PARTNERS HEALTHCARE | FOUNDED BY BRIGHAM AND WOMEN'S HOSPITAL AND MASSACHUSETTS GENERAL HOSPITAL | servicenow

SERVICENOW: WORKING WITH CHANGE RECORDS

This document provides IS users with instructions for working with Change Records (CRs). You can use a CR to directly submit a change request, bypassing the Request for Change (RFC) process. You may also be involved in submitting CRs 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 IS Service Desk.

1.2 Accessing ServiceNow

ServiceNow is available on and off the Partners network.

From a Partners Workstation

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

Online

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

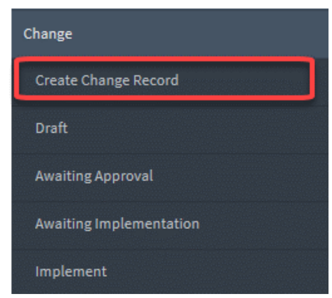
2 KEY TERMS

Term	Definition
RFC	Request for Change. Used either by business users or IS when requestor does not have all the required information to submit a Change Record (CR).
Change Type	Calculated by ServiceNow based on the Change Subtype for your CR 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 CR.) 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 CR is treated by ServiceNow as a Normal change by allowing the proper amount of lead time between when you click to submit your CR 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).

3 WORKING WITH CHANGE RECORDS

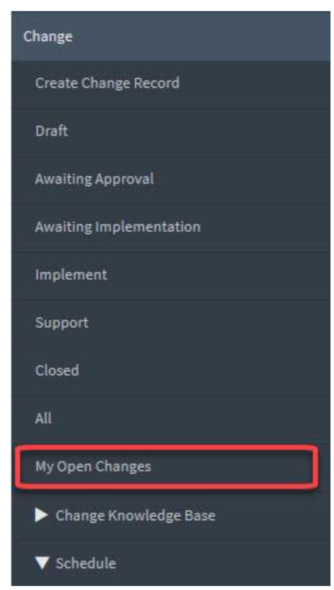
3.1 Submit a Change Record – Create Option



1. On the left navigation bar, click **Change**, and then click **Create Change Record**.
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 Record – When Identified as Assigned Group



An email notification is sent to your group if a business user or other IS 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 CR and your group is responsible for the submittal and subsequent processing of that change.

1. To access CRs that have been assigned to your group, click **Change** and then click **My Open Changes**. (You can also access these CRs 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

For changes with a subtype of Major or Significant and all Emergency changes: 3 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 Change Records

1. To access the change record (CR) you wish to update, click **Change** and then click **My Open Changes**. (You can also access these CRs 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 CR.

3.5 Adding Change Tasks

1. To access the change record (CR) you wish to update, click **Change** and then click **My Open Changes**. (You can also access these CRs 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 CR.
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.

3.6 Canceling Change Records

1. To access the change record (CR) you wish to update, click **Change** and then click **My Open Changes**. (You can also access these CRs 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 CR.

3.7 Closing Change Records

Change records are automatically closed by ServiceNow based on the specified End Date.

3.8 Change Record Field Descriptions

Field	Description
Number	Unique number assigned by the system.
State	System-assigned, based on where the change record is in its lifecycle.
Requested by	Person requesting the change. Defaults to your name.
Change type	Assigned by the system as Normal, Emergency, or Expedited. Calculated by Start date/time and Change subtype.
Change sub-type	Subtype of the change, based on its impact or potential impact. Specify Minor, Significant, or Major.
Related to an incident?*	Displays only for Major changes and only once you enter the Start and End date/time fields. Indicates whether or not this change is related to an incident.
Related incident*	Displays only when Related to an incident? field is set to "Yes." Indicates the incident related to this Major change.
Start date/time*	Date and time change starts.
End date/time*	Date and time change ends. If the change extends beyond 24 hours, you must create change tasks to document the work performed (see paragraph 3.5).
Service outage*	Indicates whether or not this change will result in a service outage. If Yes, you must indicate the start and end dates and times. Also, if the sub-type is Minor, service outages are only allowed if your change is occurring within a maintenance schedule.
End user impact*	The impact or potential impact of any downtime related to this change.
End user impact reason *	Displays only if Service outage is "Yes" and End user impact is "No." You must indicate why the outage has no impact (for example, "Off hours – site is closed").
Environment*	The environment where the change is being implemented.
Configuration item*	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."
Request item	If applicable, enter the RITM associated with this change. This is automatically filled from the IS Provisioning Request form.
Assignment group	The group to be assigned to make this change.
Assigned to	The person in the assignment group who this change will be assigned, if known.
Pre-approved change	Indicates whether or not this request is for a pre-approved change. Defaults to No. Change to Yes to base your change request on a pre-approved change template. (If so, system displays a field labeled "Pre-approved change template" to select that template.)
Require manager approval	Whether approval by your manager is required. Leave checked if your manager has approval access in ServiceNow.
Approver	Defaults to your manager.
Watch list	Indicate whether or not you want to follow the status of this request, and receive all associated notifications. If so, click the "Add me" option.
Site(s) impacted	Site or sites potentially impacted by this change. If this field is supposed to be Enterprise, select "PHS | Partners Healthcare, Inc." here.

3.8 Change Record Field Descriptions (cont)

Field	Description
Change Description*	Description of the change.
Justification for change*	Business reason for this change.
Justification for timing*	Explain why the application, system, or service owner has chosen this window to implement this change.
Test plan*	Detailed steps to test the change. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Tested the plan*	Indicates whether or not the test plan has been validated. You may also be prompted to enter this field if you make updates to older CRs.
Test plan text*	Displayed only if “Use free text field” is selected at the Test plan field.
Implementation plan*	Detailed steps to implement the change. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Implementation plan text*	Displayed only if “Use free text field” is selected at the Implementation plan field.
Backout plan*	Detailed steps to back out the change if it is unsuccessful. Use the drop-down list to select one of the following options: • Attached Document • Link to procedure (SOP) • Use free text field
Backout plan text*	Displayed only if “Use free text field” is selected at the Backout plan field.
Email to customer (Customer visible)	Additional notes that you wish to include. Notes entered here are included in email notifications for this change request.
Work notes	A log of updates for this change.

Indicates required field

3.9 Change Task Field Descriptions

Field	Description
Number	Unique number assigned by the system.
State	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*	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*	Initially defaults to 4 (Low), but can be reset. Values include: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low
Change request	The parent change record for this task. Assigned by the system.
Start date/time*	Date and time change task starts.
End date/time*	Date and time change task ends.
Assignment group*	The group to be assigned to make this change.
Short description*	Indicate what is to be done.
Description*	The original description from the change record. Assigned by the system.
Work notes	A log of updates for this change.
Work notes list	Indicate whether or not you want to follow the status of this task, and receive all associated notifications. If so, click the “Add me” option.

**Indicates required field*