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Lab Guide

Change 201:

Deliver Effective Change

Martin Wood & Lynda Rees

Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

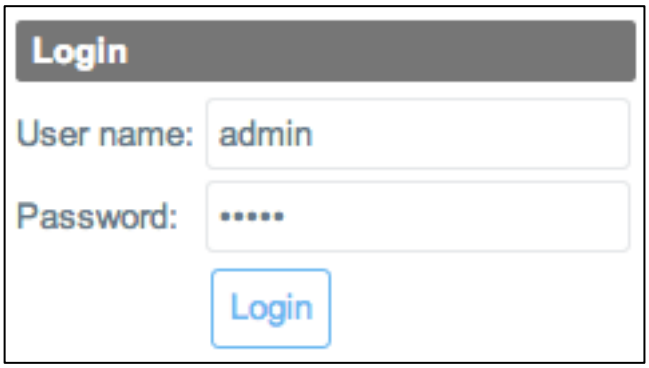
A Change Model is a series of pre-defined steps that the Change Request will take. You can represent these as workflow in ServiceNow. Let's empower the team to pick their own workflow.

Lab 1
Specifying Your Workflow

Log on to Your Instance

1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover.

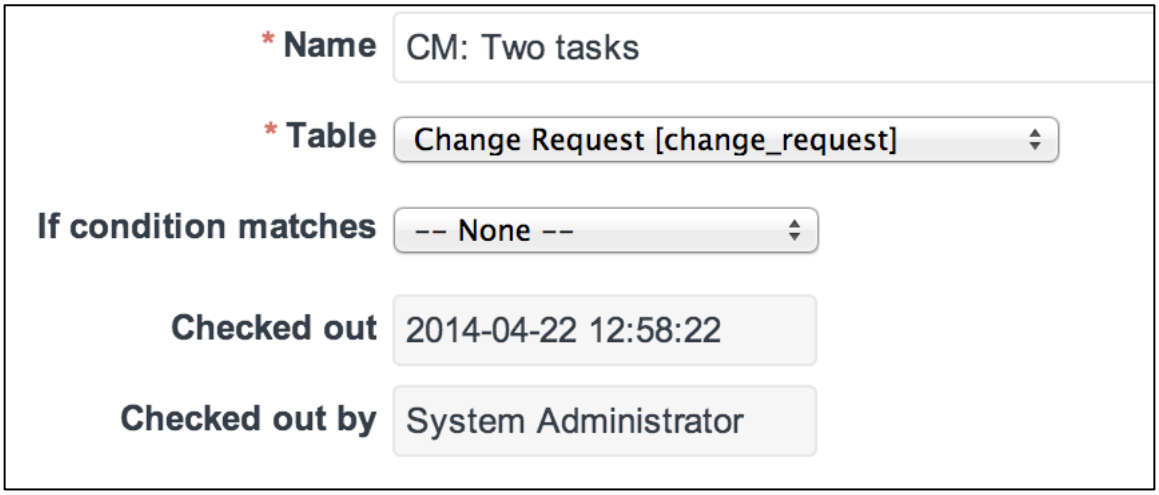


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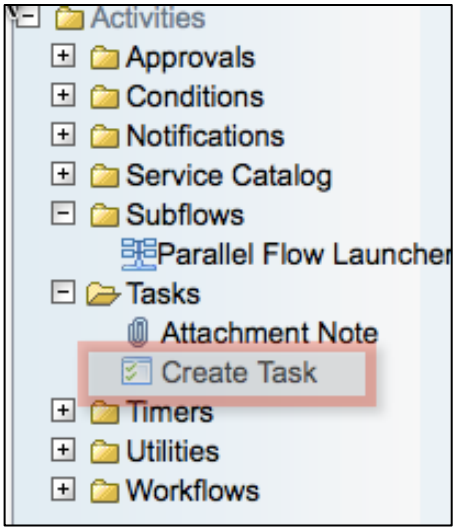
Lab 1.1 - Create a Two-Task Workflow

1. Navigate to **Workflow > Workflow Editor**. Click **New**, fill in the following information, then click **Submit**.

   Name: **CM: Two tasks**
   Table: **Change Request**
   If condition matches: Change from Run the workflow to **-- None –**



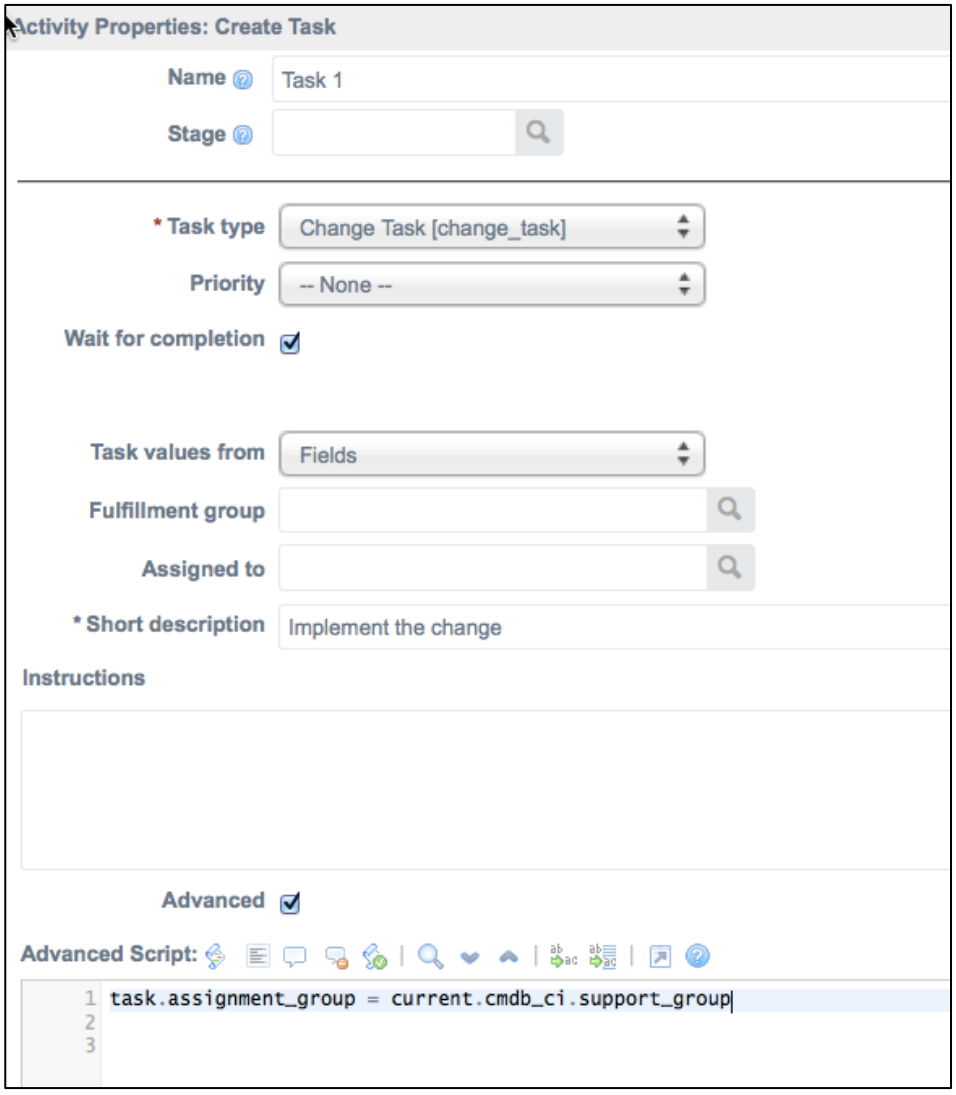
2. Expand the **Tasks** group, and drag the **Create Task** activity on to the screen.



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3. Set the following fields, and click **Submit**.

   Name: **Task 1**
   Task type: **Change Task**
   Short description: **Implement the change**
   Advanced: **<checked>**
   Advanced Script: **`task.assignment_group = current.cmdb_ci.support_group`**

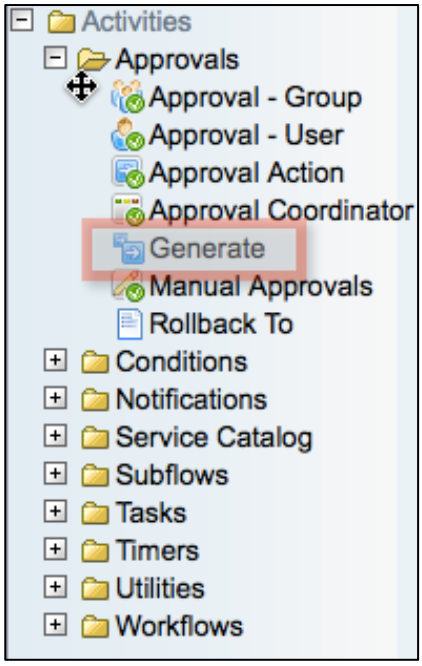


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4. Drag the **Create Task** activity on to the screen. Set the following fields, and click **Submit**.

   Name: **Task 2**
   Task type: **Change Task**
   Short description: **Test the change**
   Advanced: **<checked>**
   Advanced Script: `task.assignment_group = current.cmdb_ci.support_group`

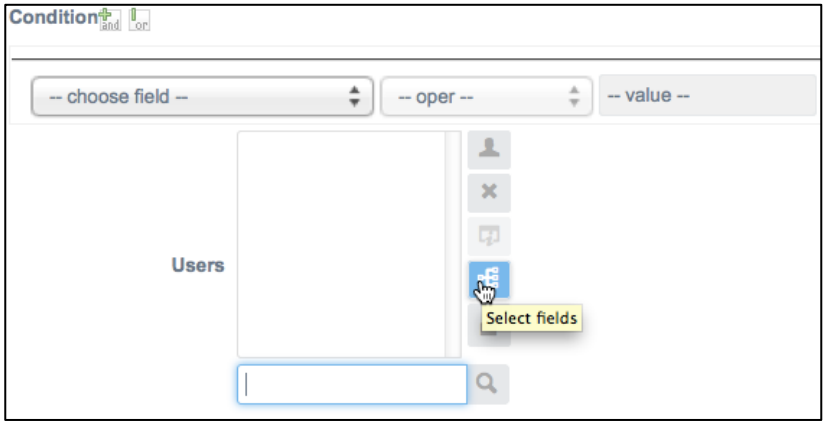
5. Expand the **Approvers** group, and drag the **Generate** activity on to the screen. Set the name to be **Generate tasks**.

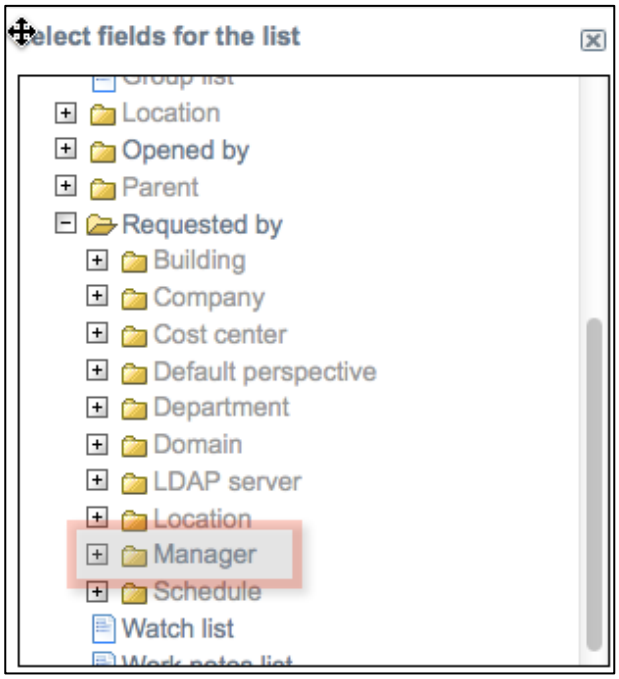


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6. Drag the **Approval - User** activity on to the screen, fill out the following fields, and click **Submit**.

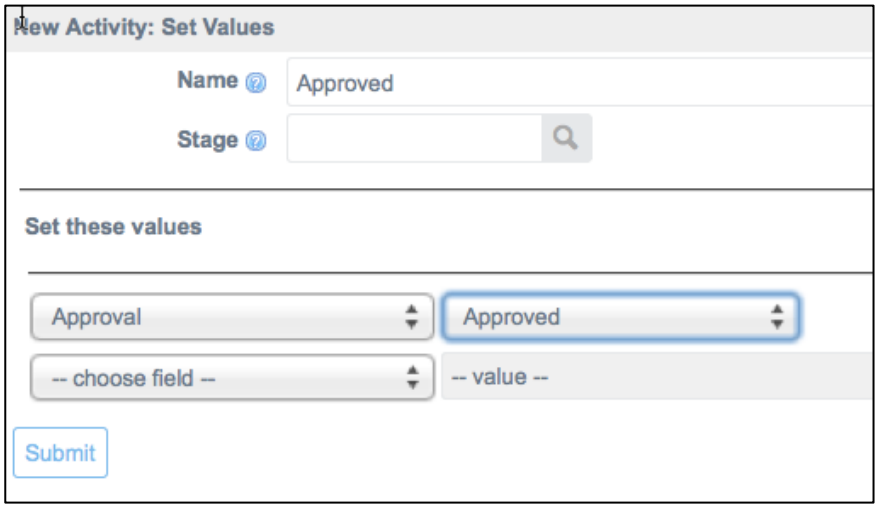
   Set the name to be **Approve by manager**.
   Unlock the **Users** field by clicking on the padlock. Click on the **Select fields** icon. Expand **Requested by**: Click **Manager**.





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7. Expand the **Utilities** group, and drag the **Set values** activity on to the screen. Set the name to be **Approved**, and select **Approval - Approved** in **Set these values**.



8. Drag the **Set values** activity on to the screen. Set the name to be **Rejected**, and select **Approval - Rejected** in **Set these values**.

9. Drag the **Run Script** activity on to the screen. Set the name to **Workflow complete**, and set the script to be:

```
current.state = 'complete';

var wf = new Workflow().getRunningFlows(current);
while(wf.next()) {
   new Workflow().broadcastEvent(wf.sys_id, 'subflow_complete');
}
```

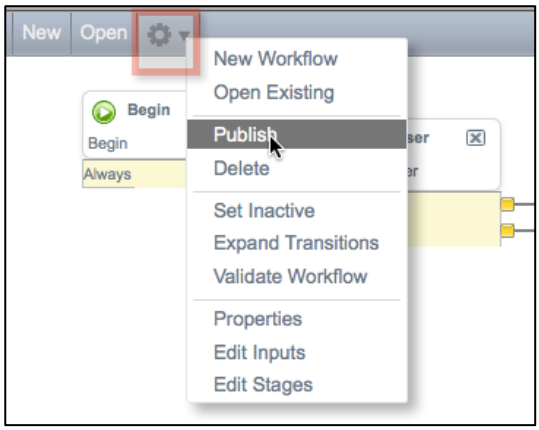
10. Remove the line between **Begin** and **End**.

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11. Create connections between the activities:

    Drag from **Begin** to **Approve by Manager**
    Drag from **Approve by Manager / Approved** to **Approved**
    Drag from **Approve by Manager / Rejected** to **Rejected**
    Drag from **Rejected** to **End**
    Drag from **Approved** to **Generate tasks**
    Drag from **Generate tasks** to **Task 1**
    Drag from **Task 1** to **Task 2**
    Drag from **Task 2** to **Workflow Complete**
    Drag from **Workflow Complete** to **End**

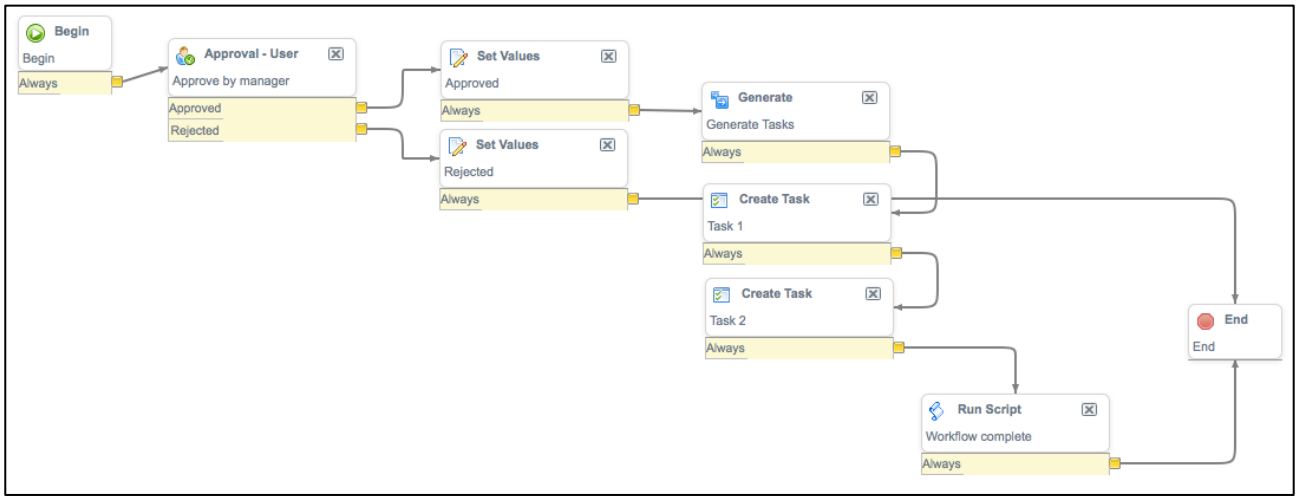
12. Click the **Gear** icon, and choose **Publish**.



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Lab Success Verification

1. Your screen should look like below:



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Lab 1.2 - Create an Approval Workflow

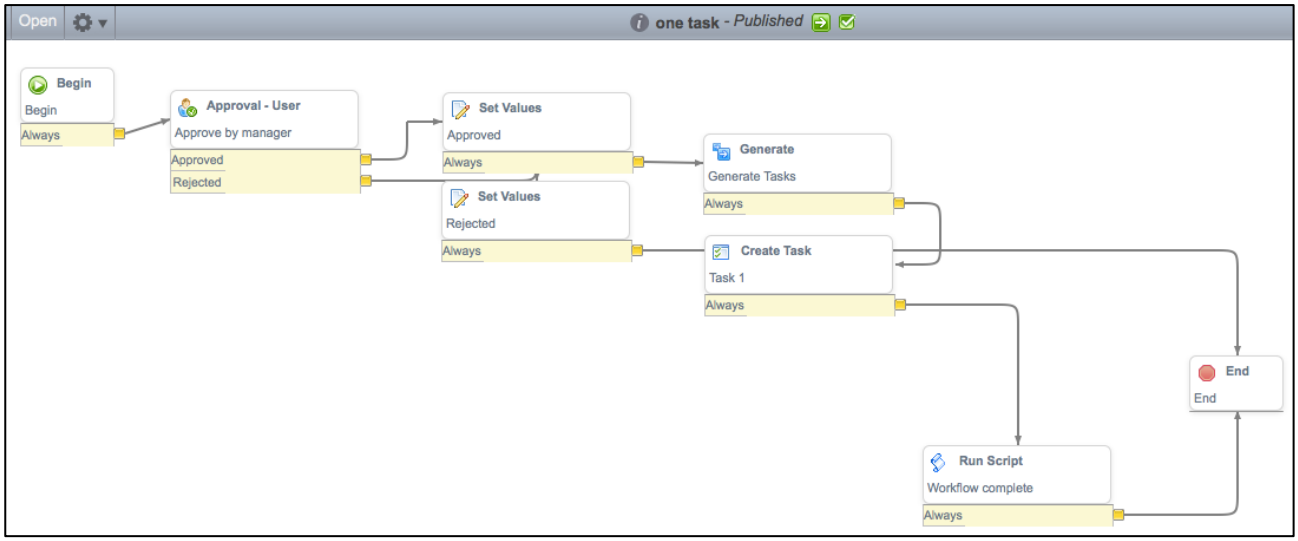
1. Click the **Gear** icon, and choose **Copy**.
2. Fill in the following information and click **OK**.

   Workflow Name: **CM: one task**

3. Delete the **Task 2** activity by clicking [x].
4. Click the **Gear** icon, and choose **Publish**.

Lab Success Verification

1. Your screen should look like below:

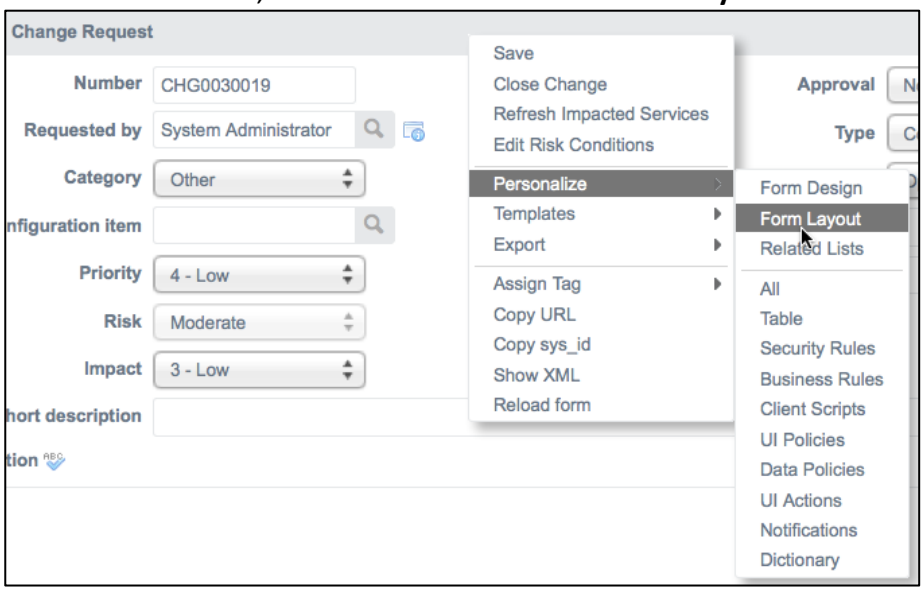


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Lab 1.3 - Create a Change Model field

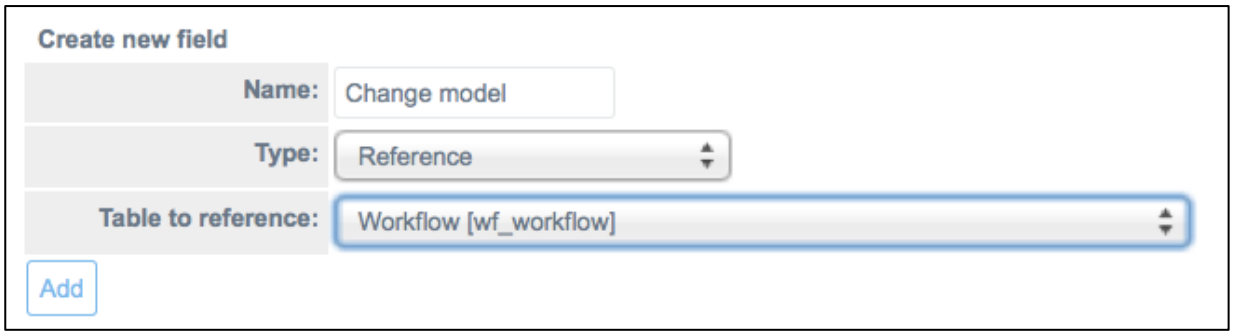
1. Switch to the standard interface by closing the tab. Navigate to **Change > Create New**.

2. Click the menu icon, and choose **Personalize > Form Layout**.



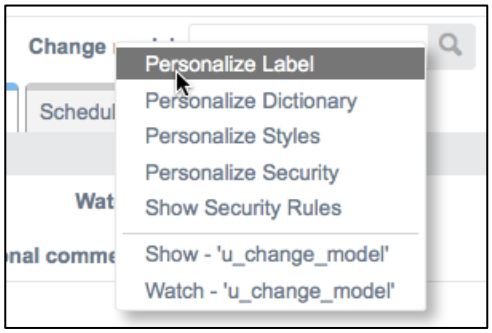
3. In the Create new field section, fill out the following information, and click **Add**, then click **Save.**

   Name: **Change model**
   Type: **Reference**
   Table to reference: **Workflow**



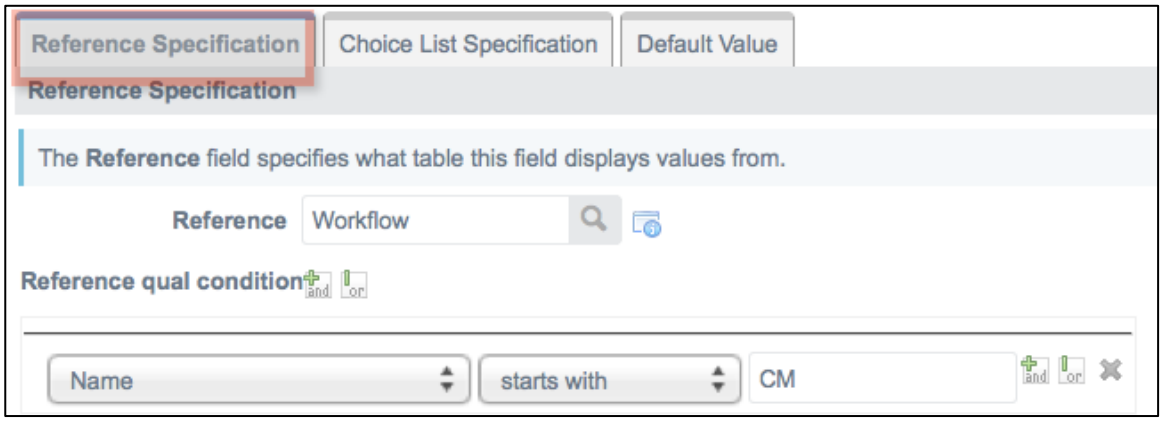
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4. Right click on the **Change model** label, and choose **Personalize Dictionary**.



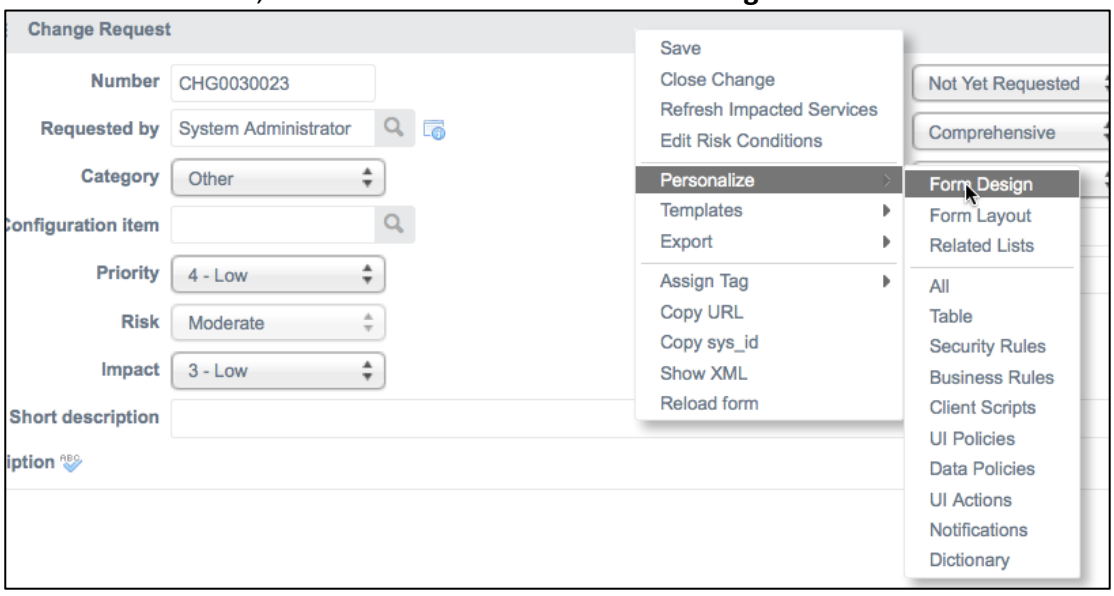
5. In the Reference Specification Section, set **Reference qual condition** as follows, and click **Update**.

Name - starts with – CM

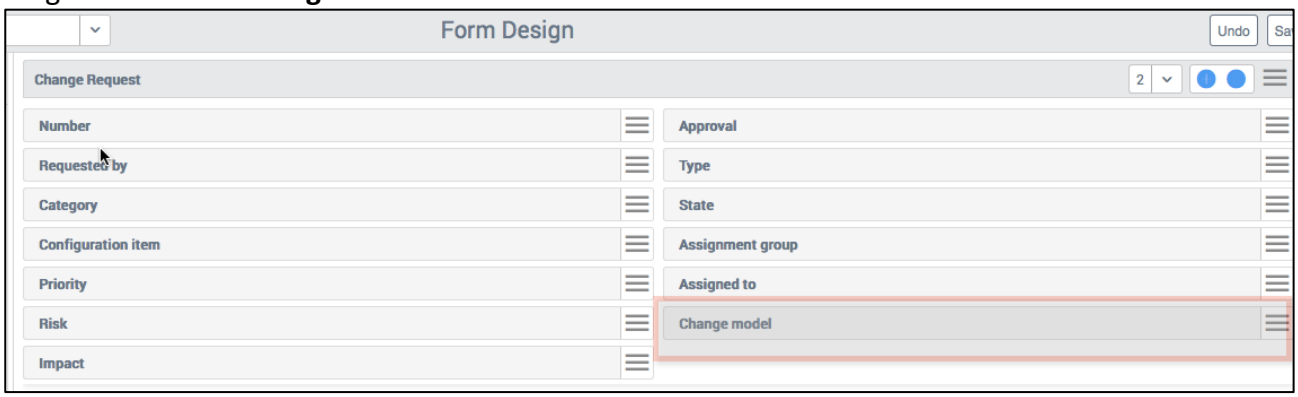


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6. Click the menu icon, and choose **Personalize > Form Design**.



7. Find the **Change Model** field mid way down the page, and using the drag handle on the right, drag it underneath **Assigned to**.



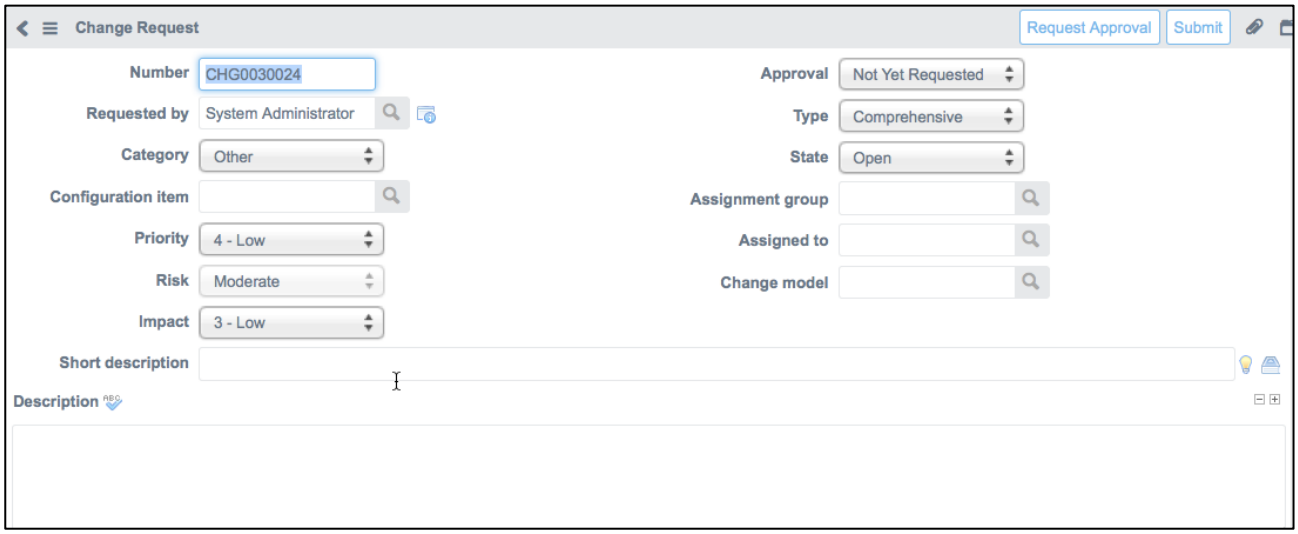
8. Find the **Incident Variable Editor (Formatter)** and remove it by dragging it into the left column.

9. Click **Save**, and close the Form Design window.

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Lab Success Verification

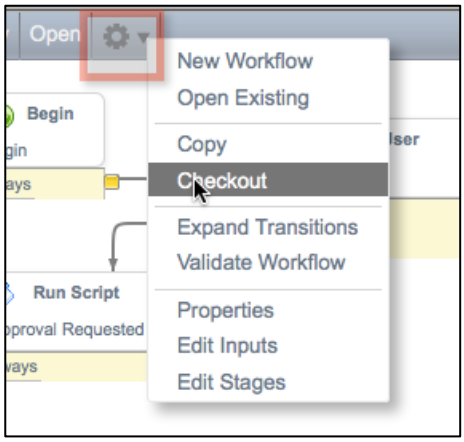
1. Your screen should look like below:



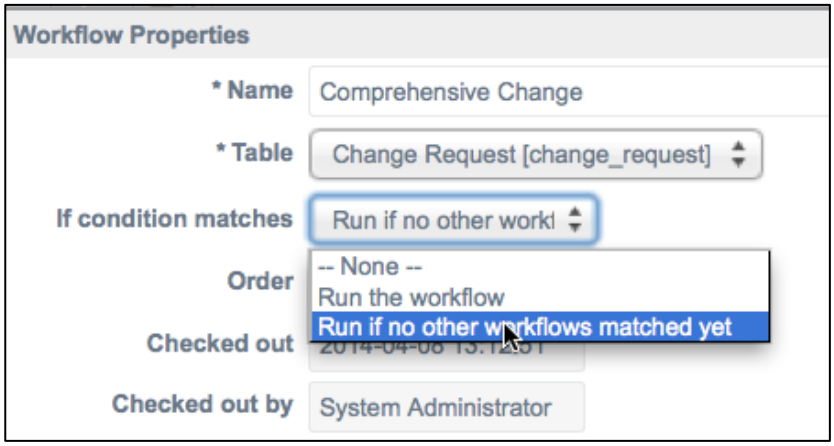
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Lab 1.4 - Edit the Standard Workflows

1. Navigate to **Workflow > Workflow** Editor.
2. Choose **Open** on the menu. Choose **Comprehensive Change**.
3. Click the Gear icon and choose **Checkout**.



4. Click the Gear icon and choose **Properties**.
5. Set the **if** condition matches to be **Run if no other workflows matched yet**.



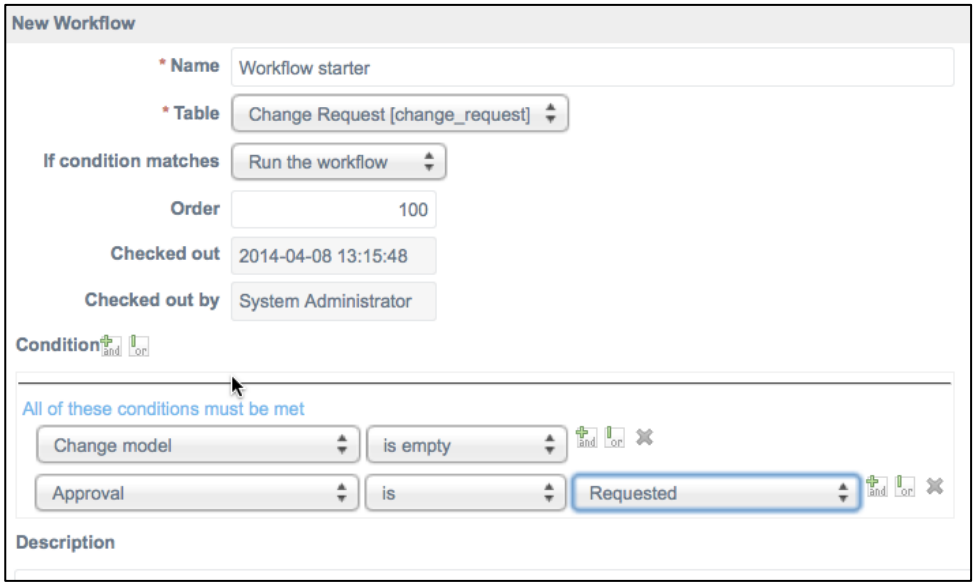
6. Click **Update**.
7. Click the Gear icon and choose **Publish**.
8. Repeat this same process for the **Routine Change**, and **Emergency Change** workflows

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Lab 1.5 - Create the Workflow Starter

1. Click **New** in the Workflow Editor, set the following fields, and click **Submit**.

   Name: **Workflow starter**
   Table: **Change Request**
   Condition: **Change model - is not empty AND Approval - is – Requested**

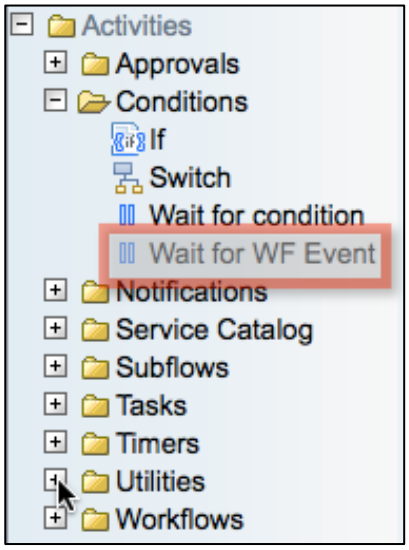


2. Drag the **Run Script** activity on to the form, on the left side. Set the name to be **Run Workflow**, and set the script to be:

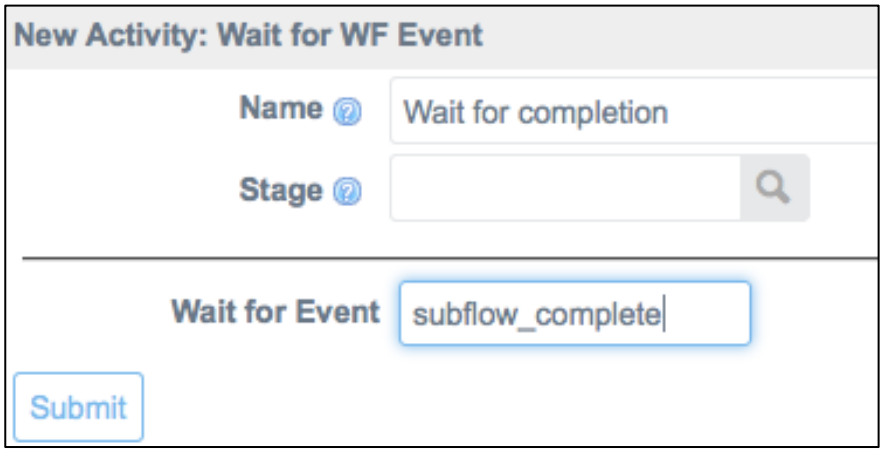
```
var w = new Workflow();
var context = w.startFlow(current.u_change_model, current);
```

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3. Drag the **Wait for WF Event** activity on to the form, on the left side.



4. Set the name to be **Wait for completion**, and set Wait for Event to be **subflow_complete**.



5. Remove the connection between **Start** and **End**, then create connections between these activities:

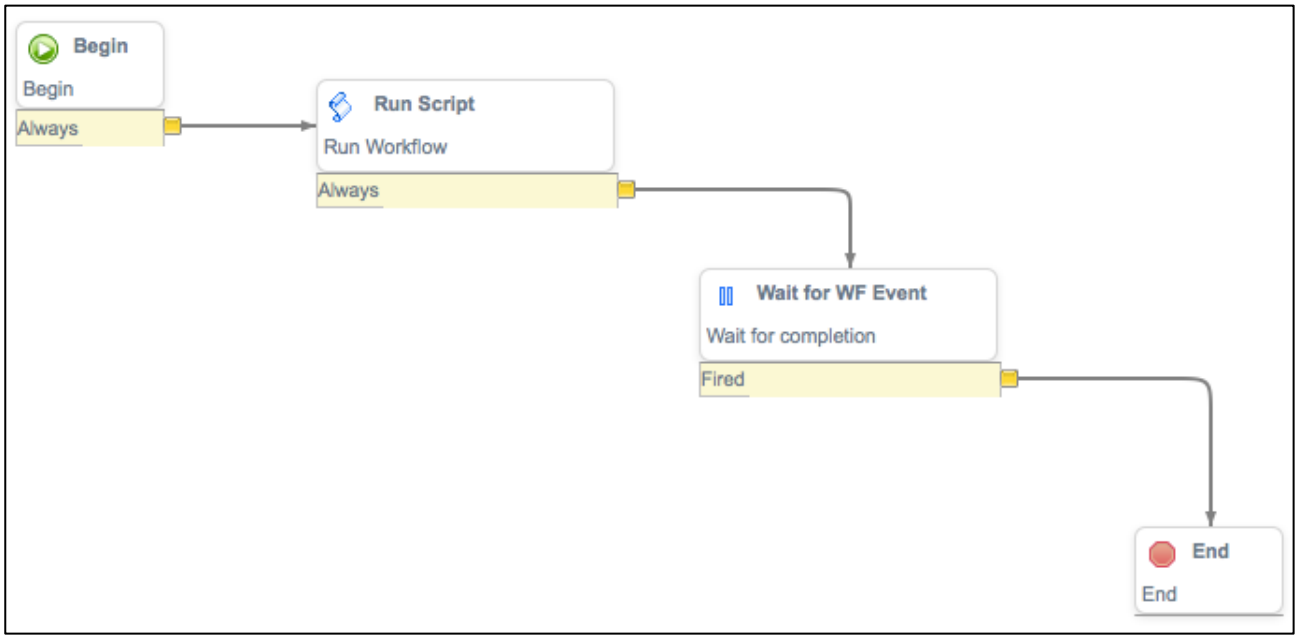
   Drag from **Begin** to **Run Workflow**
   Drag from **Run Workflow** to **Wait for completion**
   Drag from **Wait for completion** to **End**

6. Click the Gear icon and choose **Publish**.

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Lab Success Verification

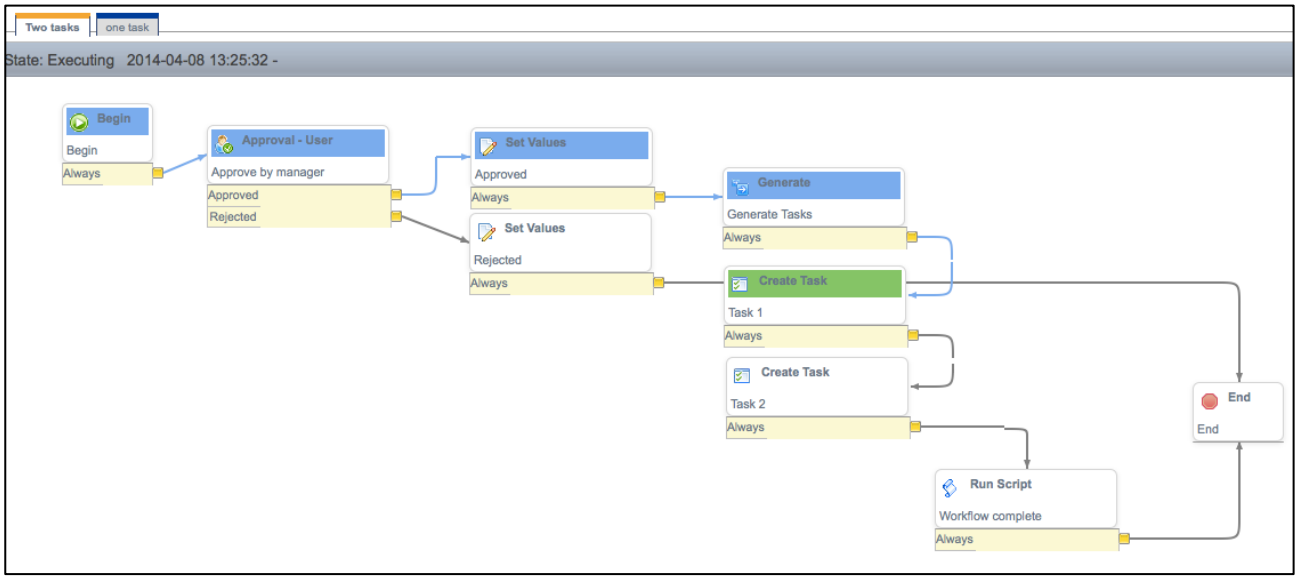
1. Your screen should look like below:



2. Create a new Change Request, and populate the Change Model field with **CM: Two tasks**. Click **Request Approval**.

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3. Click **Show workflow**. You should see that two workflows are running: **Workflow starter** and **CM: Two tasks**.



4. Create a new Change Request, and **do not** populate the Change Model field.

5. Click Show workflow. You should see that the **Comprehensive** workflow is running.

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Lab Goal

Let's expand our data driven system! We want a very quick way to create some standard changes, and place them on the Service Catalog. To do this, we'll use templates, which allow us to very quickly and easily enter data into ServiceNow. We'll even use the workflows we developed earlier!

Lab 2
Creating standard changes

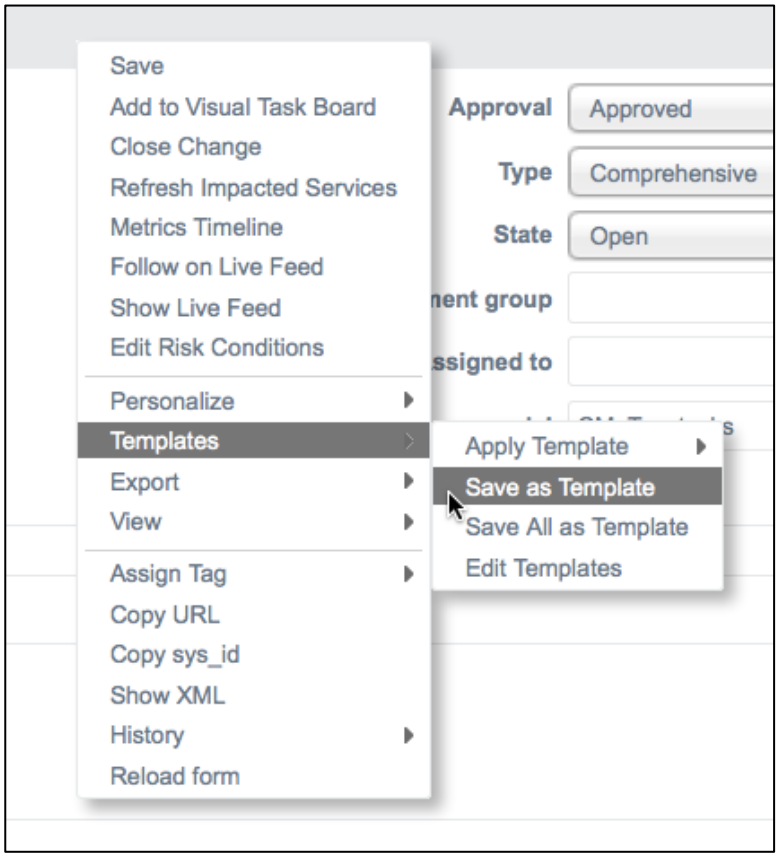
Lab 2.1 - Create a Change Template

1. Navigate to **Change > Create New**. Fill in the following information, then click the menu icon and choose **Save**.

   Short description: **Rebuild SAP form**
   Configuration item: **SAP Payroll**
   Change model: **CM: Two tasks**
   Priority: **3 – Moderate**
   Change plan: **Click lots of buttons**
   Backout plan: **Throw it in the bin**
   Test plan: **Cross fingers**

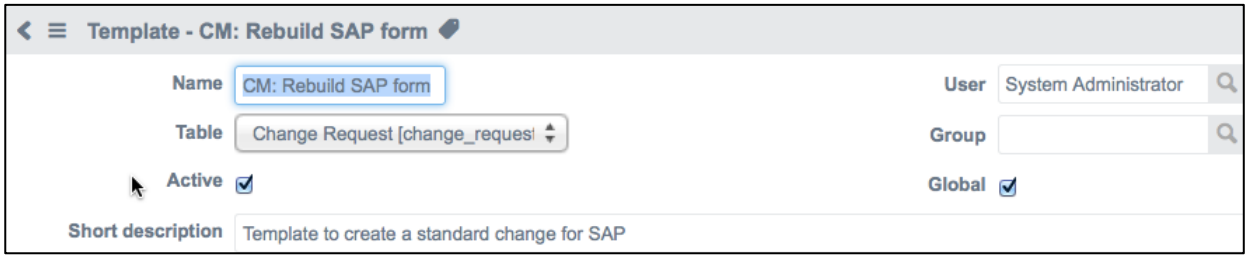
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2. Click the menu icon and choose **Templates > Save as template**.



3. Change the following fields and click **Update**:

   Name: **CM: Rebuild SAP form**
   Short description: **Template to create a standard change for SAP**
   Global: **<checked>**



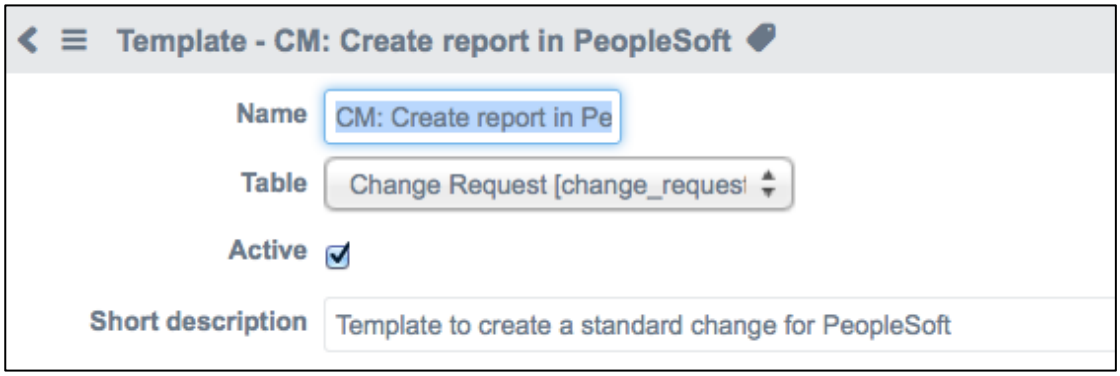
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4. Navigate to **Change > Create New**. Fill in the following information, then click the menu icon and choose **Save**.

   Short description: **Create report in PeopleSoft**
   Change model: **CM: One task**
   Priority: **2 – High**
   Change plan: **Move the mouse a lot**
   Backout plan: **Reinstall. Again**
   Test plan: **Ask Joe if he likes the report**

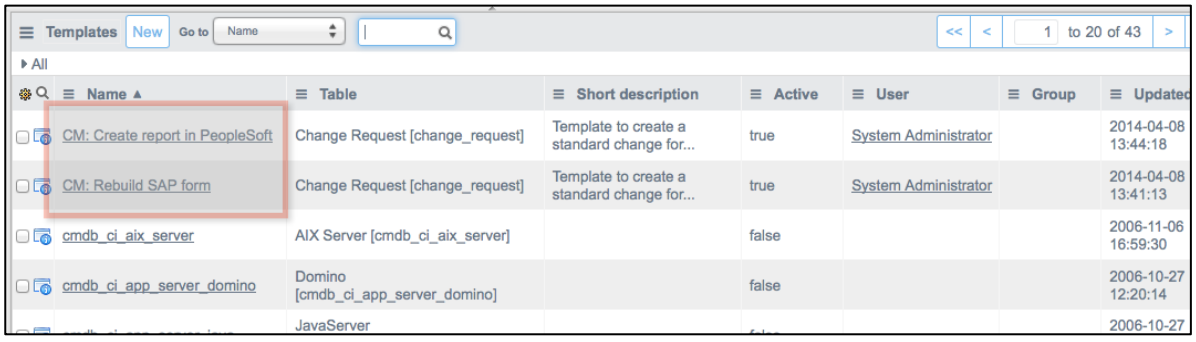
5. Click the menu icon and choose **Templates > Save as template**. Change the following fields and click **Update**:

   Name: **CM: Create report in PeopleSoft**
   Short description: **Template to create a standard change for PeopleSoft**
   Global: **<checked>**



Lab Success Verification

1. Navigate to **System Definition > Templates**. You should see the entries for your two new templates



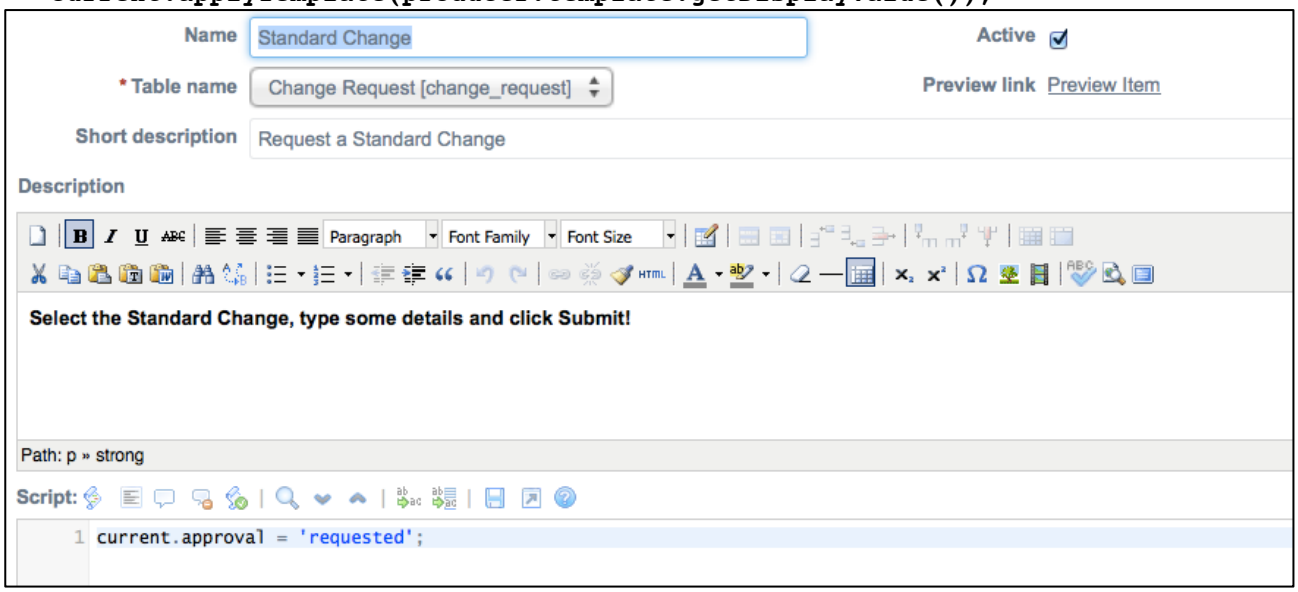
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Lab 2.2 - Create a Standard Change Record Producer

1. Navigate to **Service Catalog > Record Producer**. Click **New**. Fill in the following information, then click the menu icon and choose **Save**.

   Name: **Standard Change**
   Table name: **Change Request**
   Catalogs: **Service Catalog**
   Category: **Can We Help You?**
   Short description: **Request a Standard Change**
   Description: **Select the Standard Change, type some details and click Submit!**
   Script:

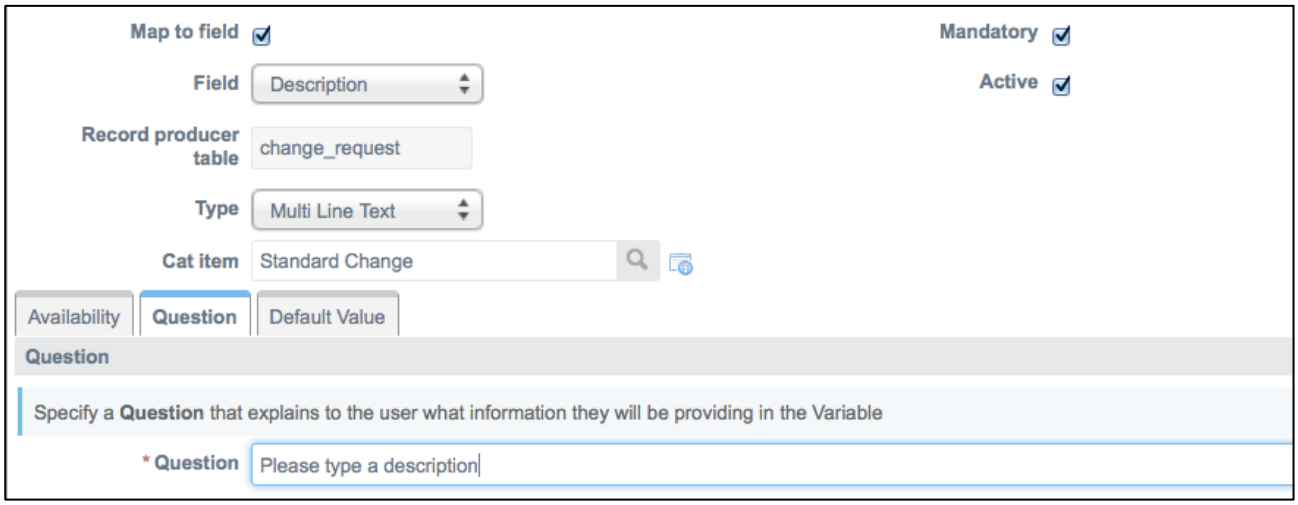
```
current.approval = 'requested';
current.applyTemplate(producer.template.getDisplayValue());
```



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2. Under Variables, click **New**, and fill in the **following** information, and click **Submit**.

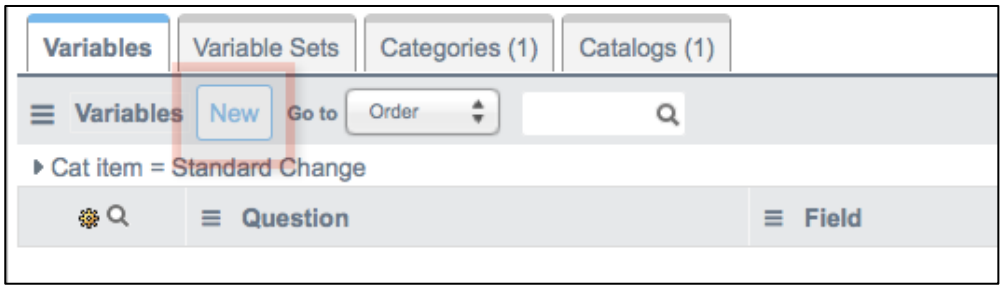
   Map to field: **<checked>**
   Field: **Description**
   Type: **Multi Line Text**
   Question: **Please type a description**

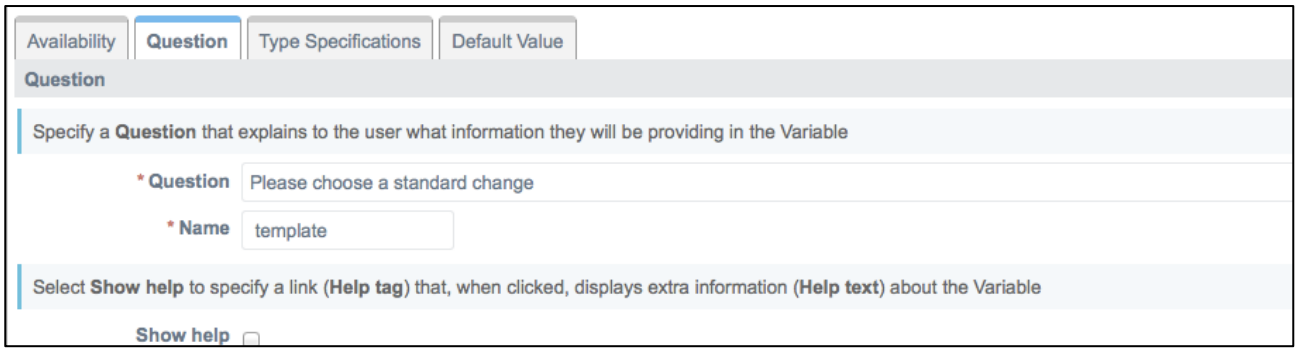


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3. Under Variables, click **New**, and fill in **the** following information, and click **Submit**.

   Type: **Reference**
   Question: **Please choose a standard change**
   Name: **template**
   Mandatory: **<checked>**
   Reference: **Template [sys_template]**
   Reference qual condition: **Name - starts with – CM**





Lab Success Verification

1. Click **Try It** or **navigate** to **Self-Service > Service Catalog > Can We Help You? > Standard Change**.

2. Fill out your form, and click **Submit**. Note that a new Change Request will have been submitted, using your template.

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Lab Goal

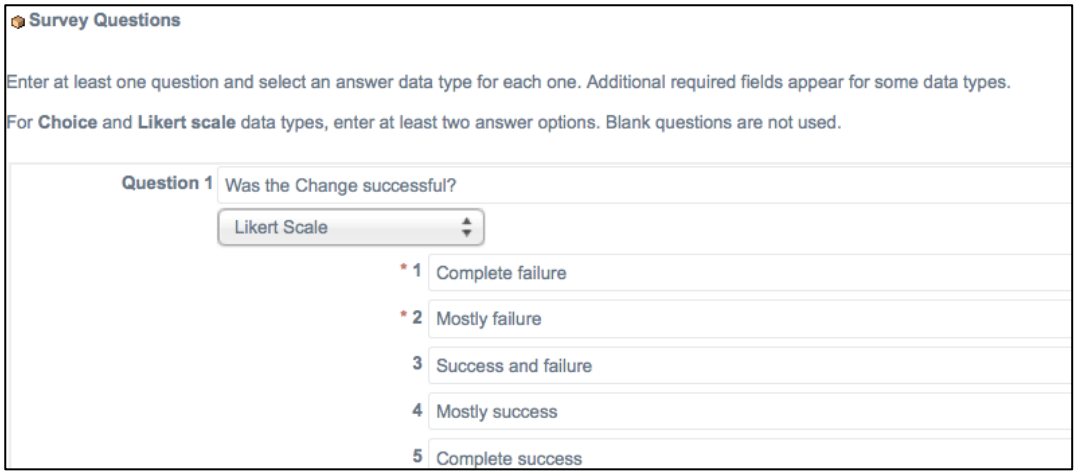
Once our changes are completed, we need to review how we've done. Sending out a survey is a great way to accomplish this. The platform will ensure it get sent at the end of a Change Request.

Lab 3
Creating Standard Changes

Lab 3.1 - Create a Survey

1. Go to **Survey Management > Create Survey**. Enter the following and click **Publish**.

   Name: **Post Implementation Review**
   Question 1: **Was the Change successful?**
   Likert scale
   1: Complete failure
   2: Mostly failure
   3: Success and failure
   4: Mostly success
   5: Complete success

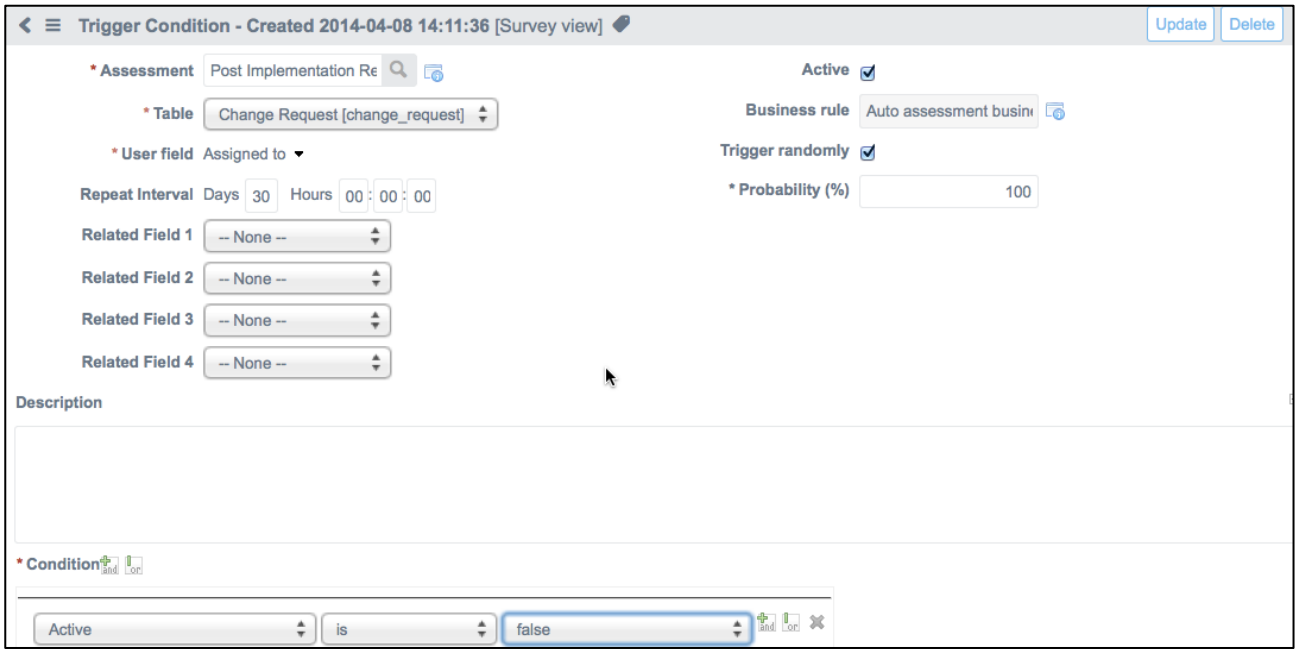


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Question 2: **Was the backout plan used?**
Yes/No
Question 3: **Please document any unexpected results**
String
String option: Multiline
Question 4: **Was the Service Level impacted?**
Yes/No
Question 5: **How satisfied are the users, stakeholders and customers with the Change?**
Likert scale:
1: Very unsatisfied
2: Unsatisfied
3: Neutral
4: Satisfied
5: Very satisfied
Survey user access: **Certain users can take this survey, based on conditions**

2. Fill in the following information, and click **Update**.

Table: **Change Request**
User field: **Assigned to**
Condition: **Active - is – false**



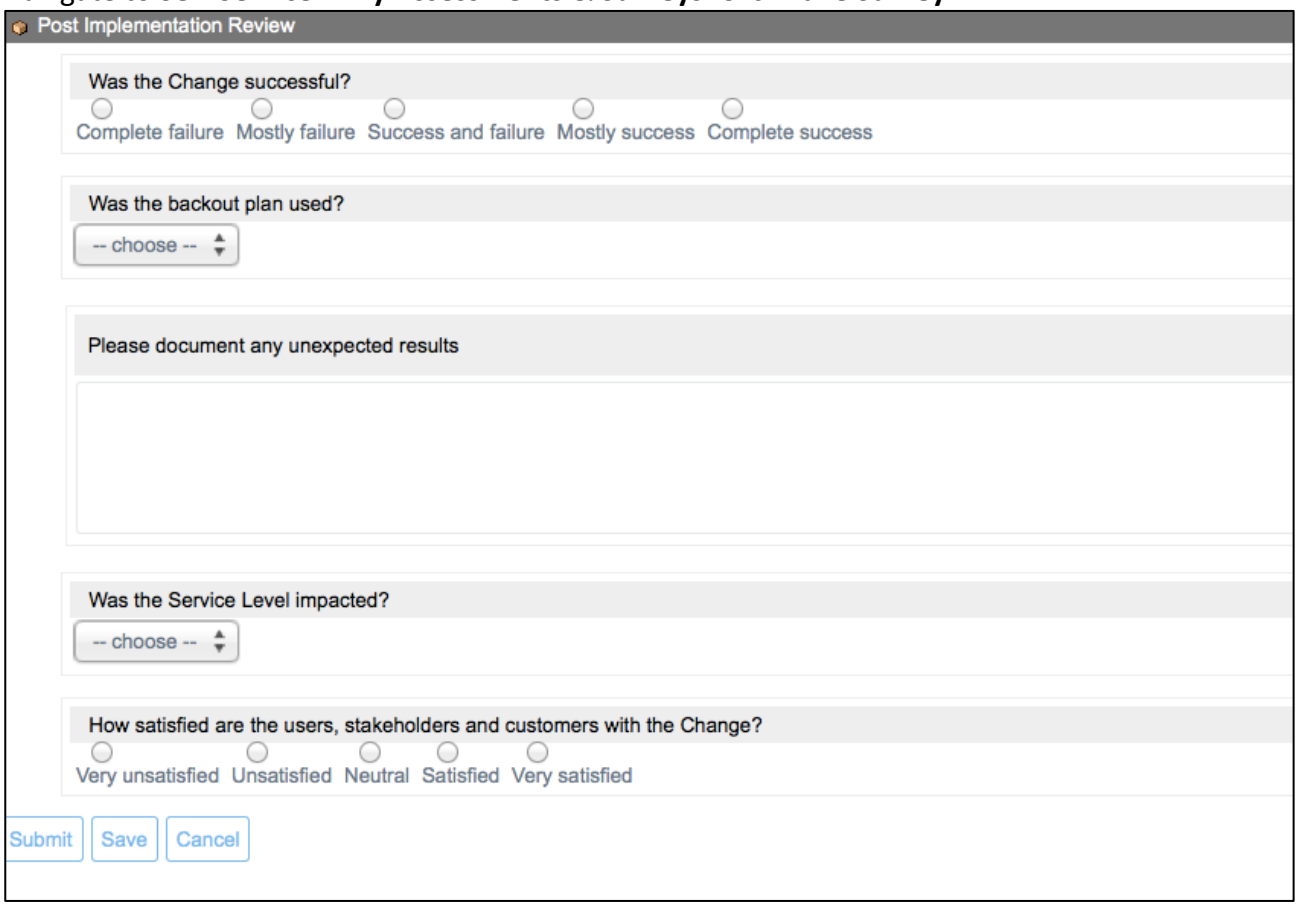
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Lab Success Verification

1. Navigate to **Change > Create New**. Fill in the following information, and click **Submit**.

   Assigned to: **System Administrator**
   Short description: **Test PIR**
   State: **Closed Complete**

2. Navigate to **Self-Service > My Assessments & Surveys**. Click **Take Survey**.



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