Managing Non-Production Changes in ServiceNow

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Introduction

Service Management uses ServiceNow to manage the creation, approval, scheduling, and implementation of non-production changes. All Non-production changes occur outside of the production instance. If a non-production change is intended to move to production, then testing is required.

This document contains instructions for the following tasks:

- Logging in to Service Now
- Creating a New Change Request
- Updating Change Request Inputs
  - Adding Approvers
  - Adding Change Tasks
  - Identifying Affected Configuration Items
  - Requesting Approval
- Approving Changes in ServiceNow
- Implementing a Scheduled Change Request
- Reviewing a Change Request
  - Adding a Test Plan and Results
  - Closing Post Implementation Review Tasks
- Closing a Change Request
  - Creating a Production Change Request from a Non-Production Change Request

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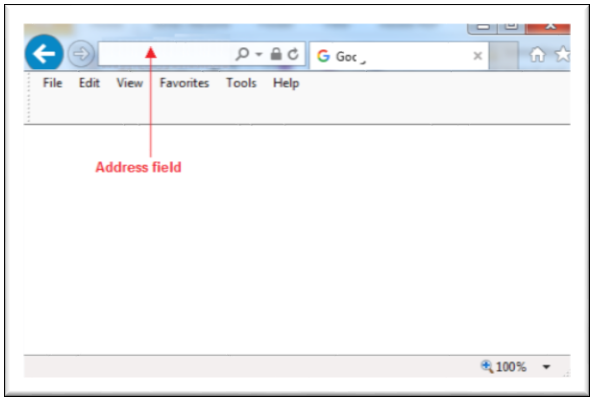
Logging on to ServiceNow

To use ServiceNow to participate in the Change Management process, users access the ServiceNow portal via the intranet and are automatically logged on through the single sign on service using the Windows login credentials.

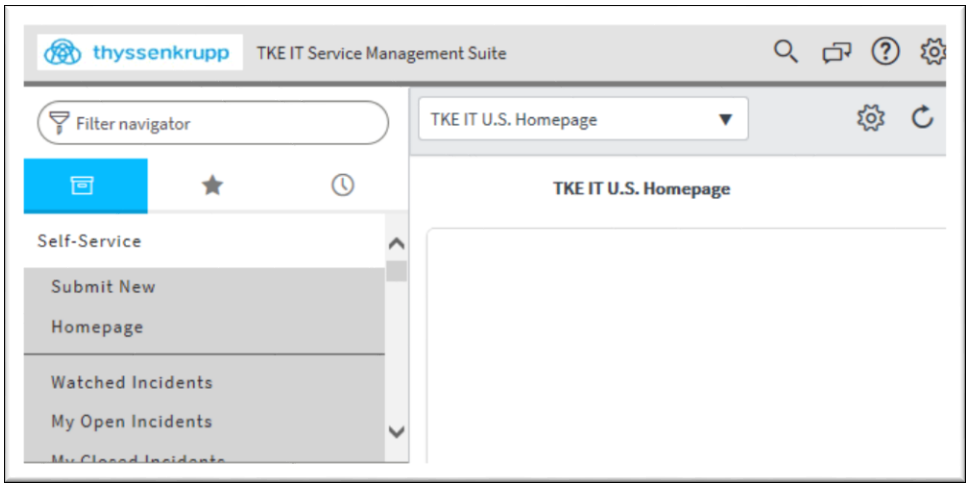
To log on to ServiceNow:

1. Open an internet browser (Chrome or Internet Explorer).



2. Type the ServiceNow URL, https://tke.service-now.com , into the address field.
3. Click the **Enter** key.

   ServiceNow signs you on and displays the [redacted]-IT ServiceNow home page.



You are now ready to use ServiceNow.

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Creating a New Change

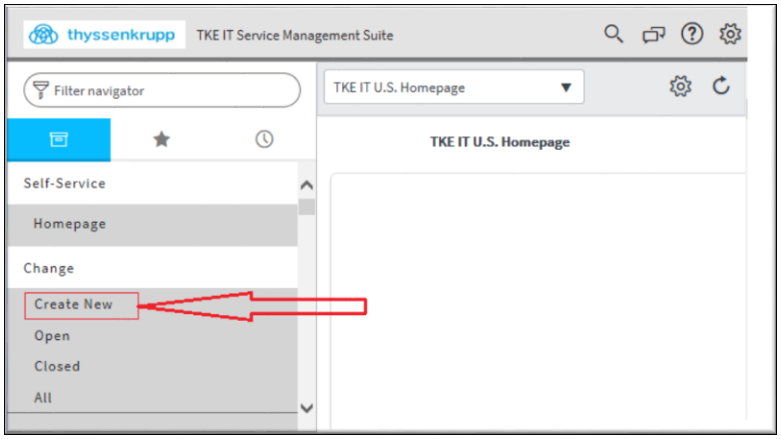
On the initial Change Request screen you will complete such tasks as:

- Entering Basic Descriptions
- Entering Plan Information
- Entering Notes
- Identifying Conflicts

Note: All required fields are marked with an asterisk (*).

To create a change:

1. Log on to ServiceNow, if not already logged on.
   The ServiceNow Home page is displayed.
2. In the left hand navigation bar, scroll to the Change section, and click Create New.



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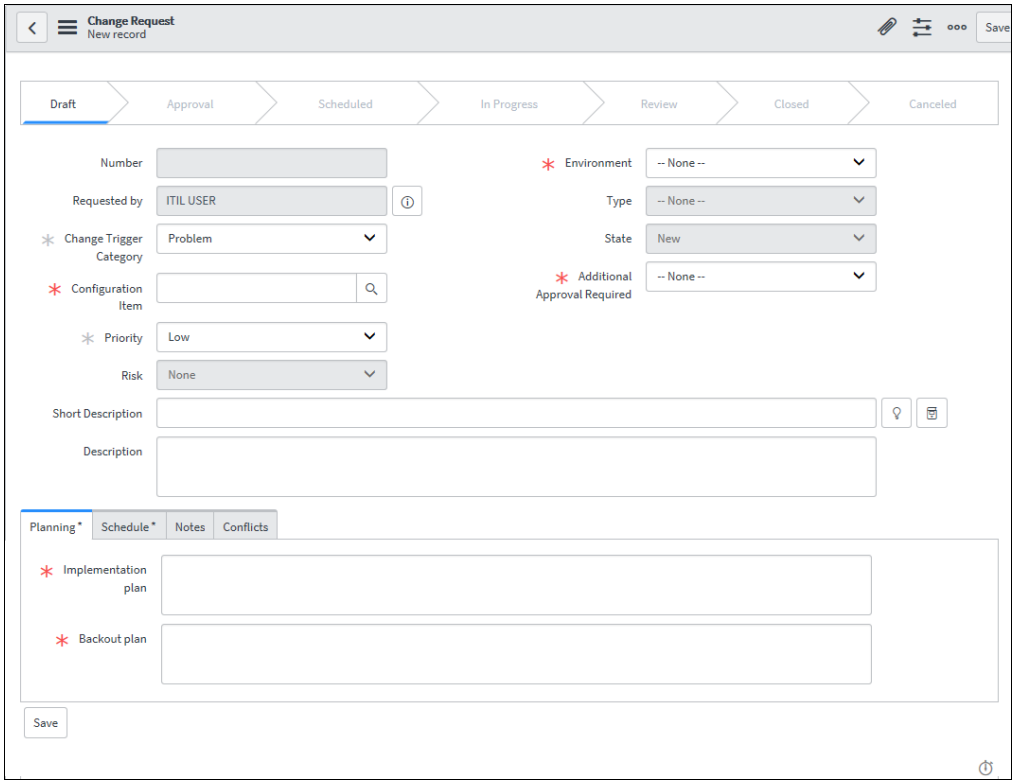
A new Change Request form is displayed with the Requested By field pre-populated.

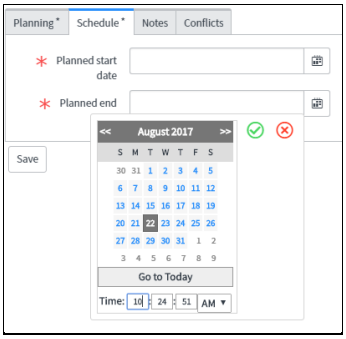


Note: The name of the change owner is pre-populated in the Requested By field.

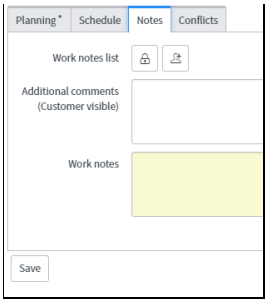
3. Click the down arrow in the **Instance** field and choose Non-Production.
4. Click the down arrow in the Change Trigger Category field, and choose one of the following options:
   - Project
   - Enhancement
   - Maintenance
   - Incident
   - Problem
5. Click the Lookup icon next to the Configuration Item field, and choose the name of the Configuration Item you are changing.
6. Click the down arrow in the Additional Approval Required option list, and choose one of the following options:
   - No
   - Yes

Note: If you choose Yes, then you have to add the approvers when you are entering additional inputs. See instructions in the Adding Additional Inputs section.

7. Click the down arrow in the **Priority** field and choose one of the following priorities:
   - Emergency – This field is displayed only for incidents and problems
   - Urgent
   - Routine
   - Low
8. Click in the **Short Description** field and enter a brief description of the Change Request (75 character limit).
9. Click in the **Description** field and enter a detailed description of the Change Request.
10. Click the **Planning** tab and complete the following:
    a) Enter the implementation plan.
    b) Enter the Backout plan.
11. Click the **Schedule** tab and complete the following:
    a) Select the Planned Start Date from the calendar.
    b) Select the Planned End Date from the calendar.



12. Click the Notes tab.
13. Click in the Notes field and add any additional information, as needed.



14. Click **Save**.

    The change is entered into the system, and you are now ready to add more inputs.

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Updating Change Request Inputs

After you enter basic Change Request information and save the Change Request, the initial input screen refreshes with additional fields and functionality. You are now ready to enter the additional information.

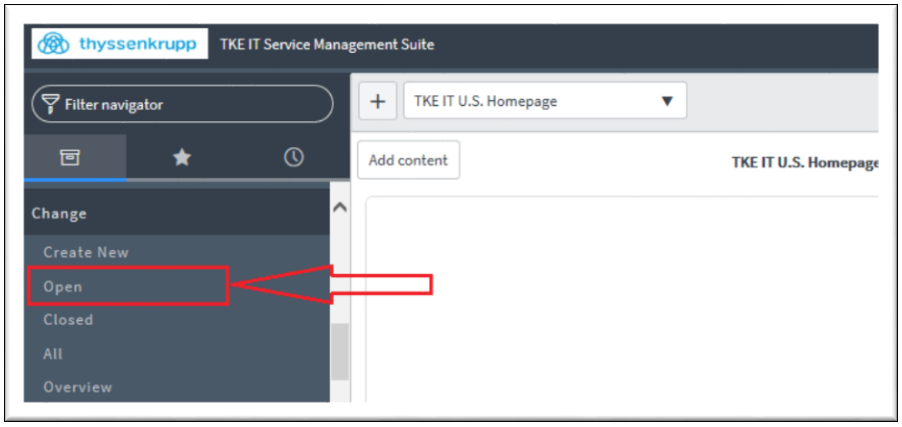
Note: If you closed the initial form and are returning to ServiceNow, you can search for the Change Request.

To enter additional information:

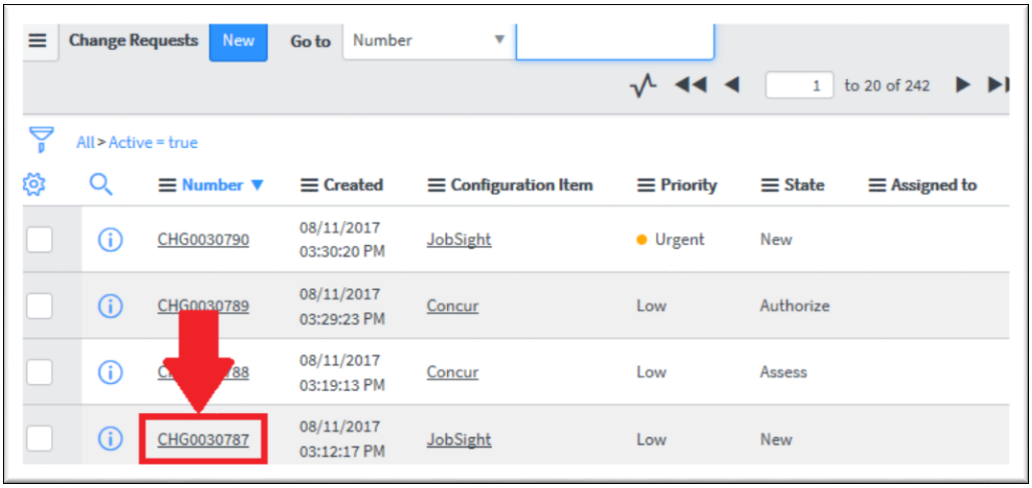
1. Log on to ServiceNow, if not already logged on.

   The ServiceNow Home page is displayed.

2. In the left hand navigation bar, scroll to the Change section and click Open.



ServiceNow displays a list of Change Requests.



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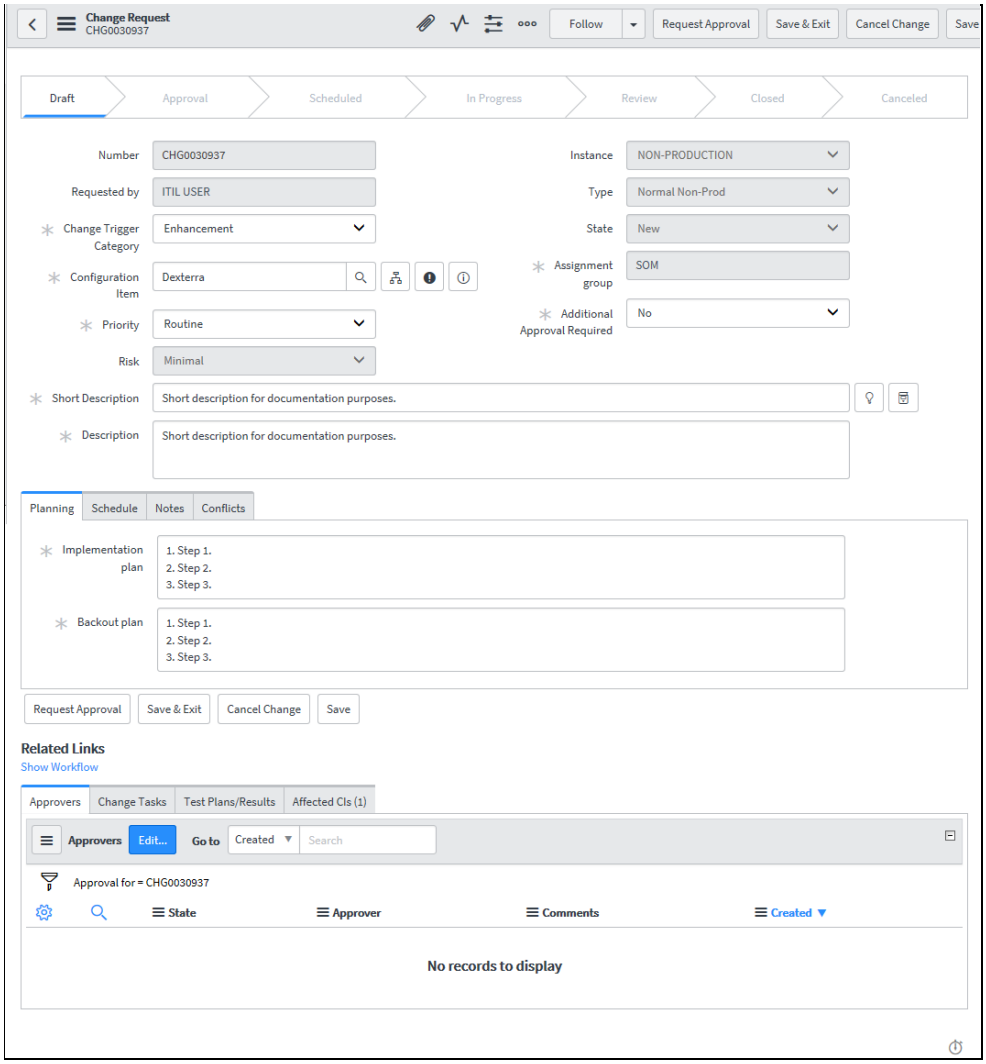
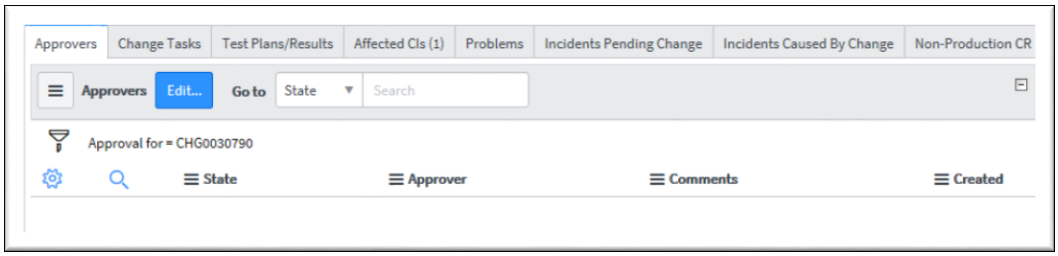
3. Scroll through the list of Change Requests and click the one you want to display.

   ServiceNow displays the Change Request you selected with all the information you entered when you completed the initial input fields.



4. Scroll to the **Related Links** section of the Change Request.

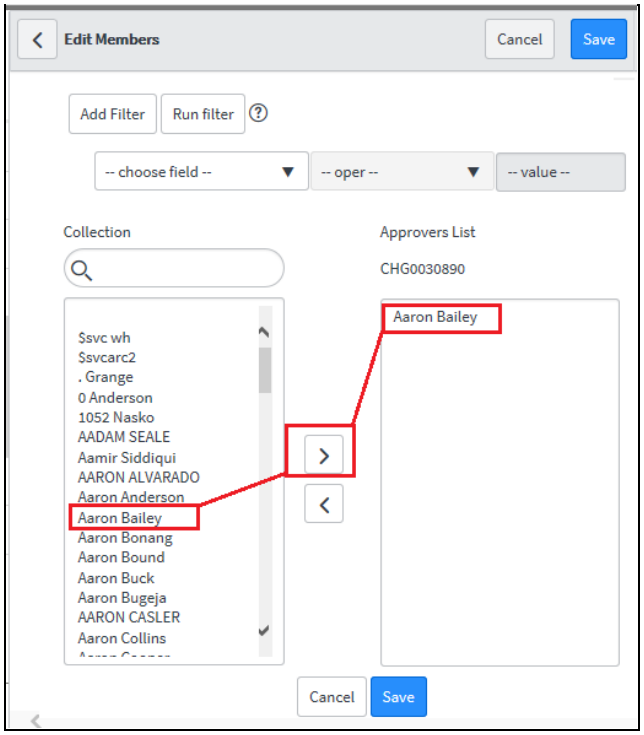
   You are now ready to add other inputs using the tabs at the bottom of the Change Request window.



Adding Approvers

5. Click the Approvers tab and click **Edit**.

   ServiceNow displays the Edit Members interface that allows you to select one or more approvers.



6. Click the name of the approver and click the arrow key to add it to the Approvers List.

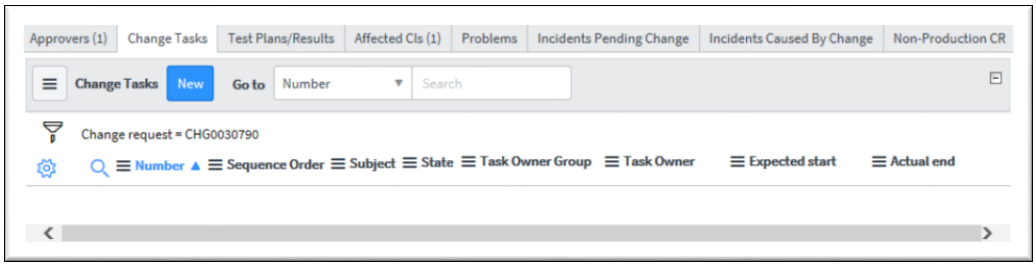
   *You can also click in the **Collection** field and type the name of the appropriate approver to move it to the selection list. You can repeat this step to add multiple approvers.*

7. Click **Save** to add the approver to the Change Request.

   You are now ready to Add Change Tasks.

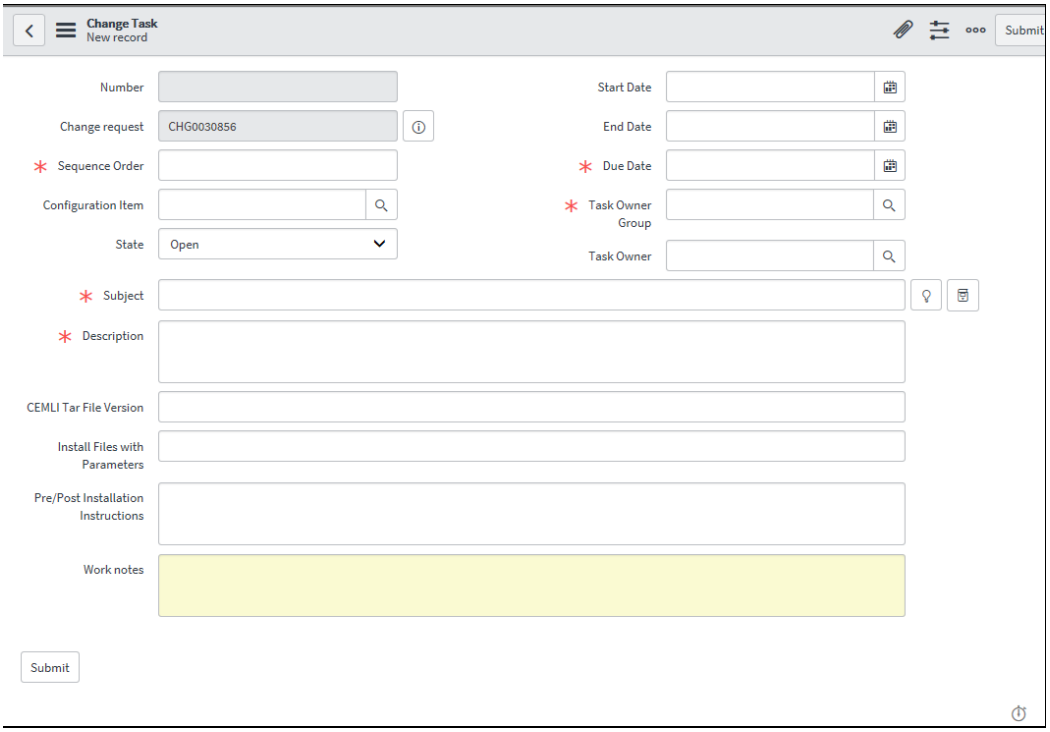
Adding Change Tasks

8. Click the **Change Tasks** tab and then click the **New** button to add Change Tasks.



Note: Make note of the Sequence Number of the most recently entered change task. You can find this in the Sequence Order column.

ServiceNow displays the Change Task interface where you can add a new Change Task.



9. Click in the **Sequence Order** field and enter the next number higher than the number of the most recently entered change task.

   Note: This field is used only if you want to sequence your task.

10. Click in the **Configuration Item** field and type the name of the Configuration Item associated with this change task.
11. Click in the **Start Date** field and enter the Start Date of the change task.

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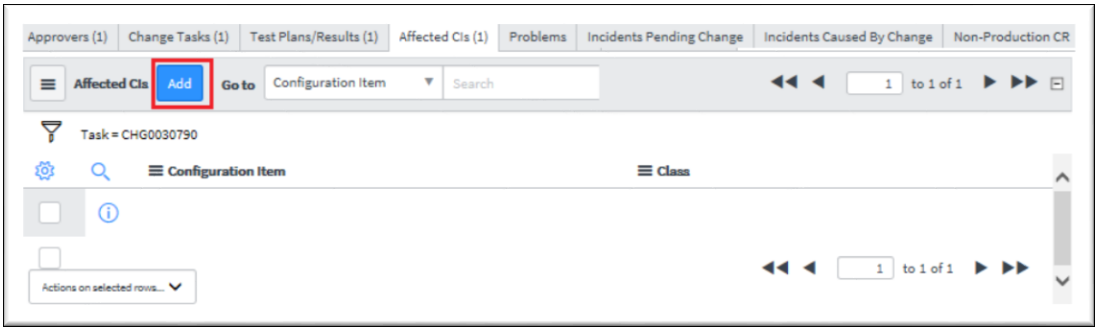
12. Click in the **End Date** field and enter the End Date of the change task.
13. Click in the **Due Date** field and enter the Due Date for the change task.
14. Click in the **Task Owner Group** and select the name of the domain that supports the configuration item being changed.
15. Click in the **Task Owner** field and select the name of an individual, if desired.
16. Click the down arrow in the **State** field and choose one of the following options:
    - Pending
    - Open
    - Work in Progress
    - Closed Complete
    - Closed Incomplete
    - Closed Skipped
17. Click in the **Subject** field and enter a high level subject for the change (75 character limit).
18. Click in the **Description** field and enter a detailed description of the change.
19. Click in the **CEMLI Tar File Version** field and enter the version number.
20. Click in the **Install Files with Parameters** field and enter the name of the Install Files.
21. Click in the **Pre/Post Installation Instructions** field and list the steps to implement the change task.
22. Click in the **Work Notes** field and enter any notes that might help to explain and implement this change, if desired.
23. Click **Submit** to return to the Change Request window.

    You've completed adding a change task. These steps can be repeated if you need to add more change tasks. Otherwise, you are ready to add Test Plans and Results.

Identifying Affected Configuration Items

24. Click the **Affected CIs** tab.
25. Click **Add**.



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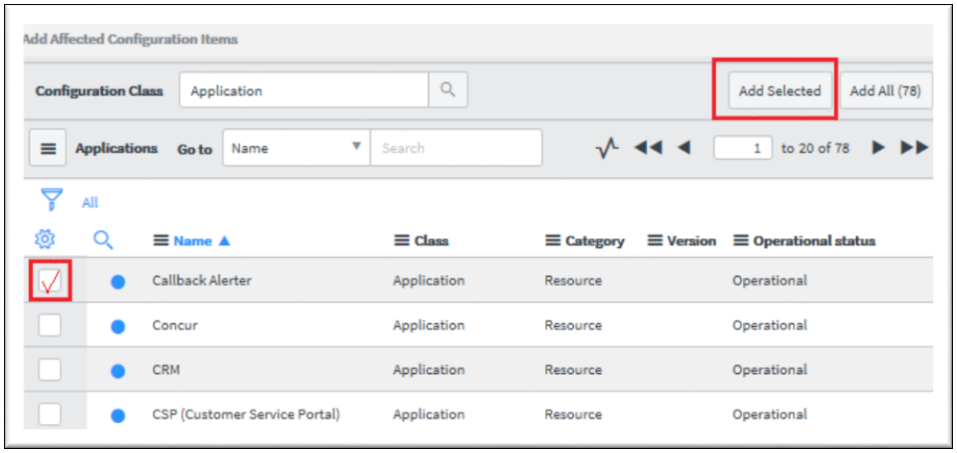
ServiceNow displays the Add Affected Configuration Items window. You can add configuration items that are affected by your change.

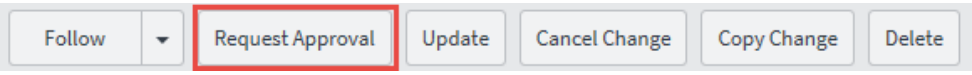
26. Select the Configuration Item that might be affected by this change and click **Add Selected**.

    ServiceNow adds your configuration item to the Affected CIs list and then returns you to the Change Request window.



Requesting Approval

27. Click the **Request Approval** button.



Clicking the Request Approval button at the top of the window advances the Change Request through the lifecycle into the Approval phase. ServiceNow sends emails to designated approvers. The draft stage is now completed.

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Approving Changes in ServiceNow

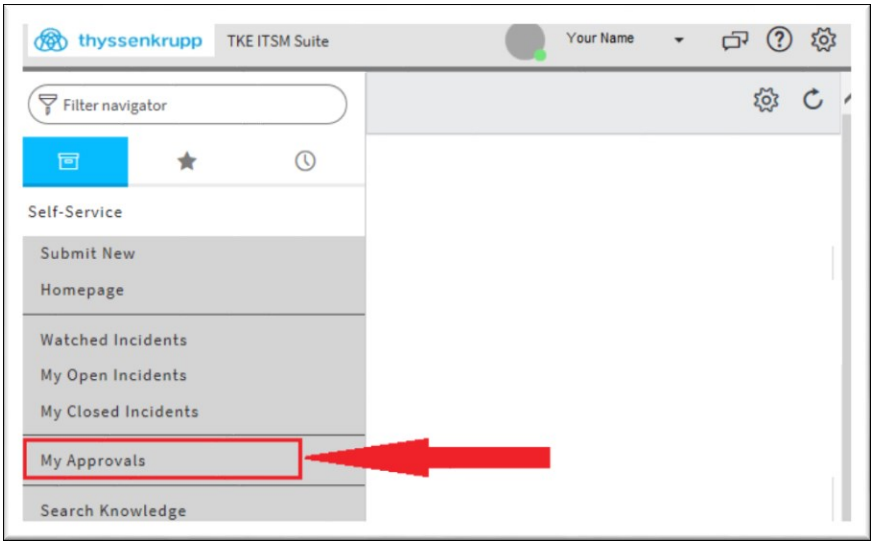
You can view Change Requests that need your approval in ServiceNow and then approve them. After all designated approvers have approved the Change Request, the state changes to Scheduled.

To approve changes:

1. Log on to ServiceNow, if not already logged on.

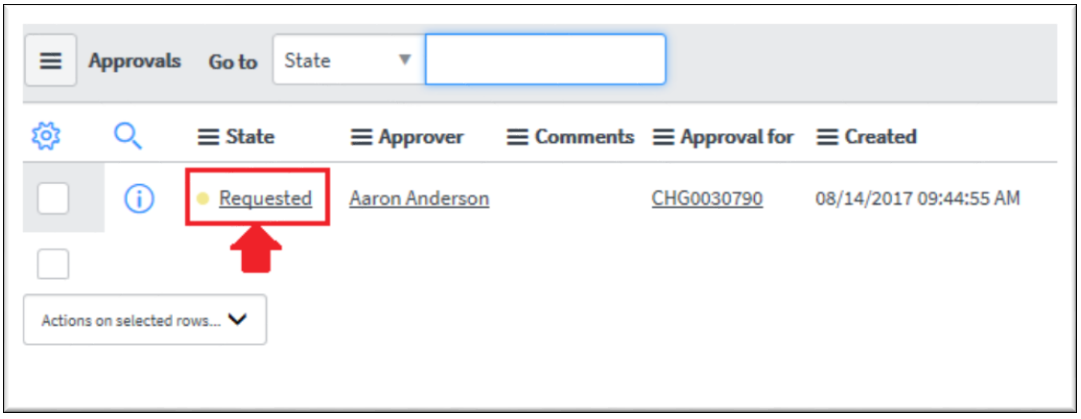
   The ServiceNow Home page is displayed.

2. In the left hand navigation bar, click **My Approvals**.



   ServiceNow displays a list of changes for approval.

3. Click the **Requested** link next to the change you want to approve.



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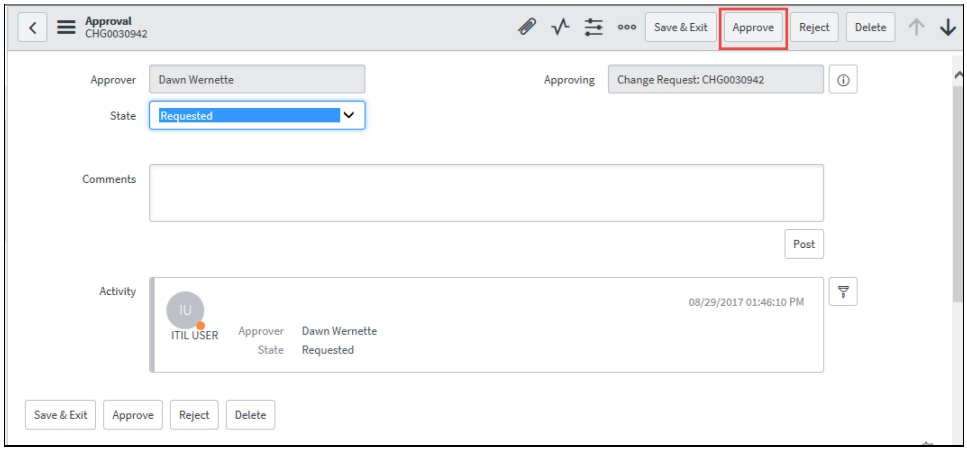
ServiceNow displays the Change Request for you to review.



Note: You can click the information icon to display a copy of the full Change Request, or scroll to the bottom of the window to review a summary of the Change Request.

4. Click the down arrow in the **State** field, and click one of the following options:
   - Requested
   - Approved (to approve the Change Request)
   - Rejected
5. Click in the **Comments** field to enter any comments you want to record with your approval, and then click the **Post** button.
6. Click **Approve** to approve the request.

   The Change Request is approved and is now ready to be implemented.

   Note: You can also click the **Reject** button if you want to Reject this request. Remember to change the state to Rejected.

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Implementing a Scheduled Change Request

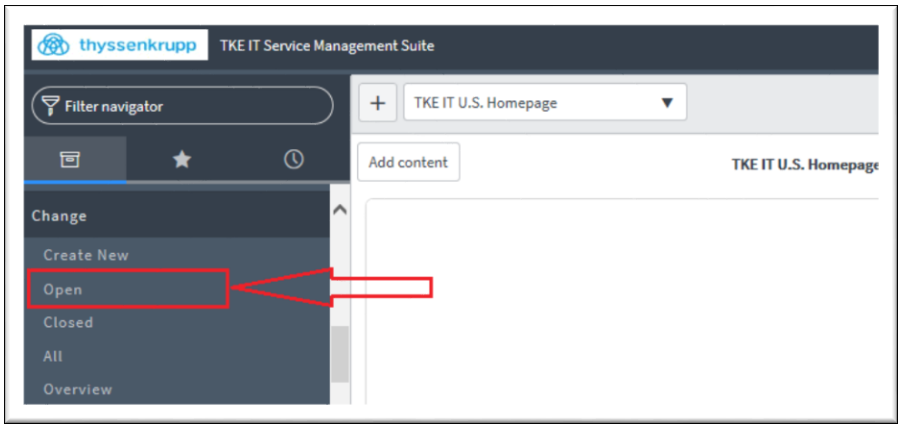
Once a Change Request has been scheduled, it is ready to be implemented. Once the implementation is completed, the Change Request progresses to the In-Progress stage.

To implement a scheduled change:

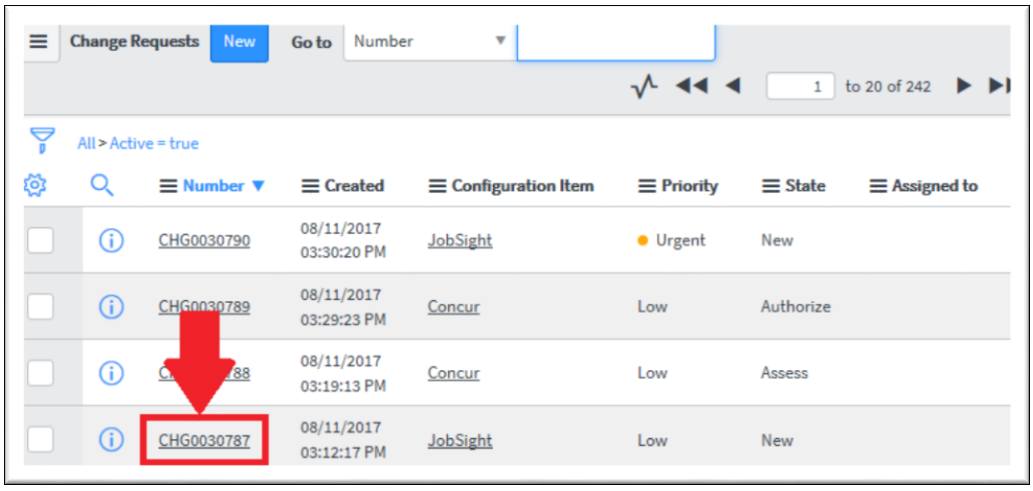
1. Log on to ServiceNow, if not already logged on.

   The ServiceNow Home page is displayed.

2. In the left hand navigation bar, scroll to the **Change** section, and click **Open**.



ServiceNow displays a list of Change Requests.



3. Scroll through the list of Change Requests, and click the one you want to display.

   ServiceNow displays the Change Request you selected.

4. Click the **Implement** button to implement the change.

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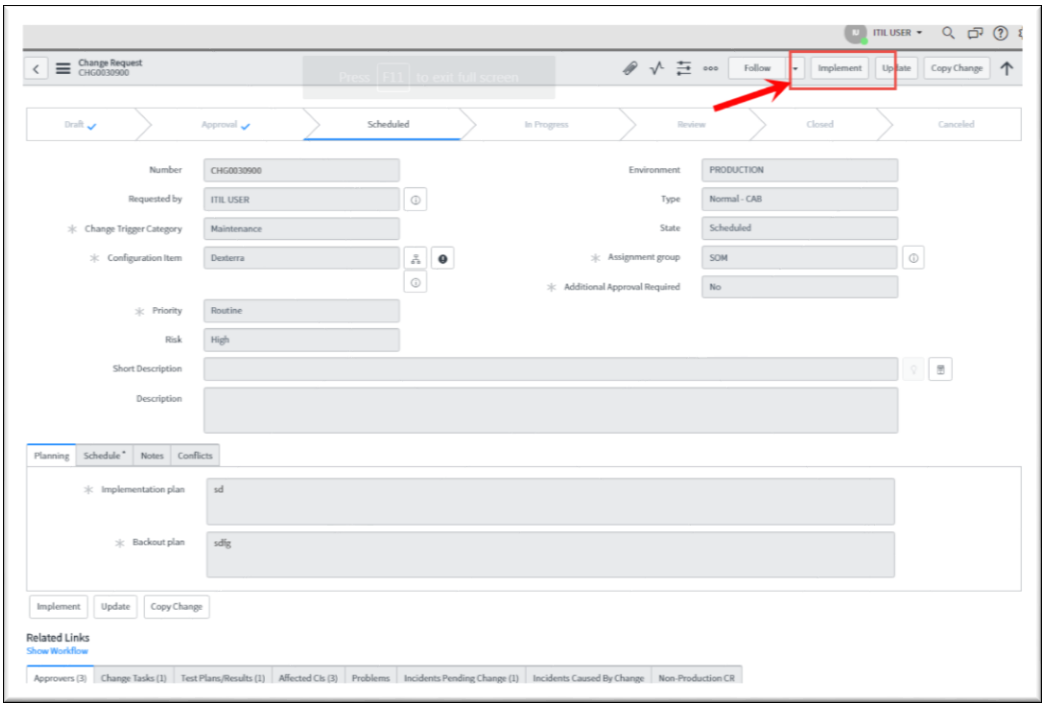
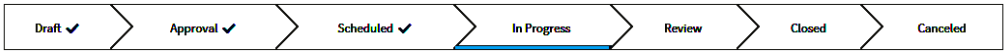


ServiceNow advances the change to the In Progress phase. All Change Tasks should be completed by the due date during the In Progress phase.



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Closing Change Tasks

The following steps explain how to close the change tasks.

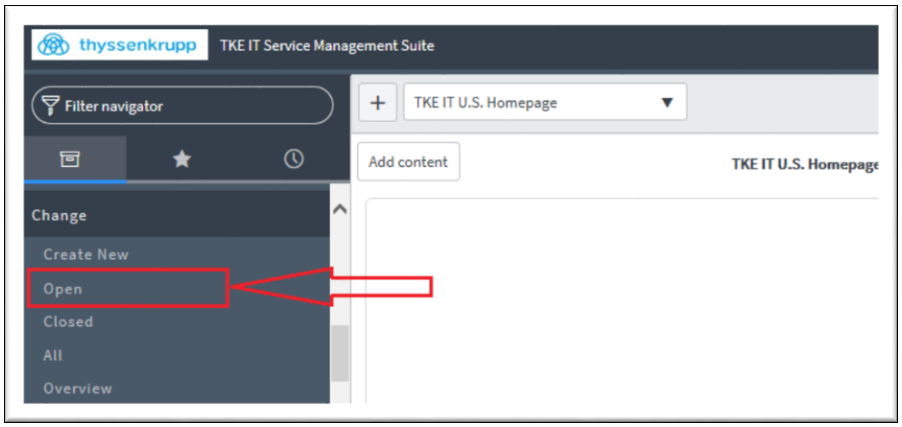
Note: You add test plans and results only if the non-production change request requires a production change request. Test Plans/Results are automatically added to the Production Change Request.

To close the change tasks:

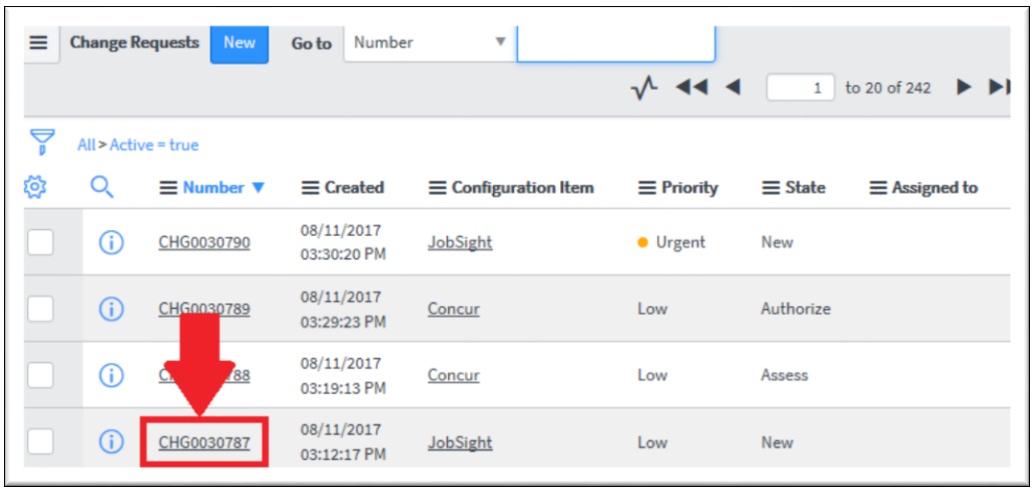
1. Log on to ServiceNow, if not already logged on.

   The ServiceNow Home page is displayed.

2. In the left hand navigation bar, scroll to the Change section, and click **Open**.



   ServiceNow displays a list of Change Requests.



3. Scroll through the list of Change Requests and click the one you want to display.

   ServiceNow displays the Change Request you selected. The phase is now In Progress.

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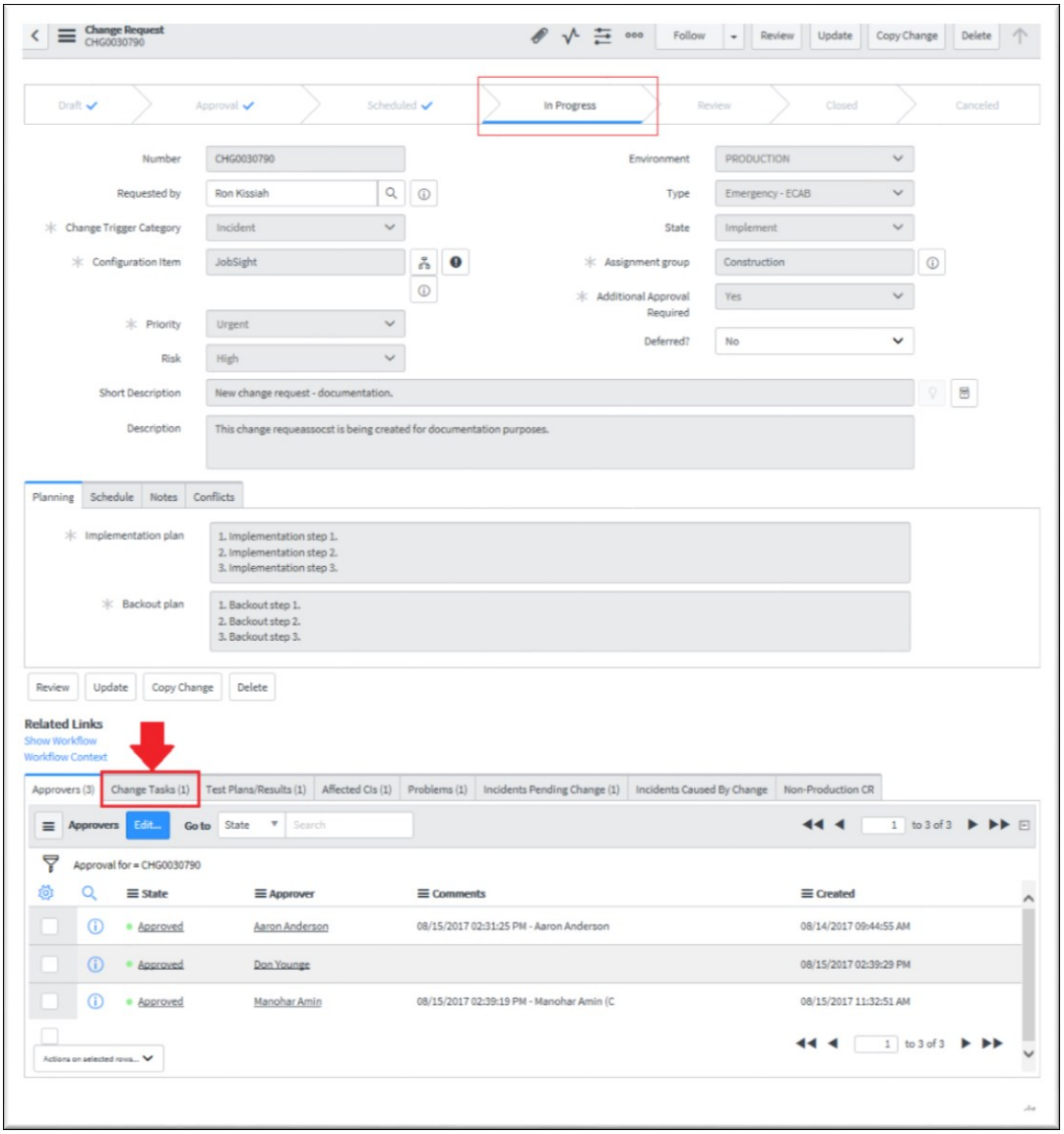
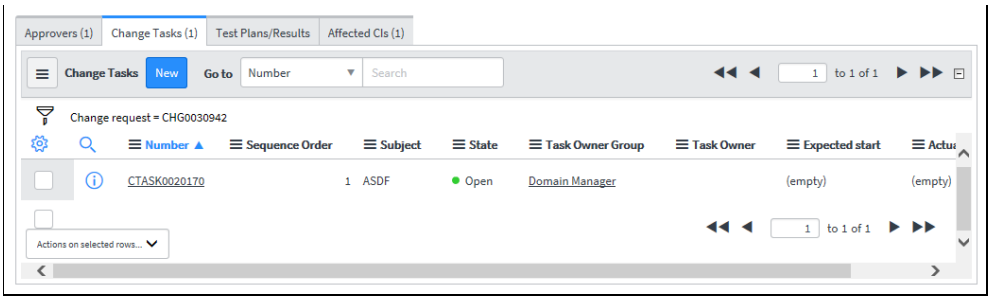
4. Scroll to the bottom of the window and click the Change Tasks tab.



ServiceNow displays a list of change tasks for you to review and close when they are completed.



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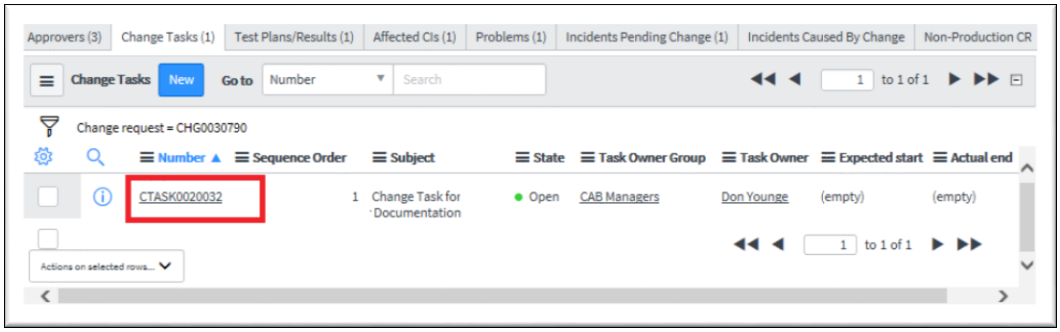
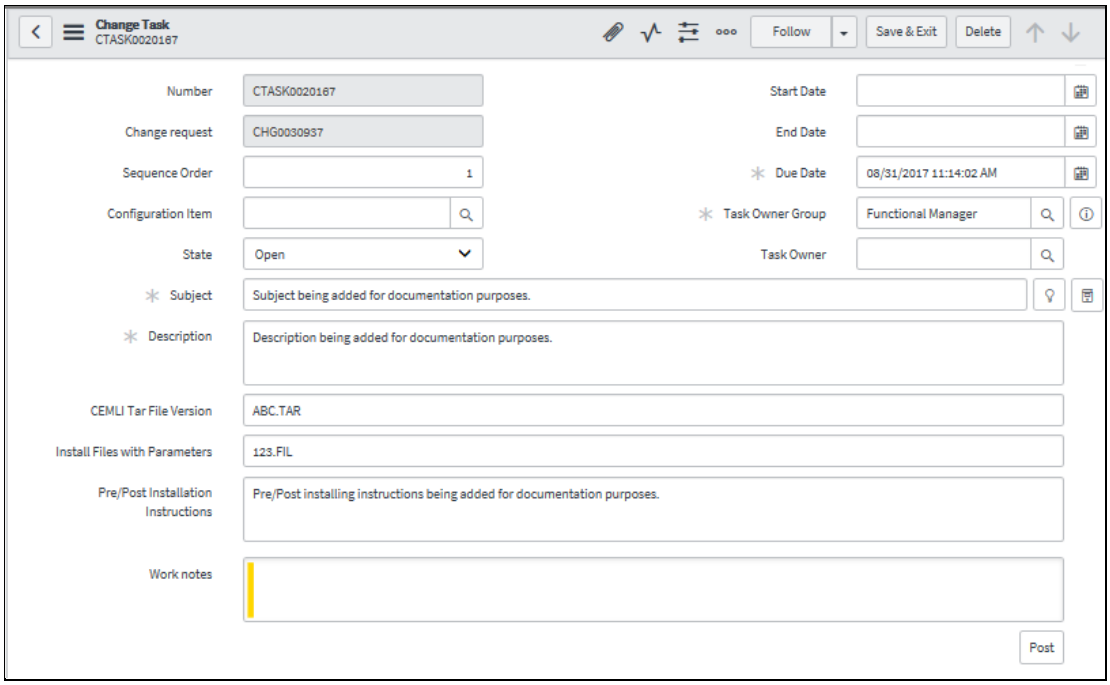
5. Click the Change Task number you want to work and close.



ServiceNow displays a copy of the Change Task you selected.



6. Click the down arrow in the **State** field and select Closed Complete to close the change task.

   Note: You can select any of the following options, depending upon the state of the change task:

   - *Pending*
   - *Open*
   - *Work in Progress*
   - *Closed Complete*
   - *Closed Incomplete*
   - *Closed Skipped*

7. Enter the task owner in the **Task Owner** field.
8. Click **Save**.

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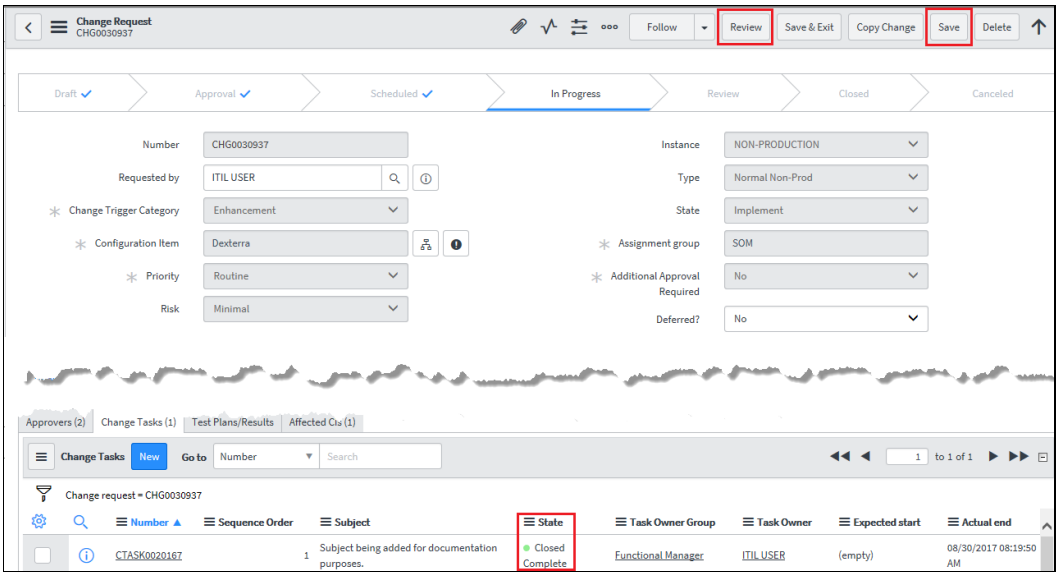
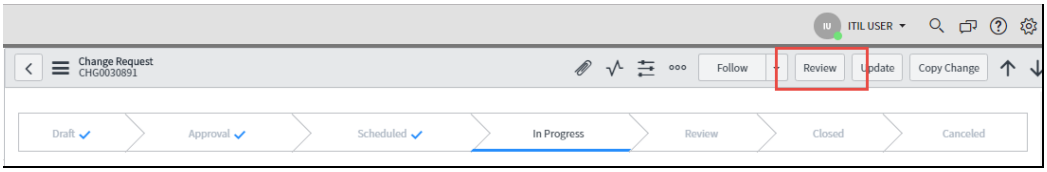
ServiceNow updates the change task state, and you can now close other change tasks, if necessary. Closed tasks display in the Task tab on the Change Request window.



9. Click **Review**.



ServiceNow advances to the Review phase and creates a Post Implementation Review (PIR) task.

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Closing Post Implementation Review Tasks

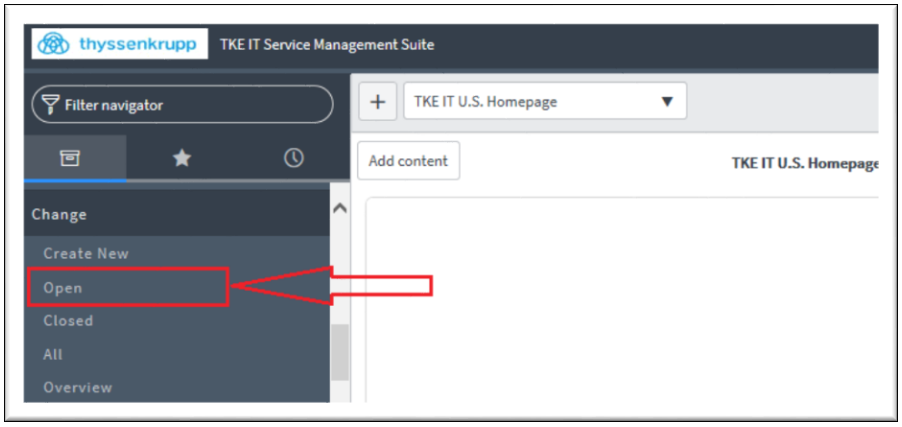
By default, ServiceNow assigns a Post Implementation Review (PIR) task to the change owner. The Change Owner completes the PIR task and closes the task.

Note: You add test plans and results in this phase if the non-production change request requires a production change request. The Test Plans/Results are automatically added to the corresponding Production Change Request.

To close a PIR change task:

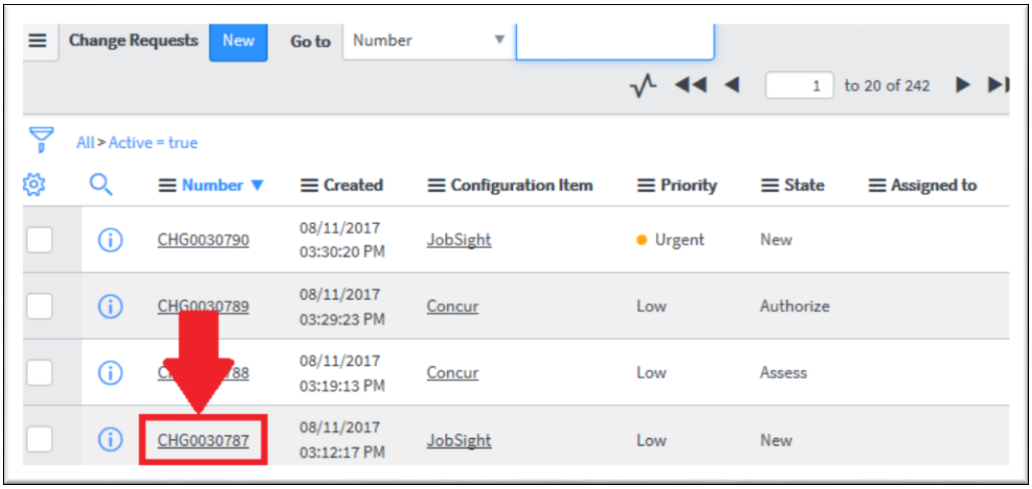
1. Log on to ServiceNow, if not already logged on.

   The ServiceNow Home page is displayed.



2. In the left hand navigation bar, scroll to the Change section, and click Open.

   ServiceNow displays a list of Change Requests.



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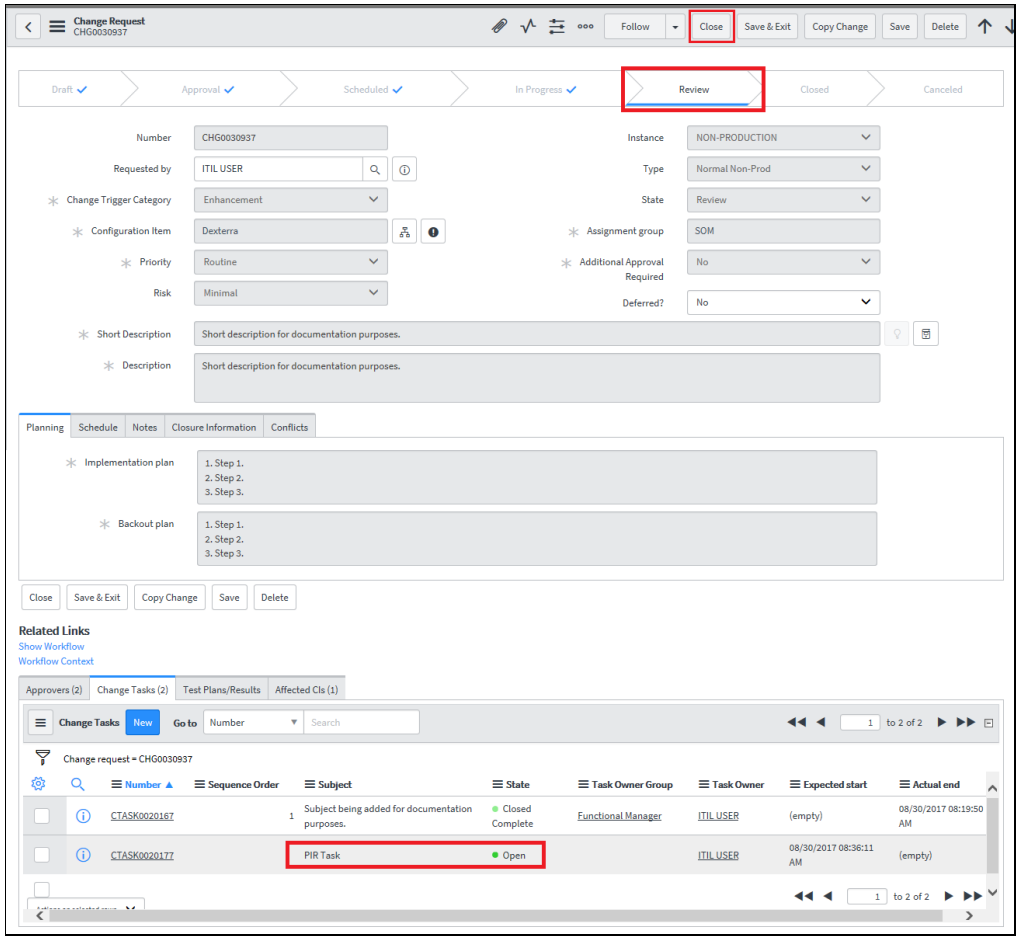
3. Scroll through the list of Change Requests, and click the one you want to display.

   ServiceNow displays the Change Request you selected.



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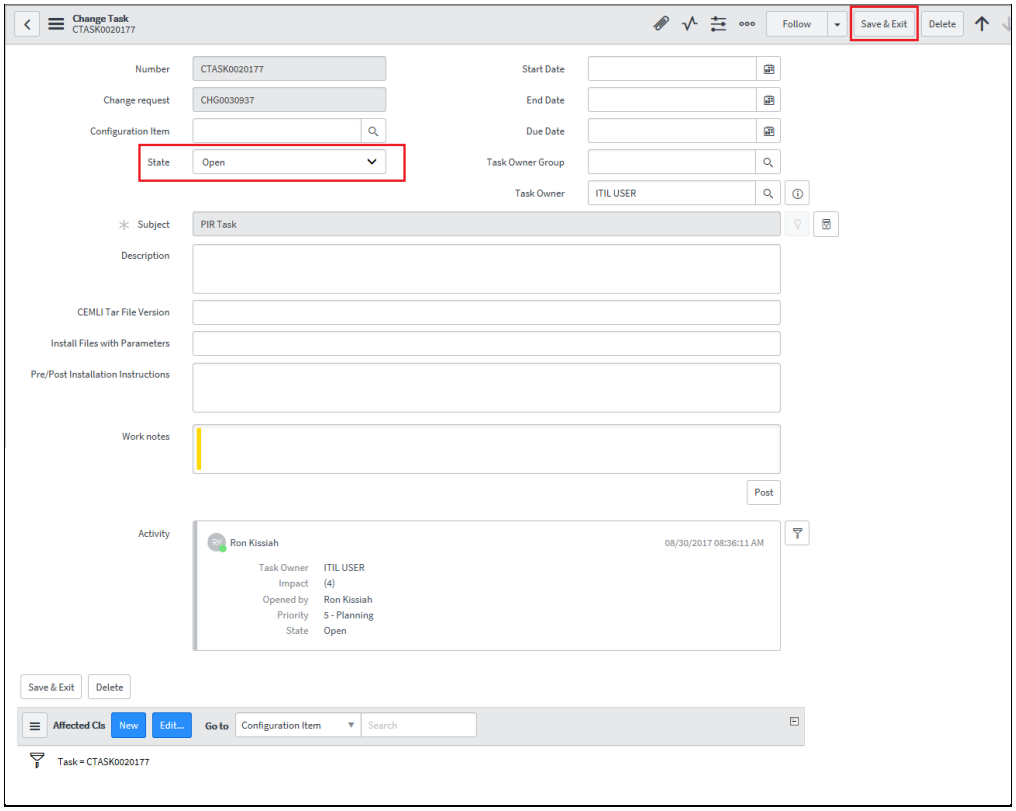
4. Click the PIR change task assigned to you.

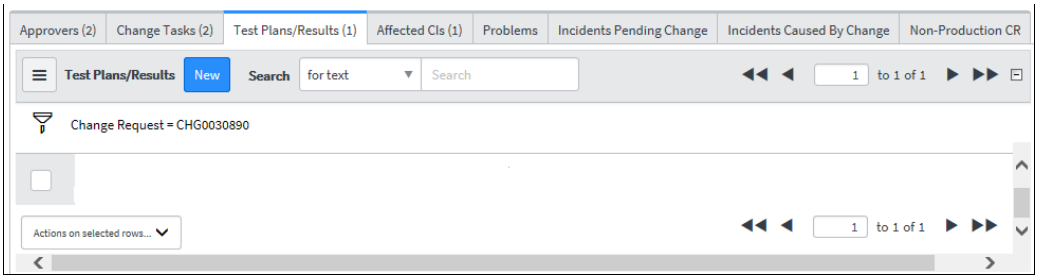
   ServiceNow displays the PIR change task you selected. You can review any notes about the change.



5. Click the down arrow in the State field, and select Closed Complete to change the PIR change class to a closed state.

6. Click the **Save & Exit** button.

   ServiceNow returns you to the Change Request window, and you are ready to add a test plan and results, if necessary. You add Test Plan/Results if the non-production Change Request requires a Production change request. Otherwise, you are ready to close the Change Request.



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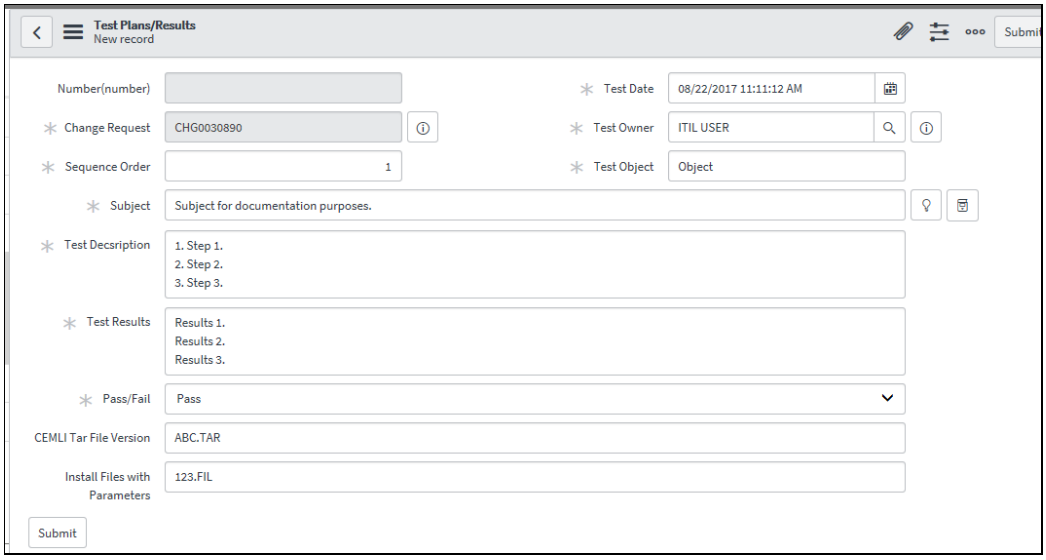
7. Select the Test Plans/Results tab and then click the **New** button.

   ServiceNow displays the Test Plans/Results New Record window.



8. Click in the **Sequence Order** field, and enter the next number higher than the number of the most recently entered Test Plan/Results task.
9. Click in the **Test Date** field, and enter the date the test is conducted.
10. Click in the **Test Owner** field, and enter the name of the individual responsible for the test.
11. Click in the **Test Object** field, and enter the name of the object being tested.
12. Click in the **Subject** field, and enter a high level subject (75 characters or fewer).
13. Click in the **Test Description** field, and enter a detailed description of the test.
14. Click in the **Test Results** field, and enter the test results.
15. Click the down arrow in the **Pass/Fail** field, and select one of the following:
    - Pass
    - Fail
16. Click in the **CEMLI Tar File Version** field, and enter the version number.
17. Click in the **Install Files with Parameters** field, and enter the name of the Install Files.
18. Click the **Submit** button to save test plans and results.

    You are now ready to close the change request.

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Closing a Change Request

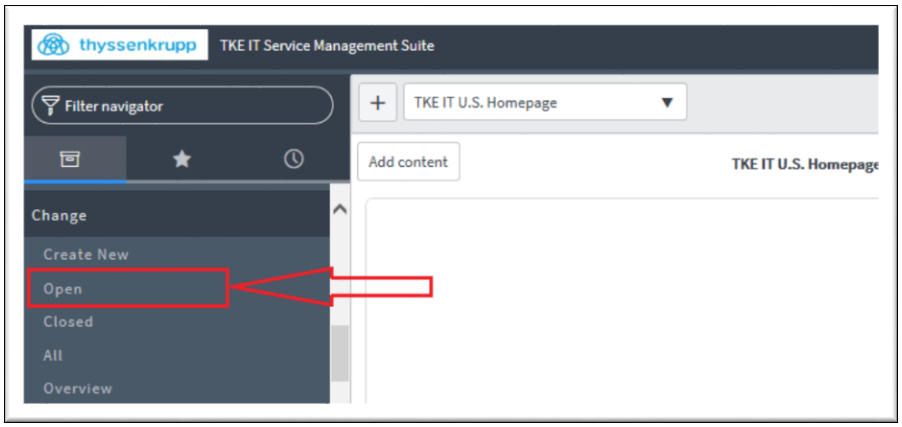
After you have completed a Post Implementation Review (PIR) and closed the associated PIR change tasks, you are ready to close the Change Request. Closing the Change Request completes the change cycle. If the non-production change request requires a production change request, then you indicate that a production change request is needed.

To close a Change Request:

1. Log on to ServiceNow, if not already logged on.

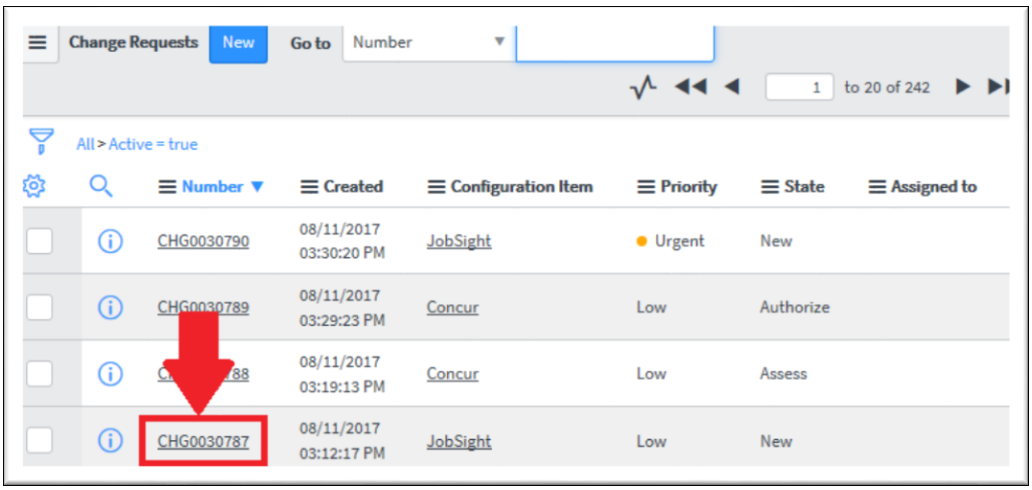
   The ServiceNow Home page is displayed.

2. In the left hand navigation bar, scroll to the Change section, and click Open.



   ServiceNow displays a list of Change Requests.

3. Scroll through the list of Change Requests and click the one you want to view.



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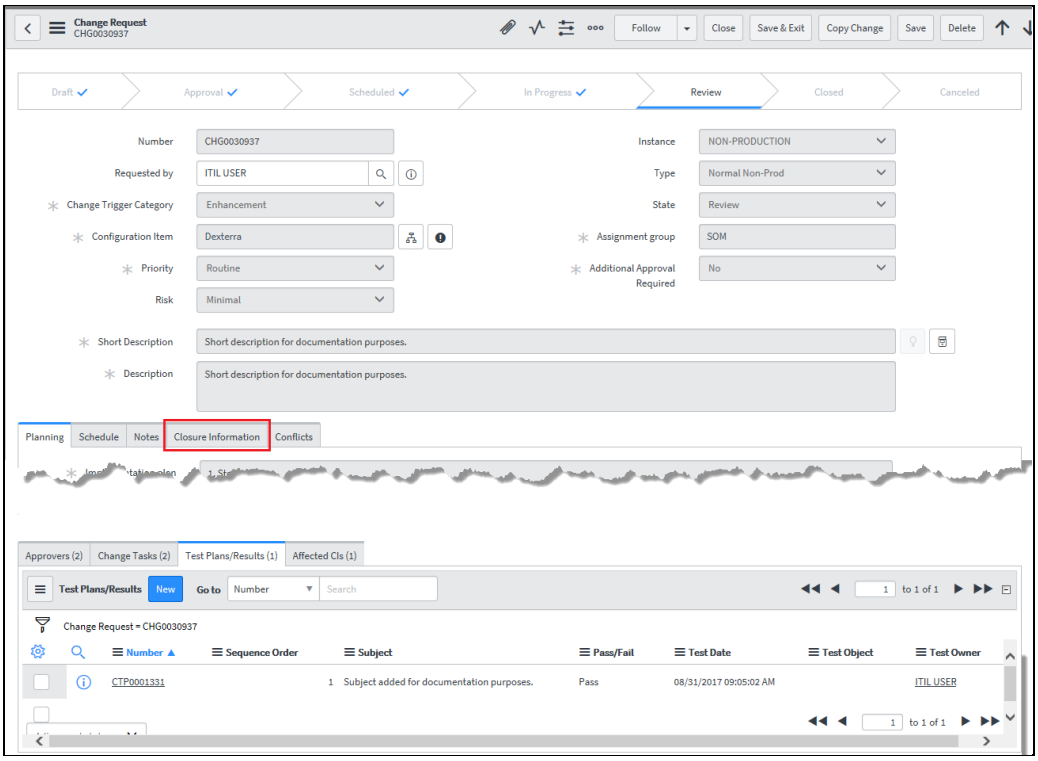
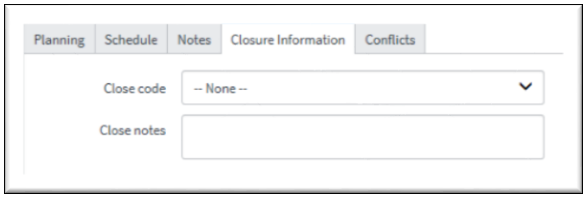
ServiceNow displays the Change Request you selected.



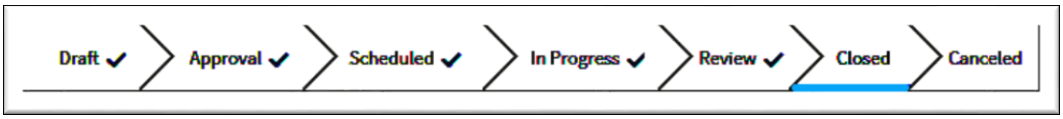
4. Click the **Closure Information** tab.

   ServiceNow displays the Closure Information fields.

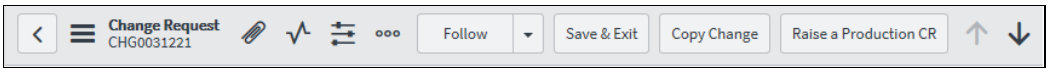


5. Click the down arrow in the **Close Code** field and choose one of the following options:
   - Successful
   - Successful with issues
   - Unsuccessful
6. Click in the **Notes** field and enter any notes associated with the closure of the Change Request.
7. Click the **Close** button.

   ServiceNow closes the Change Request. You have now completed the change cycle.

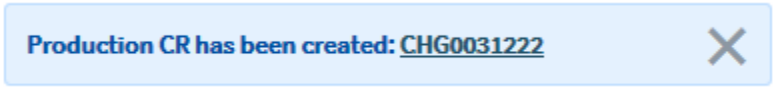


For non-production changes that require a production change, you have the option of creating a production change request.



8. Click the **Raise a Production CR** button at the top of the window.

   ServiceNow creates a new Production Change Request and associates it with the current Non-Production Change Request. Any Test Plans/Results are automatically added to the Production CR.



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