tr>
<td>Completed all Planned Work within Window</td>
<td>True</td>
<td></td>
<td>N/A</td>
</tr>
</tbody>
</table>
With status change to ‘Work Complete’, the following tasks may appear in the Change Tasks tab:

- Perform PIR for unsuccessful change
- Update CIs for change (only for Change Type ‘Server’)
If the task *Update CIs for change* is required, open the *Change Task* by clicking the task number from the *Tasks* related list tab or from your *Overview/Dashboard* page.

Within the task form, scroll down to the *Affected CIs* tab and click on the *Configuration Item* link to open the CI record.

Update the relevant fields within the *CI record* and click *Save* (to remain in the record) or *Update and Return* to go back to the *Change Task*.
Step-by-step instructions & Hands-on Exercises
Change Tasks – Updating CI Records

• Change the status of the Change Task to *Closed Complete* when you have completed updating the *Configuration Item* record.

• An additional task will be created in the change ticket called ‘*Verify CIs for change*:’

• Task is assigned to the Group Manager by default, but can be reassigned

• Changes cannot be closed if any Tasks remain Open
Step-by-step instructions & Hands-on Exercises

Change Review

<table>
<thead>
<tr>
<th>Change Category</th>
<th>Change Outcome</th>
<th>Post Implementation Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Successful</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Problems Encountered or Change Failed</td>
<td>Change Manager</td>
</tr>
<tr>
<td>Normal – Low Risk</td>
<td>Successful</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Problems Encountered or Change Failed</td>
<td>Assignment Group Manager</td>
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</table>
Step-by-step instructions & Hands-on Exercises
Change Review

<table>
<thead>
<tr>
<th>Change Category</th>
<th>Change Outcome</th>
<th>Post Implementation Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal – Medium Risk</td>
<td>Successful</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Problems Encountered</td>
<td>Assignment Group Manager</td>
</tr>
<tr>
<td></td>
<td>Change Failed</td>
<td>Change Manager</td>
</tr>
<tr>
<td>Normal – High Risk</td>
<td>All</td>
<td>Change Manager and/or CAB</td>
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</table>

Initiate ➔ Assess ➔ Document ➔ Assign ➔ Schedule ➔ Submit ➔ Implement ➔ Complete
Step-by-step instructions & Hands-on Exercises
Change Review

<table>
<thead>
<tr>
<th>Initiate</th>
<th>Assess</th>
<th>Document</th>
<th>Assign</th>
<th>Schedule</th>
<th>Submit</th>
<th>Implement</th>
<th>Complete</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Change Category</th>
<th>Implementation Rating</th>
<th>Post Implementation Review</th>
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</thead>
<tbody>
<tr>
<td>Emergency / Major</td>
<td>All</td>
<td>Change Manager and/or CAB</td>
</tr>
</tbody>
</table>
Step-by-step instructions & Hands-on Exercises

Change Review

- What went right & what went wrong?
- What are the lessons learned?
- What are the action items for follow-up?

In the event of a major incident, reviews occur at Tuesday MIR meeting
Step-by-step instructions & Hands-on Exercises
Hands-on Exercise #7

• Complete your Change Requests
  – Complete any change tasks as necessary
Agenda

- Session Overview
- HUIT Change Management Process Review
- Introduction to ServiceNow Change Management
- Step-by-step instructions & Hands-on Exercises

- Q&A
Q & A

• Where to get help
  – huit.harvard.edu/itsm

• Where you can ‘practice’ with the tool
  – harvardtest.service-now.com
  – Mail notifications are NOT enabled

• How to give us your feedback
  – itsm@harvard.edu

• Training class evaluations
  – Link from huit.harvard.edu/itsm
CONGRATULATIONS!

• Thank You for taking the time to attend this training

• All change Approvers (CAB members, Assignment Group Approvers, and Service Owner Approvers) should attend additional training.

• Videos coming soon!

• Logout out of ServiceNow, but not the computers please.