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April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Change 201:

Deliver Effective Change

Martin Wood & Tim Norman

Default Login / Password:

admin / Knowledge15

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Lab Goal

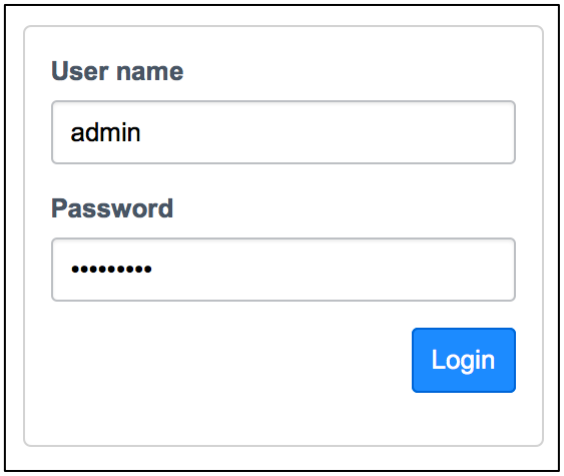
A Change Model is a series of predefined steps that the Change Request will take. This helps automate the change deployment, by generating the right number of change tasks.

These are represented as workflow in ServiceNow. This lab explains how to empower a team to pick their own workflow.

Lab 1.1
Change Models

Log on to Your Instance

1. Navigate to the unique instance URL provided to you.
2. Log in using the **admin** credentials provided.

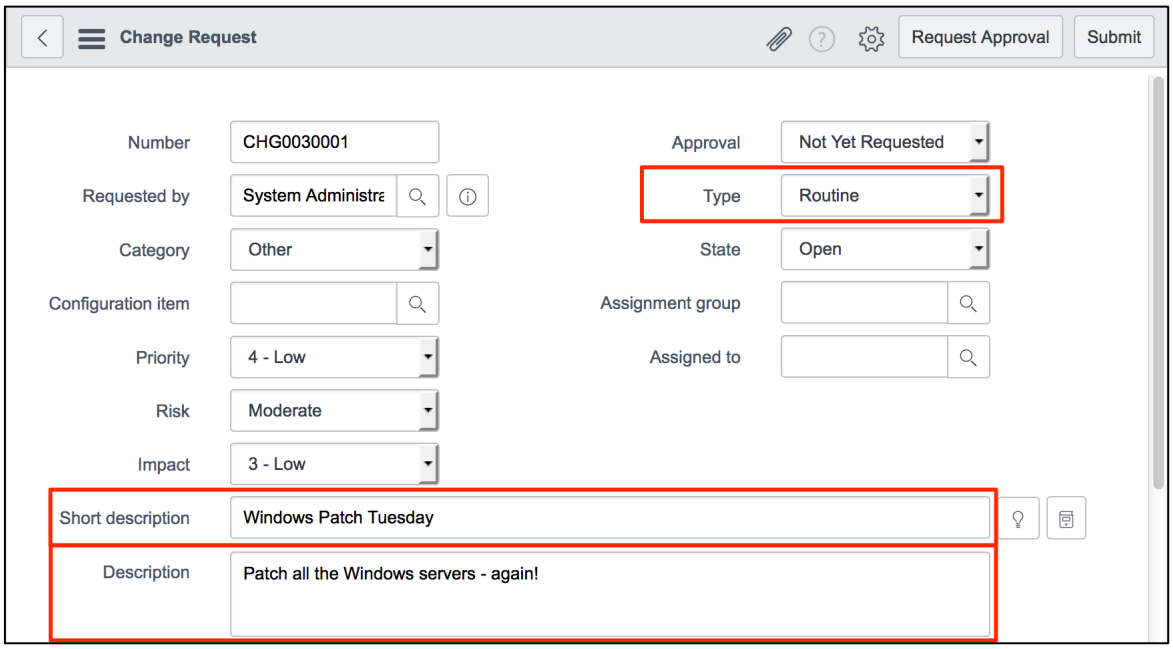


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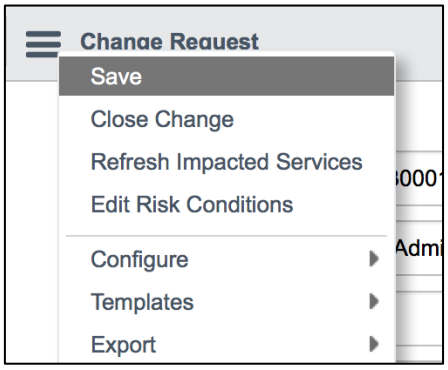
Lab 1.1 – Review Default Change Models

1. Navigate to **Change > Create New**. Fill out the following information.

   Type: **Routine**
   Short Description: **Windows Patch Tuesday**
   Description: **Patch all the Windows servers - again!**
   Planned start date: **2015-05-12 10:00:00**
   Planned end date: **2015-05-12 12:00:00**



2. Click the menu button, then **Save**.

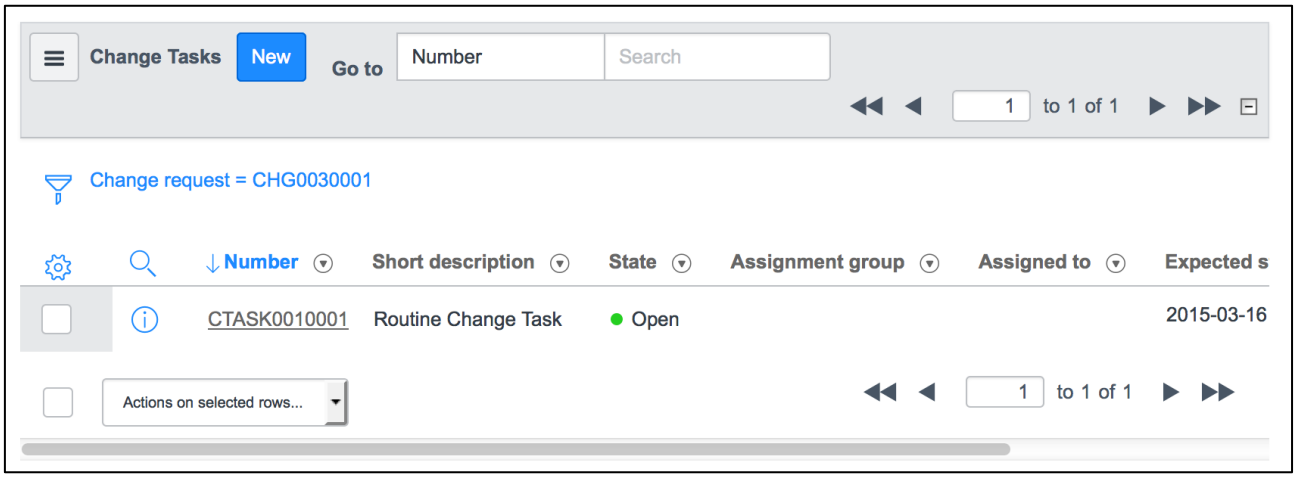


3. Click **Request Approval**.

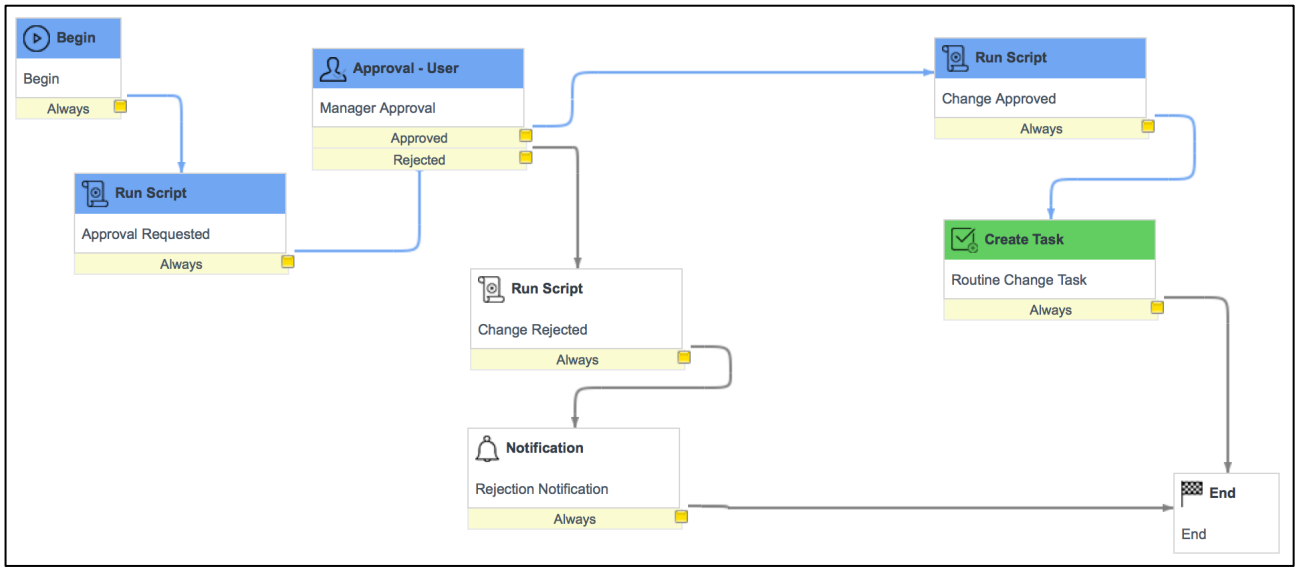
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Lab Success Verification

1. Confirm that a single task is created.



2. Click **Show Workflow** to view the work done by the instance.



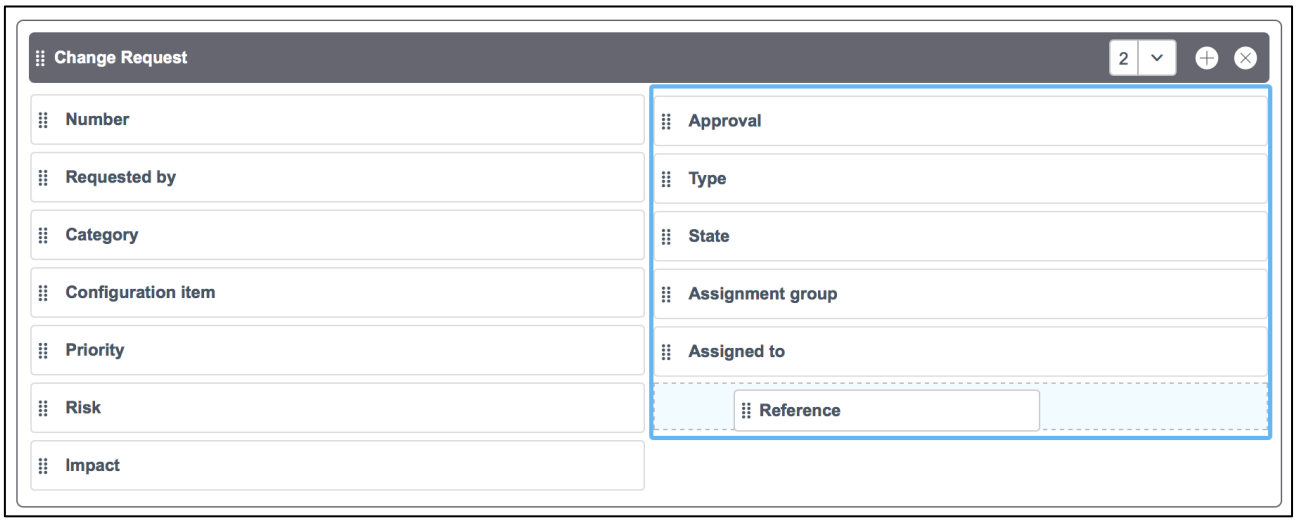
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Lab 1.2 - Create a Change Model field

1. Navigate to **Change > Create New**.
2. Click the **menu** icon, and choose **Configure > Form Design**.
3. Click the **Field Types** tab.



4. Drag a reference field underneath **Assigned to**.



5. Click the **cog** icon next to the new reference field.

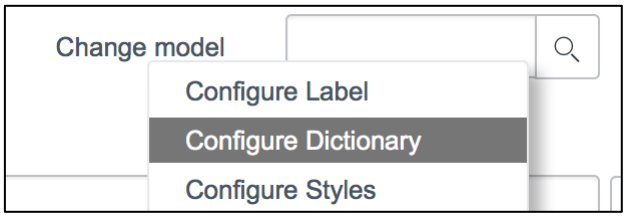


6. Change the following items:

   Label: **Change model**
   Name: **u_change_model**
   Reference: **Workflow**

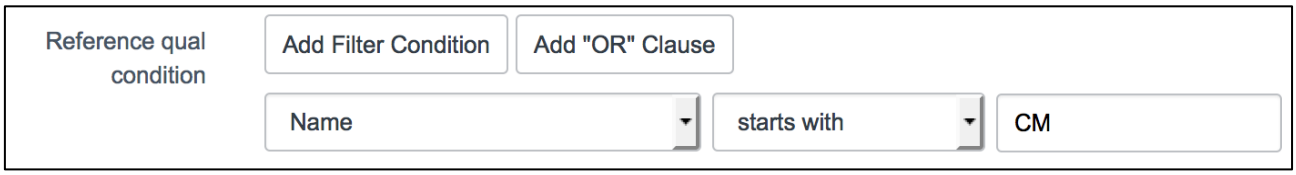
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7. Close the popup, and **Save**. Close the tab/window.
8. Navigate to **Change > Create New**.
9. Right click the **Change** model label, and choose **Configure Dictionary**.



10. Set the following fields:

    Reference qual condition: **Name – starts with – CM**



11. Click **Update**.

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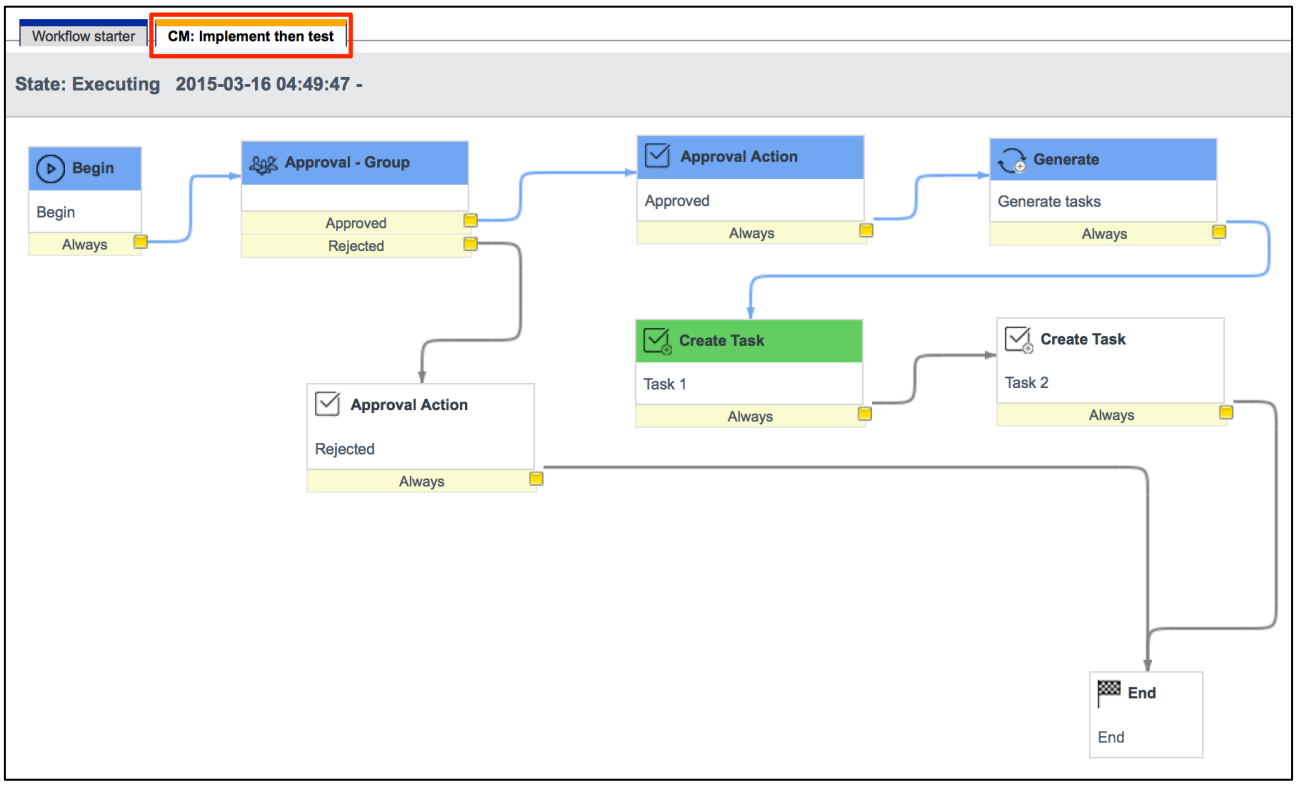
Lab Success Verification

1. Navigate to **Change > Create New**. Fill out the following information:

   Type: **Routine**
   Short Description: **Windows Complex Patching**
   Description: **Patch all the Windows servers - again!**
   Change model: CM: **Implement then test**

2. Click **Request Approval**.

3. Click **Show Workflow**, then **CM: Implement then test**. Verify the workflow.



4. Close the tab.

5. Click the **menu** icon, then **Reload Form**.

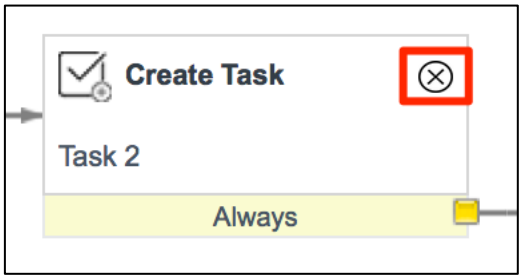
6. Validate that two tasks are created.

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Lab 1.2 - Create Another Change Model

1. Navigate to **Workflow > Workflow Editor**.
2. Find **CM: Implement then test** in the Workflows tab on the right. Click it.
3. Click the **menu** icon, and choose **Copy**.

   Workflow Name: **CM: Implement**
4. Remove **Task 2** by clicking the **X** icon.



5. Click the **menu** icon, and choose **Publish**.

Lab Success Verification

1. Navigate to **Change > Create New**.
2. Create another change record. Specify the **CM: Implement** Change Model, and confirm that it works.

Bonus!

1. Try creating a Change Request for a specific CI (like PeopleSoft CRM, or Bond Trading). Specify a Change Model. They will require approval from the support group.
2. When approved, the tasks will be created and assigned to the support group.
3. Validate the Support Groups through **Configuration > Business Services**.

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Lab Goal

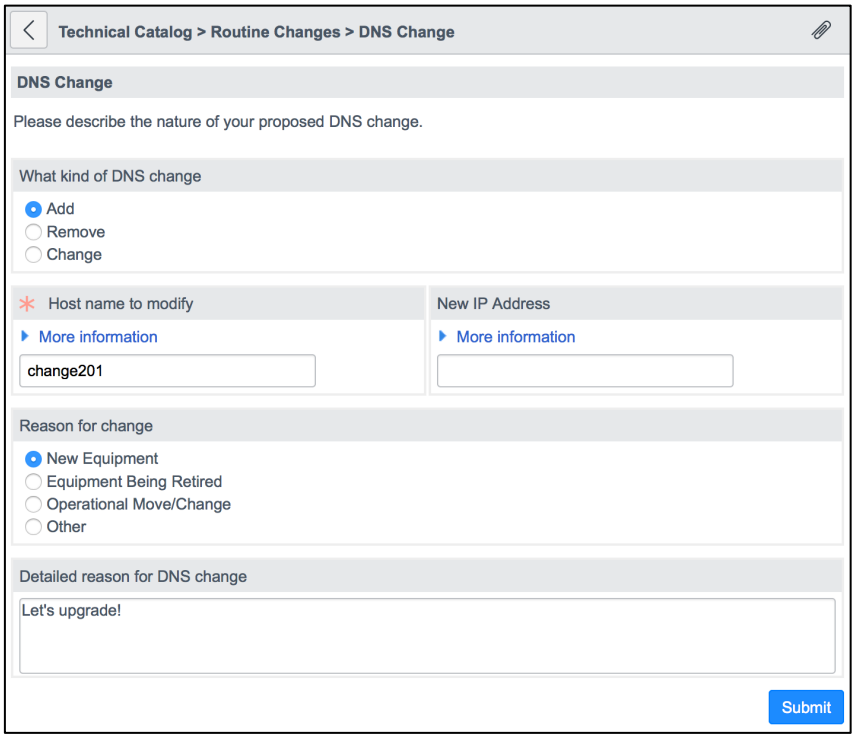
Expand the data driven system! You want a quick way to create some standard changes, and place them on the Service Catalog. To do this, use templates, which allow quick and easy data entry into ServiceNow. Use the workflows developed earlier!

Lab 2
Create
Standard
Changes

Lab 2.1 - Review standard changes

1. Navigate to **Service Catalog > Catalogs > Technical Catalog > Routine Changes > DNS Change.** Fill in the following information:

   What kind of DNS change: **Add**
   Hostname to modify: **change201**
   Detailed reason for DNS change: **Let's upgrade!**



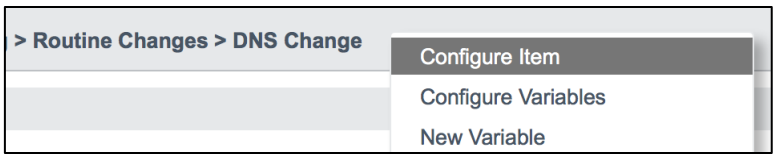
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2. Click **Submit**.

3. Review the Change that was created. Note the Assignment and Short description were automatically populated.

4. Click back in your browser, or navigate to **Service Catalog > Catalogs > Technical Catalog > Routine Changes > DNS Change.**

5. Right click the header bar and choose **Configure Item**.



6. Review how the DNS Change Record Producer is constructed.

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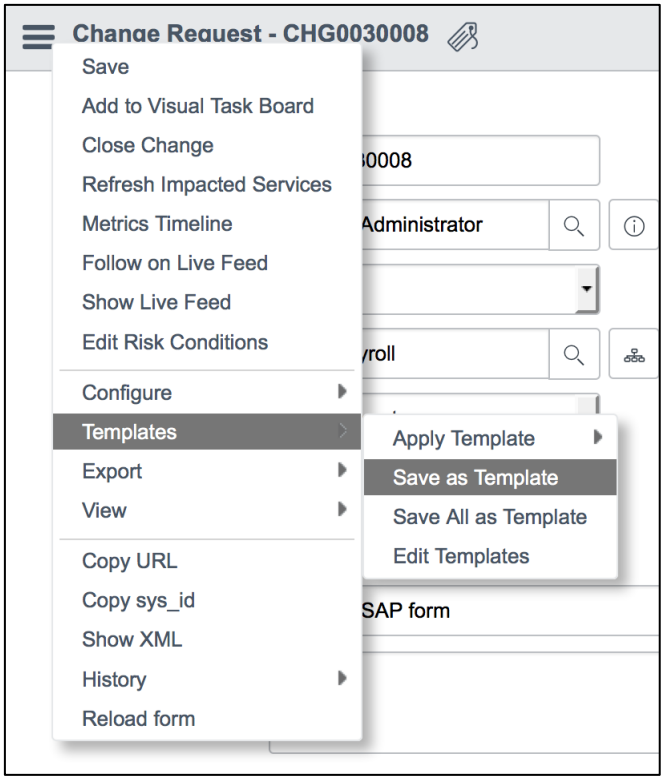
Lab 2.2 - Create a Change Template

1. Navigate to **Change > Create New**. Fill in the following information:

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

2. Click the **menu** icon and choose **Save**.

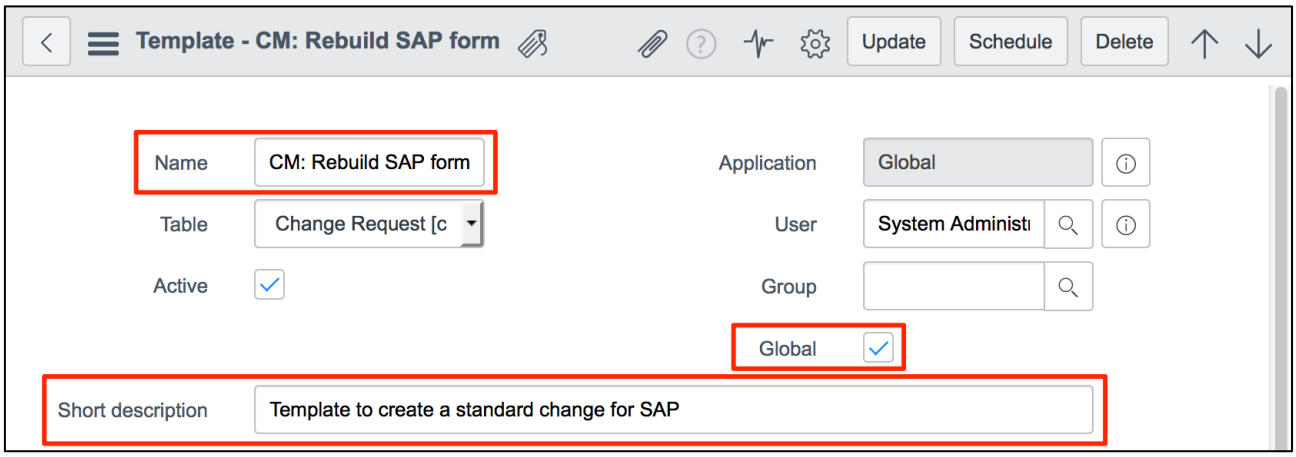
3. Click the **menu** icon and choose **Templates > Save as template**.



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4. Change the following fields:

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



5. Click **Update**.

6. Navigate to **Change > Create New**. Fill in the following information:

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

7. Click the **menu** icon and choose **Save**.

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

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

9. Click **Update**.

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Lab Success Verification

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

		Name	Table	Short description	Active
☐	ⓘ	CM: Create report in PeopleSoft	Change Request [change_request]	Template to create a standard change for...	true
☐	ⓘ	CM: Rebuild SAP form	Change Request [change_request]	Template to create a standard change for...	true

2. Navigate to **Change > Create New**.
3. Click the **menu** icon and choose **Templates > Apply Template > CM: Rebuild SAP form**.
4. Confirm that the fields are automatically populated.

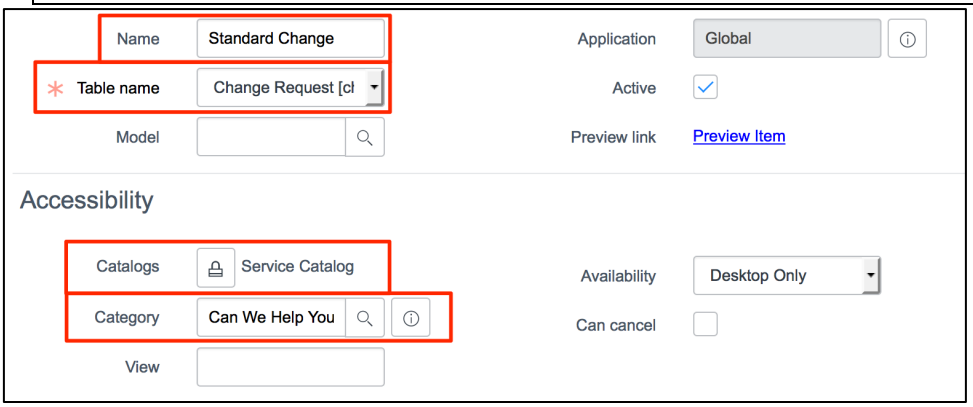
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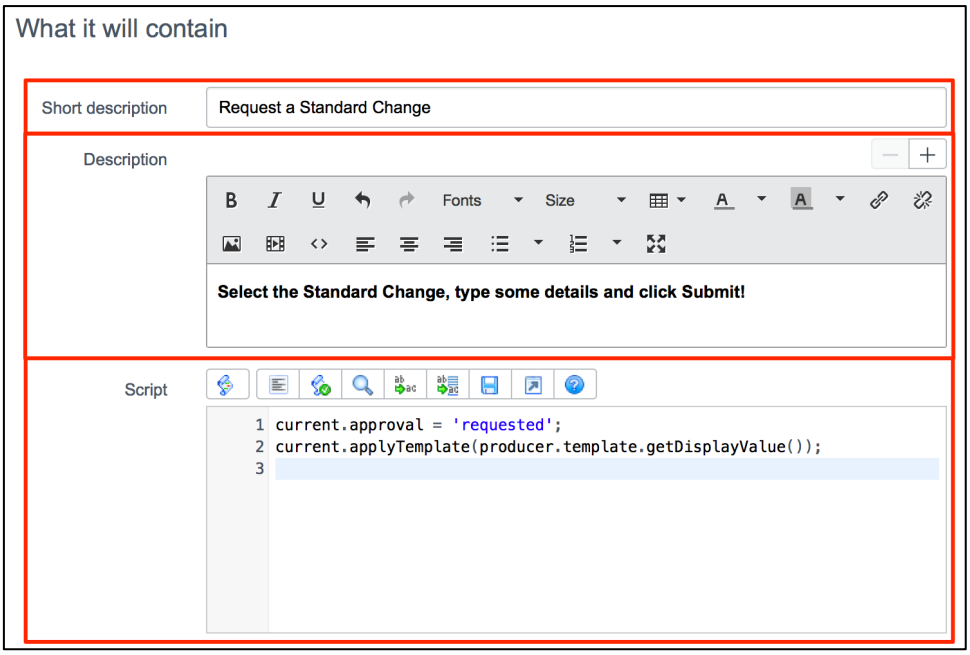
Lab 2.3 - Create a Standard Change Record Producer

1. Navigate to **Service Catalog > Record Producer**. Click **New**. Fill in the following information:

   Name: **Standard Change**
   Table name: **Change Request [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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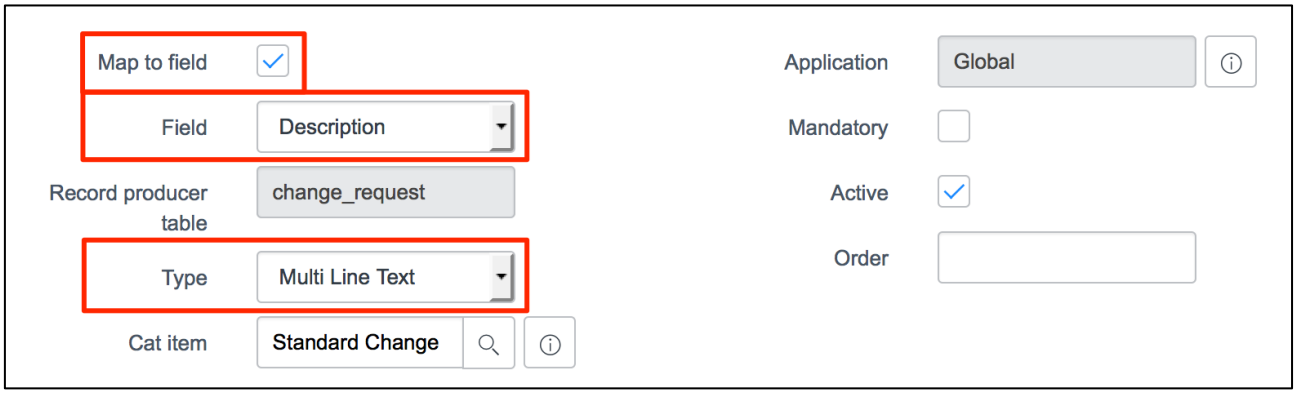
2. Click the **menu** icon and choose **Save**.

3. Under **Variables**, click **New**.



4. Fill in the following information.

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



5. Click **Submit**.

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

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

7. Click **Submit**.

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Lab Success Verification

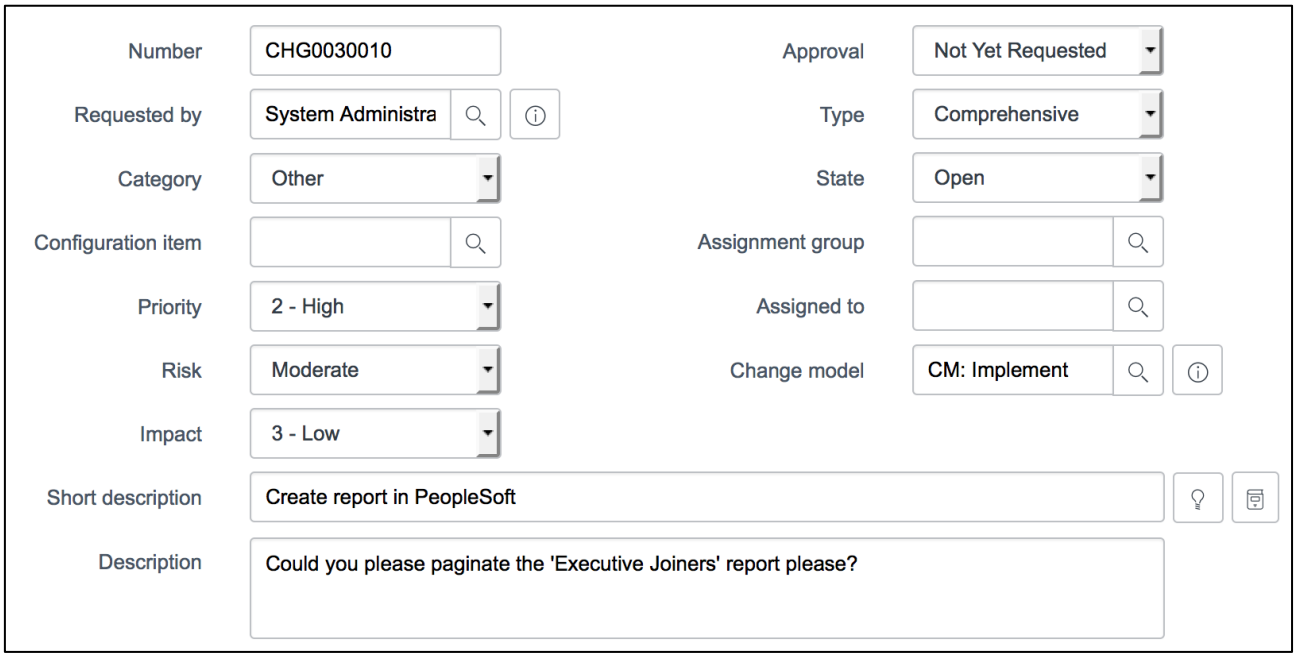
1. Click **Try It** or navigate to **Self-Service > Service Catalog > Can We Help You? > Standard Change**.

2. Fill out the form:

   Please choose a standard change: **CM: Create report in PeopleSoft**
   Please type a description: **Could you please paginate the 'Executive Joiners' report please?**

3. Click **Submit**.

4. Confirm that a new **Change Request** has been created, filling out the fields with the chosen template.



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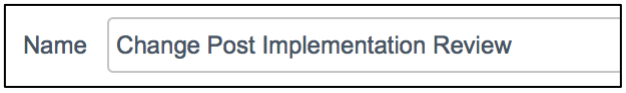
Lab Goal

After the changes are completed, review the level of success. Sending out a survey is a great way to accomplish this. The platform ensures that it get sent at the end of a Change Request.

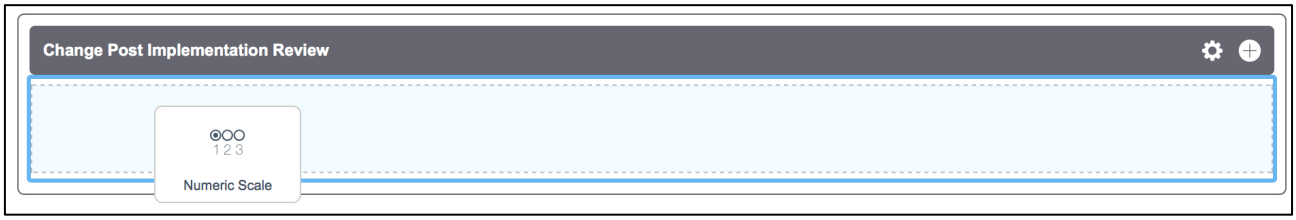
Lab 3
Run Post Implementation Reviews

Lab 3.1 - Create a Survey

1. Go to **Survey > Survey Designer**.
2. Change New Survey to Change Post Implementation Review.



3. Drag Numeric Scale onto the content dropzone.



4. Hover over the question, then click the **gear** icon to edit the question.



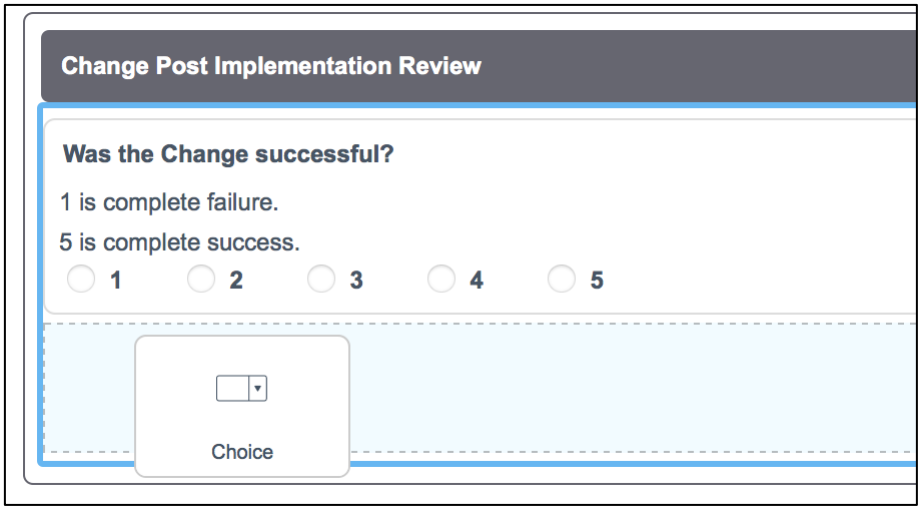
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5. Set the following information:

   Name: **Successful**
   Question: **Was the Change successful?**
   Min: **1**
   Positive indicator: **High value**
   Details:
   1 is complete failure.
   5 is complete success.



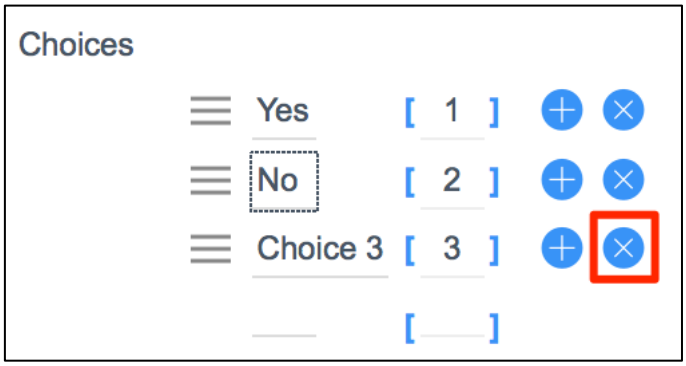
6. Drag **Choice** onto the content dropzone.



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7. Hover over the question, then click the **gear** icon to edit the question. Set:

   Name: **Backout plan used**
   Question: **Was the backout plan used?**
   Rename Choice 1 to **Yes**
   Rename Choice 2 to **No**
   Remove Choice 3
   Positive indicator: **High values**



8. Drag String onto the content dropzone. Hover over the question, then click the **gear** icon to edit the question. Set:

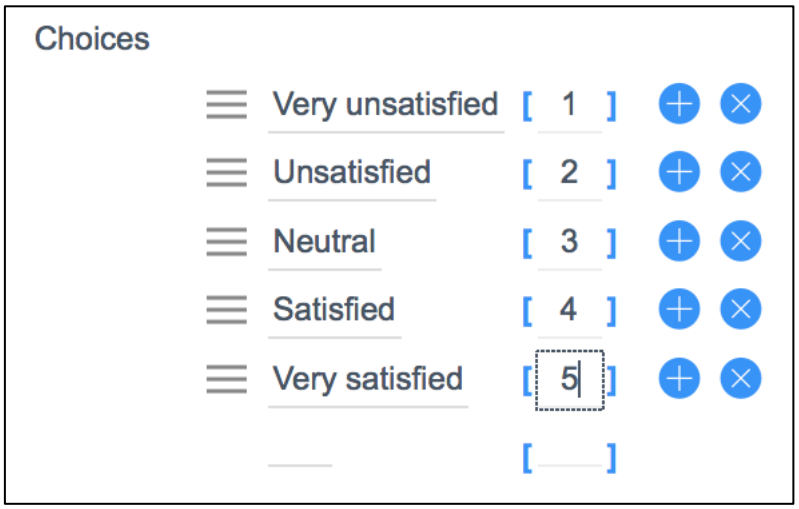
   Name: **Unexpected results**
   Question: **Please document any unexpected results**
   String option: **Multiline**

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9. Drag Scale onto the content dropzone. Hover over the question, then click the **gear** icon to edit the question. Set:

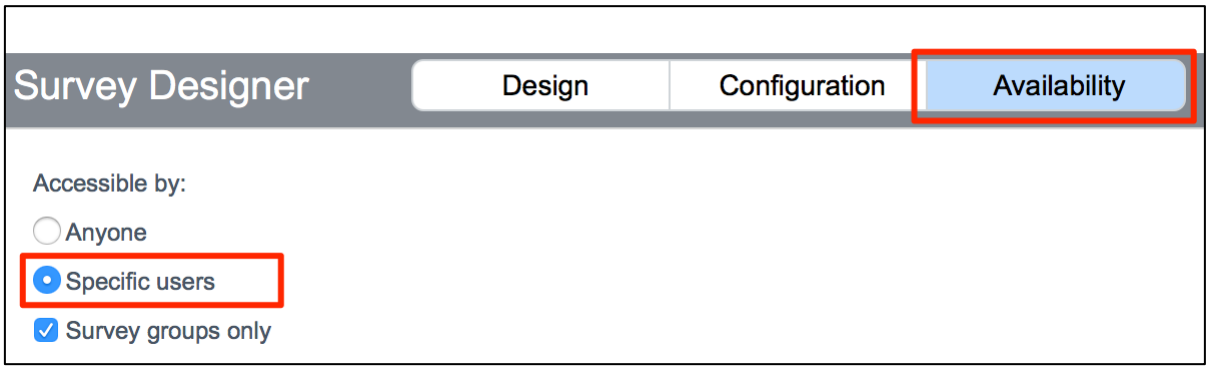
   Name: **Satisfaction**
   Question: **How satisfied are the users, stakeholders and customers with the Change?**
   Positive indicator: **High values**

   Rename choice A to: **Very unsatisfied**
   Rename choice D to: **Unsatisfied**
   Rename choice C to: **Neutral**
   Click the plus to add: **Satisfied**. Add a value of 4.
   Click the plus to add: **Very satisfied**. Add a value of 5.



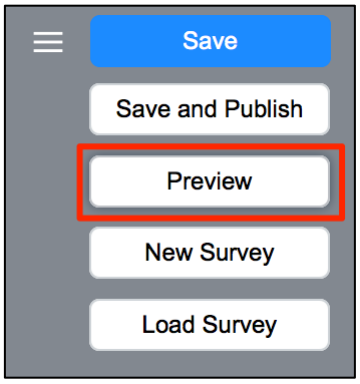
10. Click the **Availability** tab. Set the following information:

    Survey user access: **Specific Users**



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11. Hover over **Save** and then click **Preview**.



12. Once satisfied, close, hover over **Save**, and choose **Save and Publish**. Close the window/tab.

13. Navigate to **Survey > Administration > Trigger conditions**.

14. Click **New**, and fill out the following information:

    Assessment: **Change Post Implementation Review**
    Table: **Change Request [change_request]**
    User field**: Requested by**
    Repeat Internal: **Days 0 Hours 00:00:00**
    Condition: **Active - is - false**

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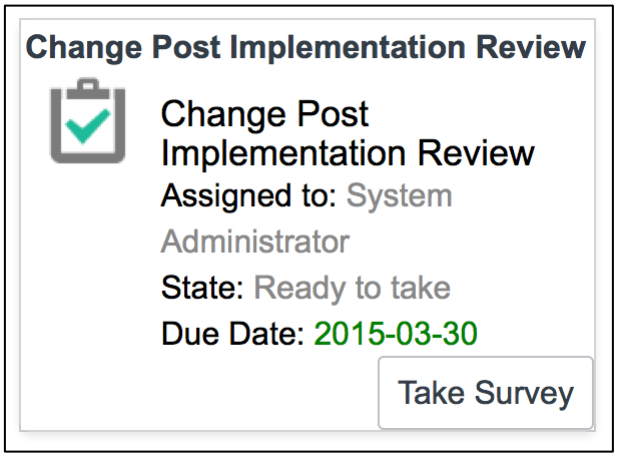
Lab Success Verification

1. Navigate to **Change > Create New**. Fill in the following information:

   Short description: **Roll out ServiceNow company wide**
   Change mode: **CM: Implement**
   State: **Closed Complete**

2. Click the **menu** icon and choose **Save**.

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

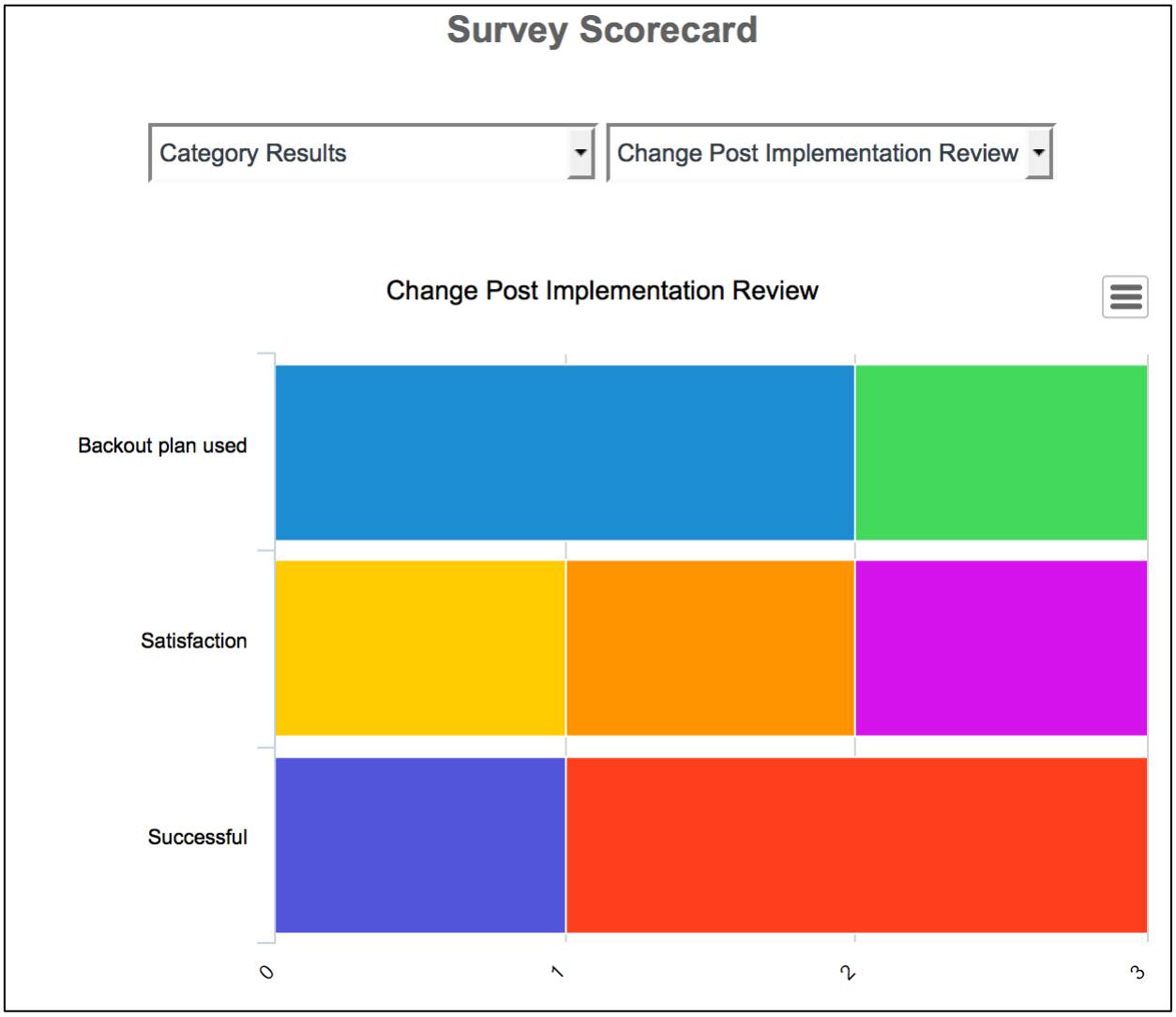


4. Fill out the survey as desired. Click **Submit** at the end.

5. Navigate to **Survey > View Surveys**. Click **Change Post Implementation Review**.

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6. Click **View Scorecard**. You may want to run the verification steps several times to build up more data for the scorecard.



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