ServiceNow Training

Phase 1: August Release

August 2016
Introductions

• Rachel Manongdo, Communications Specialist, UIT

• Vesna Siracevska, Business Analyst, UIT

• Kiran Joshi, AS Tools Manager, UIT
Key Dates and Context

- **February 2016**: Incident and request (lite) management for UIT services provided to the hospital
- **July 18 – Aug. 4**: UAT (user acceptance testing) for problem, change and knowledge management
- **July 27 – July 28**: User training on knowledge management
- **Aug. 1 – Aug. 25**: User training on problem, change, JIRA
- **Aug. 18-22**: Go-live
- **December 2016**: Client portal, mobile application, incident, non-billable requests, client-facing and internal knowledge articles
Agenda

Part 1 – Introduction to ServiceNow – Rachel

Part 2 – Problem Management
  • Problem Management process at Stanford – Vesna
  • ServiceNow environment – Rachel
  • Challenge Lab – Students

Part 3 – Change Management
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Part 4 – JIRA – Kiran
  • Overview of workflow integration change
  • ServiceNow integration demo
ServiceNow User Interface

BASIC SYSTEM NAVIGATION AND PERSONALIZATION
Background

• ServiceNow manages the workflow for requests for service

• Key roles:
  ▪ **End-User:** Someone who uses the system for Self-Service. They are not a licensed user and have limited access to the system.
  ▪ **Fulfiller:** Someone who uses the system to fulfill requests/needs. They are a licensed user and have access to their fulfillment areas.
  ▪ **Approver:** Someone who approves requests sent to them
  ▪ **Administrator:** Configures and manages system-wide settings

• Your role in the system will dictate what you are able to see when you login to ServiceNow
ServiceNow UI Demo Topics

• Screen elements:
  ▪ Banner frame
  ▪ Application Navigator
  ▪ Content Frame
• User Settings
• Applications and Modules
• Application Navigator Filter
• Favorites
• Lists and personalization

• Search
• Filters
• Bookmarks
• Breadcrumbs
• Forms
  ▪ Field types
  ▪ Field icons
  ▪ Form sections
  ▪ Related lists and links
• Right-click functions
Breadcrumbs

Click a breadcrumb to remove all conditions after it from your filter

Click on the “>” sign to remove just the condition “Category = Software”
### Reference fields

- **PRB00000004**: Boot with shift key held down
- **PRB00000010**: Oracle Down

**Assigned to**:
- ITIL User
- ACD Services - IT
- Cellular Phone Services

**State**:
- Closed - Fixed

**Updated**:
- 2016-04-22 12:45:30
- 2016-04-22 12:45:40
Forms

"Hamburger" or “Trigram” icon displays context menu

Additional buttons and attachments icon

Mandatory reference field

"Affected" field

Hover icon

Tabbed sections of the form

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Navigation Challenge Lab

1. Create a filter for all **Open – P1** problems that have no **Assigned to** filled in. Save it with a name of **Unassigned P1 Problems**.

2. Create a **new favorite** to show all active Problems opened in the last week and assigned to one of your groups. After you create the favorite, **rename** it “New Problems – My Group”.

3. Personalize the Problem list to add **Updated** field in between **State** and **Assignment group** fields.
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Problem Management
CREATE AND DOCUMENT A PROBLEM
ServiceNow Problem Topics

• Key roles
• Problem application & modules
• Creating new problem records
• Problem fields
• Problem States
• Assignment

• Process Flow
• Known Errors
• Root Cause Analysis
• Notifications
When/How to Create a Problem

• **When:**
  - Incident Support has identified a trend in incidents
  - Incident Support has identified a Priority 1 incident
  - Problem monitoring has identified potential problem

• **How:**
  - **(A)** Create a problem directly from module
  - **(B)** Create a problem from an incident**
    
    *(available with *December 2016 release*)
Other Problem Modules

- Use modules to see Problems and Problem Tasks assigned to you and your Groups
- See all Open and Open – Unassigned Problems
- Known Errors (problems with known root cause)
- Overview page for Problem reports
Documenting a Problem
Problem States

- Open
- Do Not Pursue
- Under Investigation
- Pending Change
- Resolved
- Closed – Fixed* (Only Problem Management group members may set Problem record to a “Closed” state.
- Closed – Cancelled*
- Closed – Duplicate*
Root Cause Analysis**

- Prevent a problem from recurring by identifying the “root cause”
- One corrective action may not always be sufficient
- **Problem records should be updated by the Assigned To prior to review meetings**
Creating Problem Tasks

Number: PTASK00010350
* Type: None
* Affected CI: ACO Services - IT
Priority: None
Due date: 
Problem: PR000041037

State: Open
Assignment group:
Assigned to:
Work notes list:

Short description:
Description:

Characters left: 4000

Work notes:

Characters left: 4000

Save  Save and Exit
Related Links

**“Communicate Workaround” link not to be used until December release**
Creating a Knowledge Article from a Problem

**“Communicate Workaround” link not to be used until December release**
Creating a Normal Change from a Problem

Inherited by Change:
• Short description
• Affected CI
• Assignment group
• Assigned To
• Link to Problem record
# Email Notifications

<table>
<thead>
<tr>
<th>Notification Trigger</th>
<th>Sent To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem created against CI you own</td>
<td>Service Owner (Owned By) of Affected CI</td>
</tr>
<tr>
<td>Problem created or Problem has been assigned to an Assignment Group</td>
<td>Problem Manager Group or Assignment Group</td>
</tr>
<tr>
<td>Problem has been assigned to you</td>
<td>Assignee</td>
</tr>
<tr>
<td>Work note added to a problem</td>
<td>Assignee (if he/she didn't add note); Assignment Group, Work Notes List</td>
</tr>
<tr>
<td>Problem Task assigned to a particular group</td>
<td>Assignment Group</td>
</tr>
<tr>
<td>Problem task has been assigned to you</td>
<td>Assignee</td>
</tr>
<tr>
<td>Problem Task work noted</td>
<td>Assignee</td>
</tr>
<tr>
<td>Work note added to a problem task without an Assigned To.</td>
<td>Assignment Group</td>
</tr>
<tr>
<td>Problem State changes to Resolved</td>
<td>UIT Problem Management group</td>
</tr>
<tr>
<td>Problem state is to “Do Not Pursue” and is newly associated with an Incident</td>
<td>Assigned to or Assignment group (if no assigned to)</td>
</tr>
<tr>
<td>When Critical Incidents, Problems and/or Emergency Changes are logged against a CI</td>
<td>CI Subscriber</td>
</tr>
</tbody>
</table>
Problem Challenge Lab

1. Create a new Problem record, fill in the mandatory fields, and save the record.

2. Fill in the **Root Cause Analysis** tab. Document example steps for Corrective Action Summary.

3. For each step in the Corrective Action Summary, open and assign a **Problem Task**.

4. Find all **unassigned** Problems belonging to **your group** and assign a Problem to yourself.
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Change Management
CREATE AND DOCUMENT CHANGE REQUESTS
ServiceNow Change Management Demo Topics

- Roles
- ITIL background
- Types of Changes
- Creating new Changes
- Process overview
- Change modules/applications
- Change form/fields

- Notifications
- Approvals
- Delegation
**When to Create a new Change**

**When:**
- There is an addition, modification or removal of anything that will affect Production environments and/or IT services

**How:**
- Create a Change from a **Problem**
- Create a Change from the **Change application**
- Create an Emergency Change from a Priority 1 incident** (only option for Emergency Changes with December 2016 release)

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**Change Request**

What type of change is required?

- **Normal:** Changes without predefined plans that require approval and CAB authorization.
- **Standard:** Select from available pre-approved change templates. These changes do not require approval.
- **Emergency:** Unplanned changes necessary to restore service. These changes require CAB authorization only.

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Creating a Change, cont.

**With the December 2016 release, the only way to create an Emergency Change will be from a P1 incident**
Normal Change Walk Through
Notes and Planning Tabs

![Image of the Notes and Planning Tabs interface]

This image displays a form with tabs for Notes, Planning, Schedule, Risk Assessment, Conflicts, and Closure Information. Below the tabs is a section for Work notes, followed by another section labeled Risk and impact analysis, Backout plan, and Test plan.
## Schedule and Risk Tabs

### Notes | Planning | Schedule | Risk Assessment | Conflicts | Closure Information
--- | --- | --- | --- | --- | ---
Planned start date | | | | | |
Planned end date | | | | | |
Actual start | | | | | |
Actual end | | | | | |

Create a new line for each time there will be an outage impact during planned start and end times.

### Risk Assessment

<table>
<thead>
<tr>
<th>Questions</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outage Scope / Complexity</td>
<td>Partial Service (degradation) and/or moderately Complex. Services down during standard maintenance window.</td>
</tr>
<tr>
<td>Locations or # Users Impacted</td>
<td>Enterprise or &gt;500</td>
</tr>
<tr>
<td>Business Impact of Change</td>
<td>Medium impact business or clients. Moderate visibility or low to moderate business users or services impacted. Minor impact if problems occur</td>
</tr>
<tr>
<td>Backup prior to end of change</td>
<td>Very difficult or not desired to back out change due to dependencies on data and other systems. Likely to require additional downtime within 24 hours</td>
</tr>
<tr>
<td>Experience of Implementing this type of change</td>
<td>No experience with this type of change or unable to fully test the change. The group implementing the change has not performed the change</td>
</tr>
</tbody>
</table>

Save | Save and Exit
Conflicts and Closure Information Tabs

<table>
<thead>
<tr>
<th>Notes</th>
<th>Planning</th>
<th>Schedule</th>
<th>Risk Assessment</th>
<th>Conflicts</th>
<th>Closure Information</th>
</tr>
</thead>
</table>

Conflicts Detected

<table>
<thead>
<tr>
<th>Change</th>
<th>Affected CI</th>
<th>Type</th>
<th>Schedule</th>
<th>Conflicting change</th>
<th>Last checked</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHG00032554</td>
<td>cmdb service for testing</td>
<td>Not In Maintenance Window</td>
<td>Global Infrastructure</td>
<td>2016-06-27 11:57:33</td>
<td></td>
</tr>
<tr>
<td>CHG00032554</td>
<td>cmdb service for testing</td>
<td>Blackout</td>
<td>Blackout Wednesdays (GMT)</td>
<td>2016-06-27 11:57:33</td>
<td></td>
</tr>
</tbody>
</table>

Close code: -- None --

Close notes: 

---
Assessment and Approvals

- **Assessor** (Assignment group manager) authorizes Change request.
- **Approvers** approve and schedule request (CI owner, Change Manager).
- **all conflicts must be resolved prior to approval**
Delegation of Approvals/Assignments

• For times you are away from work, you can set up another user to receive notifications for you, approve requests for you, and handle assignments for you.
Approving Changes

- Can be done by email
- Can be done within ServiceNow (comments will be necessary if rejected)
Change Tasks

The change should be **approved** before work is done on the task.

The **Approval** field indicates the status of the parent change request.
Emergency Change form

**ECAB Reviewer** will be your Director.

These changes are created due to **P1** incidents.

**Approvers:** Assignment Group Manager and ECAB reviewer
Requesting a new Standard Change Template

1. **Change Request**
   - What type of change is required?
     - Normal: Changes without predefined plans that require approval and CAB authorization.
     - Standard: Select from available pre-approved change templates. These changes do not require approval.
     - Informational: Create a change for information purposes only.
     - Emergency: Unplanned changes necessary to restore service. These changes require CAB authorization only.

2. **Template Management**
   - Propose a new Standard Change Template. Modify or Retire an existing Standard Change Template.

   - **Propose a new Standard Change Template**
     - Preview
     - Standard Changes are those with repeatable implementation steps that have a proven history of success and are considered by Change Management to be low risk. Use this request to propose a Standard Change for your Change Management team to confirm.

   - **Modify a Standard Change Template**
     - Preview
     - Request alterations to an existing Standard Change Template. These changes will be confirmed by your Change Management team.

   - **Retire a Standard Change Template**
     - Preview
     - Request an existing Standard Change Template is made unavailable when it is no longer required or no longer acceptable as a Standard Change. This will be confirmed by your Change Management team.
Fill in the details of the new template

Standard Changes are those with repeatable implementation steps that have a proven history of success and are considered by Change Management to be low risk. Use this request to propose a Standard Change for your Change Management team to confirm.

- Short description
  - More Information
- Description
  - More Information
- Business justification
  - More Information
- Category
  - More Information
- Sample Change Requests
  - More Information

More Information
- Short description
  - Include a title for your change no greater than 160 characters
- Description
  - Describe the work which is planned. Include information on what should be included in the Change plan field.
- Backout plan
  - Describe the steps you will take to revert the change to its pre-implementation state. What will you do if the implementation fails?
- Test plan
  - Explain what testing you have done or will do prior to implementation that gives you confidence this change will be successful.
- Assignment group
  - EAD Financial Aid
- Backout prior to end of change
  - Very difficult or not desired to back out change
- Business impact of change
  - High profile changes or highly visible changes
- Experience of implementing this type of change
  - Limited experience in making this type of change
- Outage Scope / Complexity
  - Partial Service (degradation) and/or moderate
- Locations of Users Impacted
  - Region or 1000-2499
- - chosen field -
  - - value -
Save your template and request approval
Requesting a Standard Change

[Image of a screenshot of a Change Request form with details filled in]

- **Number**: CHG00033999
- **Requested by**: Knowledge Manager
- **Affected CI**: [Input field]
- **CAB supported**: [Checkbox]
- **PIB**: None
- **Risk/Impact**: 2 - High
- **Type**: Standard
- **State**: Draft
- **Approval**: Not Yet Requested
- **Conflict status**: Not Run
- **Assignment group**: Knowledge Contributors
- **Assigned to**: Stanford University
- **Impact Orgs**: Stanford University
- **Short description**: Include a title for your change no greater than 160 characters
- **Description**: Describe the work which is planned. Include information on what should be included in the Change plan field.

[Additional fields for planning, schedule, risk assessment, conflicts, and closure information]

[Stanford University IT logo]
# Change Notifications

<table>
<thead>
<tr>
<th>Notification Triggers</th>
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</tr>
</thead>
<tbody>
<tr>
<td>A Change Request of any type requires approval</td>
<td>Change Approver</td>
</tr>
<tr>
<td>A Change Request of any type has been approved</td>
<td>Assigned To, Change Management Group</td>
</tr>
<tr>
<td>A Change Request of any type has been rejected</td>
<td>Assigned To, Change Management Group</td>
</tr>
<tr>
<td>A Change Request affecting a Configuration Item I subscribe to has been approved</td>
<td>CI Subscriber</td>
</tr>
<tr>
<td>When an Emergency Change request moves to Assessment State</td>
<td>Change Management Group &amp; CAB</td>
</tr>
<tr>
<td>When a Change Request of any type has been fully approved</td>
<td>Change Management Group</td>
</tr>
<tr>
<td>A Change Request has been assigned to you</td>
<td>Assigned To</td>
</tr>
<tr>
<td>A Change Request has been assigned to your group</td>
<td>Assignment Group</td>
</tr>
<tr>
<td>A Change Task has been assigned to you</td>
<td>Assigned To</td>
</tr>
<tr>
<td>A Change Task has been assigned to your group</td>
<td>Assignment Group</td>
</tr>
<tr>
<td>A Change Request has been canceled</td>
<td>Assigned To, Change Management Group</td>
</tr>
<tr>
<td>A Change Task has been work noted (but not to Assigned To if Assigned To made the work note update)</td>
<td>Assigned To, Work notes list</td>
</tr>
<tr>
<td>An unassigned Change Task has been work noted</td>
<td>Assignment Group, Work notes list</td>
</tr>
<tr>
<td>Change Task Canceled</td>
<td>Assigned To</td>
</tr>
<tr>
<td>A Change Request has been work noted (but not to Assigned To if Assigned To made the work note update)</td>
<td>Assigned To, Work notes list</td>
</tr>
<tr>
<td>An unassigned Change Request has been work noted</td>
<td>Assignment Group, Work notes list</td>
</tr>
<tr>
<td>Standard Change proposal approved</td>
<td>Change Management Group</td>
</tr>
<tr>
<td>Standard Change proposal rejected</td>
<td>Change Management Group</td>
</tr>
<tr>
<td>Change Request has been withdrawn</td>
<td>Change Approvers</td>
</tr>
<tr>
<td>Change has been set to Expedited</td>
<td>Assigned To</td>
</tr>
</tbody>
</table>
Challenge Lab - Change

1. Create a high-risk, **Normal** change from the application navigator. Assign the change to yourself and one of your groups. Create two **Change Tasks** and then save the change.

2. Check to see if there are any conflicts with your Change.

3. Request **approval** for the Change and identify the approver.

4. Create a **new Problem** record. Create a **new Normal Change** from the Problem.
JIRA Integration
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ServiceNow Support
You can submit an incident ticket directly in ServiceNow that will go immediately to our support team. To enter an issue, question, or request related to one of the new ServiceNow processes:

1. [Log in to ServiceNow](#).
2. On the [Navigation](#) menu (left column), click [Incident](#). Other options are displayed.
3. Click [Create New](#). A new Incident form is displayed.
4. In the [Affected CI](#) field, type “ServiceNow” or select it from the autofill list that appears.
5. In the [Short description](#) field, type your question or a brief description of the issue.
6. Click the [Notes](#) tab (middle of form).
7. In the [Additional Comments (Customer Visible)](#) field, type the details of the issue.
8. Click [Save and Exit](#).
For additional information

• User guides and slides are available at:
  ▪ https://uit.stanford.edu/service-management/servicenow

• Consult the ServiceNow product documentation:
  ▪ https://docs.servicenow.com/
Q&A