Change Management

servicenow

June 2014

What are we doing?

In June 2014 Intuit will be migrating our IT Service Management disciplines to ServiceNow. ServiceNow is a SaaS provider that will help us utilize a set of best practices to improve the overall quality of our IT Services.

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Why ServiceNow?

From – Remedy: ITSM on Premises

- Current implementation hosted in QDC Zone A, with failover to LVDC (Remedy does not support HA)
- ITSM Engineering team manages infrastructure and upgrades (very costly/time consuming)
- Mobile capabilities require implementation of a new BMC module
- Inconsistent performance, especially for users in IDC
- No social functionality for Resolver community
- Configuration is cumbersome, requires engineering resources
- Limited reporting capabilities (reliant on Business Objects)

To – ServiceNow: ITSM on a SaaS Platform

- ITSM product, built for SaaS (latest technology): high availability, single-instance, multi-tenant
- Upgrades managed by vendor, no down time
- OOB Mobility
- Consistent performance, globally
- OOB Social functionality
- Graphical workflow interface allows process owners to effectively manage their processes
- OOB Reporting and dashboards allow users to control what they see and how they see it (point and click report building, easy configuration, scheduling)

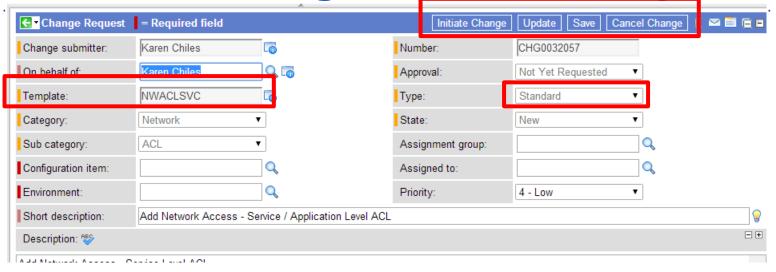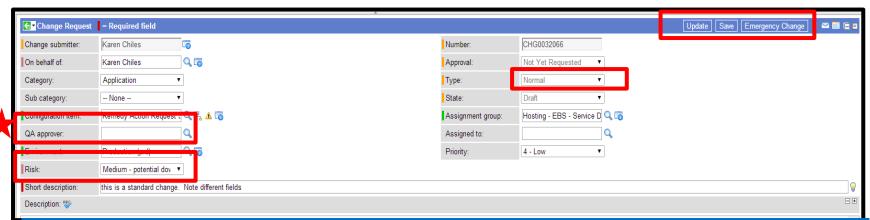Best practices • Process optimization

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Change Management Change Types

- **Standard**– A Change that is **pre-approved** by Change Management, evaluated as low-risk, relatively common and performed according to a procedure or work instructions. There are no approvals on Standard Changes. Most Changes will be Standard.

- **Normal**– A Change that that must follow the complete change management process and will be reviewed by the Change Advisory Board (CAB).

- **Emergency**– A Change that must be introduced as soon as possible in order to restore service, or protect a service from an unacceptable risk of failure or degradation. Changes can be submitted after the fix has been made. They will still have to go through the approval process and workflow.

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Standard Change vs Normal Change View

**The views are different to better address the workflow of the change type
QA Approver – submitter will provide the name. The QA Approver is the person that would be signing off on a successful QA before the change is introduced to production**

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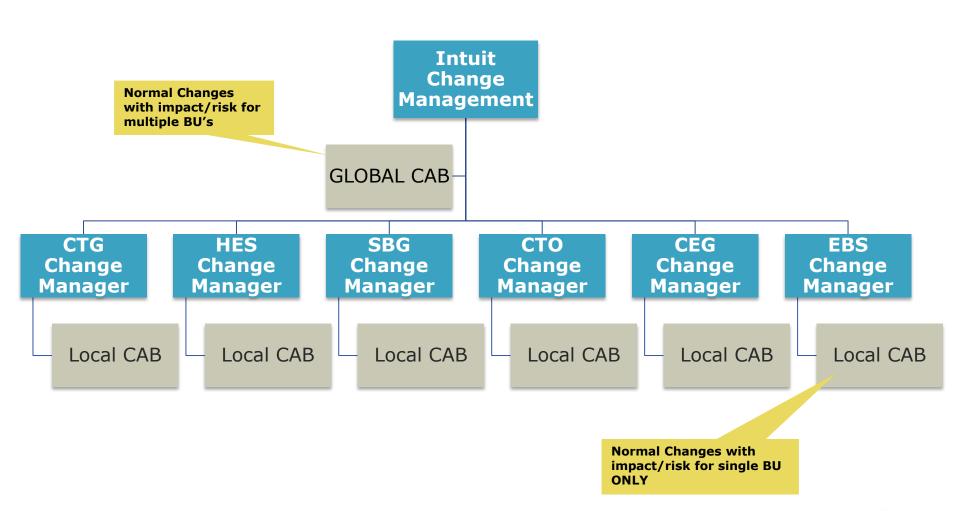**Normal Changes will have at least 3 approvals:**

- **QA approval** – The submitter will provide an individual to provide a QA approval.

- **CI Approver** – An approval group will be pulled from the related CI (Configuration item).

- **CAB Approval** – The CAB will provide the final approval.

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CAB

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GLOBAL CAB

Normal Changes with impact/risk for multiple BU's

CTG Change Manager	HES Change Manager	SBG Change Manager	CTO Change Manager	CEG Change Manager	EBS Change Manager
Local CAB	Local CAB	Local CAB	Local CAB	Local CAB	Local CAB

Normal Changes with impact/risk for single BU ONLY

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All Normal Changes require 7 days lead time

If a Change does not meet the lead time, it will be Flagged as Expedited. Expedited Changes will follow the same workflow as all Normal Changes.

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Assignments to Support Group

Once a Change Request has been submitted, it is assign to a designated Support Group. The Support Group is determined by the CI that has been related. Support Groups are based on IOC On-Call groups.

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Change Requirements

- **Related CIs** - All CRs will require that a CI be related to it. This can be an Application (Former Product Name), Server, Network Device, Storage Filer, Etc.

- **Downtime** – The amount of downtime is no longer a separate field. Downtime will be determined by the Risk Level and the Change Details

- **RTB/Project Name** – Project Name is no longer required for submitting a CR

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Approver Notification

Approvers will be notified of pending approvals via email. They will be able to approve within the tool or directly from the email or their smart phone.

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Notification Subscriptions

Standard notifications will be enabled in ServiceNow providing updates to the submitter as the CR moves through the process.

- Users can unsubscribe to specific notifications if they are not wanted.

- Users can also subscribe to certain types of Changes that they would like to be notified about.

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Create Change > Select Template

Templates

Standard Changes   ## Normal Changes

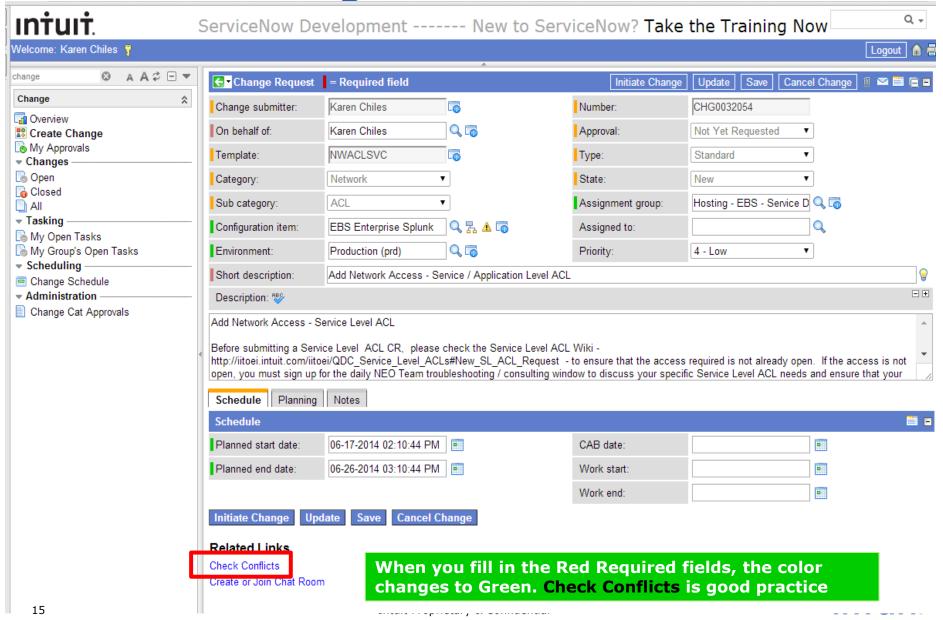| Standard Changes |
| --- |
| Ad-hoc backup |
| Add / Modify Encryption Service |
| Add Database Backup |
| Add Network Access (ACL) |
| Add Network Access - Service / Application Level ACL |
| Add/Modify - GTM (Global Traffic Manager) |
| Add/Modify - LTM (Load Balancer) |
| Add/Modify - LTM (Load Balancer) + GTM |
| Add/Modify - LTM (Load Balancer) + GTM + SSL |
| Add/Modify - LTM (Load Balancer) + SSL |
| Add/Modify IP DNS |
| Add/Modify Server Backup |
| Add/Modify/Delete DHCP Scope(s) |
| Add/Modify/Remove Client Storage Access |
| Add/Update Analysis Tool Port Assignment |
| Add/Update Analysis Tool Port Flows |
| Add/Update Proxy Service - Quincy/Las Vegas |
| Amazon (AWS) Account Sunset |
| AWS (Amazon Web Services) Vyatta Instances Configuration |
| Install Server/Hypervisor Build - QDC |
| Install/Renew - SSL Cert - Load Balancer (MANUAL) |
| Modify Hardware Break/Fix - ALL DC |
| Modify Hardware Break/Fix - LVDC |
| Modify Hardware Break/Fix - Other |
| Modify Hardware Break/Fix - QDC |
| Modify Hardware Break/Fix - WDHDC |
| Remove Network Access - ACL |
| Restore from Backup |
| Run Cable Network - LVDC |
| Run Cable Network - QDC |
| Update IFS LTM iRule Data Group - FI |
| Upgrade Vyatta VPN Amazon Web |
| VENAFI - Add / Modify - SSL Cert Renewal |

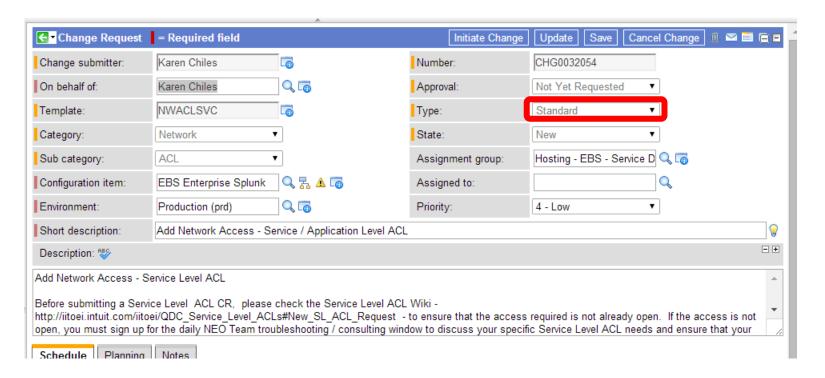| Normal Changes |
| --- |
| Add New Network Vlan |
| Add / Modify / Remove Database Objects |
| Add / Modify / Remove Database or Cluster Configuration |
| Add / Modify / Remove Database Replication |
| Add SAN Storage Array |
| Add/Modify IP/DNS - Coordinated Cutover |
| Application Release |
| BREAK/FIX storage array parts replacement |
| Bus App - Broadcast Events – Maintenance |
| Bus App - Contact Center– Maintenance |
| Can't find what I'm looking for |
| CTG Application Release |
| Data Center IT Infrastructure Change |
| Employee Tech - Collaboration Service - Maintenance |
| Employee Tech - Voice Services - Maintenance |
| Facilities Corrective Maintenance |
| Facilities New Equipment Installation |
| Facilities Preventative Maintenance |
| Install Database Patches |
| Install Database Tools |
| Install NetApp storage array - LVDC |
| Install NetApp storage array - QDC |
| Install San Storage Switch |
| Migrate Storage Host |
| Modify Hardware - LVDC |
| Modify Hardware - QDC |
| Modify Network Device |
| Modify Network WAN Config |
| Modify Operating System |
| Modify San Storage Array |
| Modify San Storage Switch |
| Network Maintenance |
| Performance Maintenance |
| Platform Operations Maintenance |
| Reboot Server |
| Remove Network Device |
| SBG - Add/Modify/Remove Application Code |
| Site to Site VPN |
| Storage Software Update |
| Tech Infrastructure - LAN/WAN - Maintenance |
| UC Network Maintenance |
| WDH DC - Decommission Server/Device |

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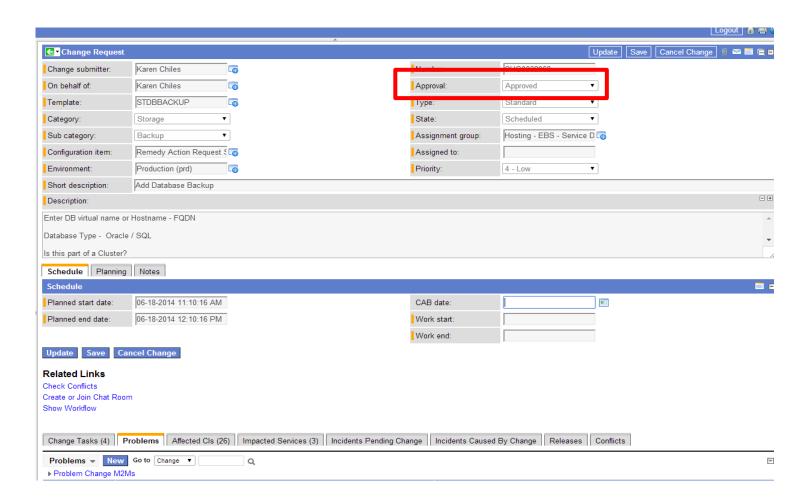
Standard Change

Standard Change

Save – Saves the form and leaves you on the form
Update – Saves the form and closes the form
When your have completed filling out the CR, click Initiate Change

This is a Standard Change and does NOT need to go to CAB
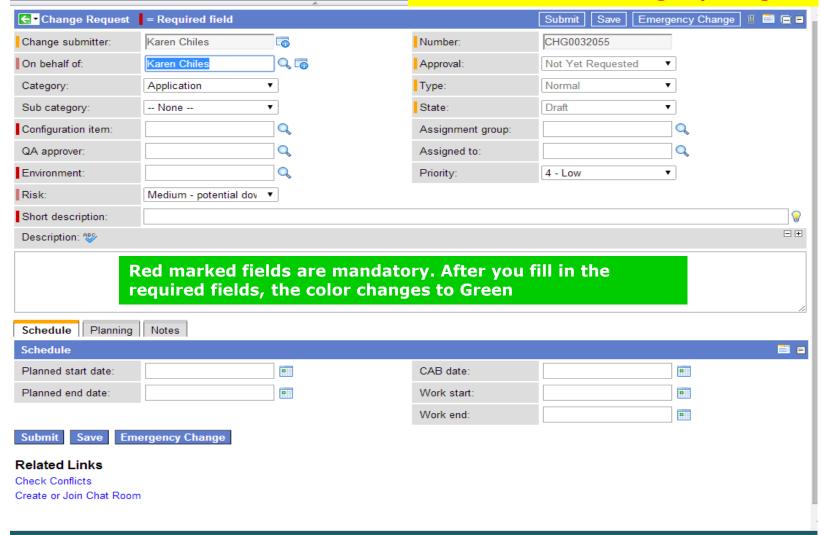
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Standard Change Approved

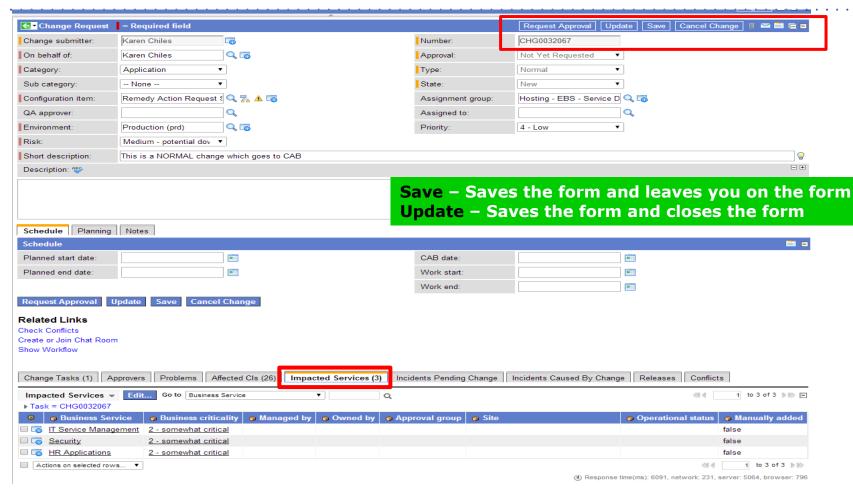**Standard Changes are mostly pre-approved or have few approval requests. i.e. ACLs only have Security approval. Standard Changes do not go to CAB**

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Normal Change = CAB

Emergency changes are only Normal changes. For emergency changes DO NOT click SAVE. Just click Emergency Change

Red marked fields are mandatory. After you fill in the required fields, the color changes to Green

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Save the Normal Change

Save – Saves the form and leaves you on the form
Update – Saves the form and closes the form

Note: the Emergency button goes away and new buttons appear. Saving the change leaves the change state in New until you are ready to Request Approval
Checking Impacted Services is recommended

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Selecting Request Approval

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Planning tab

| Schedule | **Planning** | Notes |

Planning

Change plan: ABC

These fields are mandatory

⊘ Change plan cannot be blank

Backout plan: ABC

⊘ Backout plan cannot be blank

Test plan: ABC

⊘ Test plan cannot be blank

PIR:

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Normal Changes must follow lead time

Normal Change will be reviewed by a Change Advisory Board (CAB) regardless of downtime or risk
        Lead time required is based on Risk
        High – 7 day lead time required
        Medium – 3 day lead time required
        Low – 0 day lead time required
If a Change does not fit in this lead time, the Change will automatically move to Expedited (see below)

Expedited Justification is required

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Change State moves to Pending Approval

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Although this looks like there are 39 approvers....
Only one person needs to approve from each group
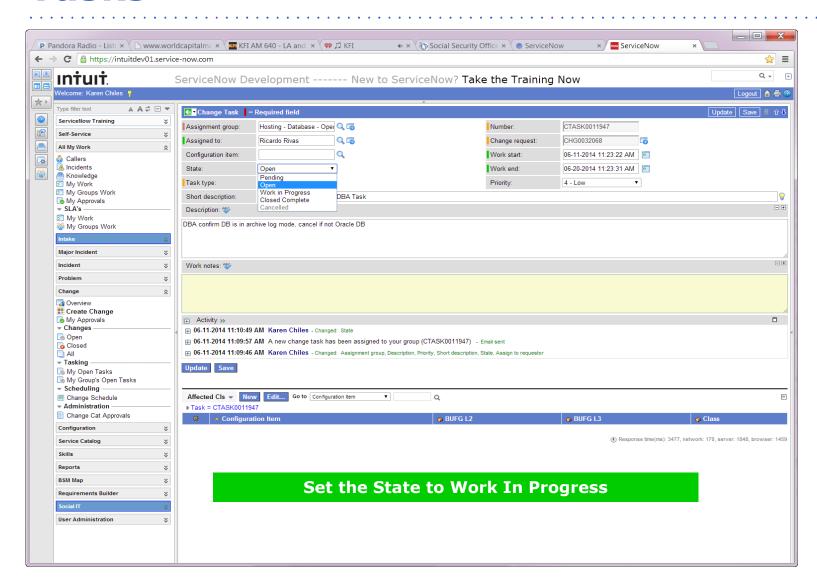# and the others will be marked No Longer Required

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Workflow

It is important that CRs and tasks State field (status) are moved through the workflow and tasks and changes are Closed.
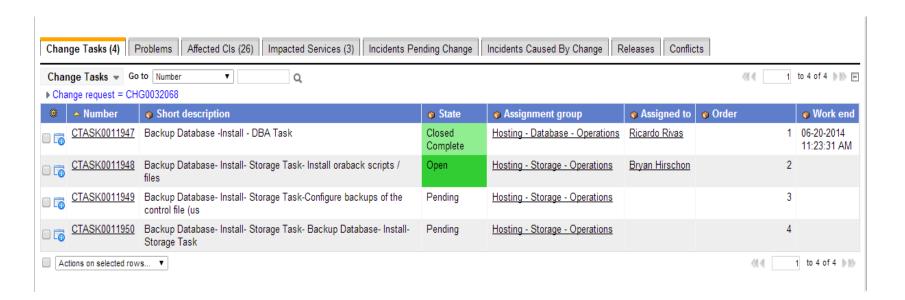
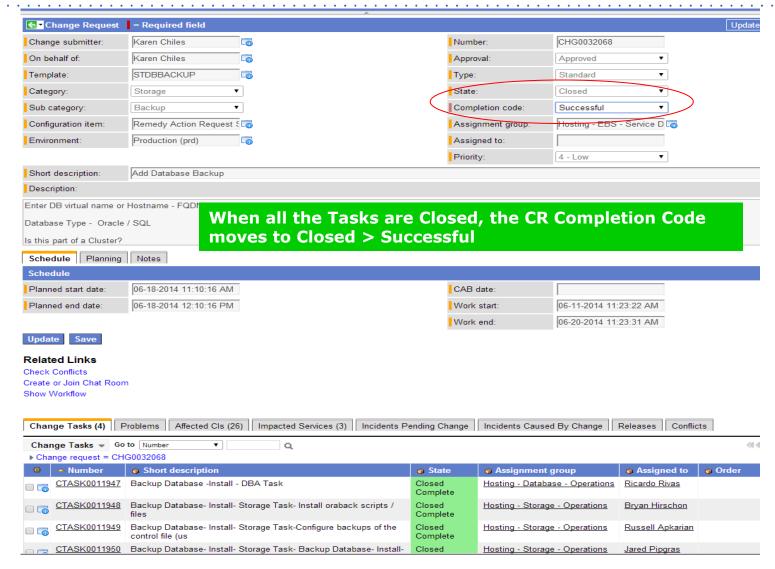Make sure you mark each task closed as you work it.

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Tasks

Set the State to Work In Progress

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Tasks

When the task gets closed, it moves the next task to Open

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Tasks – Standard Change

When all the Tasks are Closed, the CR Completion Code moves to Closed > Successful

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Task – Normal Change

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Task is ready to work

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Task State – Work in Progress

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Task State – Closed Complete

State – move to Closed Complete
Work End – will then automatically populate

Task is closed **Normal** CR State = Implemented

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Normal Change stays Implemented until the Completion Code is filled in

State in CR moves to Implemented. The submitter must go into the CR and select the **Completion Code**

CR is now Closed.

After **Completion Code** is populated, the **State** moves to Closed.
Closing the CR will allow for accurate metrics