Mass General Brigham

SERVICENOW: WORKING WITH CHANGES

This document provides users with instructions for working with Changes. You can use a Change to directly submit a change request, bypassing the Request for Change (RFC) process. You may also be involved in submitting Changes to process RFCs for which your team is identified as the assigned group.

- This procedure should only be used to add, modify, or remove a supported service or modify an application or hardware.
- To request information, advice, or access to a service (such as a new SFA or equipment), use the New Call option from the ServiceNow menu, and select a Call Type of “Request.”

1 GETTING STARTED

1.1 ServiceNow Support

For additional resources, search the ServiceNow Knowledgebase at http://www.partners.org/servicenow or contact the Service Desk.

1.2 Accessing ServiceNow

ServiceNow is available on and off the Mass General Brigham network.

From a Mass General Brigham Workstation

1. Go to **Applications**.
2. Select **ServiceNow**.

Online

1. Go to https://www.partners.org/servicenow.
2. Log in with your user name and password.

2 KEY TERMS

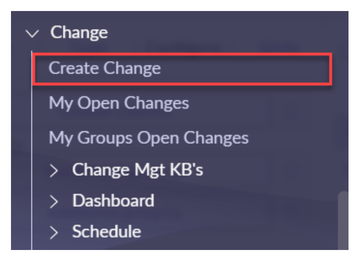
Term	Definition
RFC	Request for Change. Used either by business users or Digital teams when requester does not have all the required information to submit a Change.
Change Type	Calculated by ServiceNow based on the Change Subtype for your Change compared to the lead-time calculated for your request. (Lead-time is calculated by comparing the date and time when you click the Submit button to the Start date/time you specify for the Change.) Options are: • Normal – To introduce a new service or to improve or retire service. • Expedited – To resolve degradation of a service. Other Changes categorized as Expedited due to improper lead-time are perceived as lacking proper planning. • Emergency – To resolve a service interruption (such as an Incident). • Pre-Approved – Assigned based on your selection of the associated check box.
Change Subtype	Categorization of the Change based on its impact or potential impact. Options are: • Major - Enterprise-wide or multiple site impact or potential impact • Significant - Site-specific or multiple-department impact or potential impact • Minor - Single department impact or potential impact The relationship between the Change Type and Subtype field in ServiceNow is defined according to the following table. You can ensure that your Change is treated by ServiceNow as a Normal Change by allowing the proper amount of lead time between when you click to submit your Change and the Start date/time that you specify.

Change Type is...	when Change Subtype is...	...and Lead Time (System calculated based on difference between submit time and Start date/time) is...
Normal	Major	Greater than or equal to 30 days.
	Significant	Greater than or equal to 7 days.
	Minor	Greater than or equal to 2 days.
Expedited	Major	Less than 30 days but greater than 30 minutes.
	Significant	Less than 7 days but greater than 30 minutes.
	Minor	Less than 2 days but greater than 30 minutes.
Emergency	Major/Significant/Minor	30 minutes or less (or in the past).

Term	Definition
Change Compliance	Change Management reviews all Significant and Major Changes for compliance both before they are scheduled for review by the Change Control Board (CCB) as well as after implementation. A compliant Change is a well-prepared Change, and one that clarifies what, why, and how the Change is being executed. See KB0038398 for Do's and Don'ts, vendor considerations, and an example of a Compliant Change.

3 WORKING WITH CHANGES

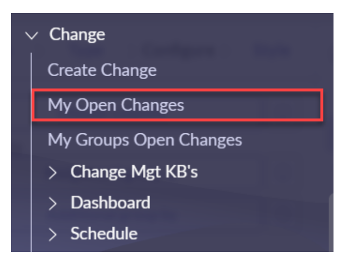
3.1 Submit a Change – Create Option



1. On the left navigation bar, click **Change**, and then click **Create Change**.
2. Complete all fields, as appropriate. See the list of Field Descriptions in paragraph 3.8.

   Tip! You can copy/paste from an existing document into any field.
3. Click **Submit**. ServiceNow display the CHG number assigned to your request.

3.2 Submit a Change – When Identified as Assigned Group



An email notification is sent to your group if a business user or Digital user has identified your group as the Assigned Group for a Request for Change (RFC). If approved, information from the RFC is transferred to a Change and your group is responsible for the submittal and subsequent processing of that Change.

1. To access Changes that have been assigned to your group, click **Change** and then click **My Open Changes**. (You can also access these Changes by searching for the CHG number in the search field in the upper right corner.)
2. Complete all fields, as appropriate. Many fields include values transferred from the initial RFC, but can be updated. See the list of Field Descriptions in paragraph 3.8.
3. Click **Submit**.

3.3 Post-Implementation Review

Three days after the End date/time, the system sends an email notification requesting completion of the PIR (Post Implementation Review) tab. If not completed within 5 days, the system automatically closes the request, noting the missing PIR information.

3.4 Updating Changes

1. To access the Change you wish to update, click **Change** and then click **My Open Changes**. (You can also access these Changes by searching for the CHG number in the search field in the upper right corner.)
2. Update all fields, as appropriate. See the list of Field Descriptions in paragraph 3.8.

   Tip! You can copy/paste from an existing document into any field.

3. Click **Update**. The system sends an email notification message to all users associated with this Change.

3.5 Adding Change Tasks

Change Tasks should be used whenever implementation dates extend for more than 24 hours. Doing so, can help Major Incident Specialists identify possible sources of issues that occur within a specified time frame.

1. To access the Change you wish to update, click **Change** and then click **My Open Changes**. (You can also access these Changes by searching for the CHG number in the search field in the upper right corner.)
2. Click **Create Change task**. The system sends an email notification message to all users associated with this Change.
3. Update all fields, as appropriate. See the list of Field Descriptions in paragraph 3.9.

   Tip! You can copy/paste from an existing document into any field.

4. Click **Update**. The system sends an email notification message to all users associated with this task. Note that a Change cannot be closed until all tasks are closed.

3.6 Canceling Changes

1. To access the Change you wish to update, click **Change** and then click **My Open Changes**. (You can also access these Changes by searching for the CHG number in the search field in the upper right corner.)
2. Click **Cancel Change**. The system sends an email notification message to all users associated with this Change.

3.7 Closing Changes

Changes are automatically closed by ServiceNow based on the specified End Date. If any tasks are associated with the Change, they must be closed before the Change can be closed.

3.8 Change Field Descriptions

Field	Field Type	Description
Number	System-generated	Unique number assigned by the system.
State	System-generated	Based on where the Change is in its lifecycle.
Requested by	System-defaulted	Person requesting the Change. Defaults to your name.
CCB date	Completed by Change Manager	Assigned by the Change Manager once all other approvals have been granted and Change has been reviewed for compliance. Indicates the date when requester or a representative must represent this Change to the Change Control Board (CCB).
Change type	System-calculated	Assigned by the system as Normal, Emergency, or Expedited. Calculated by Start date/time and Change subtype.
Change sub-type*	Required	Subtype of the Change, based on its risk and impact or potential risk and impact. Specify Minor, Significant, or Major.
Suggested sub-type	System generated	Assigned by ServiceNow once you complete all required fields and click to Save your Change. Note that you can override this suggested sub-type (for example, if you wish to bump up a Minor Change to Significant to gain visibility at the CCB).
Related to an incident?*	Conditional	Displays only for Expedited or Emergency Changes. Indicates whether or not this Change is related to an incident.
Related incident*	Conditional	Displays only when Related to an incident? field is set to "Yes." Indicates the incident related to this Change.
Start date/time*	Required	Date and time Change starts. Key field for Change compliance.
End date/time*	Required	Date and time Change ends. Key field for Change compliance. If Change extends beyond 24 hours, you must create Change Tasks to document the work performed (see paragraph 3.5).
Service outage*	Required	Indicates whether or not this Change will result in a service outage. If sub-type is Minor, service outages are only allowed if your Change is occurring within a maintenance schedule.
Outage start date/time	Conditional	Date and time Outage starts.
Outage end date/time	Conditional	Date and time Outage ends.
Environment*	Required	The environment where the Change is being implemented.
Configuration item*	Required	Main or parent Configuration Item to which Change is being applied. This field is not required if the Environment field is "Non-Technical." Key field for Change compliance. • If vendor related, indicate the application or technical service (for example, if Epic needs to make a Change on their end, use "Epic"). If don't have, use "CI Not Found." • If you enter "CI Not Found" (and not vendor-related), note in Description that you are awaiting CI import and include the request ticket number for that import. • If multiple CIs, use the Affected CIs tab to enter additional CIs (see KB0034251 for details).

**Indicates required field*

3.8 Change Field Descriptions (cont)

Field	Field Type	Description
Conflict status	System-generated	Displays "Not Run" until Change is submitted. Then, indicates either "Conflict" or "No Conflict," as appropriate.
Conflict Checker Last Run	System-generated	Blank until Change is submitted. Then, displays date and time that Change was submitted. Can be updated by clicking "Check Conflicts" under Related links.
Opened	System-generated	Displays date and time when Change was initiated.
Request item	Optional	If applicable, enter the RITM associated with this Change. This is automatically filled from the IS Provisioning Request form.
Assignment group*	Required	The group to be assigned to make this Change.
Assigned to	Optional	The person in the assignment group to whom this Change will be assigned, if known.
Pre-approved change	System-defaulted	Indicates whether or not this request is for a Pre-Approved Change. Defaults to "No." Change to "Yes" to base your Change on a Pre-Approved Change template.
Pre-Approved Change Template	Conditional	Select the Pre-approved Change Template to which this Change will be based.
Require manager approval*	System-defaulted	Whether approval by your manager is required. Defaults to "Yes."
Approver*	System-defaulted	Defaults to your manager.
Watch list	Optional	Indicate whether or not you want to follow the status of this Change, and receive all associated notifications. If so, click the "Add me" icon ( ). Note that if you are the requester, you automatically receive notifications. If you wish to add another user, click the "Unlock" icon ( ) and search for the name.
Site(s) impacted*	Required	Site or sites potentially impacted by this Change. To add a site, click the "Unlock" icon ( ) and search for the name. To indicate Enterprise impact, select "MGB" here.
Change Description*	Required	Identify what is being changed, using text that is clear and understandable by anyone outside of your team. For vendor-related Changes, must start with "Vendor-Related" along with the name of the vendor. Key field for Change compliance.
Level of impact*	Required	Select High, Medium, or Low.
End user impact*	Required	Select "Yes," "No," or "Intermittent degradation" to indicate the impact or potential impact of this Change.
Describe impact to user, if any*	Required	Indicate the impact from the user's perspective. This field is required if the End user impact field is "Yes" or "Intermittent degradation." Field should also be used to indicate why there is no impact to users (such as if site is closed).
Justification for change*	Required	Indicate the business reason for this Change. Key field for Change compliance.
Justification for timing*	Required	Explain why the application, system, or service owner has chosen this window to implement this Change.

**Indicates required field*

3.8 Change Field Descriptions (cont)

Field	Field Type	Description
Justification text*	Conditional	Displays only if "Use free text" is selected at Justification for timing field.
Test plan*	Required	Actionable and detailed steps to test the Change. If vendor-related, enter "Vendor related." Key field for Change compliance. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Test plan procedure link*	Conditional	Displays only if "Link to procedure (SOP)" is selected at Test plan field.
Test plan text*	Conditional	Displays if "Use free text field" is selected at Test plan field.
Test will be completed*	Required	Indicate when the Change will be tested (Pre-Implementation, Post Implementation, Pre & Post Implementation, or No Testing).
Who tested the plan*	Conditional	Displays only if "Pre-Implementation," "Post Implementation," or "Pre & Post Implementation" is selected at the Test will be completed field. Select the person or people who will be completing the testing by clicking the "Unlock" icon ( ) and searching for the name.
Implementation plan*	Required	Actionable and detailed steps to implement the Change. If vendor-related, enter "Vendor related." Key field for Change compliance. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Implementation plan procedure link*	Conditional	Displays only if "Link to procedure (SOP)" is selected at the Implementation plan field.
Implementation plan text*	Conditional	Displays only if "Use free text field" is selected at the Implementation plan field.
Backout plan*	Required	Actionable and detailed steps to back out the Change if it is unsuccessful. If vendor-related, enter "Vendor related." Key field for Change compliance. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Backout plan procedure link*	Conditional	Displays only if "Link to procedure (SOP)" is selected at the Backout plan field.
Backout plan text*	Conditional	Displays only if "Use free text field" is selected at the Backout plan field.

**Indicates required field*

3.8 Change Field Descriptions (cont)

Field	Field Type	Description
How many technical groups are involved with implementing the change?*	Required	Select from the drop-down list to indicate the number of other teams that will need to coordinate this Change. The greater the number of teams involved, the greater the risk.
Has this change been attempted before successfully?*	Required	Select from the drop-down list to indicate how previous attempts to complete this Change have gone. Changes that have been previously unsuccessful have a greater risk.
Has this type of change ever caused a major incident?*	Required	Select whether or not this Change has ever resulted in an incident with significant disruption to the business. Changes that have caused major incidents are assessed as having greater risk.
What's the length of time to back out the change?*	Required	Select from the drop-down list to indicate how much time is needed to back out the Change, if necessary. The longer the time to back out the Change, the greater the risk.
Will change take place from 7am to 6pm weekdays? *	Required	Select whether or not this Change will be implemented during core business hour. Changes that are implemented during these hours are assessed as having greater risk.
Email to customer (Customer visible)	Optional	Additional notes that you wish to include. Notes entered here are included in email notifications for this Change.
Work notes	Optional	A log of updates for this Change.

**Indicates required field*

3.9 Change Task Field Descriptions

Field	Field Type	Description
Number	System-generated	Unique number assigned by the system.
State	System-generated	Indicates where the Change Task is in its lifecycle. Initially defaults to Open, but can be reset. Values include: • Open • Closed Complete • Cancelled • Closed Incomplete • Passed Unit Testing in Dev • Passed UAT in QA • Passed Unit Testing in QA • Awaiting Move to QA • Awaiting Move to Production • Failed Testing in Production
Configuration item*	Required	Main or parent configuration item to which Change is being applied. This field is not required if the Environment field is set to “Non-Technical.”
Priority*	Required	Initially defaults to 4 (Low), but can be reset. Values include: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low
Change request	System-generated	The parent Change for this task. Assigned by the system.
Start date/time*	Required	Date and time Change Task starts.
End date/time*	Required	Date and time Change Task ends.
Assignment group*	Required	The group to be assigned to make this Change.
Short description*	Required	Indicate what is to be done.
Description*	System-generated	The original description from the Change. Assigned by the system.
Work notes	Optional	A log of updates for this Change.
Work notes list	Optional	Indicate whether or not you want to follow the status of this Task, and receive all associated notifications. If so, click the “Add me” icon ( ). Note that if you are the requester, you automatically receive notifications. If you wish to add another user, click the “Unlock” icon ( ) and search for the name.

**Indicates required field*