Change Management Record Field Dictionary

MINIMUM REQUIRED FIELDS TO BE UPDATED

NORMAL CHANGE RECORD

To create a change record

Business Service

Configuration Item

QA Signoff Required

Short Description

Description

Planned Start Date

Planned End date

Move to an Assess State

Category

Subcategory

Assigned to

Justification

Implementation plan

Risk and impact analysis

Backout plan

At least one Implementation task

Risk Assessment performed

Post implementation validation plan

Pre-implementation testing

Move to an Authorize state

Technical approval from a member for each Affected CI (Configuration Item), based on the approval group for the CI.

Move to a Scheduled state

Low Risk change: Change Coordinator approval

Moderate/High Risk change: CAB Chairperson approval, based on the CAB decision

Move to a Review state

Actual end date

All Implementation tasks closed

Move to a Closed state

Closed Status

Close notes

EMERGENCY CHANGE RECORD

To create a change record

Business Service

Configuration Item

Category

Short Description

Description

Subcategory

Justification

Implementation plan

Risk and impact analysis

Priority must be set to High or Critical

Move to an Authorize State

Planned Start Date

Planned End date

Assigned to

At least one Implementation task

Risk Assessment performed

Post implementation validation plan

Pre-implementation testing

Move to a Scheduled state

CAB Chairperson approval, based on the eCAB decision

Move to a Review state

Actual end date

All Implementation tasks closed

Move to a Closed state

Closed Status

Close notes

FOR CHANGE TASK

To create a change task

Type

Assigned group

Short description

Description

To close a change task

Actual end date

Close Notes

Type field to Closed

CHANGE RECORD – TOP SECTION

Field Name

Definition

Number

Change record number.

Requested By

User who requested the change.

Category

General category describing the change:

Software & ApplicationsHardwareNetwork SecurityDatabase

Subcategory

This is a more detailed level of what is being changed. The list is based on the option chosen for the Category field.

Business Service

A business service uses specific components in the system, Configuration Items. A business service can have multiple configuration Items underneath it. This would be the Business Service directly impacted by the change.

Configuration Item

The component/service in DTI which is directly impacted by this change. This is the same or underneath the Business Service chosen.

Priority

Priority is how urgent it is to perform the change.

Risk

The risk level of the change. This is determined by the Risk Assessment, where answers are chosen for the questions, each answer with a point value. ServiceNow adds up the points to determine the

Risk Level: Low, Moderate, High. The list of questions and answers can be found on Teams.

Impact

Impact is a measure of the effect of the change on business processes.

Type

Type of change request:

Normal – Change follows the regular process and requires approvals.Emergency - Unplanned change to restore service during a Major Incident event or to prevent imminent adverse impact to: Patient Care, Security Operations, Financials, Regulatory/Compliance. These require eCAB approval.Standard - A pre-approved change chosen from the pre-approved change templates. No approvals are required.Non-production - Changes or deployments for QA, Production Support, and Performance environments.

QA Signoff Required

This indicates if the DTI QA team is required to signoff on the change. Their ServiceNow group name is CHG-QA-Signoff.

State

Phase of the change: New, Assess, Authorize, Scheduled, Implement, Review, Closed.

Conflict status

Status that indicates whether there is a conflict for this change, or the conflict is not run.

Conflict last run

Date and the time when the conflict was last run.

Assignment group

Always the Change Coordinator group, "Change Coordinator".

Assigned to

Change Coordinator assigned to the change.

Prod dark release

Indicates this change is related to a Prod Dark release, a non-user facing deployment for testing purposes.

Downtime

Indicates there is at least one task with a downtime. This is automatically checked when an implementation task on this change record has a downtime listed.

Short description

Short summary of the change.

Description

More specific details of the change.

CHANGE RECORD – MIDDLE SECTION

Planning Tab

Field Name

Definition

Justification

Enter benefits of implementing this change and impact if this change is not implemented.

Implementation Plan

Enter sequential steps to implement this change. In addition, enter dependencies between steps and assignee details for each step.

Risk and Impact analysis

Enter potential risks and impact associated with this change. Include impact details if this change implementation is unsuccessful.

All changes include some level of risk and potential impact.

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.

Pre-implementation testing

Used for adding information about testing performed prior to the release. This field will be mandatory when moving to an Assess state (requesting approvals) for Moderate and High risk level changes and not mandatory on Low risk changes.

Post implementation validation plan

Purpose is for adding information about the validating of the change being performed after the release implementation. This field will be mandatory when moving to an Assess state (requesting approvals) for Moderate and High risk level changes and not mandatory on Low risk changes.

Impacted by downtime

This is the information to post on FMC4ME. List of applications impacted by this change.

Downtime posting

This is the information to post on FMC4ME. Details about the downtime, such as availability, stale data, etc.

Schedule Tab

Field Name

Definition

Planned start date

When the implementation tasks of the change are targeted to begin.

Planned end date

When the implementation tasks of the change are targeted to finish.

Actual start date

When the implementation tasks of the change began.

Actual end date

When the implementation tasks of the change ended.

Conflicts Tab

Field Name

Definition

Check Conflicts button

This will trigger ServiceNow to determine if there are any conflicts with maintenance window, freeze or other changes based on your schedule and affected Configuration Items.

Conflicts Detected

This section will show conflicts which were detected (if any). The following are the fields shown:

Conflicting change - The change in conflict with the scheduled change, if any.Affected CI - The affected CI associated with the change.Last Checked - The last time the conflicts were checked. The Last Checked field is automatically updated.Related CI - The parent CI or child CI of the current CI, if the CI has caused a conflict.Schedule - The name of the maintenance window or blackout window that is causing the conflict, if any.Type - The issue that caused the conflict.

CI Already Scheduled

Parent CI Already Scheduled

Child CI Already Scheduled

Not in Maintenance Window

Parent Not In Maintenance Window

Child Not In Maintenance Window

Blackout

Notes Tab

Field Name

Definition

Watchlist

Watch lists allow multiple users to subscribe to notifications of the change.

Work notes list

Users to receive notifications when work notes are added.

Work notes

Information you wish to add to the Work Notes journal.

Post

Click to add what you have written in the Work Notes field to the journal.

Additional comments

Check this box to make the information available to non-ITIL users.

Activities

Work Notes journal entries.

Closure Tab

Field Name

Definition

PIR Date

If a post implementation review is performed, then this is where the date it was performed would be recorded.

Closed Status

This is the result when the change is closed. The options are:

Completed Successful – No issues left when the change was closed.Completed with Issues – Issues remained but they were acceptable to close the change. Or if an production issue comes up later and is related to this change.Completed Unsuccessful – Change had issues and had to be rolled back.

Closed notes

Details of the results of the change.

CHANGE RECORD – BOTTOM TABS

Affected CIs Tab – Key Fields

Purpose: List of CIs affected by the change. Approvers for these CIs are added to the Approvers tab. You can associate multiple affected CIs with a change.

Field Name

Definition

Configuration Item (CI)

The component/services in DTI which are directly impacted by this change.

Approval Group

Group of users who are potential approvers for this CI on this change.

Updated

The date/time the CI was added to this tab.

Impacted Services/CIs Tab – Key Fields

Purpose: List of CIs that are impacted by the affected CI in the change. Approvers for these CIs are not added to the Approvers tab. You can associate multiple impacted CIs with a change.

Field Name

Definition

Configuration Item (CI)

The component/services in DTI which are directly impacted by this change.

Approval Group

Group of users who are potential approvers for this CI on this change.

IT Owner

The individual who can answer technical questions about the CI.

Manually added

Indicates if the CI was added by a user or system generated.

Updated

The date/time the CI was added to this tab.

Approvers Tab – Key Fields

Purpose: This list is automatically generated base on the CIs on the Affected CIs tab.

Field Name

Definition

State

The state of the approval being requested.

Requested – The approval from the person has been requestedNo longer required – An approval for that CI has already been obtained so this approval is no longer needed.Approved – Approval has been obtained from this approver for the approval group.

Approver

The individual approval is being requested from the approval group.

Approval Group

Group of users who are potential approvers for this CI on this change.

Created

The date the approval request was made.

Change Tasks Tab – The fields displayed can be any of the fields from the task.

Purpose: A change task is a piece of work related to the change request. For example, there can be tasks to plan the change, implement the change, and test, and review the work. The list of tasks can be created from a workflow or manually.

Order field

Problems Tab – The fields displayed can be any of the fields from the Problem record.

Purpose: This lists the Problem the change was generated from if it was generated from a Problem.

Incidents Fixed by Change Tab – The fields displayed can be some fields from the Incident record.

Purpose: List of incidents that require the change for resolution.

Incidents Caused by Change Tab – The fields displayed can be some fields from the Incident record.

Purpose: List of incidents caused by the implementation of the change.

Change Requests Tab – The fields displayed can be some fields from the related Change record.

Purpose: Change records related to this change from this change.

CAB Agenda Items Tab – Key Fields

Purpose: Values for the CAB which the change was reviewed.

Field Name

Definition

Meeting

The name of the related CAB meeting.

Allotted time

The amount of time allotted for this change to be reviewed during the CAB meeting.

Decision

Whether the change was approved or not.

Elapsed

How much time it took to review the change in the CAB meeting.

Assessment Instances Tab – Key Fields

Purpose: The list of risk assessments performed.

Field Name

Definition

Number

This is the unique assessment number generated by the system. Click this number to review the actual answers from the risk assessment.

Assigned to

The user who performed the assessment.

Taken on

This is when the assessment was performed.

Other Tabs

Field Name

Definition

Vulnerability Groups

Not developed yet.

Security Incidents

Not developed yet.

CHANGE RECORD – ADDITIONAL ITEMS

Action Buttons

Field Name

Definition

Request Approval

This is used to move the change to the Assess state to obtain technical approval.

Conflict Calendar

This is used to review the change conflict calendar.

Update

This is used to save updates to the screen. After saving ServiceNow will exit the change record.

Risk Assessment

This is to initiate a Risk Assessment of the change record.

Related Links

Field Name

Definition

Risk Assessment

Click this if you to perform a new risk assessment of the change.

Completed Risk Assessment

This is to review the answers to the most recent risk assessment performed.

Context Sensitive Analytics links

Not fully developed yet.

CHANGE TASK

Top Section

Field Name

Definition

Number

Task number.

Change Request

The change record the Task is on.

Configuration Item

The component/service in DTI which is directly impacted by this change. This is the same or underneath the Business Service chosen.

Planned start date

When the task is targeted to begin.

Planned end date

When the task is targeted to finish.

Actual start date

The time when the task begins.

Actual end date

The time when the task ends.

Downtime start

When the downtime for this task is targeted to begin.

Downtime end

When the downtime for this task is targeted to finish.

Type

This is what type of change task, options are:

Planning – Used for work being performed to organize the release.

QA Signoff – Assigned to the QA team when their sign off is required.

Implementation – For actions performed to execute the change.

Testing – Used for tracking testing performed leading up to the release.

Review – Used for tracking validation after implementation.

State

Phase of the task: Open, In progress, Pending, Closed, Canceled.

Assigned group

ServiceNow group responsible for working this task.

Assigned to

Individual in the Assigned group responsible for working the task.

Execution sequence

Used for ordering the database tasks.

Short description

Short summary of the purpose of the task.

Description

Specific details about the work needed for this task.

Notes Tab

Field Name

Definition

Watchlist

Watch lists allow multiple users to subscribe to notifications of the change.

Work notes list

Users to receive notifications when work notes are added.

Work notes

Information you wish to add to the Work Notes journal.

Post

Click to add what you have written in the Work Notes field to the journal.

Additional comments

Check this box to make the information available to non-ITIL users.

Activities

Work Notes journal entries.

Closure Information Tab

Field Name

Definition

PIR Date

If a post implementation review is performed, then this is where the date it was performed would be recorded.

Closed Status

This is the result when the change is closed. The options are:

Completed Successful – No issues left when the change was closed.Completed with Issues – Issues remained but they were acceptable to close the change.Completed Unsuccessful – Change had issues and had to be rolled back.

Closed notes

Details of the results of the change.