Create/Edit a change or change task template

Article ID: KB0024358
Created: 2023-02-21 15:53:47
Updated: 2023-02-21 15:54:09
Author: {'link': 'https://fmcnadev.service-now.com/api/now/table/sys_user/c39a6bc26fb9860070404a950d3ee41e', 'value': 'c39a6bc26fb9860070404a950d3ee41e'}
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Create a change template

There are two ways to start:

Open the change record you wish to use as an example to create the change record template. This option will copy the contents of the current change into the template.Start to create a new change and proceed to the change form.

Once in the change form, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen.

After it appears, click the plus sign (+) at the bottom right of the screen. This will open a new screen to create the change record template.

Update the following fields:

Name – This would be the name of the template.

Short Description – This will fill in the same field in the change record.Under Template fill in the following mandatory fields as they should appear on the change record:

ImpactPriorityRequested byState – This must always be New.DowntimeProd Dark Release

The last drop down says “—choose field—.” You can choose from the list of other fields you want to set in the template. After you choose and update one, it will keep giving you the option to add additional fields to the template.

Click Submit at the bottom left of the screen. This will save the template.

Edit or Delete a change template

Open any change record.Once in the change form, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen.

This is only required if the Template bar is not already showing at the bottom of the screen.

Click the three circles on the right in the “Toggle Template Bar.” A list of your change templates will appear.The templates available for your use will be listed in the Template Bar. Click Edit to the right of the template you wish to update.

The template will appear. If you wish to edit the template, perform the updates then click Update on the bottom left of the screen.If you wish to delete the template, click Delete on the bottom left of the screen.

Use a change template

Start to create a new change and proceed to the change form.Once in the change form, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen.

This is only required if the Template bar is not already showing at the bottom of the screen.

The templates available for your use will be listed in the Template Bar. Click the template you wish to use.

If any of the fields cannot be set, an error will appear at the top of the screen explaining the conflicts.When you are done click Submit.

Create a task template

There are two ways to start

Open a task you wish to use as an example to create the change task template. This option will copy the contents of the current task in to the template.Start to create a new task.

Once in the task form, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.

Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen. This is only required if the Template bar is not already showing at the bottom of the screen.

After it appears, click the plus sign (+) at the bottom right of the screen. This will open a new screen to create the change task template.Update the following fields:

Name – This would be the name of the template.Under Template fill in the following mandatory fields as they should appear on the change record:

Short DescriptionAssignment GroupTypeDescriptionState – This must always be Open.

The last drop down says “—choose field—.” You can choose from the list of other fields you want to set in the template. After you choose and update one, it will keep giving you the option to add additional fields to the template.

Click Submit at the bottom left of the screen.

Edit or Delete a task template

Open any change task.Once in the task form, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen.

This is only required if the Template bar is not already showing at the bottom of the screen.

Click the three circles on the right in the “Toggle Template Bar.” A list of your change templates will appear.The templates available for your use will be listed in the Template Bar. Click Edit to the right of the template you wish to update.The template will appear. If you wish to edit the template, perform the updates then click Update on the bottom left of the screen.If you wish to delete the template, click Delete on the bottom left of the screen.

Use a task template

Start to create a new task.Once in the task, click the three horizontal circles at the top right of the screen. When you hover your cursor over them the hint text “More options” appears.Click “Toggle Template Bar.” This makes the Template bar appear at the bottom of the screen.The templates available for your use will be listed in the Template Bar. Click the template you wish to use.If any of the fields cannot be set, an error will appear at the top of the screen explaining the conflicts.