Using ServiceNow for Change Management and Contract Administration

Robert Cheyne  rcheyne@tamu.edu
Melanie Best Iden  miden@tamu.edu
Kevin Richard  meredoc@tamu.edu
Contract Management Background

• Originally performed by CIS Associate Director for Internal Support

• After his retirement, dispersed across multiple people and roles

• Currently lies primarily with Chief Technology Officer
Challenges

1. Varied set of contract types and sources of data
2. Not a documented process
3. Varied set of requirements by different groups
Contract Management Team

- Project Leader
- Business Services SME
- Technical Administrator
- TAMU Contracts representative
Requirements

• All data on contracts in one tool
• Advance notifications of contract expiration
• Automated approval workflow
• Financial contracts in initial deployment
## ServiceNow Contract List

<table>
<thead>
<tr>
<th>Number</th>
<th>Contract type</th>
<th>State</th>
<th>Substate</th>
<th>Vendor</th>
<th>Starts</th>
<th>Ends</th>
<th>Short description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CNTR0010080</td>
<td>Contract</td>
<td>Active</td>
<td></td>
<td></td>
<td>2014-08-01</td>
<td>2017-07-31</td>
<td>maintenance - Firetower node</td>
</tr>
<tr>
<td>CNTR0010006</td>
<td>Contract</td>
<td>Active</td>
<td></td>
<td></td>
<td>2013-09-01</td>
<td>2018-08-31</td>
<td>Mobius Viewdirect - license renewal and ...</td>
</tr>
<tr>
<td>CNTR0010141</td>
<td>Contract</td>
<td>Active</td>
<td></td>
<td></td>
<td>2014-09-01</td>
<td>2020-08-31</td>
<td>license renewals - Athlos IWSAlerts Enter ...</td>
</tr>
<tr>
<td>CNTR0010150</td>
<td>Contract</td>
<td>Draft</td>
<td>Under Review</td>
<td></td>
<td>2016-09-01</td>
<td>2017-08-31</td>
<td>Networking Hubs quarterly maintenance - ...</td>
</tr>
</tbody>
</table>
# ServiceNow Contract Details

10 different Contract Models for data capture.

- **3 License Types:**
  - Enterprise
  - SAAS
  - Subscription

[Custom link to ITNet Purchase Request](#)

**Contract CNTR0010167 [New TAMU Contract view]**

**Number**: CNTR0010167  
**Vendor**: Dell  
**Contract model**: Software License  
**Short description**: Big Switch software license subscription

**General**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starts</td>
<td>2017-01-01</td>
</tr>
<tr>
<td>Ends</td>
<td>2017-12-31</td>
</tr>
<tr>
<td>PO Number</td>
<td>43416</td>
</tr>
<tr>
<td>License type</td>
<td>Subscription</td>
</tr>
<tr>
<td>Description</td>
<td>Annual subsc. prod. for research.</td>
</tr>
</tbody>
</table>

**Contract administrator**: Matthias Richter

Click here to view the Purchase Order Request.
ServiceNow Next Steps

- Create expiration notifications
- Sync FAMIS purchase data for cost details
- Roll out other contract types
- Sync AggieBuy list of vendors
ServiceNow - Change Management

Melanie Iden, Texas A&M IT
2015-2016 SN Change Process Owner

Kevin Richard, Texas A&M IT
SN Developer
ServiceNow Change Background

- ServiceNow as a shared service
- What is this group’s purpose
- Who is SN Change Shared Service group
Group Challenges

1. Experience and Process

- ITIL
- Change Management
- ServiceNow
Group Challenges cont.

2. Geographic Location

- 2 countries
- 4 states
3. Turnover

- Unit participation/involvement
- Process owners
- Shared developer
- Project managers
Group Challenges cont.

Tuckman’s Stages of group formation

- **Forming**
  - Expect: confusion about purpose, little agreement, enthusiasm
  - Requires: strong direction and guidance

- **Storming**
  - Expect: conflict, ‘turf battles’, increasing clarity of purpose
  - Requires: coaching, listening, clarification, compromise

- **Norming**
  - Expect: developing trust, efficiency, roles emerging
  - Required: facilitation, feedback, review, training

- **Performing**
  - Expect: focus on goals, clear purpose, productive and efficient
  - Requires: delegation, future planning, recognition

- **Adjourning / Transforming**
  - Expect: natural end or plan new project and goals
  - Requires: review, recognition and reward

Time & Effectiveness

Image from: http://gw4.ac.uk/files/2015/01/Tuckman.png
Successes

- Turnover communication
- Google docs, Doodle, voting, and WebEx
- AGILE environment
- Sponsor support and communication
- ITIL training courses

Image from: http://katielendel.com/the-3cs-of-success/
Technical Challenges

• Process Inequalities
  • Timers, Approvals, Review, Tasks
  • Two-tiered access control

• ServiceNow Technical Demands
  • OOB roadblocks
  • Growth for multi-process environment
  • Approvals in multi-process environment
# Technical Successes

- **Unit Configuration Pages**

## Change Unit Properties

<table>
<thead>
<tr>
<th>Unit</th>
<th>TAMU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>CMC0001033</td>
</tr>
</tbody>
</table>

**Change Manager Group:** Change Managers (TAMU)

**CAB Group:** Change Advisory Board (TAMU)

**eCAB Group:** Emergency Change Advisory Board

**Company Properties:** Texas A&M University

### Approvals

<table>
<thead>
<tr>
<th>Non-Group Approval Options</th>
<th>Group Approval Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bypass Non-Group Managers</td>
<td>Bypass Change Manager Group Approval</td>
</tr>
</tbody>
</table>

- Skips approval of all non-group managers, goes directly into group approval.
- Skips approval of your Units Change Manager Group, sends approval to the Assignment Group managers.
Technical Successes cont.

• Approval/configuration workflow integration
Technical Successes cont.

• Ad-hoc and template task creation

• Dynamic workflow
Q&A

Robert Cheyne, rcheyne@tamu.edu
Business Relationship Manager

Melanie Best Iden miden@tamu.edu
Lead IT Service and Process Improvement Consultant

Kevin Richard meredoc@tamu.edu
Software Applications Developer II