

<b>Title:</b> UCF IT Change Management – Change Record Procedure	<b>Effective: 09/01/2016</b>
	<b>Revised: 10/30/2019</b>
<b>Approved By: Michael Sink, Associate VP &amp; COO, UCF IT</b>	<b>Page 1 of 56</b>

Revision History			
Revision (Rev)	Date of Rev	Owner	Summary of Changes
Sec. V & VI; Communication plan section within Planning section/tab	02/13/2017	Scott Baron	Added Communication plan section to Planning section/tab of the Change Record
Sec. V; Notification section/tab for Normal Changes	03/23/2017	Scott Baron	Added Notifications section/tab. Will be required if Requires communication is answered Yes – ONLY FOR NORMAL CHANGES
Sec. V & VI; Additional information (URL) section within Planning section/tab	03/23/2017	Scott Baron	Added Additional information (URL) section to Planning section/tab of the Change Record. Non-required field.
Sec. VII. Item F	07/11/2017	Scott Baron	Added Windows and Changes Calendar Report
Section III; Added UCF IT definition	05/15/2018	Scott Baron	Added UCF IT definition as of May 2018
Added Section I. Document Control	04/25/2018	Scott Baron	Added Section I. Document Control
Section I; Updated title & body	10/31/2018	Scott Baron	Updated title and paragraph body verbiage
Section III; UCF IT	03/21/2019	Scott Baron	Revised UCF IT definition as of March 2019
Section V., VI./Append A & B	08/26/2019	Scott Baron	Added Confidence level config to all sections
Section III; UCF IT	10/30/2019	Scott Baron	Revised UCF IT definition as of Oct 2019

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## I. DOCUMENT CONTROL AND APPROVALS

This document is authored, managed and governed by UCF IT Strategy and Planning. Final published versions have been approved by the UCF IT AVP & COO and ITSM Governance Committee members. No other parties have the authority to modify or distribute a modified copy of this document. For any questions related to the content of this document, please contact the UCF IT Performance and Service Management department.

## II. OBJECTIVES

This document is intended to define and describe a consistent process for inputting a change record into the ITSM application (ServiceNow). This document will also walkthrough the change approval workflow as part of the change record procedure. The sections below identify all steps required for Normal AND Emergency Change records submitted for approval.

## III. DEFINITIONS

**Change Record:** A record within the ITSM application (ServiceNow) containing the details of a change. A change record is created for every request for change (RFC) that is approved by the Change Manager. Change records should reference the configuration item(s) that are affected by the change.

**Request for Change (RFC):** A RFC is a submitted request within the ITSM application (ServiceNow) for a proposed change to be made.

### Change Types:

1. **Normal Change:** A Normal Change refers to changes that must follow the complete Change Management process. A Normal Change does not need to be introduced immediately.

Normal Changes are often categorized according to risk and impact to the organization/business. A Normal Change may be a major change with high risk and high impact, or a minor change with low risk and low impact.

2. **Emergency Change:** An Emergency Change is a change that must be introduced as soon as possible – for example to resolve a major incident.

All Emergency Changes must have an associated incident record. This is to ensure that the change has a full description and history log which can be reviewed by the Change Advisory Board (CAB). For Emergency Changes, the process will follow the ECAB process.

**Change Advisory Board (CAB):** The Change Advisory Board (CAB) is made up of senior leaders that are responsible for the assessment, prioritization, approval and scheduling of changes. The CAB will approve or reject all proposed changes considering

all known risks vs. benefits of implementing the change. The CAB also reviews and pre-approves all changes identified as Standard changes.

**Emergency CAB (ECAB):** A subgroup of the CAB that makes decisions about Emergency changes. This is an ad-hoc gathering of at least two members of the CAB and the Change Owner to review and then approve or reject the Emergency change. An Emergency change CANNOT be a Normal change that needs to be expedited because it was not submitted in time for CAB review.

**Successful Change\*:** A Change is deemed successful if it has met the stated business and IT objectives validated by the end user, was implemented without deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**\* A change is ALSO deemed successful if it qualifies under this one exception.**

- Meets all of the criteria for a Successful Change as stated, however the change implemented was for an emergency incident/problem resolution and was recorded after the change was implemented (retro change record).

**Successful with issues Change:** A change is deemed successful with issues if it has met the stated business and IT objectives validated by the end user, was implemented with deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**Unsuccessful Change:** A change is deemed unsuccessful if it does not meet all of the criteria for success as stated in the Successful Change and Successful with issues Change definitions within this policy.

**Canceled Change:** A change is considered “Canceled” if a decision is made by the CAB or the Change Manager to recall/cease (reject) the planned change implementation.

**IT Service Management (ITSM) application:** This is the application (ServiceNow) used by IT to record incidents, problems, requests, and changes.

**Change Owner:** The UCF IT staff member responsible for monitoring the execution of the change and documenting the change.

**Change Manager:** Manager of the Change Owner responsible for the change’s success.

**Change States:** Change Management within ServiceNow offers a State workflow model to move and track Change records from New to Closed.



**New** - Change record has not been submitted yet for review and approval by the Change Manager. A Change Owner can save a change record as many times as necessary while building out the details of the change prior to submission.

**Assess** – Change record ready for approval by the Change Manager

**Authorize** – Change record ready for CAB/ECAB approval

**Scheduled** - The change is fully scheduled and CAB/ECAB approved. It is now waiting for the planned start date to approach.

**Implement** - The planned start date has approached and the actual work to implement the change is being conducted.

**Review** - The work has been completed. The Change Owner now determines whether the Change was Successful. A post-implementation review can be conducted during this state.

**Closed** - All review work is complete. The change is closed with no further action required.

**Canceled** - A Change can be canceled at any point if it is no longer required. However, a Change CANNOT be Canceled from a Closed state.

Figure 1.1 – Change State progressions

Normal and Emergency Changes progress States the same way.

Figure 1.1

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Canceled
Emergency	✓	✓	✓	✓	✓	✓	✓	✓
Normal	✓	✓	✓	✓	✓	✓	✓	✓

**Change Task States:** Change Management within ServiceNow offers a State workflow model to move Change Task records from Pending to Closed.

**Pending** – Change record is being planned. Any associated tasks with a pending CAB approval change record will sit in a Pending State until the Change is CAB/ECAB approved.

**Open** – After the change is CAB/ECAB approved, the task(s) will systematically Change to an Open State. Work **SHOULD NOT** begin on the task until the planned start date of the change approaches

**Work in Progress** – The task planned start date has approached and the actual work is being conducted. The Task Owner has ServiceNow write access to change the State from Open to Work in Progress.

**Closed Complete** –Task completed.

**Closed Incomplete** – Cancels task. Planned task was determined not needed.

**Closed Skipped** – Cancels task. Planned task was determined not needed.

**UCF IT (as of October 2019):** College of Arts and Humanities, College of Business Administration, College of Community Innovation and Education, College of Health Professions and Sciences, College of Sciences, Student Development and Enrollment Services, Digital Learning, College of Undergraduate Studies, Office of Instructional Resources, UCF Connect, University Libraries, Human Resources, UCF Foundation, Student Health Services

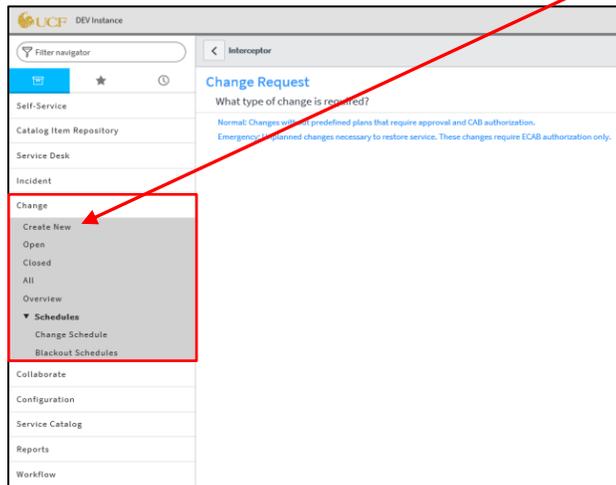
#### **IV. SCOPE OF CHANGE RECORD PROCEDURE**

This procedure document is **ONLY** for ServiceNow users that have an ITIL role. The below sections only represent the user interface per the ITIL role. End Users (customers) do not have access to record a change and must submit a service request to formally start the process for a request for Change (RFC). **Standard Changes are currently NOT within scope of Change Management.**

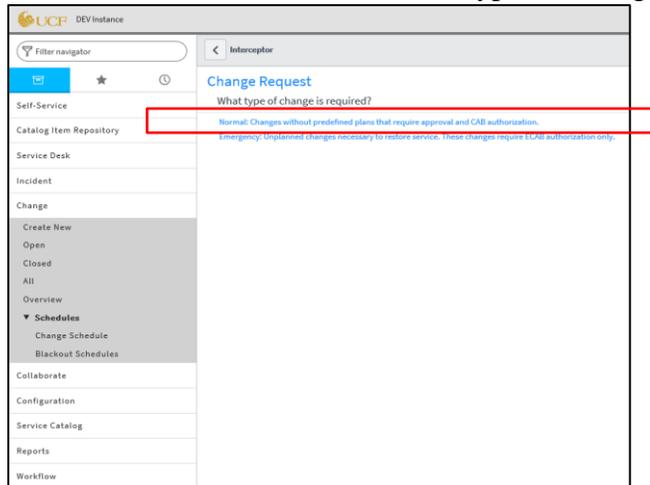
#### **V. NORMAL CHANGE - STEPS TO RECORD A CHANGE RECORD**

Per the UCF IT Change Management Policy & Procedure, if the Change Manager approves the RFC, the Change Owner is responsible to record the Change per the steps below.

1. On the left side of the Filter navigator, expand Change and click Create New

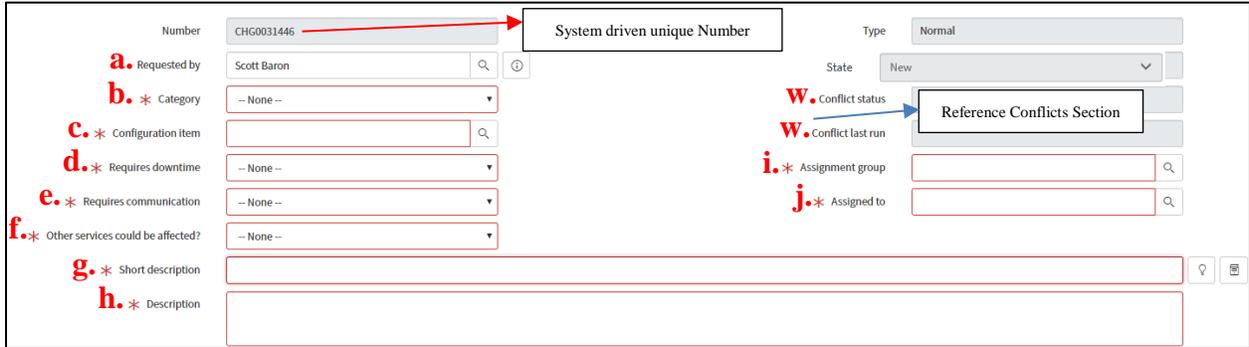


2. On the center screen, select Normal type of Change



### 3. Top Section – (Above the Planning section/tabs)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.



The screenshot shows a form for creating a change record. Fields marked with a red asterisk (\*) are required. Fields with a blue highlight and a callout box are also required. The fields are:

- a.** Requested by: Scott Baron
- b.\*** Category: -- None --
- c.\*** Configuration item: [Empty]
- d.\*** Requires downtime: -- None --
- e.\*** Requires communication: -- None --
- f.\*** Other services could be affected?: -- None --
- g.\*** Short description: [Empty]
- h.\*** Description: [Empty]
- W.\*** Conflict status: [Empty]
- W.\*** Conflict last run: [Empty]
- i.\*** Assignment group: [Empty]
- j.\*** Assigned to: [Empty]

Additional fields shown include: Number (CHG0031446), System driven unique Number, Type (Normal), and State (New). A callout box labeled 'Reference Conflicts Section' points to the Conflict status and Conflict last run fields.

- a) Requested by** – Field either needs to represent the Change Owner (same as “Assigned to” field) or needs to represent the customer that submitted a RFC through a service request
- b) Category** – Select the appropriate Category that categorizes your Change
- c) Configuration Item (CI)** – Select the appropriate CI that your Change is affecting. Reference the [Appendix; Section H](#) for additional insight to searching for a CI. If more than one CI will be affected for the change record, reference the [Appendix; Section E](#) for instructions on how to record
- d) Requires downtime** – Will this Change require a downtime?
- e) Requires communication** – Will this Change require communication? Does IT need to be notified? Do other constituent(s) need to be notified? Does the entire campus community need to be notified? If communication is required, what will the customer(s) experience during this change and when will the notification(s) take place?
  - If Yes is chosen, then the Communication plan section will appear within the Planning section (tab) and additional detail will be required for the Change Record’s Communication plan. Also, the Notifications section (tab) will need to be completed as well.
- f) Other services could be affected?** – Will this change impact/affect other IT services while being implemented?
  - If Yes is chosen, this will indicate to the change advisory board that there is higher risk (unknowns) to implement the change and that all possible IT services that may be impacted should be listed within the change record.
  - If No is chosen, the Change Owner will be required to complete a confidence level percentage on how certain they are that other/additional IT services will NOT be affected. If the confidence level is 50% or below, then the Change Owner will be required to complete the Confidence level section (within the Planning section (tab)) explaining why there is uncertainty of IT services being impacted while the change is being implemented.

- g) Short description** – Reflects a brief summary of the Change. Should be concise and in terms that can be understood by your audience. This field will be reflected on the Change Calendar (Schedule)
- h) Description** – Describe the Change. Use terms that will be understood by your audience and write in complete sentences
- i) Assignment group** – Reflects the UCF IT department responsible for the Change’s success
- j) Assigned to** – Is the Change Owner of the Change. The UCF IT staff member responsible for monitoring the execution of the Change and documenting the Change

#### 4. Planning section (tab)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.

Planning*	Schedule*	Conflicts	Notes	Closure Information	Notifications*
<b>k.*</b> Justification	Enter benefits of implementing this change and impact if this change is not implemented <small>4000 characters remaining of 4000 characters</small>				
<b>l.*</b> Implementation plan	Enter sequential steps to implement this change. In addition, enter dependencies between steps and assignee details for each step <small>4000 characters remaining of 4000 characters</small>				
<b>m.*</b> Risk and impact analysis	Enter potential risks and impact associated with this change. Include impact details if this change implementation is unsuccessful <small>4000 characters remaining of 4000 characters</small>				
<b>n.*</b> Backout plan	Enter steps to revert the change to its state prior to implementation. Include information regarding when the change can be backed out during implementation and if the change window includes time to backout <small>4000 characters remaining of 4000 characters</small>				
<b>o.*</b> Test plan	Enter details of planned and completed tests prior to implementation that indicate the potential success of this change. Enter details of planned post-implementation tests to confirm success of this change <small>4000 characters remaining of 4000 characters</small>				
<b>oo.*</b> Communication plan	Only will appear if Yes is chosen under Requires communication <small>4000 characters remaining of 4000 characters</small>				
<b>ooo.</b> Additional information (URL)	Enter the URL path if Planning resources for the Change Record are located outside of ServiceNow and cannot be attached to the Change Record. <small>1056 characters remaining of 1056 characters</small>				
<b>p.*</b> Confidence level	Only will appear if Confidence level is 50% or <=25%				

- k) Justification** – What is the desired outcome to be generated by the Change? Is the input a solution to a problem or an innovation?
- l) Implementation plan** – Documented detailed steps for the Change to be implemented successfully. The Change tasks associated with a Change will be the high level summary of the implementation plan (whether tasks are sequential or run in parallel).
- m) Risk and impact analysis** – Identify the risks to IT services inherent to the Change

- n) **Backout plan** – Can you revert back once this Change is complete? If yes, indicate how it will be restored. If no, indicate what you will do if the Change is not successful.
- o) **Test plan** – Did you test this? If yes, please describe how it was tested. If no, indicate why testing could not be performed. Once the Change is complete, how will you test to ensure it is working properly?
- oo) **Communication plan** – Does IT need to be notified? Do other constituent(s) need to be notified? Does the entire campus community need to be notified? What will the customer(s) experience during this change and when will the notification(s) take place?
- ooo) **Additional information (URL)** – Optional field. Enter the URL path if Planning resources for the Change Record are located outside of ServiceNow and cannot be attached to the Change Record.
- p) **Confidence level** – Explain why there is uncertainty of IT services being impacted while the change is being implemented.

## 5. Schedule section (tab)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.

Planning	Schedule	Conflicts	Notes	Closure Information
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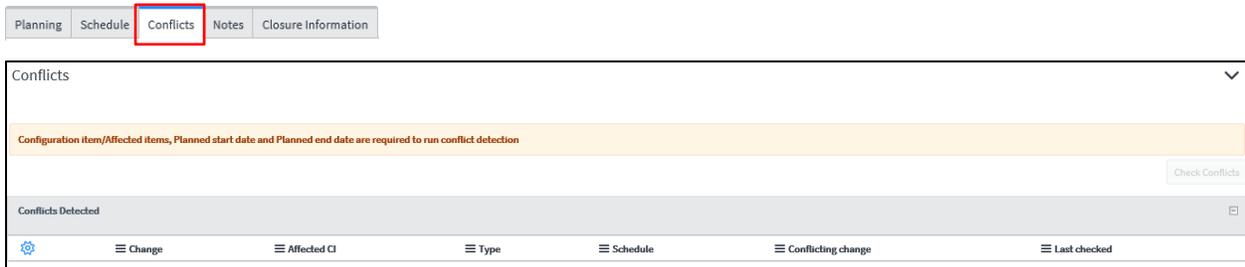
Schedule			
<b>q.*</b> Planned start date	<input type="text"/>	<b>t.</b> Actual start	<input type="text"/>
<b>r.*</b> Planned end date	<input type="text"/>	<b>u.</b> Actual end	<input type="text"/>
<b>s.</b> CAB recommendation	<input type="text"/>	<b>v.</b> CAB date	06/28/2016

- q) **Planned start date** - Change window Planned start date and time
  - Per the UCF IT Change Management Policy, only Normal Changes are required to get CAB approval a minimum of one week prior to the Change Planned start date. This lead time will ensure that sufficient resources are available, that the proposed change can be discussed in CAB and that communication is sent out in a timely manner. For example, the CAB date in the screenshot above is 06/28/2016. The minimum Planned start date would be 07/05/2016.
- r) **Planned end date** – Change window Planned end date and time
- s) **CAB recommendation** – Only should be filled out by the CAB administrator. This field reflects the recommendation from the CAB discussion if the Change is rejected or needing any modification
- t) **Actual start** – Change actual start date and time. The date and timestamp are systematically populated when the State is Changed by the Change Owner to Implement
- u) **Actual end** – Change actual end date and time. The date and timestamp are systematically populated when the State is changed by the Change Owner to

Review. NOTE: All associated Change tasks must be closed before the Review State can be selected

- v) **CAB date** – Systematically driven field that populates the upcoming CAB meeting. All Changes to be CAB approved must have a planned start date on the presented CAB date or after

## 6. Conflicts section (tab)



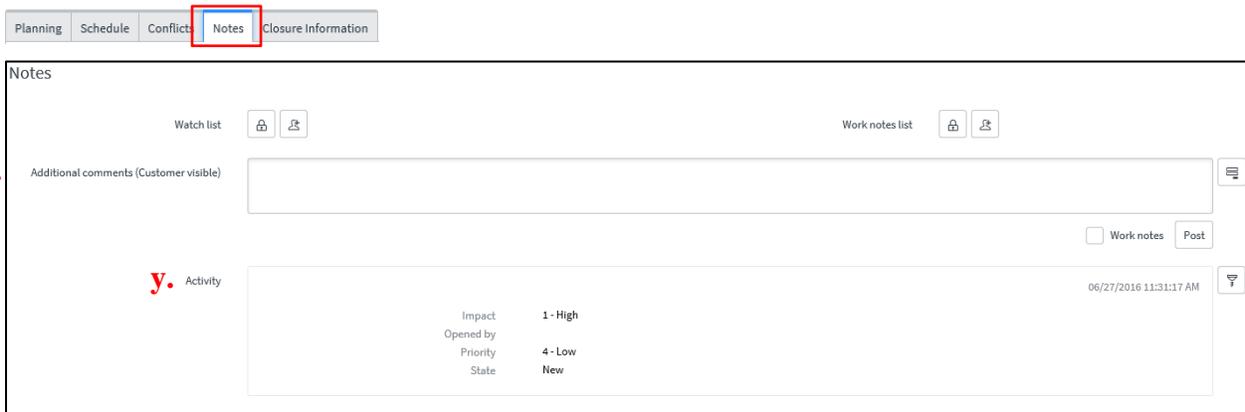
W.

- w) **Conflicts Detected** – Systematically driven off the Change record details, the conflict detector will look at the two possible conflicts below. The detector runs automatically and you will see the last run time stamp and status within the Top Section (3.).

Configuration Item(s) – System checks other Changes within the proposed Change window that affect the same CI(s)

Blackout Dates – System checks the pre-loaded blackout schedule (Change freeze window) times against the proposed Change window

## 7. Notes section (tab)



X.

- x) **Additional comments (Customer visible)** – If any comments are added to this field the “Requested by” individual will be notified

- y) **Activity** - A field that is systematically logged which captures all activities of a Change such as email notifications sent, work notes updates, additional comments added or changes to any fields.

## 8. Notifications section (tab)

- This section will only be completed if Requires communication is “Yes” (populated in the Top Section) and formal communication needs to be sent to internal and/or external customers by a responsible individual.



**n1) Does formal communication need to be sent to internal and/or external customers?** – Yes or No selection. If **Yes**, then n2 and n3 below will need to be filled out. If **No**. Then no further action is required.

**n2) Enter Message Description** - This public notification is to be written in layman’s terms so that our customers will understand how this change will affect them

**n3) Enter the person responsible to send out communication for this Change** - Enter the person responsible to send out communication for this Change. This person will be notified of the Communication plan and intended message once the change has been CAB approved

## 9. Closure Information section (tab)

- This section will be completed at the Review State of the Change.



- z)** **Close code** – The Change Owner is responsible to mark the Change as Successful, Successful with issues or Unsuccessful AFTER the Change implementation and the State being changed to Review.

**Successful Change\*:** A Change is deemed successful if it has met the stated business and IT objectives validated by the end user, was implemented without deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**\* A change is ALSO deemed successful if it qualifies under this one exception.**

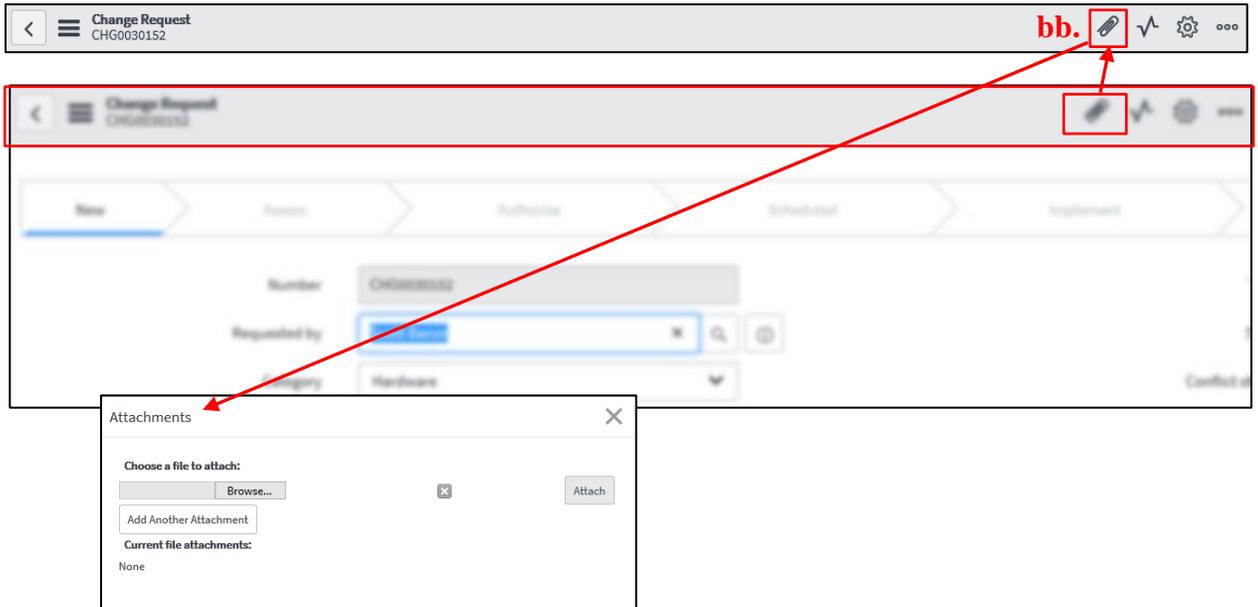
- Meets all of the criteria for a Successful Change as stated, however the change implemented was for an emergency incident/problem resolution and was recorded after the change was implemented (retro change record).

**Successful with issues Change -** A change is deemed successful with issues if it has met the stated business and IT objectives validated by the end user, was implemented with deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**Unsuccessful Change:** A change is deemed unsuccessful if it does not meet all of the criteria for success as stated in the Successful Change and Successful with issues Change definitions within this policy.

- aa)** **Close notes** – For the Change Owner to document comments such as; why the Change was unsuccessful, lessons learned, etc...

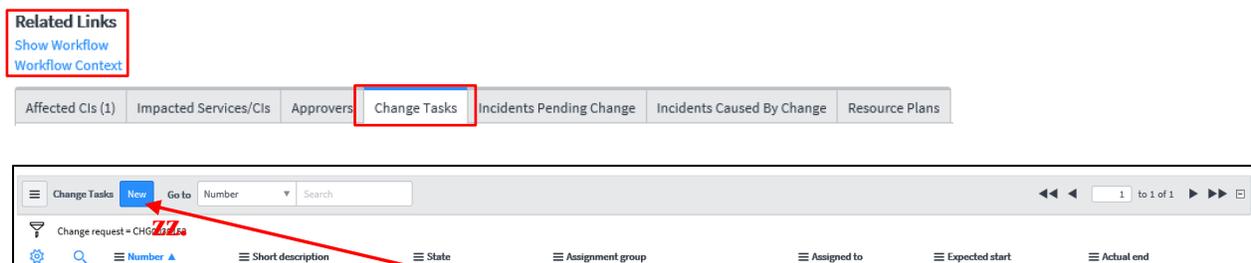
## 10. Attachments section – (Icon at the top of the Change window)



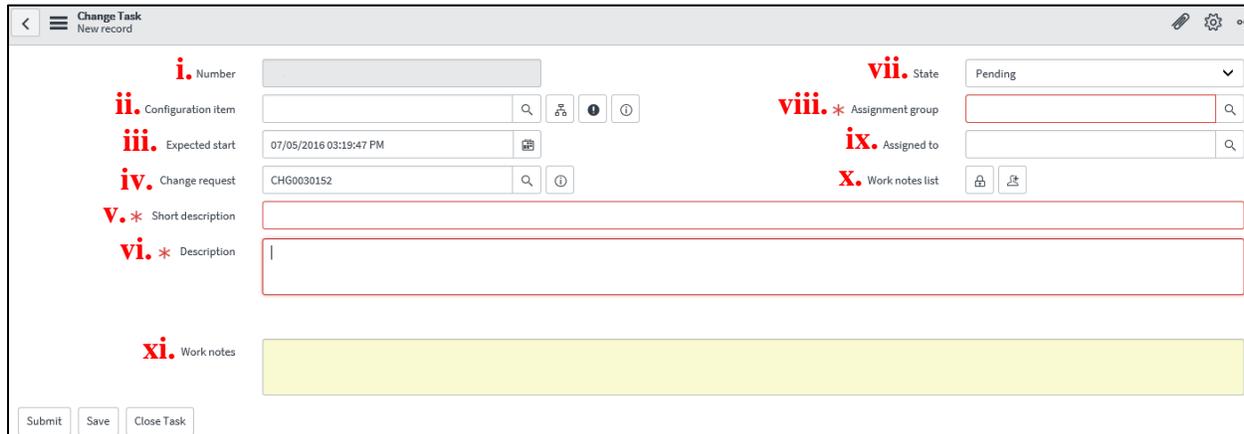
**bb)** **Attachments** – For supporting documentation such as Implementation plan, Test plan, vendor documentation, screenshots, etc.

## 11. Related Links Section - Change Tasks (tab)

- This section will appear AFTER the Change Owner Submits the New Record
- Fill out all required fields that have an asterisk in red and as reference are highlighted **blue** within this section.



**zz)** **Tasks** – The Tasks to be created (click New to create a task and the window below will need to be filled out per task) will represent your itemized implementation plan and the person(s) responsible per assigned task(s). All task(s) must be closed BEFORE the Change can be moved to a Review State. The Change Owner is responsible for monitoring the execution of the Change inclusive of ensuring all tasks are closed within the Change window.



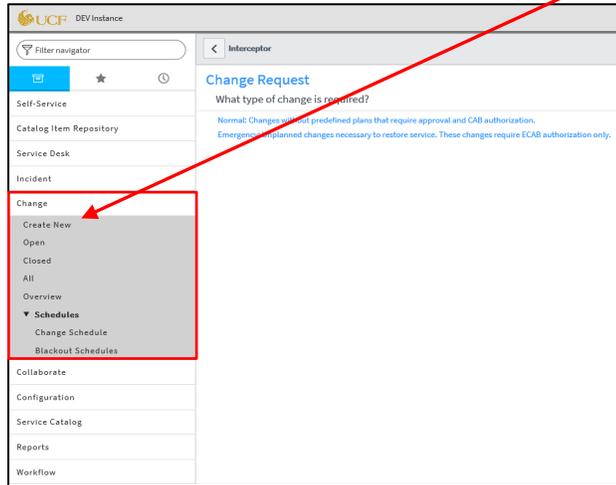
- i. Number** – System driven unique number starting with “CTASK”
- ii. Configuration item** – By default, the parent CI is brought over
- iii. Expected start** – By default, the expected start date is the parent Change planned start date. Expected start date for the Task SHOULD NOT be planned prior to parent Change planned start date
- iv. Change request** – Parent Change number
- v. Short description** – Reflects a brief summary of the task. Should be concise and in terms that can be understood by your audience
- vi. Description** – Describe the task. Use terms that will be understood by your audience and write in complete sentences
- vii. State** – Systematically driven by the State of the parent Change. Reference the Definitions section for Change Task State definitions. The State will default to Pending when a New Task is added. Once the Change is CAB approved, the State will systematically Change to Open. When the parent Change planned start date begins, then the State of the Task can be changed to Work in Progress. Once work is complete, the Task can be changed to Closed Complete.
- viii. Assignment group** – Reflects the UCF IT department responsible for the task completion
- ix. Assigned to** – Reflects the UCF IT staff member responsible for the task completion
- x. Work notes list** – For other users to be added for notifications on work notes updates
- xi. Work notes** – For documentation purposes on task

REFERENCE THE [QUICK STEP NEW CHANGE RECORD GUIDE – NORMAL CHANGES](#) SECTION FOR CLIFF NOTE INSTRUCTIONS.

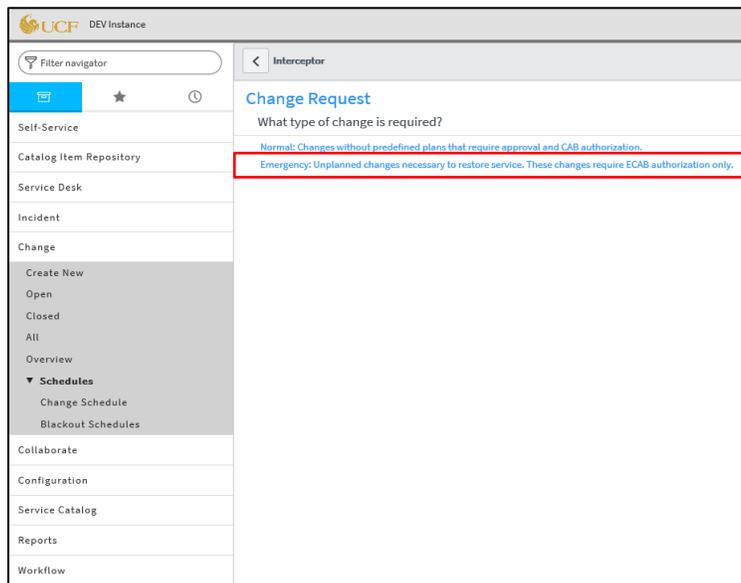
## VI. EMERGENCY CHANGE - STEPS TO RECORD A CHANGE RECORD

Per the UCF IT Change Management Policy & Procedure, if the Change Manager approves the RFC, the Change Owner is responsible to record the Emergency Change per the steps below.

1. On the left side of the Filter navigator, expand Change and click Create New

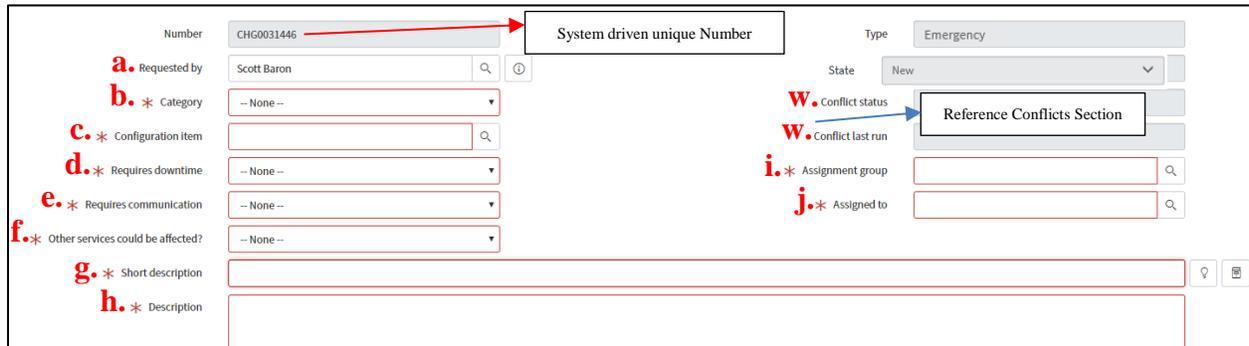


2. On the center screen, select Emergency type of Change



### 3. Top Section – (Above the Planning section/tabs)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.



- Requested by** – Field either needs to represent the Change Owner (same as “Assigned to” field) or needs to represent the customer that submitted a RFC through a service request
- Category** – Select the appropriate Category that categorizes your Emergency Change
- Configuration Item** (CI) – Select the appropriate CI that your Emergency Change is affecting. Reference the [Appendix; Section H](#) for additional insight to searching for a CI. If more than one CI will be affected for the Emergency Change record, reference the [Appendix; Section E](#) for instructions on how to record
- Requires downtime** – Will this Emergency Change require a downtime?
- Requires communication** – Will this Change require communication? Does IT need to be notified? Do other constituent(s) need to be notified? Does the entire campus community need to be notified? If communication is required, what will the customer(s) experience during this change and when will the notification(s) take place?
  - If Yes is chosen, then the Communication plan section will appear within the Planning section (tab) and additional detail will be required for the Change Record’s Communication plan
- Other services could be affected?** – Will this change impact/affect other IT services while being implemented?
  - If Yes is chosen, this will indicate to the change advisory board that there is higher risk (unknowns) to implement the change and that all possible IT services that may be impacted should be listed within the change record.
  - If No is chosen, the Change Owner will be required to complete a confidence level percentage on how certain they are that other/additional IT services will NOT be affected. If the confidence level is 50% or below, then the Change Owner will be required to complete the Confidence level section (within the Planning section (tab)) explaining why there is uncertainty of IT services being impacted while the change is being implemented.

- g) Short description** – Reflects a brief summary of the Emergency Change. Should be concise and in terms that can be understood by your audience. This field will be reflected on the Change Calendar (Schedule)
- h) Description** – Describe the Emergency Change. Why should this change be introduced as soon as possible? Use terms that will be understood by your audience and write in complete sentences
- i) Assignment group** – Reflects the UCF IT department responsible for the Emergency Change’s success
- j) Assigned to** – Is the Change Owner of the Emergency Change. The UCF IT staff member responsible for monitoring the execution of the Emergency Change and documenting the Emergency Change

#### 4. Planning section (tab)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.

Planning*	Schedule*	Conflicts	Notes	Closure Information	Notifications*
<b>k.*</b> Justification	Enter benefits of implementing this change and impact if this change is not implemented <small>4000 characters remaining of 4000 characters</small>				
<b>l.*</b> Implementation plan	Enter sequential steps to implement this change. In addition, enter dependencies between steps and assignee details for each step <small>4000 characters remaining of 4000 characters</small>				
<b>m.*</b> Risk and impact analysis	Enter potential risks and impact associated with this change. Include impact details if this change implementation is unsuccessful <small>4000 characters remaining of 4000 characters</small>				
<b>n.*</b> Backout plan	Enter steps to revert the change to its state prior to implementation. Include information regarding when the change can be backed out during implementation and if the change window includes time to backout <small>4000 characters remaining of 4000 characters</small>				
<b>o.*</b> Test plan	Enter details of planned and completed tests prior to implementation that indicate the potential success of this change. Enter details of planned post-implementation tests to confirm success of this change <small>4000 characters remaining of 4000 characters</small>				
<b>oo.*</b> Communication plan	Only will appear if Yes is chosen under Requires communication <small>4000 characters remaining of 4000 characters</small>				
<b>ooo.</b> Additional information (URL)	Enter the URL path if Planning resources for the Change Record are located outside of ServiceNow and cannot be attached to the Change Record. <small>1056 characters remaining of 1056 characters</small>				
<b>p.*</b> Confidence level	Only will appear if Confidence level is 50% or <=25%				

- k) Justification** - What is the desired outcome to be generated by the Emergency Change? Is the input a solution to an incident/problem or an innovation?
- l) Implementation plan** – Documented detailed steps for the Emergency Change to be implemented successfully. The Emergency Change tasks associated with a Change will be the high level summary of the implementation plan (whether tasks are sequential or run in parallel).
- m) Risk and impact analysis** - Identify the risks to IT services inherent to the Emergency Change

- n) Backout plan** - Can you revert back once this Emergency Change is complete? If yes, indicate how it will be restored. If no, indicate what you will do if the Emergency Change is not successful.
- o) Test plan** - Did you test this? If yes, please describe how it was tested. If no, indicate why testing could not be performed. Once the Emergency Change is complete, how will you test to ensure it is working properly?
- oo) Communication plan** – Does IT need to be notified? Do other constituent(s) need to be notified? Does the entire campus community need to be notified? What will the customer(s) experience during this change and when will the notification(s) take place?
- ooo) Additional information (URL)** – Optional field. Enter the URL path if Planning resources for the Change Record are located outside of ServiceNow and cannot be attached to the Change Record.
- p) Confidence level** – Explain why there is uncertainty of IT services being impacted while the change is being implemented.

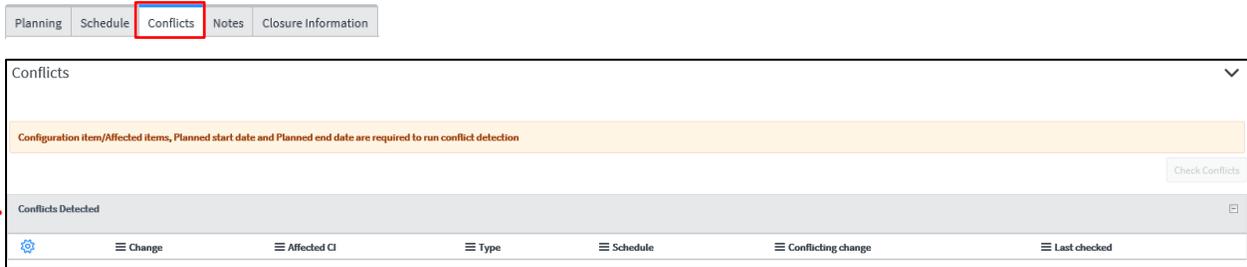
## 5. Schedule section (tab)

- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.

Planning	Schedule	Conflicts	Notes	Closure Information
Schedule				
<b>q. *</b>	Planned start date	<input type="text"/>		
<b>r. *</b>	Planned end date	<input type="text"/>		
<b>s.</b>	CAB recommendation	<input type="text"/>		
<b>t.</b>	Actual start	<input type="text"/>		
<b>u.</b>	Actual end	<input type="text"/>		
<b>v.</b>	CAB date	<input type="text"/>		

- q) Planned start date** – Emergency Change window Planned start date and time
- r) Planned end date** – Emergency Change window Planned end date and time
- s) CAB recommendation** – Only should be filled out by the CAB administrator or ECAB members. This field reflects the recommendation from ECAB discussion if the Emergency Change is rejected or needing any modification
- t) Actual start** – Emergency Change actual start date and time. The date and timestamp are systematically populated when the State is Changed by the Change Owner to Implement
- u) Actual end** – Emergency Change actual end date and time. The date and timestamp are systematically populated when the State is changed by the Change Owner to Review. NOTE: All associated Emergency Change tasks must be closed before the Review State can be selected
- v) CAB date** – CAB is NOT required for Emergency Changes. Field is left blank so the planned start date can be planned within the minimum date requirement for Normal Changes.

## 6. Conflicts section (tab)



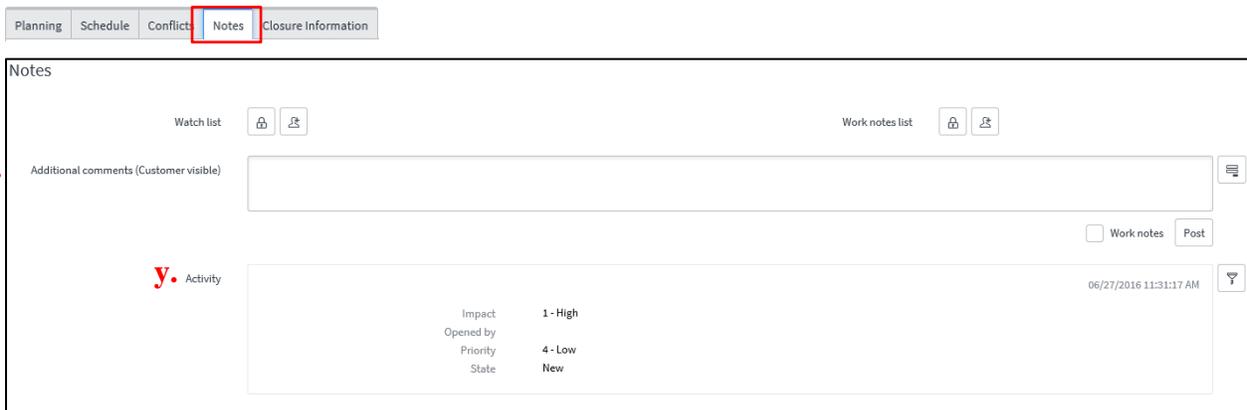
W.

**w) Conflicts Detected** – Systematically driven off the Change record details, the conflict detector will look at the two possible conflicts below. The detector runs automatically and you will see the last run time stamp and status within the Top Section (3.).

Configuration Item(s) – System checks other Changes within the proposed Change window that affect the same CI(s)

Blackout Dates – System checks the pre-loaded blackout schedule (Change freeze window) times against the proposed Change window

## 7. Notes section (tab)



X.

**x) Additional comments (Customer visible)** – If any comments are added to this field the “Requested by” individual will be notified

**y) Activity** - A field that is systematically logged which captures all activities of a Change such as email notifications sent, work notes updates, additional comments added or changes to any fields.

## 8. Closure Information section (tab)

- This section will be completed at the Review State of the Change.



Planning Schedule Conflicts Notes **Closure Information**

Closure Information

**Z.** Close code -- None --

**aa.** Close notes

- z) Close code** - The Change Owner is responsible to mark the Emergency Change as Successful, Successful with issues or Unsuccessful AFTER the Emergency Change implementation and the State being changed to Review.

**Successful Change\*:** A Change is deemed successful if it has met the stated business and IT objectives validated by the end user, was implemented without deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**\* A change is ALSO deemed successful if it qualifies under this one exception.**

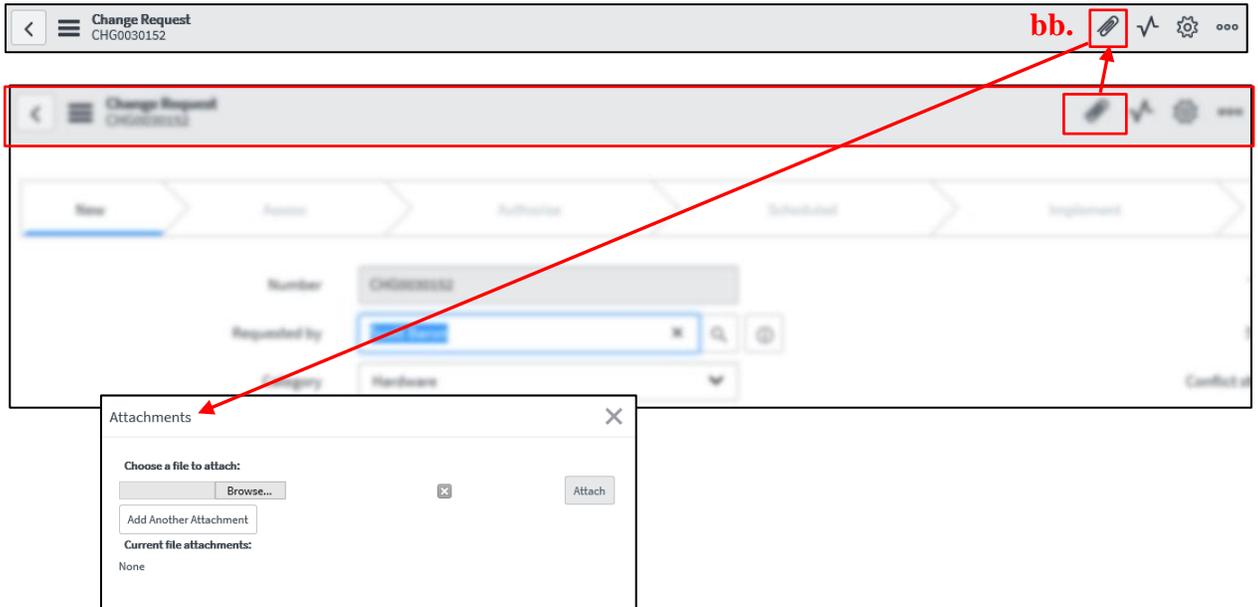
- Meets all of the criteria for a Successful Change as stated, however the change implemented was for an emergency incident/problem resolution and was recorded after the change was implemented (retro change record).

**Successful with issues Change** - A change is deemed successful with issues if it has met the stated business and IT objectives validated by the end user, was implemented with deviation to the documented change plan, was completed within the change window and has not resulted in incidents and problems.

**Unsuccessful Change:** A change is deemed unsuccessful if it does not meet all of the criteria for success as stated in the Successful Change and Successful with issues Change definitions within this policy.

- aa) Close notes** – For the Change Owner to document comments such as; why the Emergency Change was unsuccessful, lessons learned, etc...

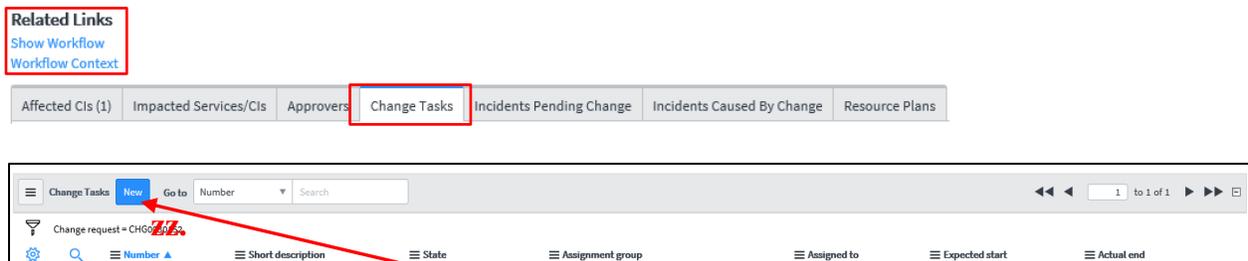
## 9. Attachments section – (Icon at the top of the Change window)



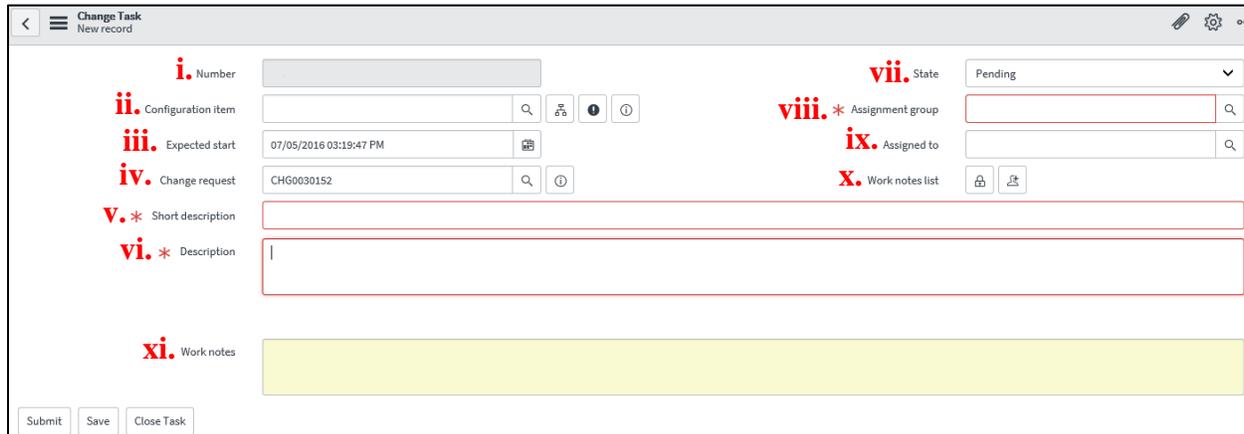
**bb)** **Attachments** – For supporting documentation such as Implementation plan, Test plan, vendor documentation, screenshots, etc.

## 10. Related Links Section - Change Tasks (tab)

- This section will appear AFTER the Change Owner Submits the New Record
- Fill out all required fields that have an asterisk in red and as reference are highlighted blue within this section.



**zz)** **Tasks** – The Tasks to be created (click New to create a task and the window below will need to be filled out per task) will represent your itemized implementation plan and the person(s) responsible per assigned task(s). All task(s) must be closed BEFORE the Emergency Change can be moved to a Review State. The Change Owner is responsible for monitoring the execution of the Emergency Change inclusive of ensuring all tasks are closed within the Change window.



The screenshot shows a 'Change Task' form with the following fields and values:

- i. Number:** [Empty text box]
- ii. Configuration item:** [Empty text box with search and refresh icons]
- iii. Expected start:** 07/05/2016 03:19:47 PM
- iv. Change request:** CHG0030152
- v. \* Short description:** [Empty text box]
- vi. \* Description:** [Empty text box]
- vii. State:** Pending
- viii. \* Assignment group:** [Empty text box with search icon]
- ix. Assigned to:** [Empty text box with search icon]
- x. Work notes list:** [Empty list with add and refresh icons]
- xi. Work notes:** [Empty text area]

Buttons at the bottom: Submit, Save, Close Task.

- i. Number** – System driven unique number starting with “CTASK”
- ii. Configuration item** – By default, the parent CI is brought over
- iii. Expected start** – By default, the expected start date is the parent Emergency Change planned start date. Expected start date for the Task SHOULD NOT be planned prior to parent Emergency Change planned start date
- iv. Change request** – Parent Emergency Change number
- v. Short description** - Reflects a brief summary of the task. Should be concise and in terms that can be understood by your audience
- vi. Description** - Describe the task. Use terms that will be understood by your audience and write in complete sentences
- vii. State** – Systematically driven by the State of the parent Emergency Change. Reference the Definitions section for Change Task State definitions. The State will default to Pending when a New Task is added. Once the Emergency Change is ECAB approved, the State will systematically change to Open. When the parent Emergency Change planned start date begins, then the State of the Task can be changed to Work in Progress. Once work is complete, the Task can be changed to Closed Complete.
- viii. Assignment group** - Reflects the UCF IT department responsible for the task completion
- ix. Assigned to** - Reflects the UCF IT staff member responsible for the task completion
- x. Work notes list** – For other users to be added for notifications on work notes updates
- xi. Work notes** – For documentation purposes on task

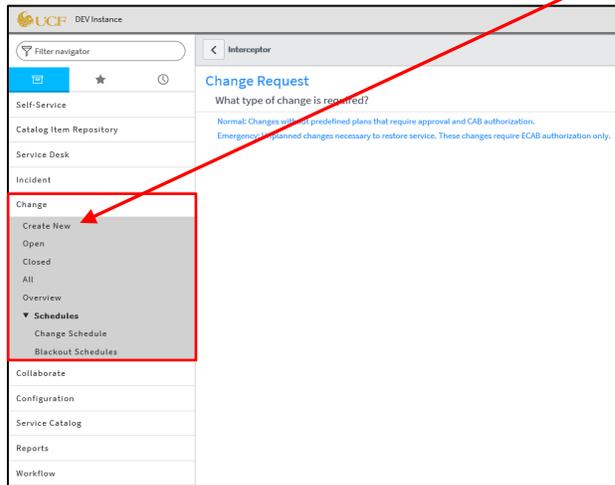
REFERENCE THE [QUICK STEP NEW CHANGE RECORD GUIDE – EMERGENCY CHANGES](#) SECTION FOR CLIFF NOTE INSTRUCTIONS.

## VII. APPENDIX

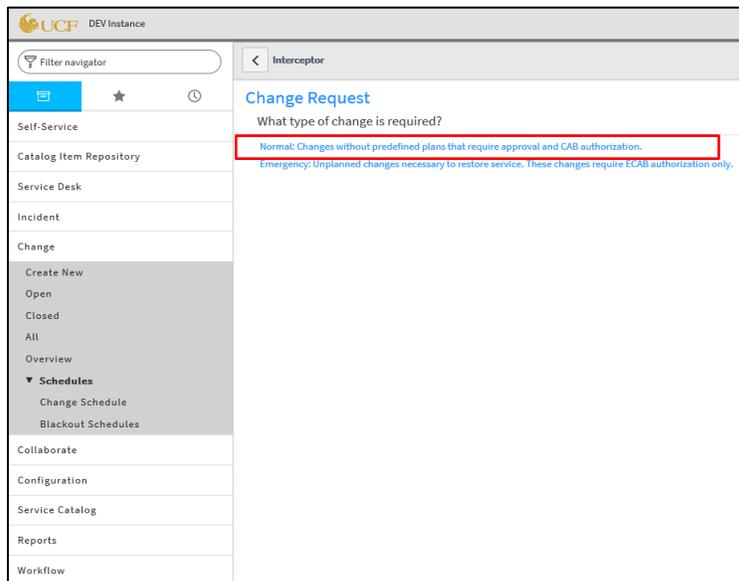
### A. QUICK STEP NEW CHANGE RECORD GUIDE – NORMAL CHANGES

- Reference the above [section](#) for detailed summaries of each Section

#### 1. On the left side of the Filter navigator, expand Change and click Create New



#### 2. On the center screen, select Normal type of Change



Change Request  
New record
Submit

New
Assess
Authorize
Scheduled
Implement
Review
Closed
Cancelled

Number: CHG0031446

Requested by:

Category: -- None --

Configuration item:

Requires downtime: -- None --

Requires communication: -- None --

Other services could be affected?: -- None --

Short description:

Description:

Type: Normal

State: New

Conflict status: Not Run

Conflict last run:

Assignment group:

Assigned to:

**Planning**

Justification:

Implementation plan:

Risk and impact analysis:

Backout plan:

Test plan:

Communication plan:

Additional information (URL):

Confidence level:

**Schedule**

Planned start date:

Planned end date:

CAB recommendation:

Actual start:

Actual end:

CAB date: 2019-07-05

**Conflicts**

Configuration item/Affected items, Planned start date and Planned end date are required to run conflict detection

[Check Conflicts](#)

Change	Affected CI	Type	Schedule	Conflicting change	Last checked
Conflicts Detected					

**Notes**

Watch list:

Work notes list:

Additional comments (Customer-visible):

Work notes:

**Notifications**

Does formal communication need to be sent to internal and/or external customers?: -- None --

**Closure Information**

Close code: -- None --

Close notes:

Submit

Attachments  
Section -  
Optional

3.  
Complete  
Top Section

4.  
Complete  
Planning  
Section  
(tab)

5.  
Complete  
Schedule  
Section  
(tab)

Conflicts  
Section  
(tab) -  
FYI Only

Notes Section  
(tab) -  
Optional

5.1.  
Complete Notifications  
(tab) Section if Requires  
communication from Top  
Section is "Yes"

Not Required until  
Review State

6.  
Click Submit

**7. Check for any conflicts either within the Top Section or the Conflicts Section (tab)**

Change Request  
CHG0031446

Number: CHG0031446  
Requested by: Greg Cain  
Category: Hardware  
Configuration item: SRTHGBQY  
Requires downtime: No  
Requires communication: Yes  
Other services could be affected?: Yes  
Short description: TEST  
Description: TEST

Type: Normal  
State: New  
Conflict status: No Conflict  
Conflict last run: 08/26/2019 12:49:23 PM  
Assignment group: Service Management Solutions Team  
Assigned to: Scott Baron

Conflicts Detected

Change	Affected CI	Type	Schedule	Conflicting change	Last checked
--------	-------------	------	----------	--------------------	--------------

**8. Create Change Task(s) as appropriate (one or many)**

Change Tasks

Click New

No records to display

Change Task  
New record

Number: CTASK0010097  
Configuration item: SRTHGBQY  
Expected start: 07/12/2016 02:25:44 PM  
Change request: [empty]  
Short description: [empty]  
Description: [empty]

State: Pending  
Assignment group: [empty]  
Assigned to: [empty]

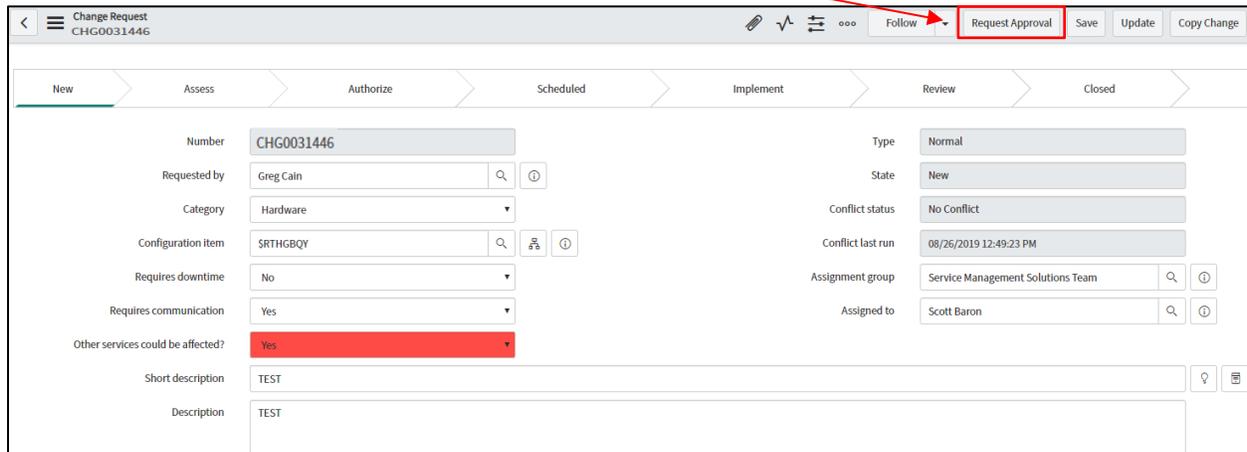
Expected start can be changed as needed

9. Complete \* Required Fields

10. Click Submit or Save

Submit Save Close Task

**11. Click Request Approval**



Change Request  
CHG0031446

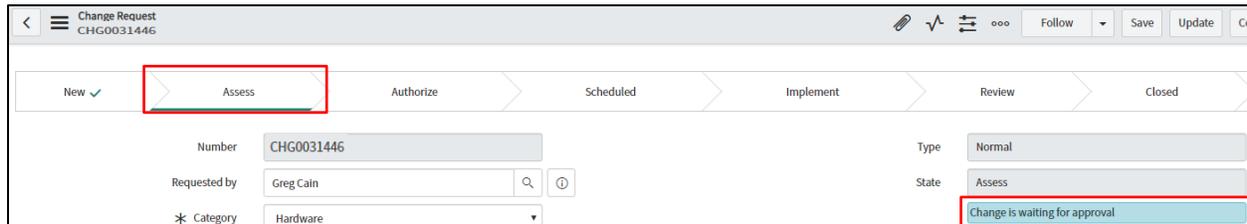
Follow Request Approval Save Update Copy Change

New Assess Authorize Scheduled Implement Review Closed

Number: CHG0031446  
 Requested by: Greg Cain  
 Category: Hardware  
 Configuration item: SRTHGBQY  
 Requires downtime: No  
 Requires communication: Yes  
 Other services could be affected?: Yes  
 Short description: TEST  
 Description: TEST

Type: Normal  
 State: New  
 Conflict status: No Conflict  
 Conflict last run: 08/26/2019 12:49:23 PM  
 Assignment group: Service Management Solutions Team  
 Assigned to: Scott Baron

**12. NO ACTION ON CHANGE OWNER** – Change Manager to review and either reject or approve Change record. Change enters Assess State.



Change Request  
CHG0031446

Follow Save Update Co

New Assess Authorize Scheduled Implement Review Closed

Number: CHG0031446  
 Requested by: Greg Cain  
 Category: Hardware

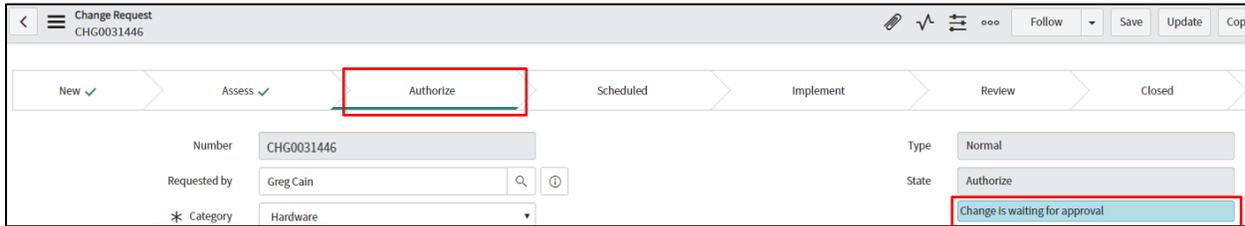
Type: Normal  
 State: Assess  
 Change is waiting for approval

Approvers Go to Created Search

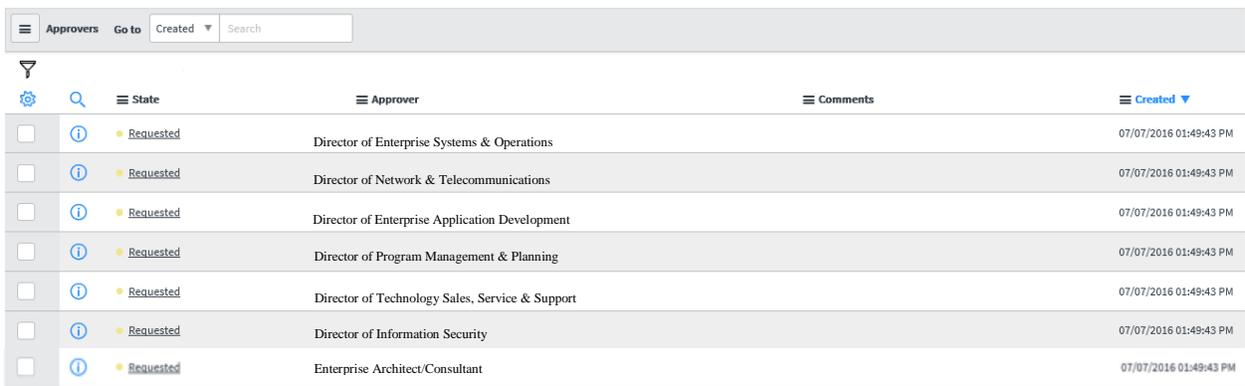
1 to 1 of 1

State	Approver	Comments	Created
Requested	Change Manager		07/07/2016 01:36:01 PM

- 13. NO ACTION ON CHANGE OWNER** – Once Change Manager approves, the Change is ready to be presented to CAB for review and either approval or rejection. Change enters an Authorize State.



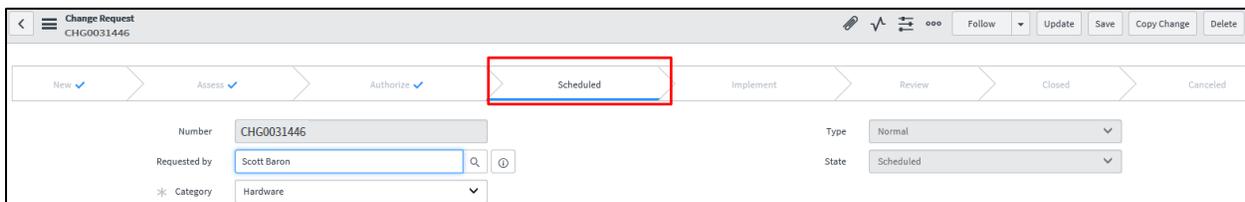
The screenshot shows the 'Change Request' interface for CHG0031446. The process flow at the top includes: New, Assess, Authorize (highlighted with a red box), Scheduled, Implement, Review, and Closed. Below the flow, the 'Number' is CHG0031446, 'Requested by' is Greg Cain, and 'Category' is Hardware. On the right, 'Type' is Normal and 'State' is Authorize. A blue box at the bottom right contains the text 'Change is waiting for approval'.



The screenshot shows the 'Approvers' section for Change Request CHG0031446. It features a table with columns for State, Approver, Comments, and Created. All entries are in the 'Requested' state.

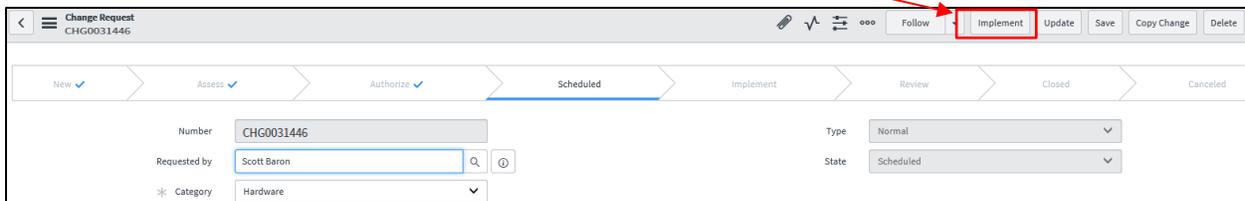
State	Approver	Comments	Created
Requested	Director of Enterprise Systems & Operations		07/07/2016 01:49:43 PM
Requested	Director of Network & Telecommunications		07/07/2016 01:49:43 PM
Requested	Director of Enterprise Application Development		07/07/2016 01:49:43 PM
Requested	Director of Program Management & Planning		07/07/2016 01:49:43 PM
Requested	Director of Technology Sales, Service & Support		07/07/2016 01:49:43 PM
Requested	Director of Information Security		07/07/2016 01:49:43 PM
Requested	Enterprise Architect/Consultant		07/07/2016 01:49:43 PM

- 14. NO ACTION ON CHANGE OWNER** – Once CAB approves, the Change is scheduled and SHOULD NOT be implemented until the Planned start date. Change enters a Scheduled State.



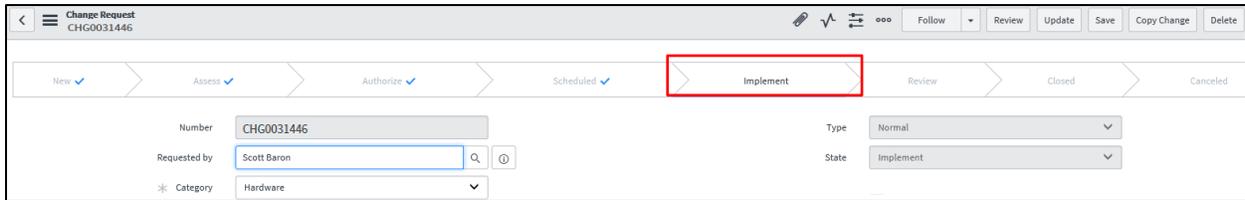
The screenshot shows the 'Change Request' interface for CHG0031446. The process flow at the top includes: New, Assess, Authorize, Scheduled (highlighted with a red box), Implement, Review, Closed, and Canceled. Below the flow, the 'Number' is CHG0031446, 'Requested by' is Scott Baron, and 'Category' is Hardware. On the right, 'Type' is Normal and 'State' is Scheduled.

- 15. When the Planned start date and time approaches, the Change will allow the Change Owner to select Implement**



The screenshot shows the 'Change Request' interface for CHG0031446. The process flow at the top includes: New, Assess, Authorize, Scheduled, Implement (highlighted with a red box), Review, Closed, and Canceled. Below the flow, the 'Number' is CHG0031446, 'Requested by' is Scott Baron, and 'Category' is Hardware. On the right, 'Type' is Normal and 'State' is Scheduled. A red arrow points from the text in the previous block to the 'Implement' button.

- 16.** After selecting Implement, the implementation can begin on the Change. Change enters an Implement State.



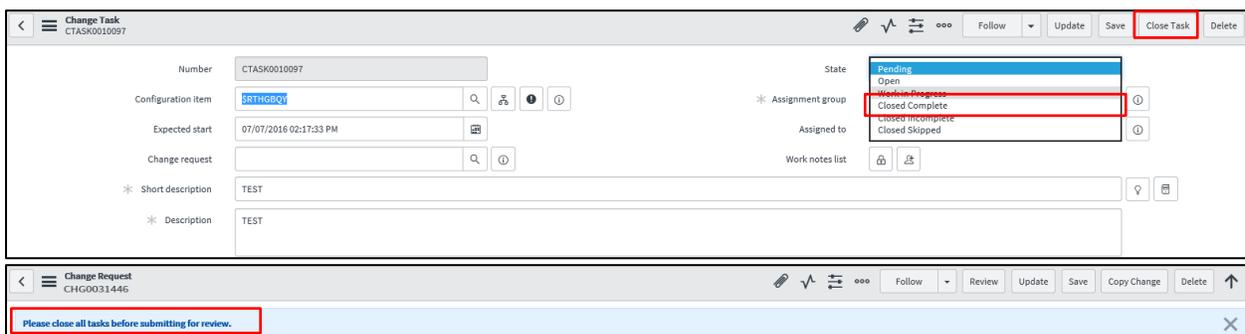
The screenshot shows the 'Change Request' interface for CHG0031446. The workflow progress bar at the top includes steps: New, Assess, Authorize, Scheduled, **Implement** (highlighted with a red box), Review, Closed, and Canceled. Below the progress bar, the 'Number' field contains CHG0031446, 'Requested by' is Scott Baron, 'Type' is Normal, and 'State' is Implement. The 'Category' is Hardware.

- 17.** If the Change has any tasks planned out, the task(s) should be moved into a Work in Progress (WIP) State dependent on the sequential order of the tasks. You will notice the Task(s) State goes from read-only to now write access. Click Update or Save after moving to WIP. If the Change does not have any tasks, skip to Step 19.



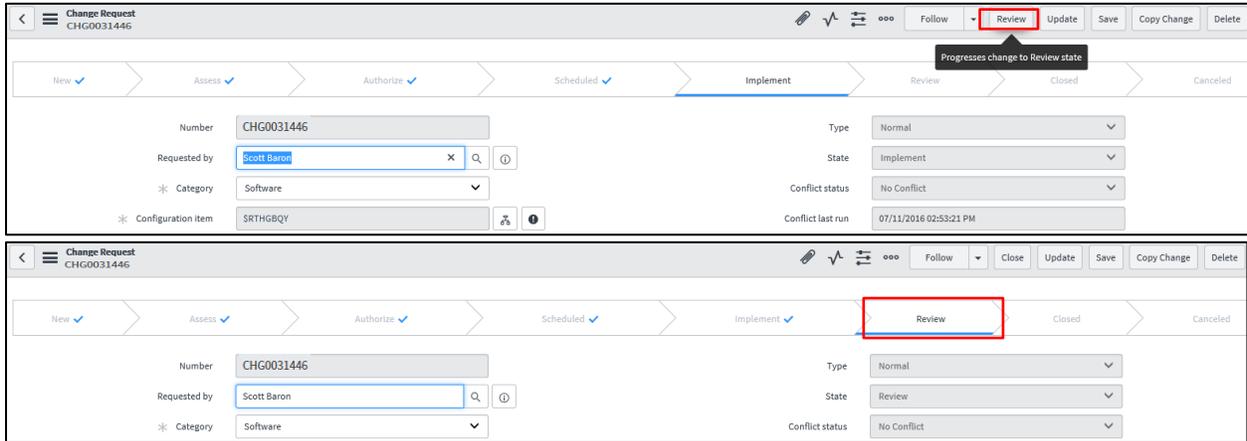
The screenshot shows the 'Change Task' interface for CTASK0010097. The 'Update' and 'Save' buttons in the top right are highlighted with a red box. The 'State' dropdown menu is open, showing options: Pending, Open, **Work in Progress** (highlighted with a red box), Closed Complete, Closed Incomplete, and Closed Skipped. The 'Assignment group' is also visible.

- 18.** If the Change has task(s), all Tasks should be moved to Closed Complete once the task work is completed. This can be executed by either moving the State to Closed Complete (and clicking Update or Save) or clicking Close Task on the header bar. NOTE: The Change CANNOT be closed until all tasks are closed.



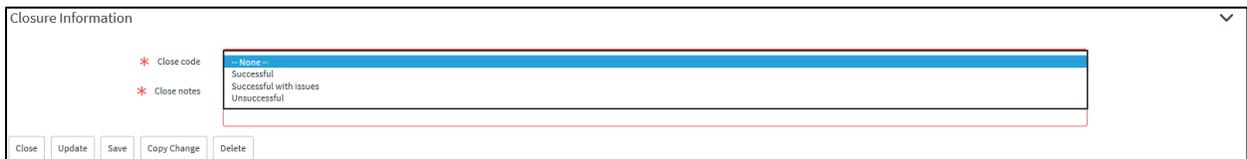
The top screenshot shows the 'Change Task' interface for CTASK0010097 with the 'Close Task' button highlighted in red. The 'State' dropdown menu is open, showing 'Work in Progress' highlighted. The bottom screenshot shows the 'Change Request' interface for CHG0031446 with a red box around a message: 'Please close all tasks before submitting for review.'

- 19.** After all tasks are closed out (if applicable) or if the change did not have any tasks and the change has been implemented, Click Review. The change will enter a Review State.



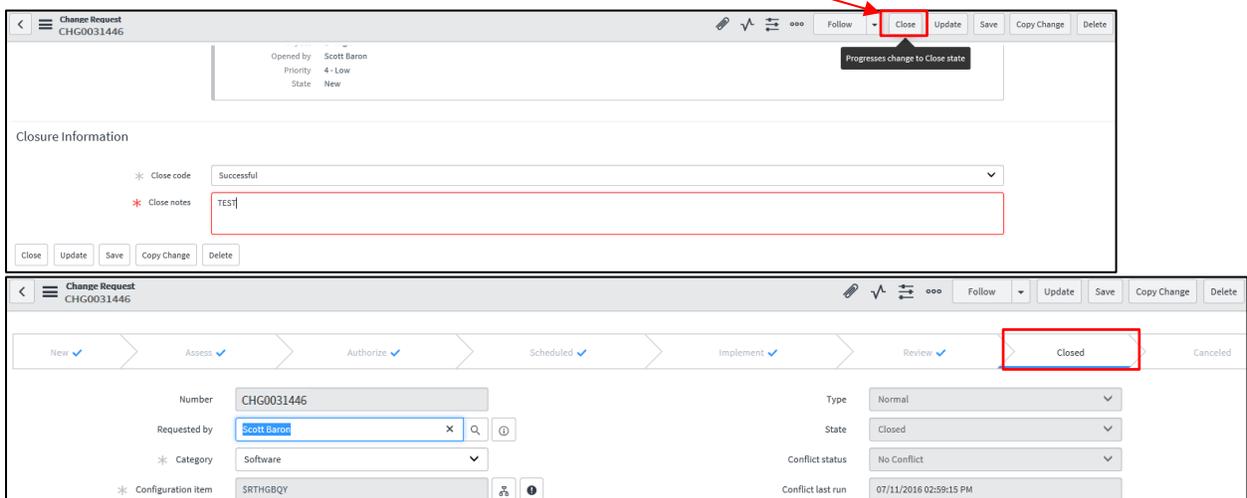
The screenshot shows the Change Request interface for CHG0031446. The top navigation bar includes buttons for Follow, Review, Update, Save, Copy Change, and Delete. A tooltip above the Review button reads "Progresses change to Review state". Below the navigation bar is a progress indicator with steps: New, Assess, Authorize, Scheduled, Implement, Review, Closed, and Canceled. The Review step is currently selected. The main form displays details for the change request, including Number (CHG0031446), Requested by (Scott Baron), Category (Software), and State (Review).

- 20.** Update the Closure Information section (tab) with the appropriate Close code and Close notes. Reference the Definitions section (Page 2) for Close code definitions (Successful, Successful with issues and Unsuccessful). NOTE: These fields are required before the change can be closed.



The screenshot shows the Closure Information section. It includes a dropdown menu for the Close code, with options: None, Successful, Successful with issues, and Unsuccessful. Below the dropdown is a text input field for Close notes. At the bottom, there are buttons for Close, Update, Save, Copy Change, and Delete.

- 21.** Click Close once the Close code and Close notes have been filled out appropriately. No further action required. Change record is complete. Change record will enter a Closed State.

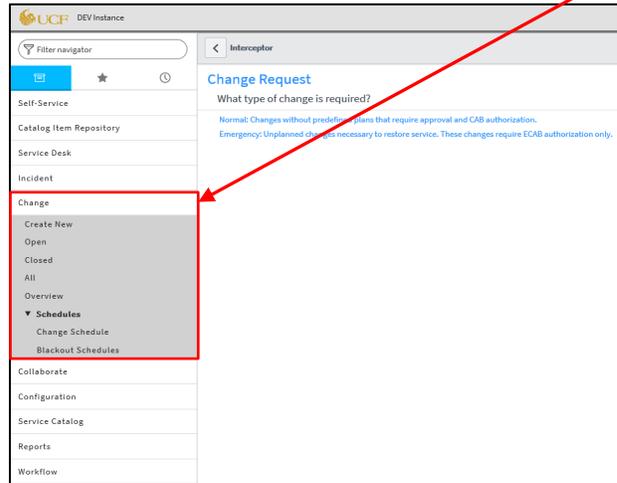


The screenshot shows the Change Request interface for CHG0031446. The top navigation bar includes buttons for Follow, Close, Update, Save, Copy Change, and Delete. A tooltip above the Close button reads "Progresses change to Close state". Below the navigation bar is a progress indicator with steps: New, Assess, Authorize, Scheduled, Implement, Review, and Closed. The Closed step is currently selected. The main form displays details for the change request, including Number (CHG0031446), Requested by (Scott Baron), Category (Software), and State (Closed). The Closure Information section is visible, showing the Close code set to "Successful" and Close notes containing "TEST".

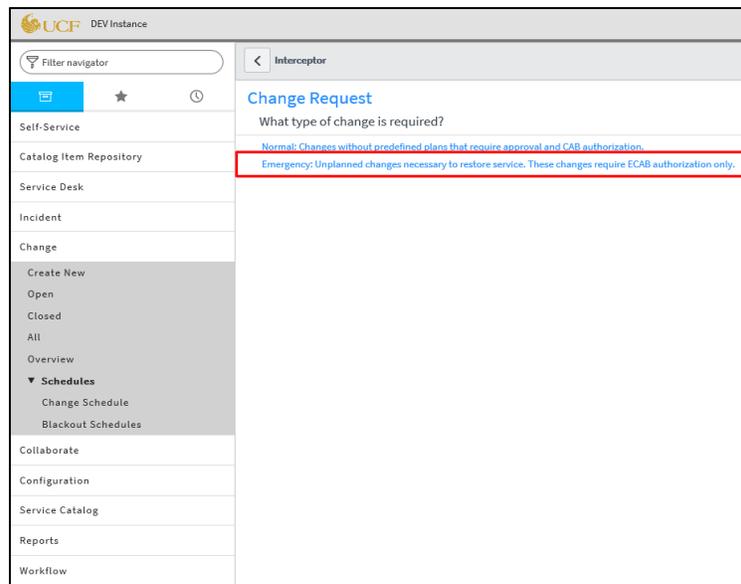
**B. QUICK STEP NEW CHANGE RECORD GUIDE – EMERGENCY CHANGES**

- Reference the above [section](#) for detailed summaries of each Section

**1.** On the left side of the Filter navigator, expand Change and click Create New



**2.** On the center screen, select Emergency type of Change





**3.** Attachments Section - Optional

**3.** Complete Top Section

**4.** Complete Planning Section (tab)

**5.** Complete Schedule Section (tab)

Conflicts Section (tab) FYI Only

Notes Section (tab) - Optional

Not Required until Review State

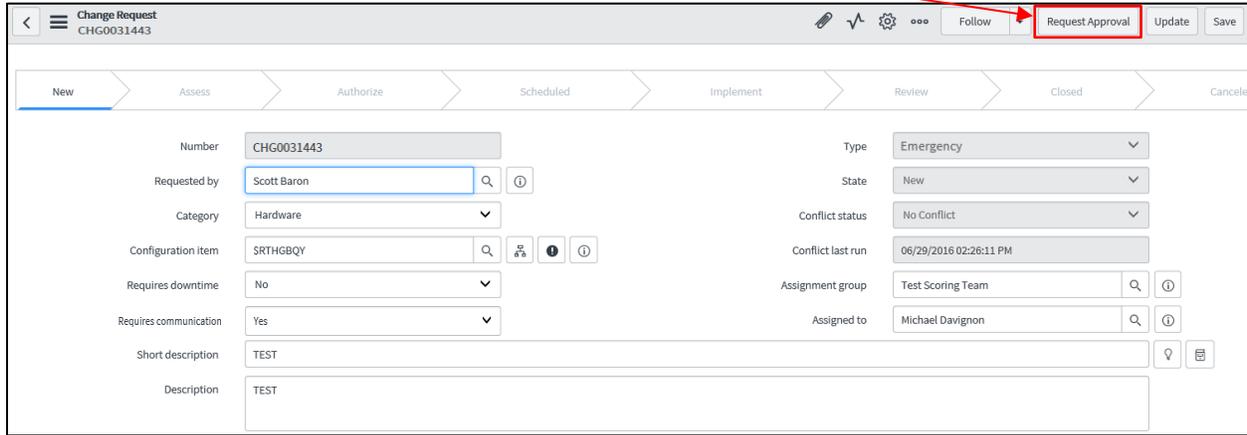
**6.** Click Submit

**7.** Check for any conflicts either within the Top Section or the Conflicts Section (tab)

**8.** Create Change task(s) as appropriate (one or many)

**10.** Click Submit or Save

**11. Click Request Approval**



Change Request  
CHG0031443

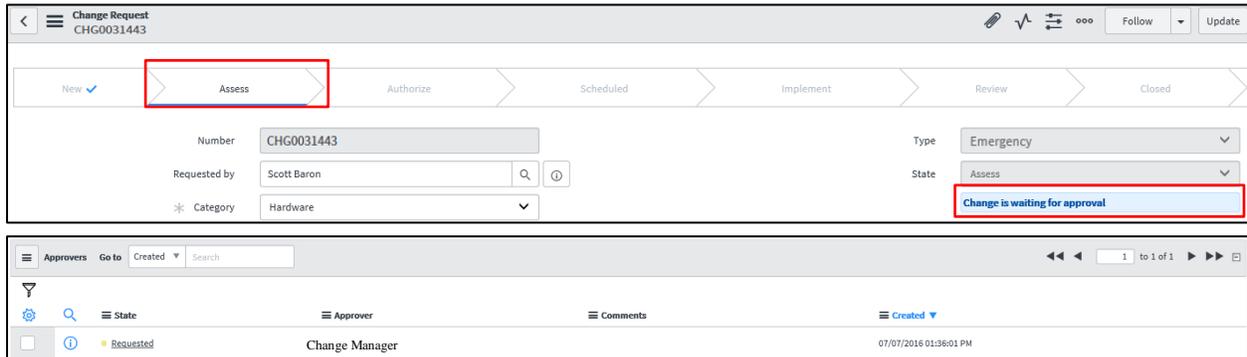
Follow Request Approval Update Save

New Assess Authorize Scheduled Implement Review Closed Cancel

Number: CHG0031443  
 Requested by: Scott Baron  
 Category: Hardware  
 Configuration item: SRTHGBQY  
 Requires downtime: No  
 Requires communication: Yes  
 Short description: TEST  
 Description: TEST

Type: Emergency  
 State: New  
 Conflict status: No Conflict  
 Conflict last run: 06/29/2016 02:26:11 PM  
 Assignment group: Test Scoring Team  
 Assigned to: Michael Davignon

**12. NO ACTION ON CHANGE OWNER – Change Manager to review and either reject or approve Change record. Change enters Assess State.**



Change Request  
CHG0031443

Follow Update

New Assess Authorize Scheduled Implement Review Closed

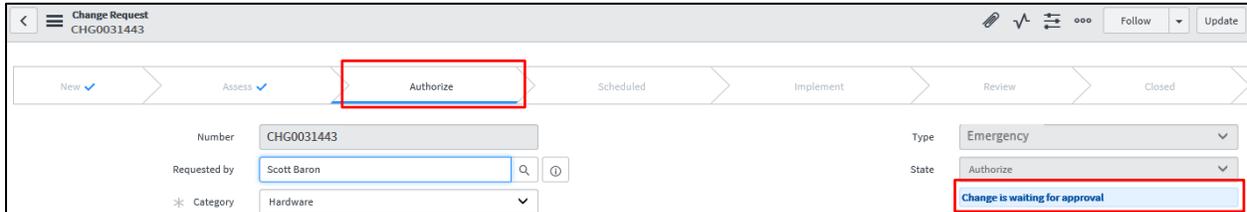
Number: CHG0031443  
 Requested by: Scott Baron  
 Category: Hardware

Type: Emergency  
 State: Assess  
 Change is waiting for approval

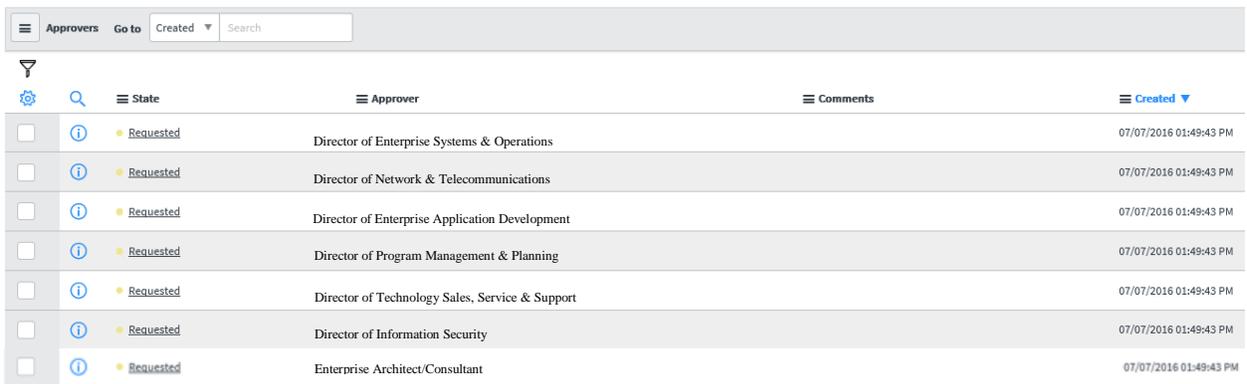
Approvers: Go to Created Search

Requested Change Manager 07/07/2016 01:36:01 PM

**13. NO ACTION ON CHANGE OWNER** –Emergency Change is ready for ECAB review and either approval or rejection. Change enters an Authorize State.



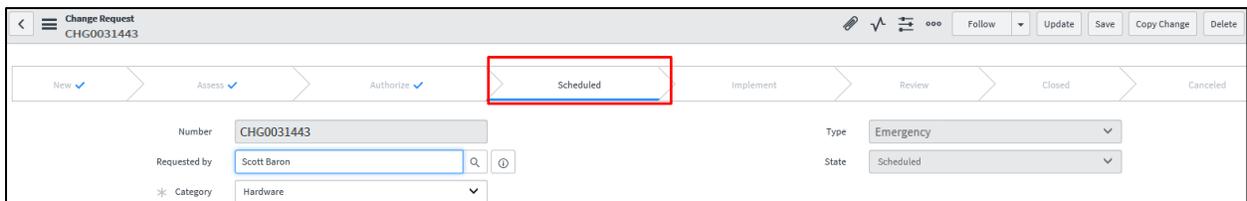
The screenshot shows the 'Change Request' interface for CHG0031443. The progress bar at the top indicates the current state is 'Authorize', which is highlighted with a red box. Below the progress bar, the 'Number' is CHG0031443, 'Requested by' is Scott Baron, and 'Type' is Emergency. The 'State' dropdown is set to 'Authorize', and a message below it says 'Change is waiting for approval', also highlighted with a red box.



The screenshot shows the 'Approvers' section for Change Request CHG0031443. It lists seven approvers, all with a 'Requested' status. The approvers are:

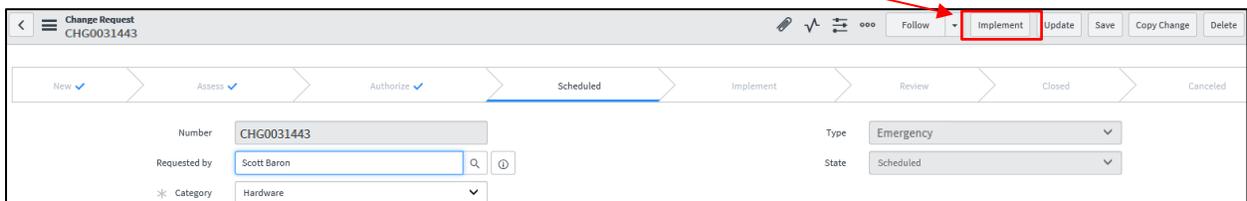
State	Approver	Created
Requested	Director of Enterprise Systems & Operations	07/07/2016 01:49:43 PM
Requested	Director of Network & Telecommunications	07/07/2016 01:49:43 PM
Requested	Director of Enterprise Application Development	07/07/2016 01:49:43 PM
Requested	Director of Program Management & Planning	07/07/2016 01:49:43 PM
Requested	Director of Technology Sales, Service & Support	07/07/2016 01:49:43 PM
Requested	Director of Information Security	07/07/2016 01:49:43 PM
Requested	Enterprise Architect/Consultant	07/07/2016 01:49:43 PM

**14. NO ACTION ON CHANGE OWNER** – Once two members of ECAB approves, the Emergency Change is scheduled and SHOULD NOT be implemented until the Planned start date. Change enters a Scheduled State.



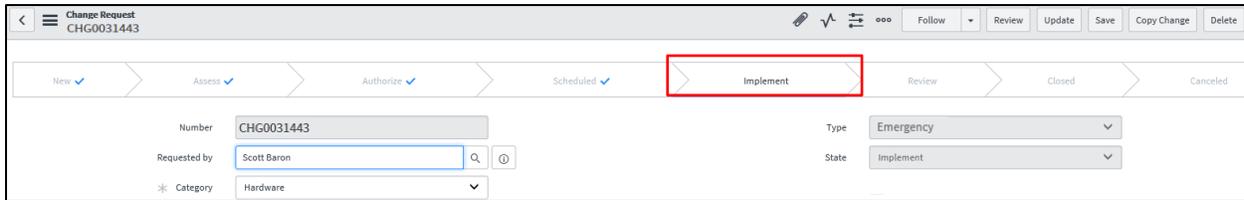
The screenshot shows the 'Change Request' interface for CHG0031443. The progress bar at the top indicates the current state is 'Scheduled', which is highlighted with a red box. Below the progress bar, the 'Number' is CHG0031443, 'Requested by' is Scott Baron, and 'Type' is Emergency. The 'State' dropdown is set to 'Scheduled'.

**15.** When the Planned start date and time approaches, the Change will allow the Change Owner to select Implement



The screenshot shows the 'Change Request' interface for CHG0031443. The progress bar at the top indicates the current state is 'Scheduled'. The 'Implement' button in the top right corner is highlighted with a red box. A red arrow points from the text in step 15 to this button.

**16.** After selecting Implement, the implementation can begin on the Emergency Change. Change enters an Implement State.



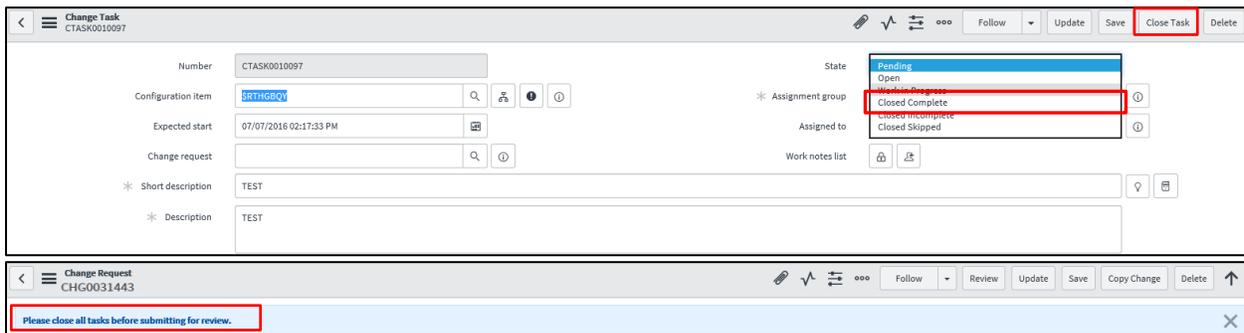
The screenshot shows the 'Change Request' interface for request CHG0031443. The workflow progress bar at the top indicates the following steps: New, Assess, Authorize, Scheduled, **Implement** (highlighted with a red box), Review, Closed, and Canceled. Below the progress bar, the 'Number' field contains 'CHG0031443', 'Requested by' is 'Scott Baron', 'Type' is 'Emergency', and 'State' is 'Implement'. The 'Category' is set to 'Hardware'.

**17.** If the Change has any tasks planned out, the task(s) should be moved into a Work in Progress (WIP) State dependent on the sequential order of the tasks. You will notice the Task(s) State goes from read-only to now write access. Click Update or Save after moving to WIP. If the Emergency Change does not have any tasks, skip to Step 19.



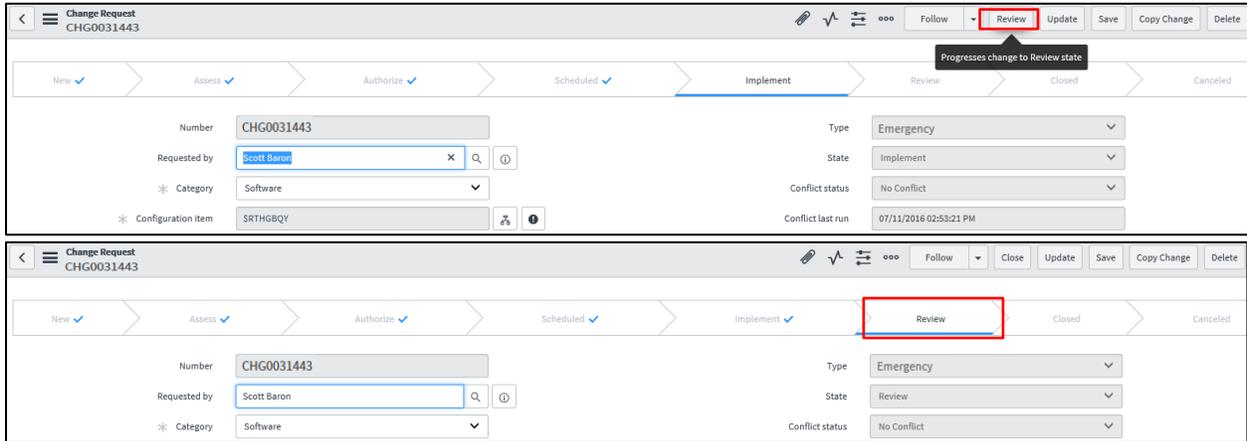
The screenshot shows the 'Change Task' interface for task CTASK0010097. The 'Update' and 'Save' buttons in the top right are highlighted with a red box. The 'State' dropdown menu is open, showing options: Pending, Open, **Work in Progress** (highlighted with a red box), Closed Complete, Closed Incomplete, and Closed Skipped. The task details include 'Number' CTASK0010097, 'Configuration Item' SRTHGBQV, 'Expected start' 07/07/2016 02:17:33 PM, 'Change request' (empty), 'Short description' TEST, and 'Description' TEST.

**18.** If the Emergency Change has task(s), all Tasks should be moved to Closed Complete once the task work is completed. This can be executed by either moving the State to Closed Complete (and clicking Update or Save) or clicking Close Task on the header bar. NOTE: The Emergency Change CANNOT be closed until all tasks are closed.



The top screenshot shows the 'Change Task' interface for task CTASK0010097. The 'Close Task' button in the top right is highlighted with a red box. The 'State' dropdown menu is open, showing options: Pending, Open, Work in Progress, **Closed Complete** (highlighted with a red box), Closed Incomplete, and Closed Skipped. The bottom screenshot shows a warning message in a blue box: 'Please close all tasks before submitting for review.'

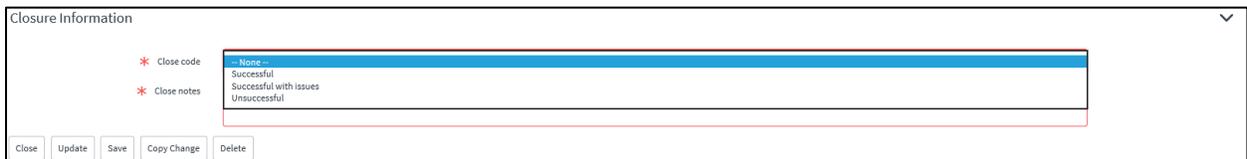
- 19.** After all tasks are closed out (if applicable) or if the change did not have any tasks and the change has been implemented, Click Review. The change will enter a Review State.



The top screenshot shows the Change Request interface for CHG0031443. The 'Review' button is highlighted in red, and a tooltip indicates 'Progresses change to Review state'. The 'State' dropdown menu is set to 'Review'.

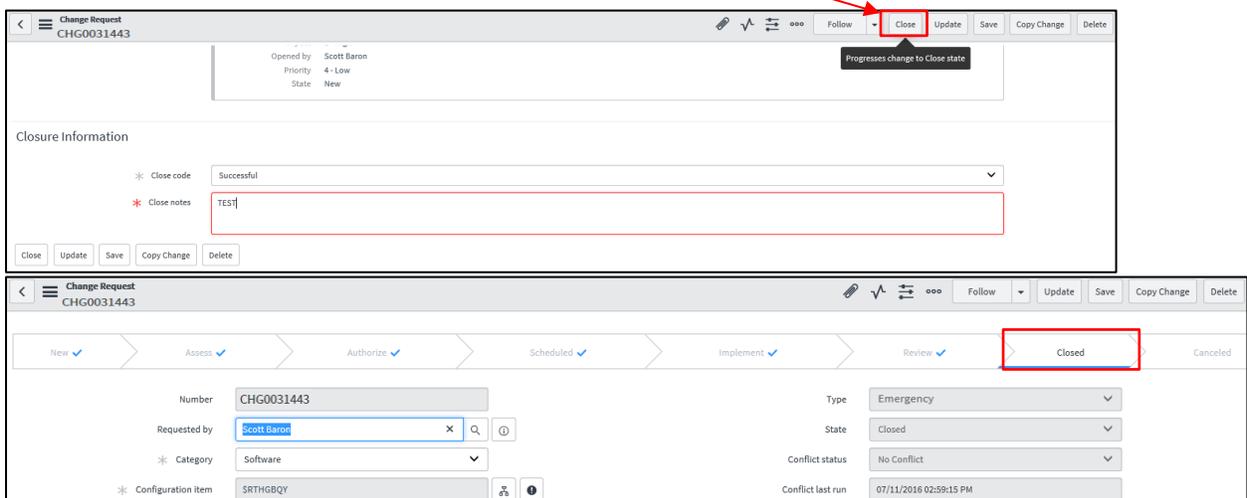
The bottom screenshot shows the same interface, but the 'Review' button is now highlighted in red, and the 'State' dropdown menu is set to 'Review'.

- 20.** Update the Closure Information section (tab) with the appropriate Close code and Close notes. Reference the Definitions section (Page 2) for Close code definitions (Successful, Successful with issues and Unsuccessful). NOTE: These fields are required before the change can be closed.



The screenshot shows the Closure Information section. The 'Close code' dropdown is set to 'Successful' and the 'Close notes' text area contains 'TEST1'.

- 21.** Click Close once the Close code and Close notes have been filled out appropriately. No further action required. Change record is complete. Change record will enter a Closed State.



The top screenshot shows the Change Request interface for CHG0031443. The 'Close' button is highlighted in red, and a tooltip indicates 'Progresses change to Close state'. The 'Close code' dropdown is set to 'Successful' and the 'Close notes' text area contains 'TEST1'.

The bottom screenshot shows the same interface, but the 'Close' button is now highlighted in red, and the 'State' dropdown menu is set to 'Closed'.

**C. RELATING INCIDENTS TO CHANGES**

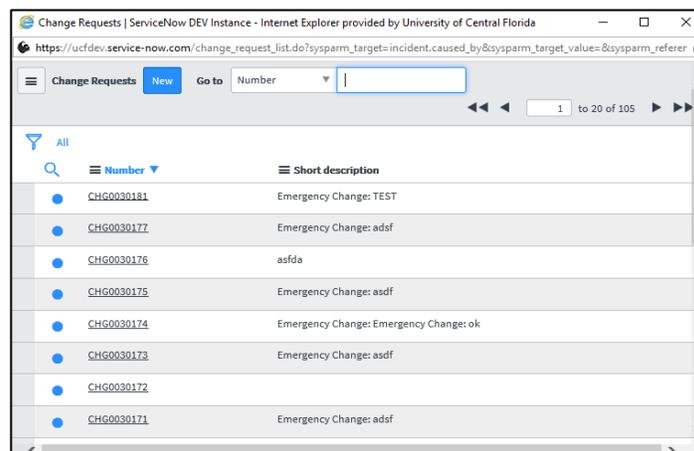
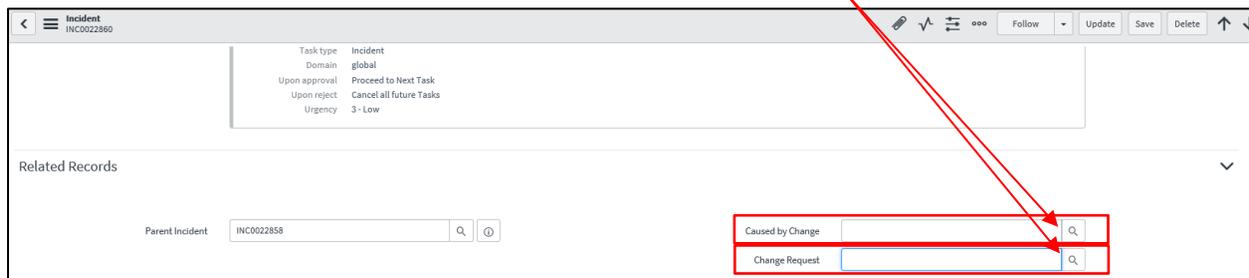
- There are two ways to relate incidents to changes. A change record can be related off of an existing incident (which was an incident Caused by Change or Change Request) or once a new incident is created, the change record can be created off that incident record.

**EXISTING INCIDENT**

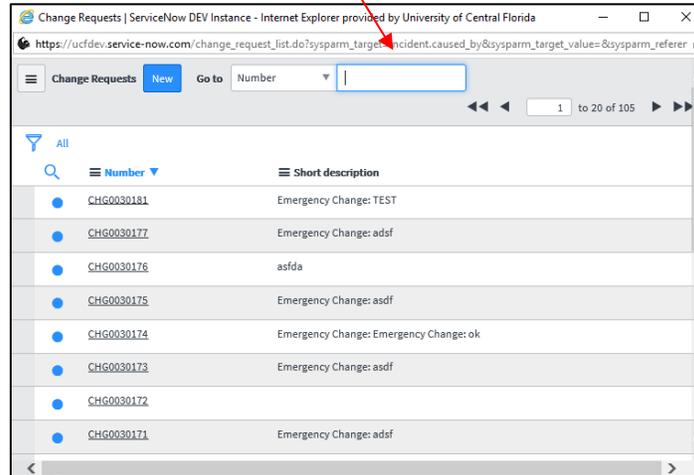
1. Within the incident record, scroll down to the Related Records section (tab)



2. A Change can be searched/related if the incident record was caused by a change implemented (Closed Change) or if the change is to be implemented from the corresponding incident. Click the magnifying glass that is applicable.



3. Search on the change record number and select the record number

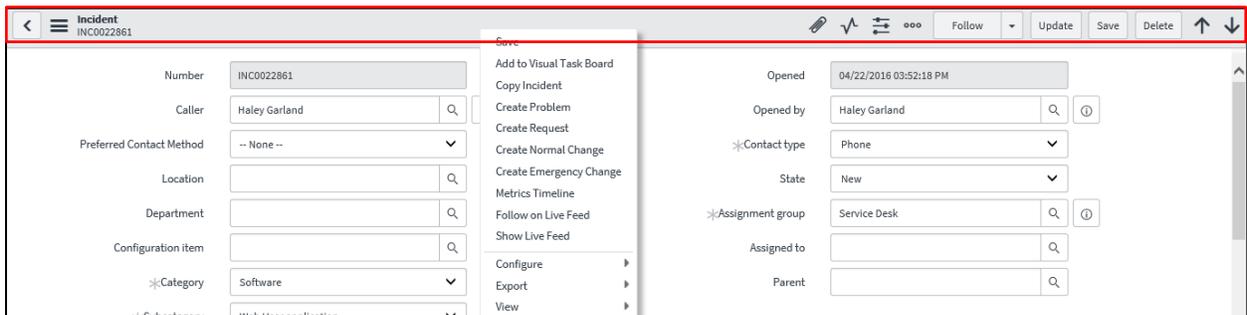


4. Save the incident record

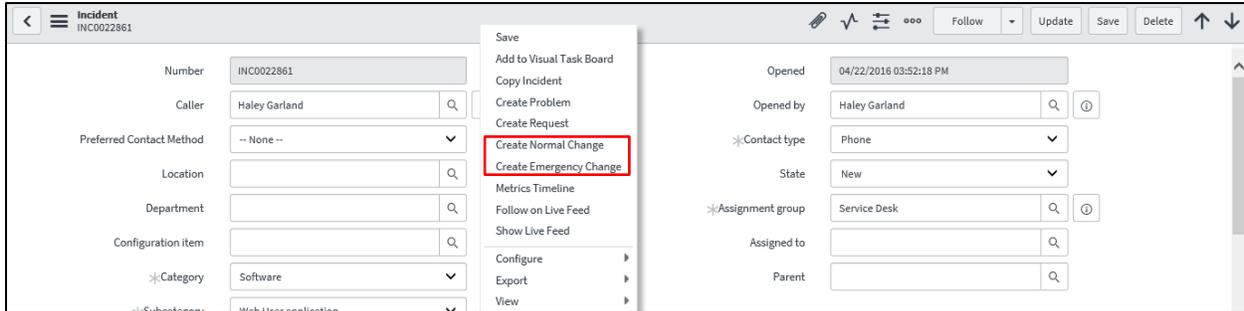


**NEW INCIDENT**

1. Off a new incident record, right click on the header bar



2. Click either Create Normal Change or Emergency Change; Whichever is applicable



Incident INC0022861

Number: INC0022861

Caller: Haley Garland

Preferred Contact Method: -- None --

Location: [Search]

Department: [Search]

Configuration Item: [Search]

Category: Software

Subcategory: Web User application

Opened: 04/22/2016 03:52:18 PM

Opened by: Haley Garland

Contact type: Phone

State: New

Assignment group: Service Desk

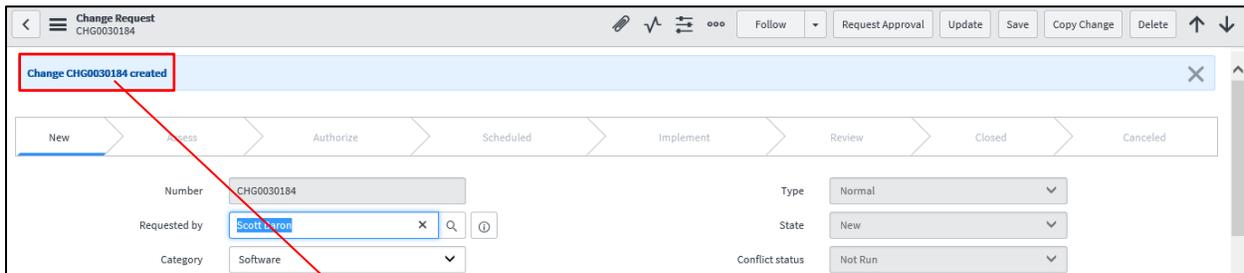
Assigned to: [Search]

Parent: [Search]

Context Menu:

- Save
- Add to Visual Task Board
- Copy Incident
- Create Problem
- Create Request
- Create Normal Change**
- Create Emergency Change**
- Metrics Timeline
- Follow on Live Feed
- Show Live Feed
- Configure
- Export
- View

3. A new change record will be created. Follow the Change record procedures per the above directions (whether for Normal or Emergency Changes)



Change Request CHG0030184

Change CHG0030184 created

Number: CHG0030184

Type: Normal

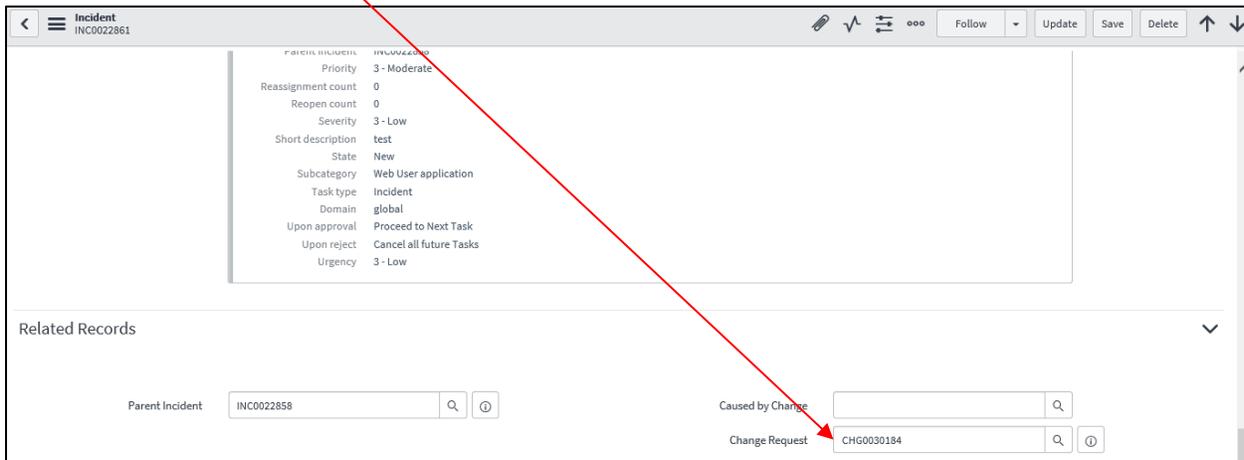
Requested by: Scott Larson

State: New

Category: Software

Conflict status: Not Run

Process: New > Assess > Authorize > Scheduled > Implement > Review > Closed > Canceled



Incident INC0022861

Priority: 3 - Moderate

Reassignment count: 0

Reopen count: 0

Severity: 3 - Low

Short description: test

State: New

Subcategory: Web User application

Task type: Incident

Domain: global

Upon approval: Proceed to Next Task

Upon reject: Cancel all future Tasks

Urgency: 3 - Low

Related Records

Parent Incident: INC0022858

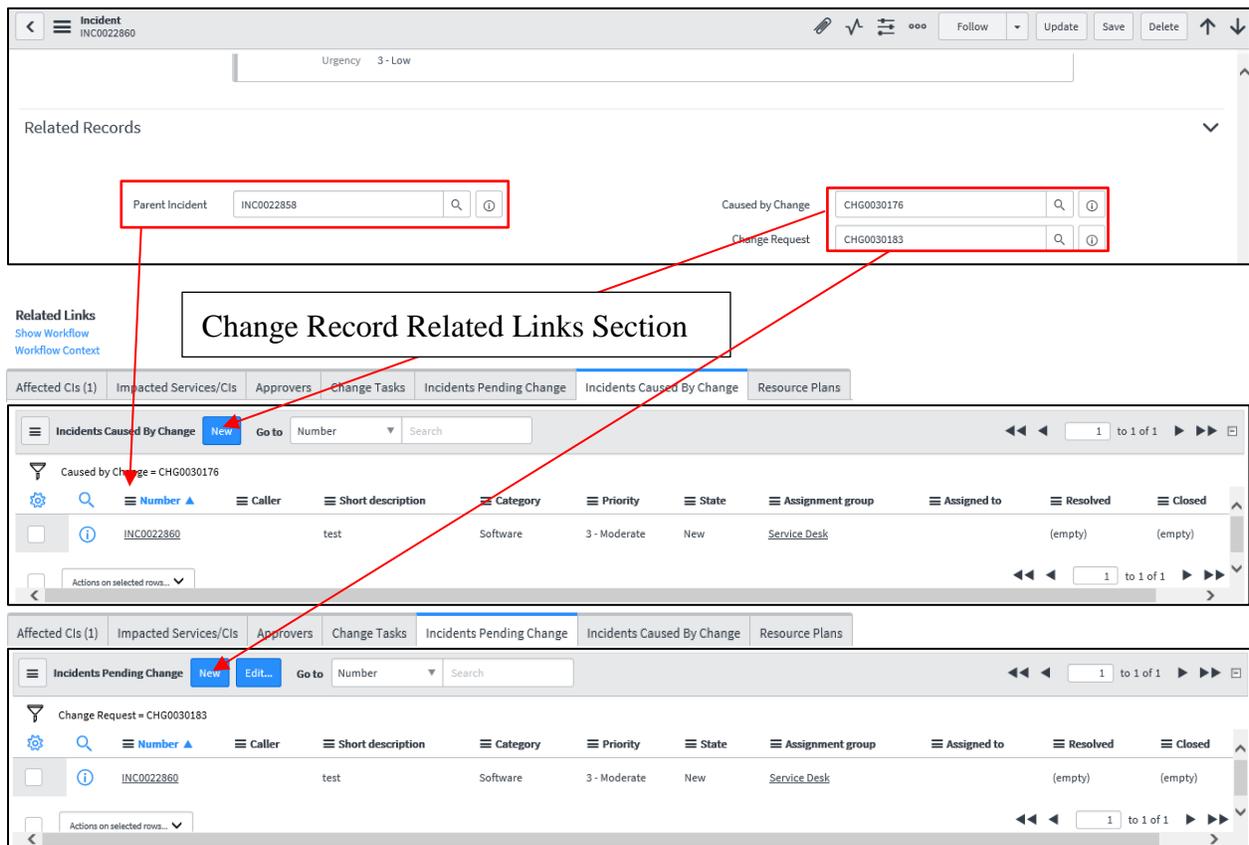
Caused by Change: [Search]

Change Request: CHG0030184

**D. RELATING CHANGES TO INCIDENTS**

- When relating incidents to changes, the cross reference of the incident number comes across to the change record within the Related Links section of the change record.

For example, a change can be implemented (CHG0030176), an incident/problem spawned (INC0022858 - Caused by Change) and then a new change record (Change Request – CHG0030183) would need to be created in order to resolve the newly identified incident/problem.

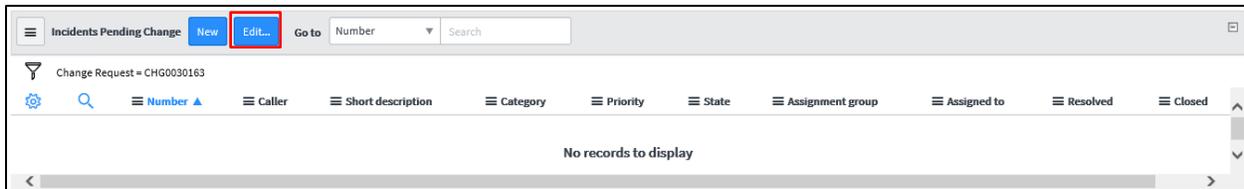


The screenshot displays the 'Incident' record for INC0022860. In the 'Related Records' section, three fields are highlighted with red boxes: 'Parent Incident' (INC0022858), 'Caused by Change' (CHG0030176), and 'Change Request' (CHG0030183). A red box labeled 'Change Record Related Links Section' points to two panels below. The first panel, 'Incidents Caused By Change', shows a table with one row for incident INC0022860, which is caused by change CHG0030176. The second panel, 'Incidents Pending Change', shows a table with one row for incident INC0022860, which is pending change CHG0030183. Both tables have columns for Number, Caller, Short description, Category, Priority, State, Assignment group, Assigned to, Resolved, and Closed.

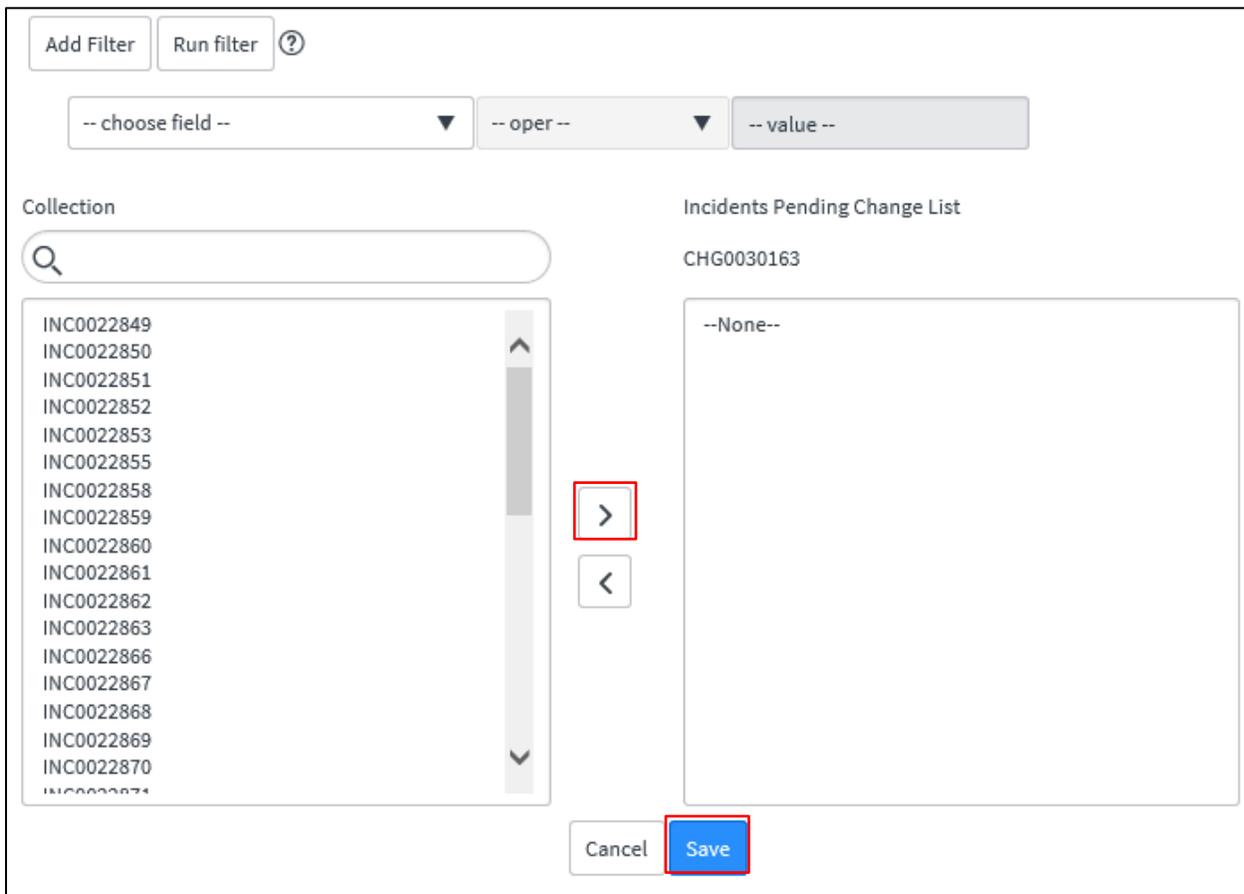
The change records are bidirectional and if the incidents are not related to the change records through the incident record, the change records can be opened and the incidents related.

- If relating incidents under the Incidents Pending Change section (tab), the Edit button will only appear if the Change is still opened. This Edit button allows the Change Owner to relate incident(s) that are dependent on the change to be implemented to be resolved. Only OPENED incidents will be permitted to be related.

**1. Click the Edit button**

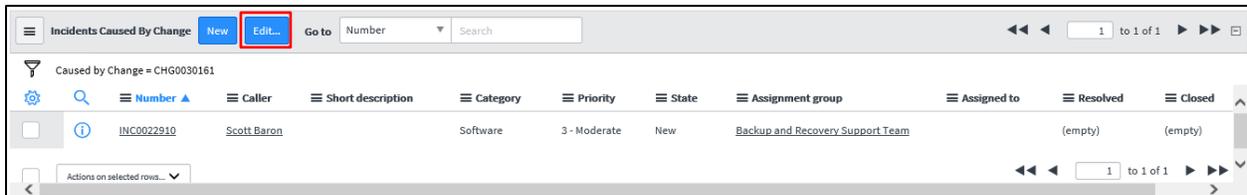


- 2. Select the appropriate incident record(s) by clicking the right arrow to move them over to the Incident Pending Change List. Then Click Save.**

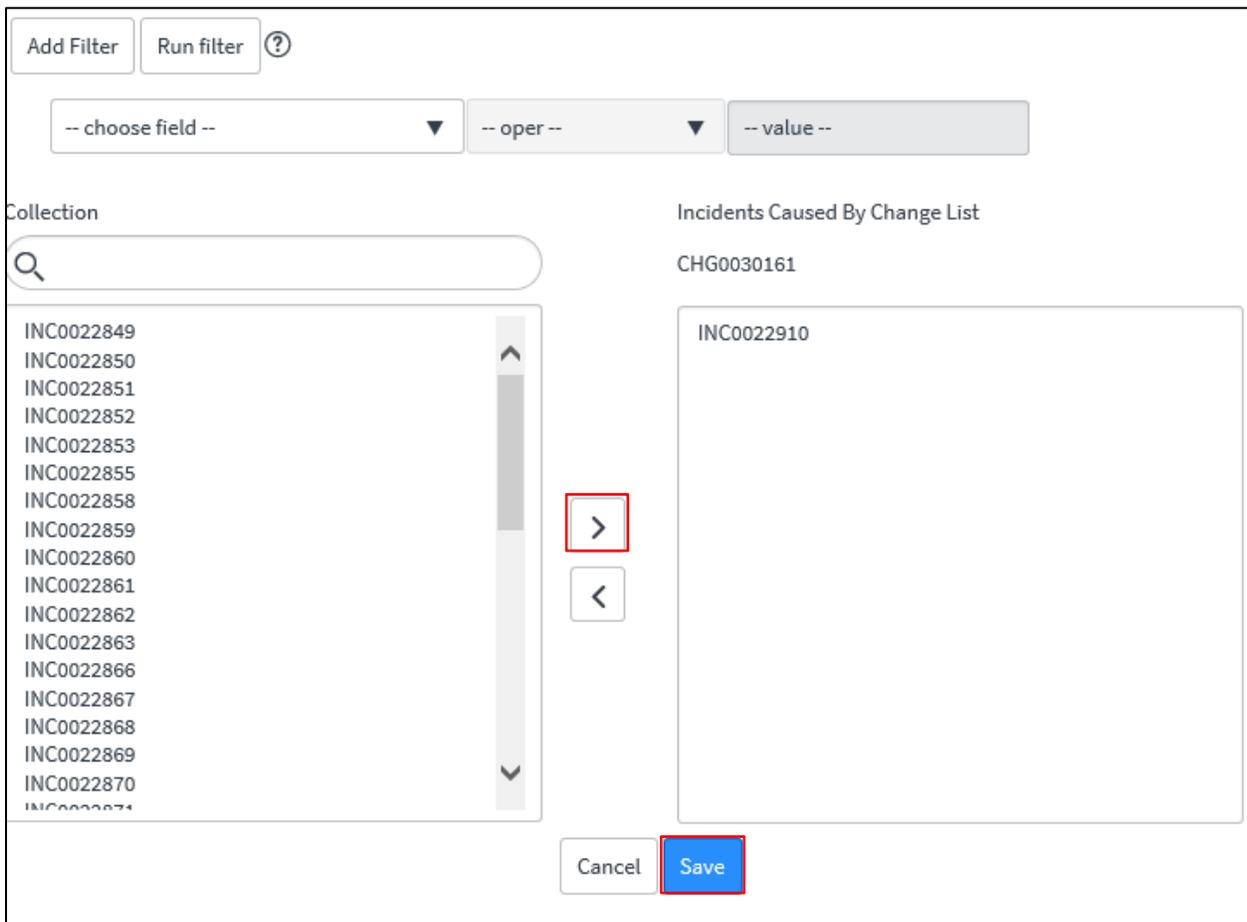


- If relating incidents under the Incidents Caused By Change section (tab), the Edit button will only appear once the Change is Closed. This Edit button allows the Change Owner to relate incident(s) that were spawned by the change implementation. New incident records can also be created by clicking the New button within this section.

**1. Click the Edit button**



- 2. Select the appropriate incident record(s) by clicking the right arrow to move them over to the Incident Caused by Change List. Then Click Save.**

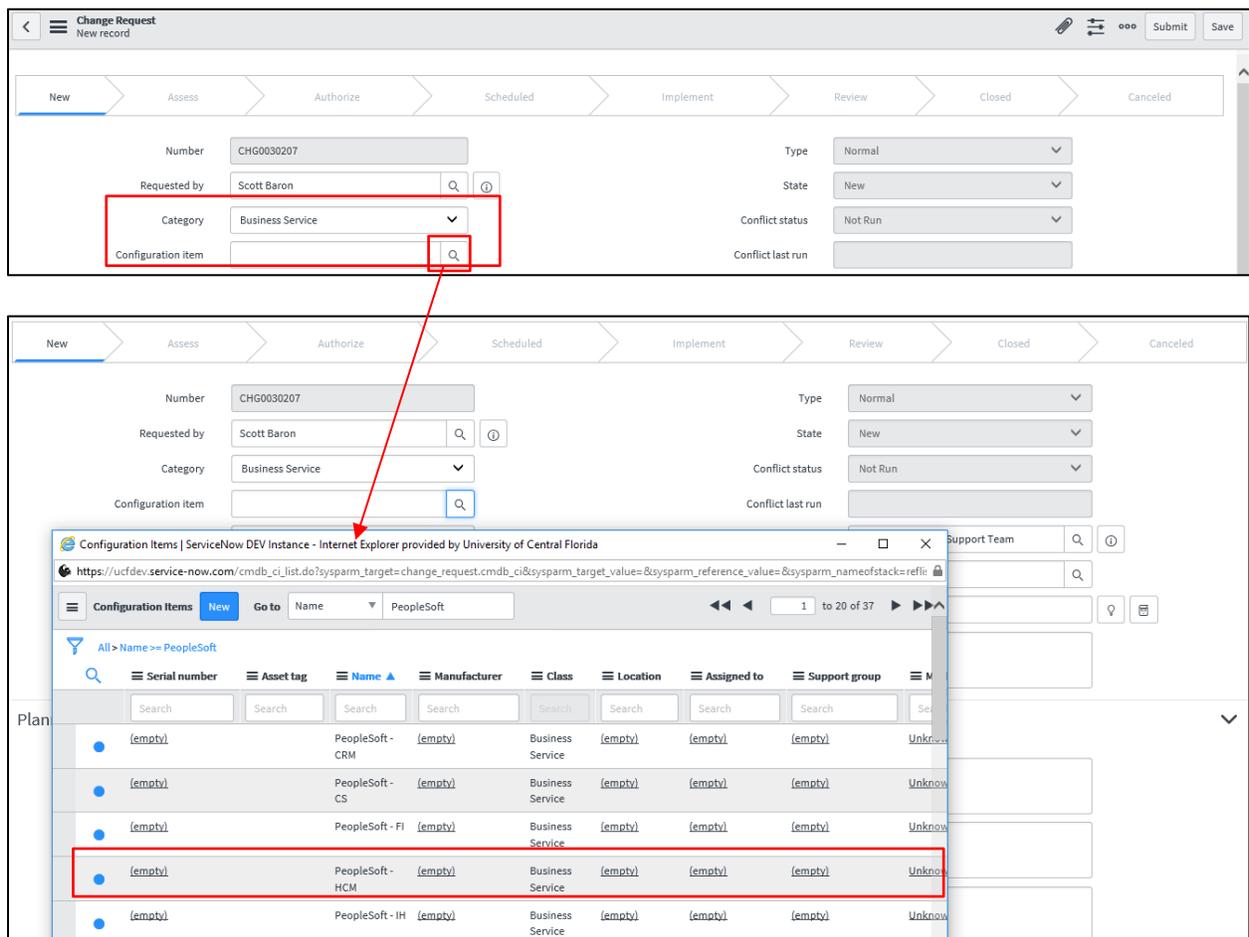


**E. RELATING MULTIPLE CI's TO A CHANGE RECORD**

- For large scale changes (multiple CIs affected within one change window), a change record can be created that serves as an overarching change (umbrella change) record. By having this functionality within ServiceNow, the Change Owner(s) does/do not have to input an individual change record for every CI affected. The below gives step-by-step instruction on how to relate multiple CIs to a change record.

Use Case – Linux/UNIX servers upgrade to the PeopleSoft HCM environment

1. Within the Category and Configuration item selection when inputting a New change record, the Category of Business Service should be selected. Upon searching for the Configuration item (by clicking the magnifying glass), PeopleSoft – HCM should be selected



The screenshot illustrates the process of creating a change record in ServiceNow. The top portion shows the 'Change Request' form in 'New record' mode. The 'Category' is set to 'Business Service', and the 'Configuration item' field has a search icon. A red box highlights these fields. A red arrow points from the search icon to a browser window below. The browser window shows a list of 'Configuration Items' filtered by 'PeopleSoft'. The 'PeopleSoft - HCM' item is highlighted with a red box.

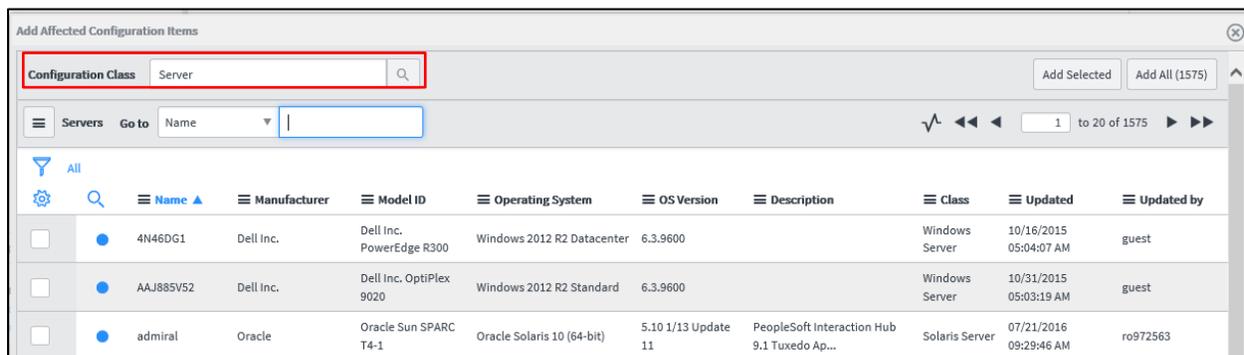
Serial number	Asset tag	Name	Manufacturer	Class	Location	Assigned to	Support group	M...
(empty)		PeopleSoft - CRM	(empty)	Business Service	(empty)	(empty)	(empty)	Unknow
(empty)		PeopleSoft - CS	(empty)	Business Service	(empty)	(empty)	(empty)	Unknow
(empty)		PeopleSoft - FI	(empty)	Business Service	(empty)	(empty)	(empty)	Unknow
(empty)		PeopleSoft - HCM	(empty)	Business Service	(empty)	(empty)	(empty)	Unknow
(empty)		PeopleSoft - IH	(empty)	Business Service	(empty)	(empty)	(empty)	Unknow

2. Complete the rest of the initial change record and click Submit or Save
3. Under the Related Links Section there is a section named Affected CIs (tab)
4. Click Add



The screenshot shows a navigation bar with tabs: Affected CIs (1), Impacted Services/CIs, Approvers, Change Tasks, Incidents Pending Change, Incidents Caused By Change, and Resource Plans. Below the navigation bar is a 'Related Links' section with a sub-section for 'Affected CIs'. The 'Add' button in this sub-section is highlighted with a red box. Below the 'Add' button is a search bar and a table with columns for Configuration Item and Class. The table contains one entry: 'PeopleSoft - HCM' with Class 'Business Service'.

5. Change (Type out) Configuration Class to “Server”. This will search the CMDB on that specific Class attribute. Then the Server Class can be searched on all Configuration Items of that Class. Additional filtering can be executed. In this example since the Change is for Linux/UNIX servers upgrade to the PeopleSoft HCM environment, the Description can be searched on any Server Description that contains “Human”.



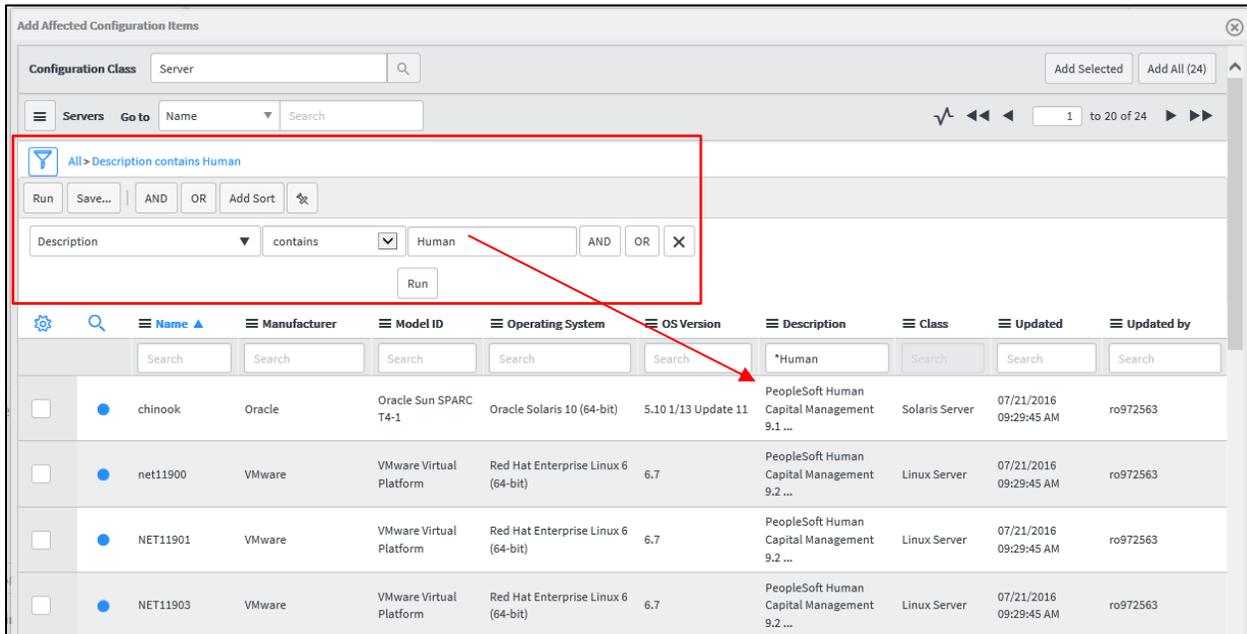
The screenshot shows the 'Add Affected Configuration Items' dialog box. The 'Configuration Class' field is set to 'Server' and is highlighted with a red box. Below the field is a search bar and a table with columns for Name, Manufacturer, Model ID, Operating System, OS Version, Description, Class, Updated, and Updated by. The table contains three entries:

Name	Manufacturer	Model ID	Operating System	OS Version	Description	Class	Updated	Updated by
4N46DG1	Dell Inc.	Dell Inc. PowerEdge R300	Windows 2012 R2 Datacenter	6.3.9600		Windows Server	10/16/2015 05:04:07 AM	guest
AAJ885V52	Dell Inc.	Dell Inc. OptiPlex 9020	Windows 2012 R2 Standard	6.3.9600		Windows Server	10/31/2015 05:03:19 AM	guest
admiral	Oracle	Oracle Sun SPARC T4-1	Oracle Solaris 10 (64-bit)	5.10 1/13 Update 11	PeopleSoft Interaction Hub 9.1 Tuxedo Ap...	Solaris Server	07/21/2016 09:29:46 AM	ro972563



The screenshot shows the 'Add Affected Configuration Items' dialog box. The 'Name' field in the search bar is highlighted with a red box. Below the search bar is a table with columns for Name, Manufacturer, Model ID, Operating System, OS Version, Description, Class, Updated, and Updated by. The table contains one entry:

Name	Manufacturer	Model ID	Operating System	OS Version	Description	Class	Updated	Updated by
4N46DG1	Dell Inc.	Dell Inc. PowerEdge R300	Windows 2012 R2 Datacenter	6.3.9600		Windows Server	10/16/2015 05:04:07 AM	guest



**Add Affected Configuration Items**

Configuration Class: Server

Servers: Go to Name Search

All > Description contains Human

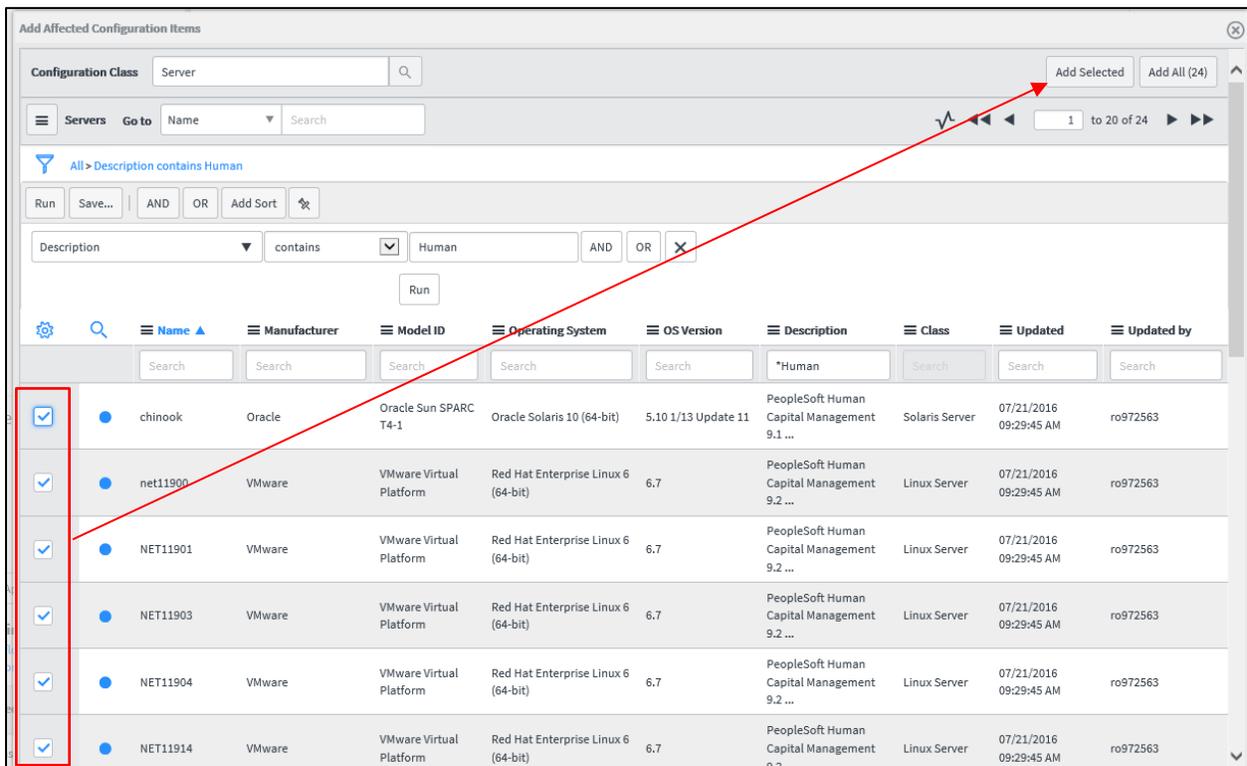
Run Save... AND OR Add Sort

Description contains Human AND OR X

Run

Name	Manufacturer	Model ID	Operating System	OS Version	Description	Class	Updated	Updated by
chinook	Oracle	Oracle Sun SPARC T4-1	Oracle Solaris 10 (64-bit)	5.10 1/13 Update 11	PeopleSoft Human Capital Management 9.1 ...	Solaris Server	07/21/2016 09:29:45 AM	ro972563
net11900	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
NET11901	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
NET11903	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563

6. Select all CIs that are affected within the change record by clicking the check boxes and then Click Add Selected



**Add Affected Configuration Items**

Configuration Class: Server

Servers: Go to Name Search

All > Description contains Human

Run Save... AND OR Add Sort

Description contains Human AND OR X

Run

Name	Manufacturer	Model ID	Operating System	OS Version	Description	Class	Updated	Updated by
<input checked="" type="checkbox"/> chinook	Oracle	Oracle Sun SPARC T4-1	Oracle Solaris 10 (64-bit)	5.10 1/13 Update 11	PeopleSoft Human Capital Management 9.1 ...	Solaris Server	07/21/2016 09:29:45 AM	ro972563
<input checked="" type="checkbox"/> net11900	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
<input checked="" type="checkbox"/> NET11901	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
<input checked="" type="checkbox"/> NET11903	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
<input checked="" type="checkbox"/> NET11904	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563
<input checked="" type="checkbox"/> NET11914	VMware	VMware Virtual Platform	Red Hat Enterprise Linux 6 (64-bit)	6.7	PeopleSoft Human Capital Management 9.2 ...	Linux Server	07/21/2016 09:29:45 AM	ro972563

- All selected CIs will now appear under the Affected CIs section (tab) of the change record.

Related Links  
[Show Workflow](#)  
[Workflow Context](#)

☰ Affected CIs [Add](#) Go to Configuration Item Search

◀◀ 1 to 9 of 9 ▶▶

Task = CHG0030207

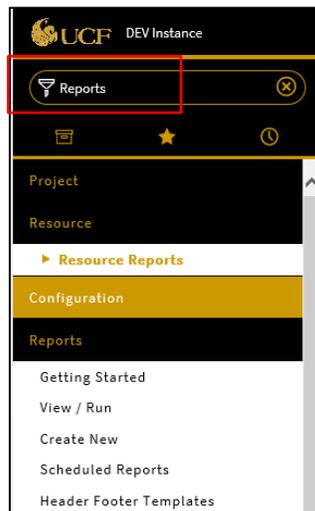
	Configuration Item	Class
<input type="checkbox"/>	<a href="#">NET11904</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">NET11915</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">chinook</a>	<a href="#">Solaris Server</a>
<input type="checkbox"/>	<a href="#">NET11901</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">PeopleSoft - HCM</a>	<a href="#">Business Service</a>
<input type="checkbox"/>	<a href="#">NET11914</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">net11916</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">net11900</a>	<a href="#">Linux Server</a>
<input type="checkbox"/>	<a href="#">NET11903</a>	<a href="#">Linux Server</a>

## F. CHANGE CALENDAR REPORTS

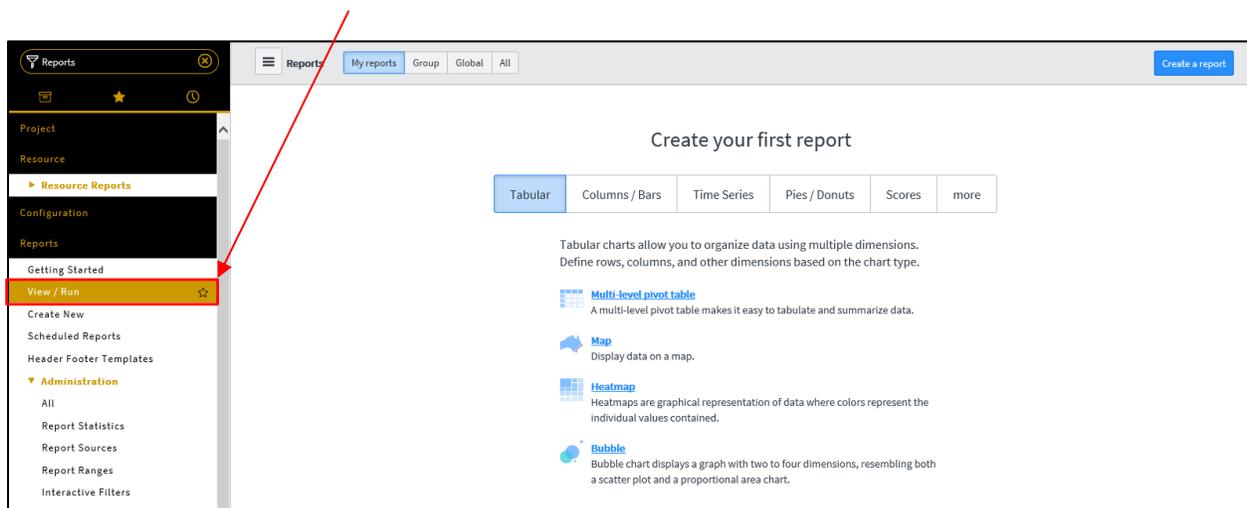
### CANNED REPORT

- This change calendar report allows ITIL role users to see a holistic representation of all changes (Normal and Emergency) that have either been approved (Scheduled), pending approval and rejected. The below gives step-by-step instruction on how to run the report and what the recommended report reflects.

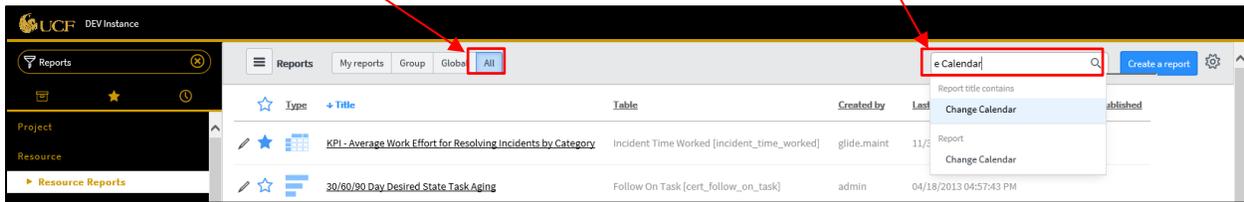
1. Type in Reports within the search box to bring up the Reports section on the left pane of the ServiceNow window. You can also scroll down and find the Reports section



2. Click View/Run



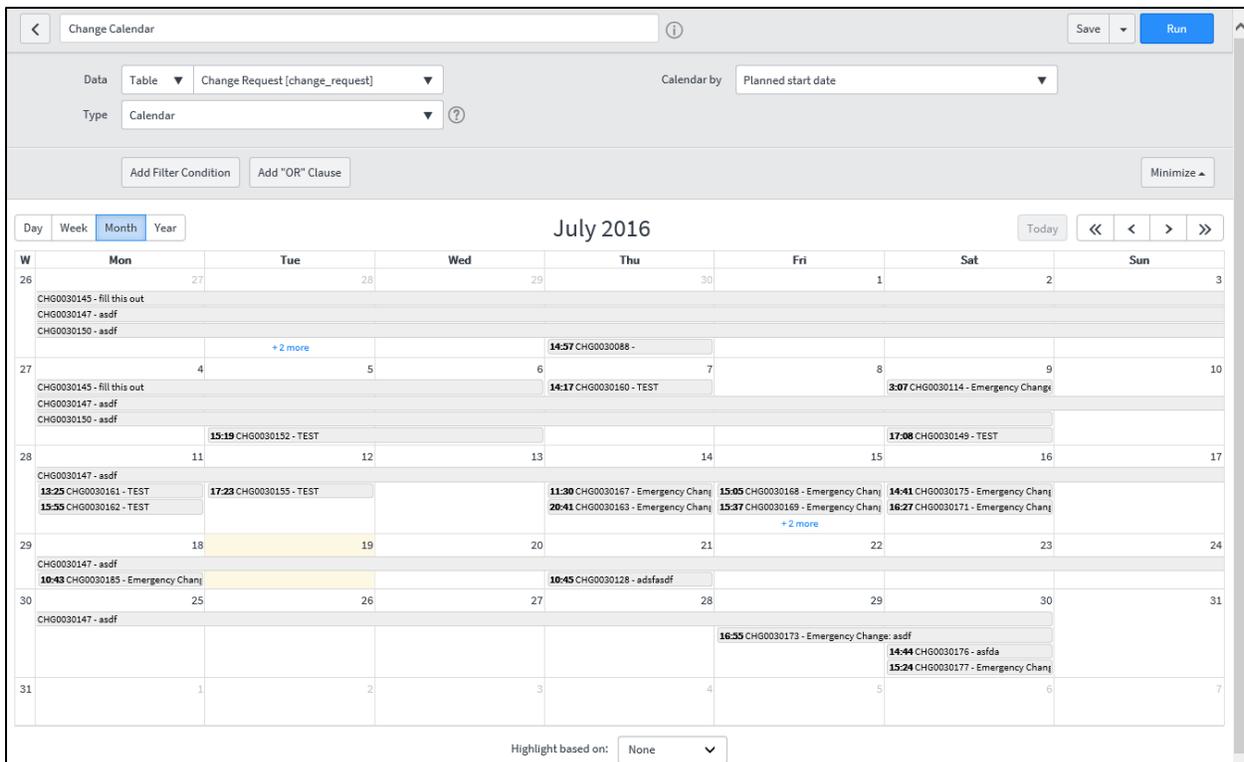
3. Click All and within the search box type in Change Calendar



4. Click Change Calendar



The Calendar will appear with no filters or highlighting



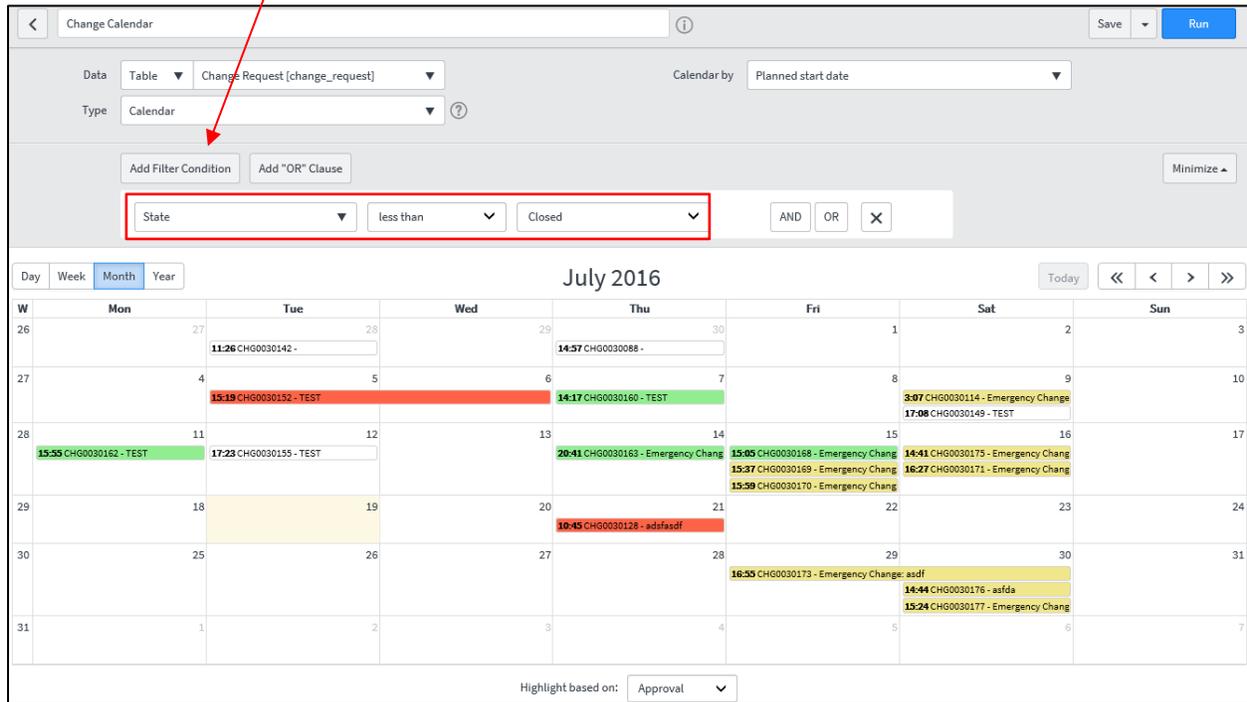
5. Click on the Highlight based on: dropdown and select Approval

Day	Week	Month	Year	July 2016						
W	Mon	Tue	Wed	Thu	Fri	Sat	Sun			
26	27	28	29	30	1	2	3			
CHG0030145 - fill this out										
CHG0030147 - asdf										
CHG0030150 - asdf										
+ 2 more										
14:57 CHG0030088 -										
27	4	5	6	7	8	9	10			
CHG0030145 - fill this out										
CHG0030147 - asdf										
CHG0030150 - asdf										
15:19 CHG0030152 - TEST										
17:08 CHG0030149 - TEST										
28	11	12	13	14	15	16	17			
CHG0030147 - asdf										
13:25 CHG0030161 - TEST										
15:55 CHG0030162 - TEST										
17:23 CHG0030155 - TEST										
11:30 CHG0030167 - Emergency Chan										
20:41 CHG0030163 - Emergency Chan										
15:05 CHG0030168 - Emergency Chan										
15:37 CHG0030169 - Emergency Chan										
14:41 CHG0030175 - Emergency Chan										
16:27 CHG0030171 - Emergency Chan										
+ 2 more										
29	18	19	20	21	22	23	24			
CHG0030147 - asdf										
10:43 CHG0030185 - Emergency Chan										
10:45 CHG0030128 - adsfasdf										
30	25	26	27	28	29	30	31			
CHG0030147 - asdf										
16:55 CHG0030173 - Emergency Change: asdf										
14:44 CHG0030176 - asfda										
15:24 CHG0030177 - Emergency Chan										
31	1	2	3	4	5	6	7			

Highlight based on:

- None
- Escalation
- Approval
- Type
- Work notes
- Priority
- Conflict status

- Click Add Filter Condition and populate as State; less than; Closed. This will show all Changes that are not in a Closed State. Legend of colors are below. The Change Calendar can be filtered many different ways. This is a recommended report to show the changes that are currently being planned, awaiting approval, scheduled and work in progress.



The screenshot shows the 'Change Calendar' application interface. At the top, there are navigation buttons for 'Save' and 'Run'. Below that, the 'Data' source is set to 'Table' and 'Change Request [change\_request]'. The 'Type' is set to 'Calendar'. A filter condition is applied: 'State less than Closed'. The calendar view is for July 2016, showing change requests on a grid. The requests are color-coded: red for 'Rejected Change', green for 'Approved Change', yellow for 'Awaiting Approval Change', and white for 'New Change'. The 'Highlight based on' dropdown is set to 'Approval'.

-  = Rejected Change (If Rejected, Change record reverts back to a New State)
-  = Approved Change (Scheduled, Implement and Review Change States)
-  = Awaiting Approval Change (Assess or Authorize Change States)
-  = New Change (New Change State)

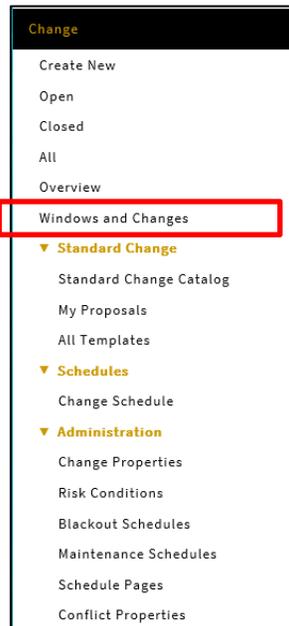
## WINDOWS AND CHANGES REPORT

- This change calendar report reflects an all-in-one view of Scheduled changes, planned maintenance (approved maintenance items that did not go through CAB) and change freeze windows. In contrast to the canned report described above, this calendar view will ONLY reflect Scheduled changes (approved by CAB), maintenance windows (approved by both the applicable ServiceNow Assignment Group manager and the UCF IT Communications Team) and applicable change freeze windows.

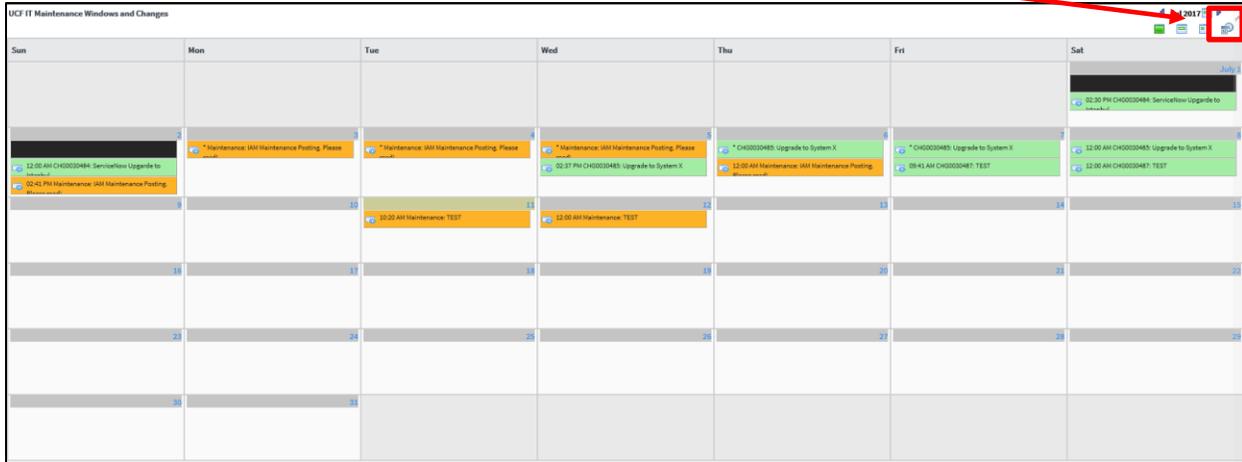
The “Windows and Changes” report view will provide insight for the Change Owner, Change Manager or CAB Members to see what planned changes/maintenance are already scheduled and if there is an upcoming freeze.

The below gives step-by-step instruction on how to run the report and what the recommended report reflects.

1. Within the Change module on the Navigator pane, click the “Windows and Changes” title



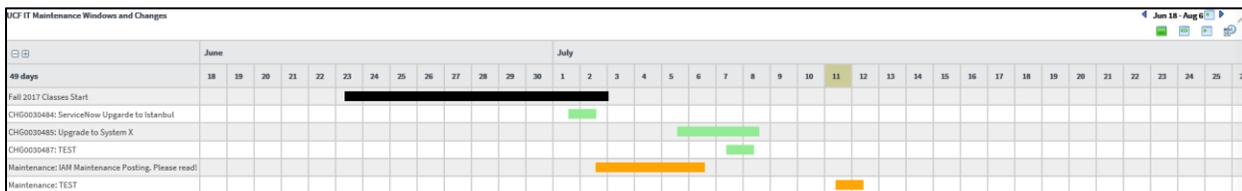
- The default view will appear as a Calendar. The view needs to be changed to a timeline view. Click this icon.



- After clicking the timeline icon, the timeline view can be expanded by clicking the “+” sign to see multiple days into the future.

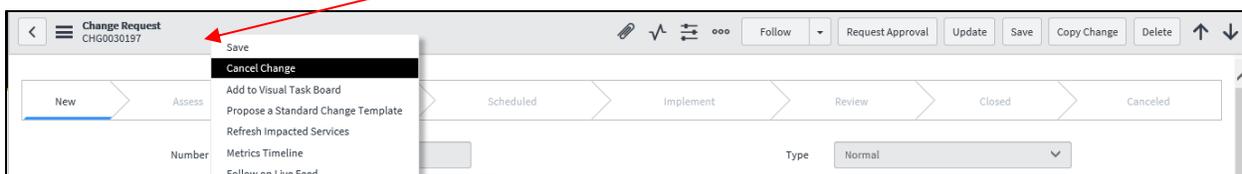


- After expanding the timeline view (to your preference), the colored time blocks represent the change freeze window (Black), Scheduled changes (Green) and the approved planned maintenance (Orange). You can double click into any of the items to see additional detail of the record. The view will show an all-in-one view.



### G. CANCEL A CHANGE

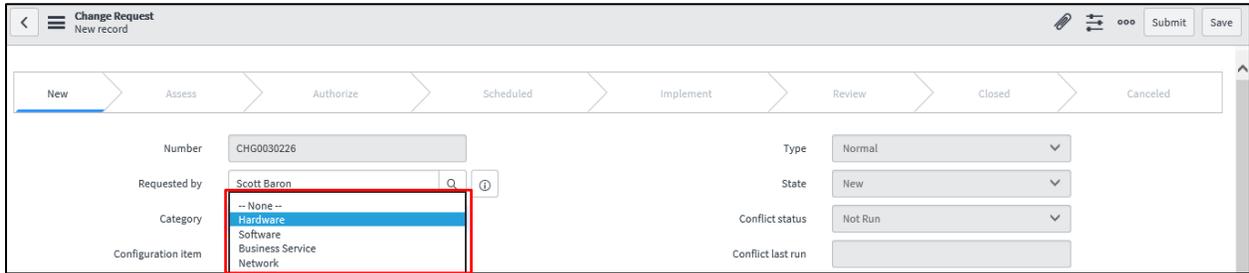
- To cancel a change record, just right click the header bar of the change record and select Cancel Change



## H. SEARCHING ON CONFIGURATION ITEM (CI)

- All change records must have a CI populated in order to complete the change record for submittal and approval. The Category selected drives what CI(s) appear to be chosen. This is known as the reference qualifier.

The Category currently is broken out into four categories. Hardware, Software, Business Service and Network.

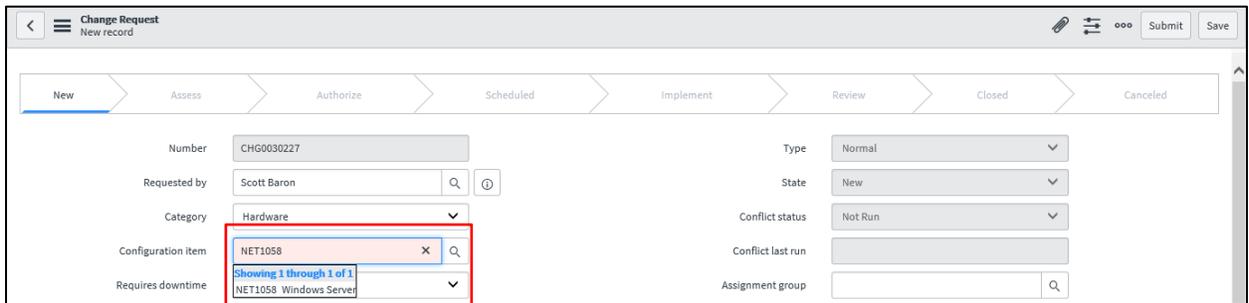


The screenshot shows the 'Change Request' form for a new record. The 'Category' dropdown menu is open, displaying the following options: -- None --, Hardware (highlighted), Software, Business Service, and Network. Other fields include Number: CHG0030226, Requested by: Scott Baron, Type: Normal, State: New, and Conflict status: Not Run.

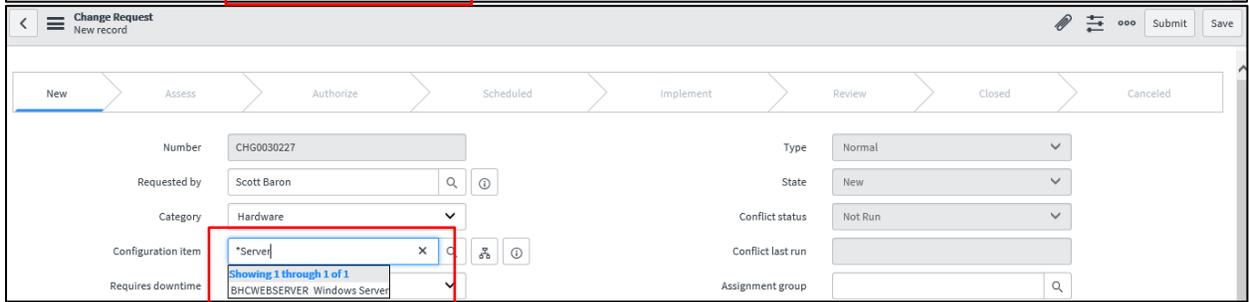
### 1. Choose the Category

Once the Category is chosen, the Configuration item can be selected two different ways. The easiest way is by typing directly into the Configuration item field. The other way is by doing an Advanced Filter search.

The Configuration item field keys off the Name within the CMDB. If the Change Owner knows the “exact” CI Name, then that can just be typed in. If the Change Owner knows the Name of the CI contains certain characters, then an \* can be put in front of the characters to search.



The screenshot shows the 'Change Request' form with the 'Configuration item' field populated with 'NET1058'. The 'Requires downtime' dropdown menu is open, showing 'NET1058 Windows Server'. Other fields include Number: CHG0030227, Requested by: Scott Baron, Type: Normal, State: New, and Conflict status: Not Run.



The screenshot shows the 'Change Request' form with the 'Configuration item' field populated with '\*Server'. The 'Requires downtime' dropdown menu is open, showing 'BHCWEBSEVER Windows Server'. Other fields include Number: CHG0030227, Requested by: Scott Baron, Type: Normal, State: New, and Conflict status: Not Run.

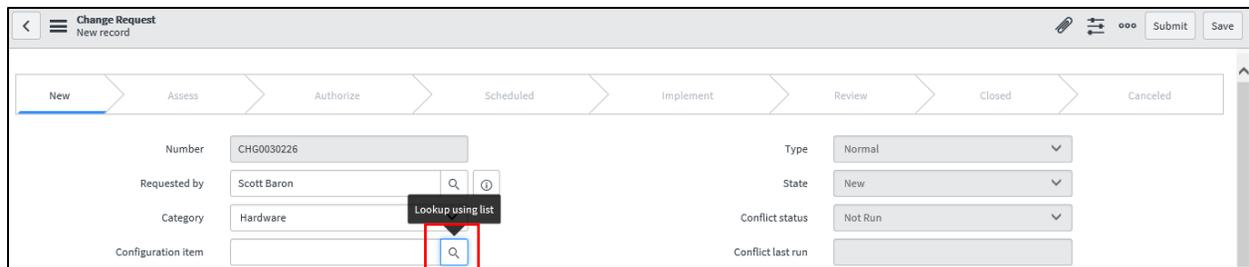
**PLEASE NOTE:**

If Category of Network is chosen, then only one CI will appear to be chosen – “Not Listed – Network”. This is because the configuration items are maintained external to ServiceNow.

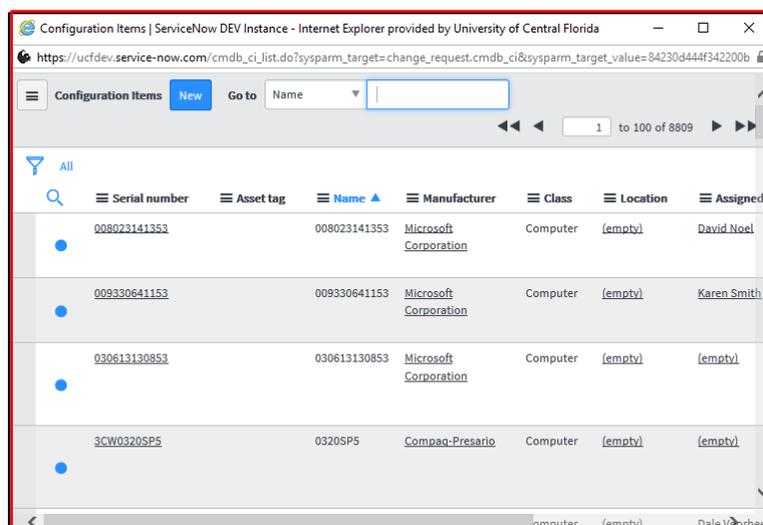
If Category of Business Service is chosen, reference the Appendix [Section E - RELATING MULTIPLE CI's TO A CHANGE RECORD](#).

If Category of Hardware and Software are chosen, there is an option to choose a CI “Not Listed – Hardware” or “Not Listed – Software”. This is not the preferred method, but allows the Change Owner to complete the change record if they are unable to locate the configuration item in the ServiceNow CMDB.

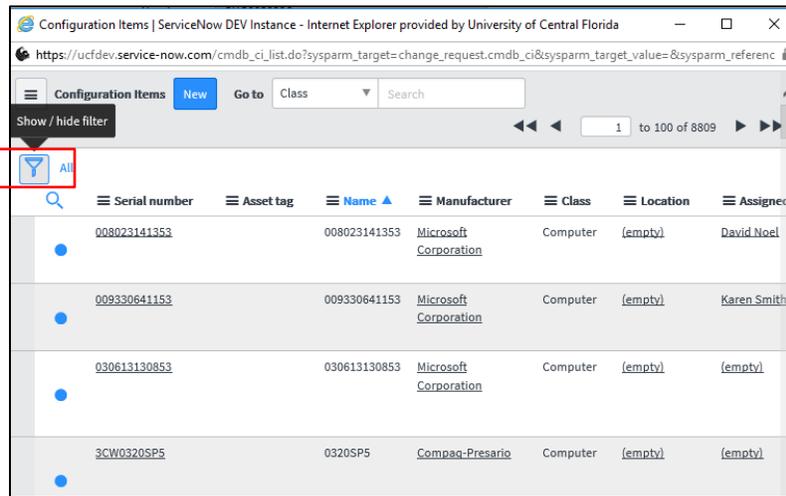
2. If the CI cannot be located by directly typing in the field, then the Advanced Filter search feature can be used. Click the magnifying glass



3. The Configuration Items search box will appear

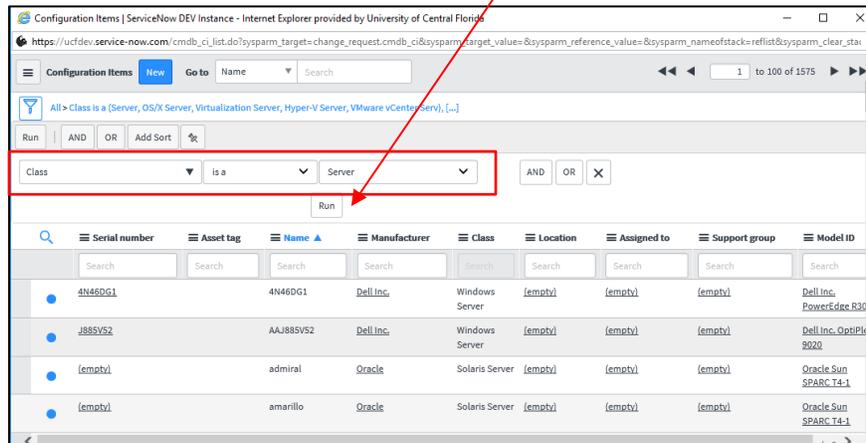


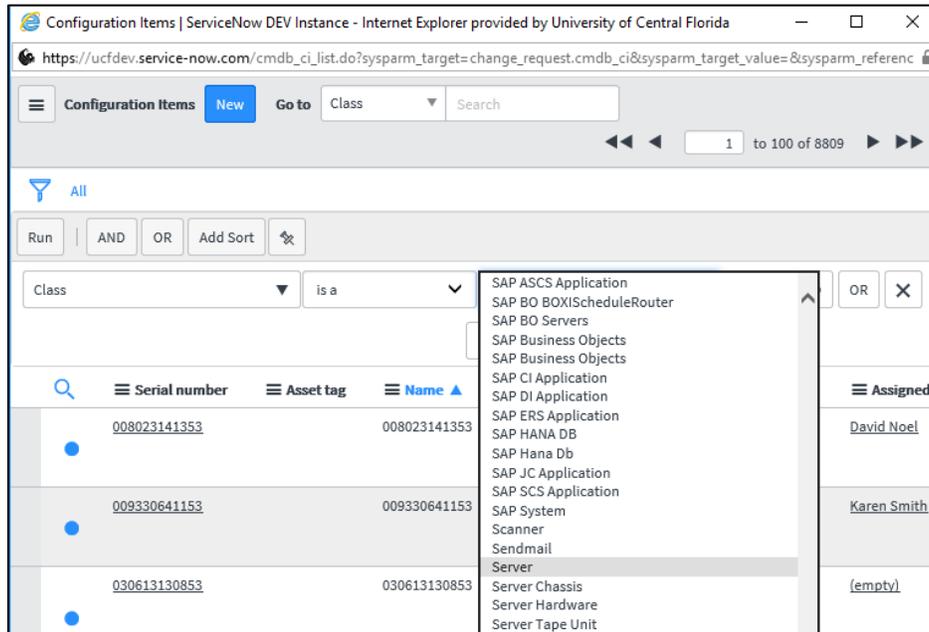
4. Click the Show/hide filter icon



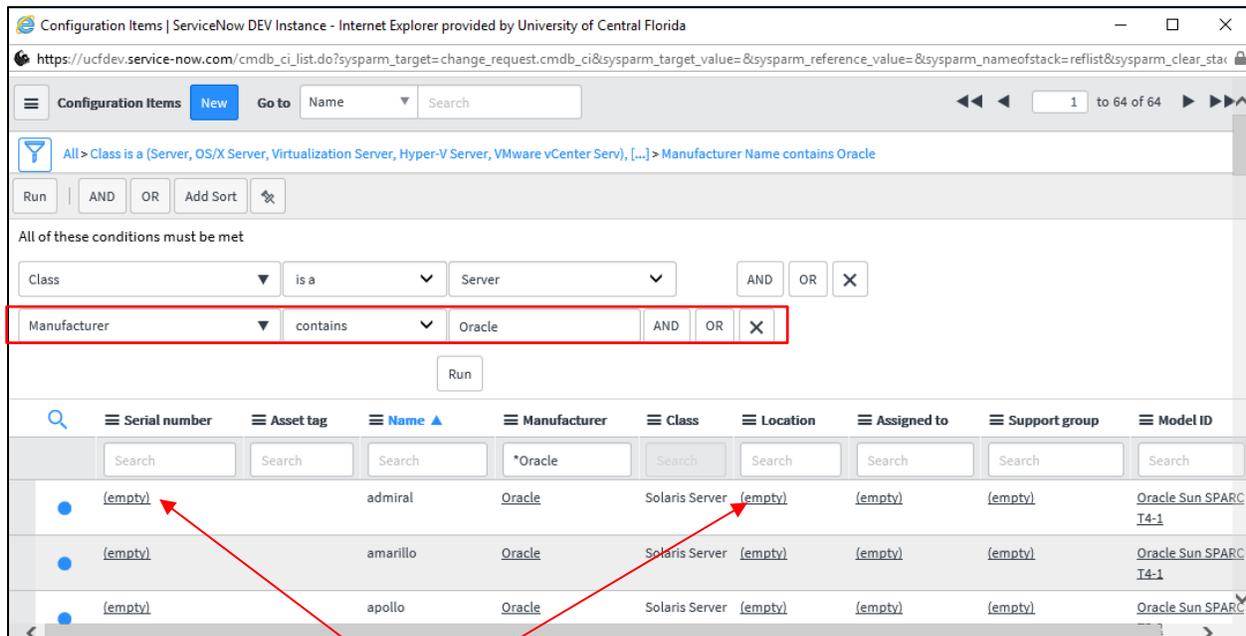
5. Next the fields can be searched many different ways based on the column data. It is up to the Change Owner to search on what they are looking for.

For example, if the Change Owner wanted to search on all Servers, the -- choose field -- would be “Class” and -- oper -- field would be “is a” and the last field would be “Server”. Click Run.





Additional criteria (AND/OR Statements) can be added to narrow down the search even further.



- Click the hyperlink of the CI to populate into the Configuration item field on the change record.