

Managing Non-Production Changes in ServiceNow

INTRODUCTION2

LOGGING ON TO SERVICENow3

CREATING A NEW CHANGE4

UPDATING CHANGE REQUEST INPUTS7

ADDING APPROVERS.....9

ADDING CHANGE TASKS10

IDENTIFYING AFFECTED CONFIGURATION ITEMS11

REQUESTING APPROVAL12

APPROVING CHANGES IN SERVICENow.....13

IMPLEMENTING A SCHEDULED CHANGE REQUEST15

CLOSING CHANGE TASKS17

CLOSING POST IMPLEMENTATION REVIEW TASKS21

CLOSING A CHANGE REQUEST.....25

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:

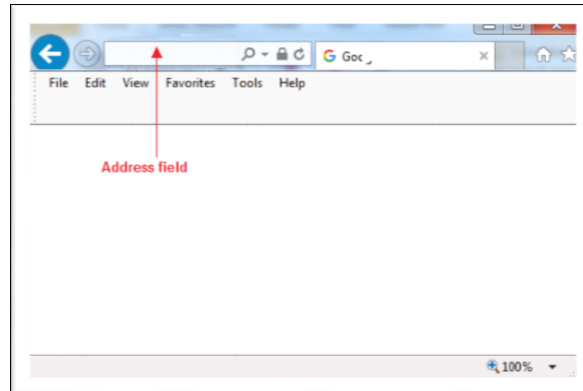
- Logging in to Service Now
- Creating a New Change Request
- Updating Change Request Inputs
 - Adding Approvers
 - Adding Change Tasks
 - Identifying Affected Configuration Items
 - Requesting Approval
- Approving Changes in ServiceNow
- Implementing a Scheduled Change Request
- Reviewing a Change Request
 - 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

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.

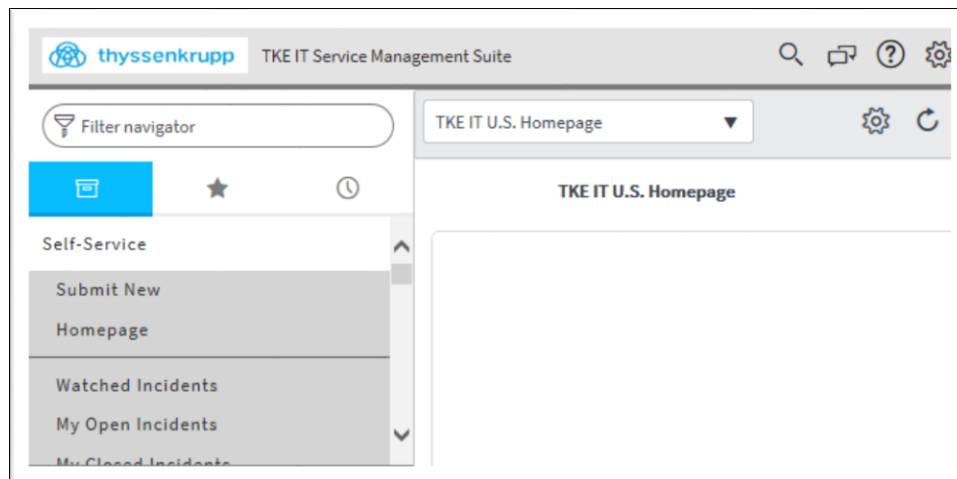
To log on to ServiceNow:

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.

Creating a New Change

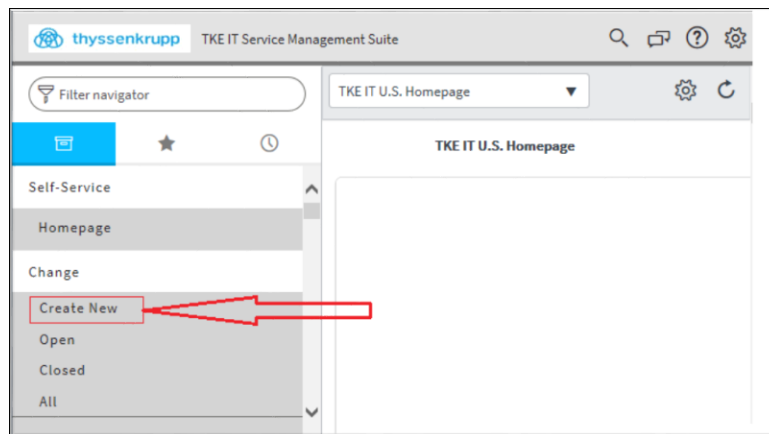
On the initial Change Request screen you will complete such tasks as:

- 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.




Managing Non-Production Changes in ServiceNow

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

The screenshot shows the 'Change Request' form in the 'Draft' state. The form is titled 'Change Request New record'. It features a progress bar at the top with stages: Draft, Approval, Scheduled, In Progress, Review, Closed, and Canceled. The form includes several fields: 'Number' (text input), 'Requested by' (pre-populated with 'ITIL USER'), 'Environment' (dropdown, marked with a red asterisk), 'Type' (dropdown), 'State' (dropdown, set to 'New'), 'Change Trigger Category' (dropdown, marked with an asterisk), 'Configuration Item' (lookup field, marked with a red asterisk), 'Priority' (dropdown, marked with an asterisk), 'Risk' (dropdown), 'Short Description' (text input), and 'Description' (text input). Below these fields are tabs for 'Planning *', 'Schedule *', 'Notes', and 'Conflicts'. Under the 'Planning *' tab, there are fields for 'Implementation plan' and 'Backout plan', both marked with red asterisks. A 'Save' button is located at the bottom left of the form.

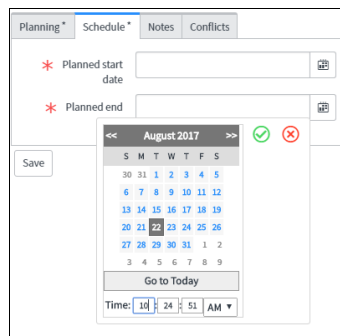
Note: The name of the change owner is pre-populated in the Requested By field.

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

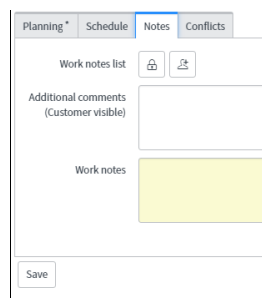
Note: If you choose Yes, then you have to add the approvers when you are entering additional inputs. See instructions in the Adding Additional Inputs section.

Managing Non-Production Changes in ServiceNow

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.

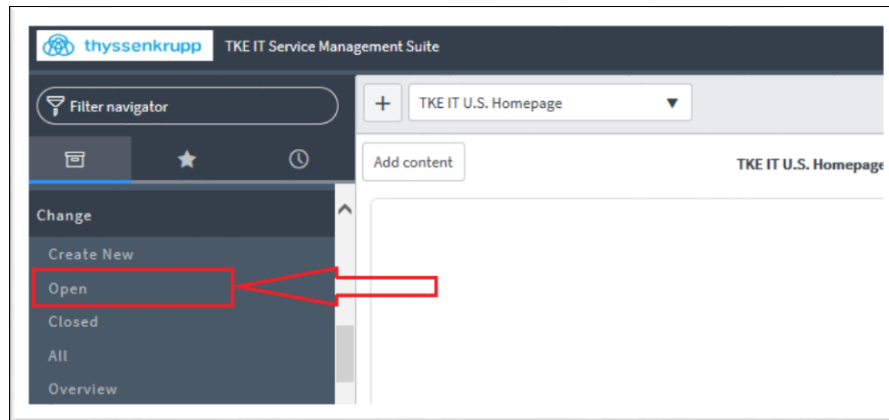
Updating Change Request Inputs

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.

A screenshot of the ServiceNow 'Change Requests' list view. The table displays a list of change requests with columns for Number, Created, Configuration Item, Priority, State, and Assigned to. The first four rows are visible. The first row has Number CHG0030790, Created 08/11/2017 03:30:20 PM, Configuration Item JobSight, Priority Urgent, and State New. The second row has Number CHG0030789, Created 08/11/2017 03:29:23 PM, Configuration Item Concur, Priority Low, and State Authorize. The third row has Number CHG0030788, Created 08/11/2017 03:19:13 PM, Configuration Item Concur, Priority Low, and State Assess. The fourth row has Number CHG0030787, Created 08/11/2017 03:12:17 PM, Configuration Item JobSight, Priority Low, and State New. A red arrow points to the 'CHG0030787' entry, which is also highlighted with a red rectangular box. The table is filtered by 'All > Active = true' and shows 1 to 20 of 242 records.

	Number	Created	Configuration Item	Priority	State	Assigned to
<input type="checkbox"/>	CHG0030790	08/11/2017 03:30:20 PM	JobSight	Urgent	New	
<input type="checkbox"/>	CHG0030789	08/11/2017 03:29:23 PM	Concur	Low	Authorize	
<input type="checkbox"/>	CHG0030788	08/11/2017 03:19:13 PM	Concur	Low	Assess	
<input type="checkbox"/>	CHG0030787	08/11/2017 03:12:17 PM	JobSight	Low	New	

Managing Non-Production Changes in ServiceNow

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.

The screenshot shows the ServiceNow Change Request form for CHG0030937. The form is in the 'Draft' state, with a progress bar showing stages: Draft, Approval, Scheduled, In Progress, Review, Closed, and Canceled. The form fields are organized into two columns. The left column includes fields for Number (CHG0030937), Requested by (ITIL USER), Change Trigger Category (Enhancement), Configuration Item (Dexterra), Priority (Routine), Risk (Minimal), Short Description, and Description. The right column includes fields for Instance (NON-PRODUCTION), Type (Normal Non-Prod), State (New), Assignment group (SOM), and Additional Approval Required (No). Below the form fields are tabs for Planning, Schedule, Notes, and Conflicts. The Planning tab is active, showing Implementation plan and Backout plan sections. At the bottom of the form are buttons for Request Approval, Save & Exit, Cancel Change, and Save. Below the form is a 'Related Links' section with a 'Show Workflow' link. The 'Approvers' tab is selected, showing a table with columns for State, Approver, Comments, and Created. The table is currently empty, displaying 'No records to display'.

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.

The screenshot shows the ServiceNow Change Request form for CHG0030790. The form is in the 'Draft' state, with a progress bar showing stages: Draft, Approval, Scheduled, In Progress, Review, Closed, and Canceled. The form fields are organized into two columns. The left column includes fields for Number (CHG0030790), Requested by (ITIL USER), Change Trigger Category (Enhancement), Configuration Item (Dexterra), Priority (Routine), Risk (Minimal), Short Description, and Description. The right column includes fields for Instance (NON-PRODUCTION), Type (Normal Non-Prod), State (New), Assignment group (SOM), and Additional Approval Required (No). Below the form fields are tabs for Planning, Schedule, Notes, and Conflicts. The Planning tab is active, showing Implementation plan and Backout plan sections. At the bottom of the form are buttons for Request Approval, Save & Exit, Cancel Change, and Save. Below the form is a 'Related Links' section with a 'Show Workflow' link. The 'Approvers' tab is selected, showing a table with columns for State, Approver, Comments, and Created. The table is currently empty, displaying 'No records to display'.


Managing Non-Production Changes in ServiceNow

Adding Approvers

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

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

The screenshot shows the 'Edit Members' window. At the top, there are 'Add Filter' and 'Run filter' buttons. Below them are dropdown menus for 'choose field', 'oper', and 'value'. The main area is divided into two sections: 'Collection' on the left and 'Approvers List' on the right. The 'Collection' section has a search bar and a list of names. 'Aaron Bailey' is highlighted with a red box. The 'Approvers List' section shows 'CHG0030890' and 'Aaron Bailey', with 'Aaron Bailey' also highlighted by a red box. A red arrow points from the 'Aaron Bailey' entry in the 'Collection' list to the right arrow button between the two lists. At the bottom, there are 'Cancel' and 'Save' buttons.

- 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.*

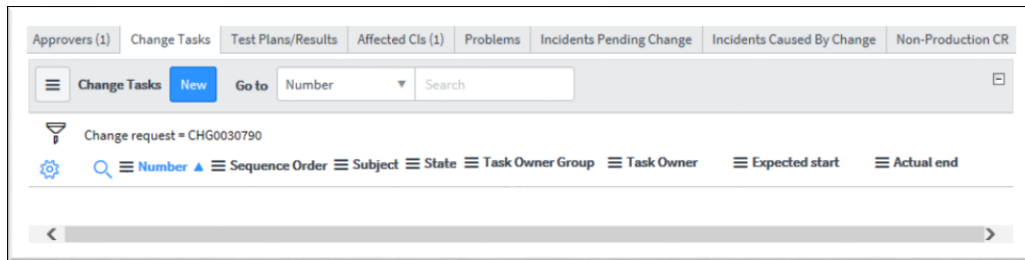
- Click **Save** to add the approver to the Change Request.

You are now ready to Add Change Tasks.

Managing Non-Production Changes in ServiceNow

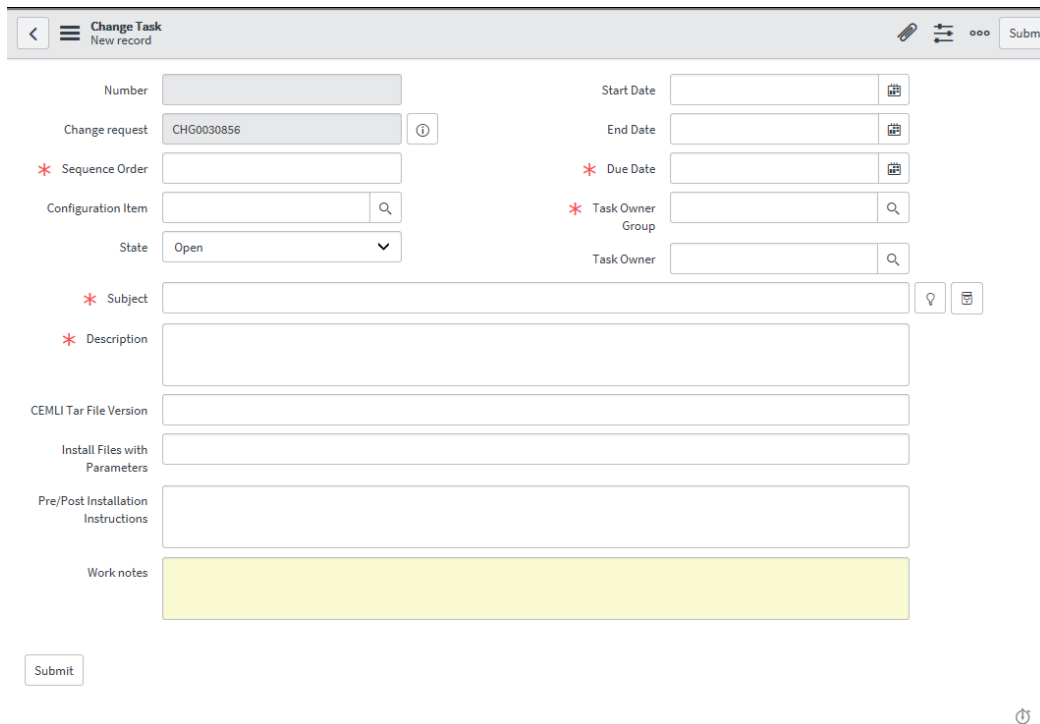
Adding Change Tasks

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

The screenshot shows the ServiceNow Change Management interface. At the top, there are several tabs: 'Approvers (1)', 'Change Tasks', 'Test Plans/Results', 'Affected CIs (1)', 'Problems', 'Incidents Pending Change', 'Incidents Caused By Change', and 'Non-Production CR'. The 'Change Tasks' tab is selected. Below the tabs, there is a 'New' button in blue. To the right of the 'New' button is a 'Go to' field with a dropdown menu and a search bar. Below this, there is a search bar with the text 'Change request = CHG0030790'. Below the search bar, there is a table with columns: 'Number', 'Sequence Order', 'Subject', 'State', 'Task Owner Group', 'Task Owner', 'Expected start', and 'Actual end'. The table is currently empty.

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.

The screenshot shows the 'Change Task' 'New record' form in ServiceNow. The form has a header bar with a back arrow, a hamburger menu, the text 'Change Task New record', and a 'Submit' button. The form fields are arranged in two columns. The left column contains: 'Number' (text field), 'Change request' (text field with value 'CHG0030856'), 'Sequence Order' (text field with a red asterisk), 'Configuration Item' (text field with a search icon), 'State' (dropdown menu with value 'Open'), 'Subject' (text field with a red asterisk), 'Description' (text field with a red asterisk), 'CEMLI Tar File Version' (text field), 'Install Files with Parameters' (text field), 'Pre/Post Installation Instructions' (text field), and 'Work notes' (text area). The right column contains: 'Start Date' (calendar icon), 'End Date' (calendar icon), 'Due Date' (text field with a red asterisk and calendar icon), 'Task Owner Group' (text field with a search icon and a red asterisk), and 'Task Owner' (text field with a search icon). At the bottom left is a 'Submit' button. At the bottom right is a refresh icon.

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

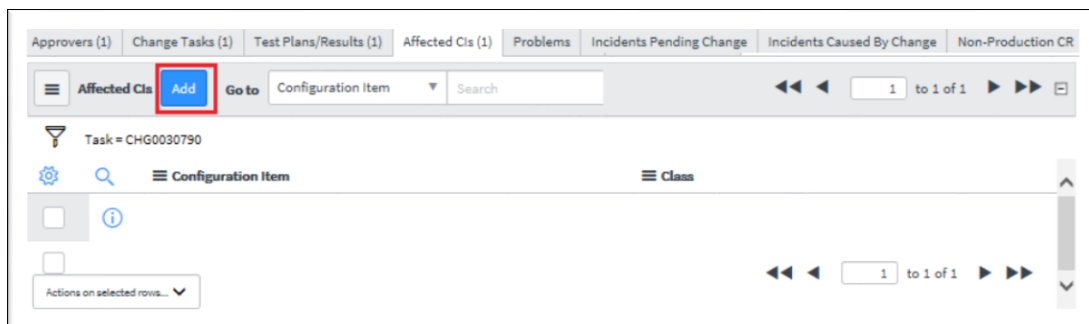
Managing Non-Production Changes in ServiceNow

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**.

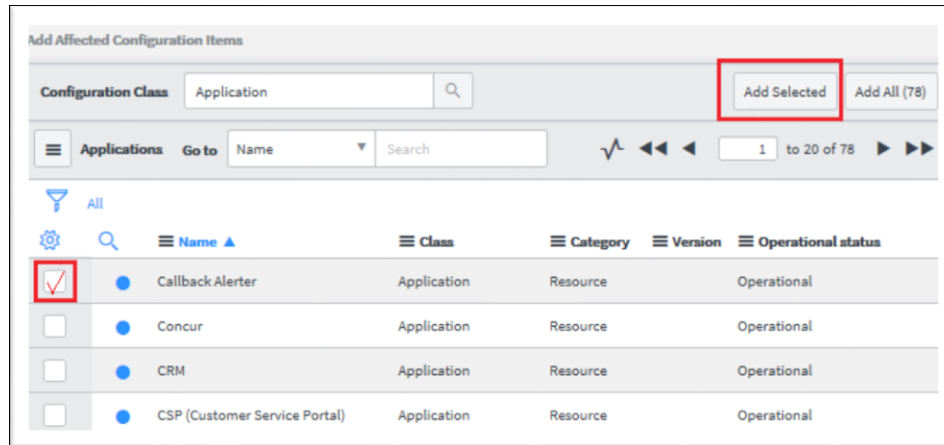


Managing Non-Production Changes in ServiceNow

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

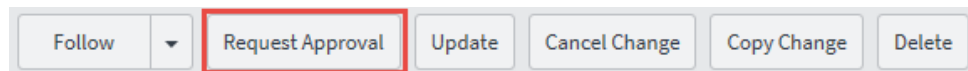
26. Select the Configuration Item that might be affected by this change and click **Add Selected**.

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

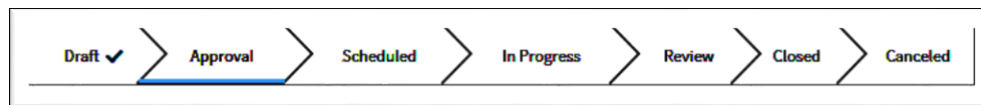


Requesting Approval

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.

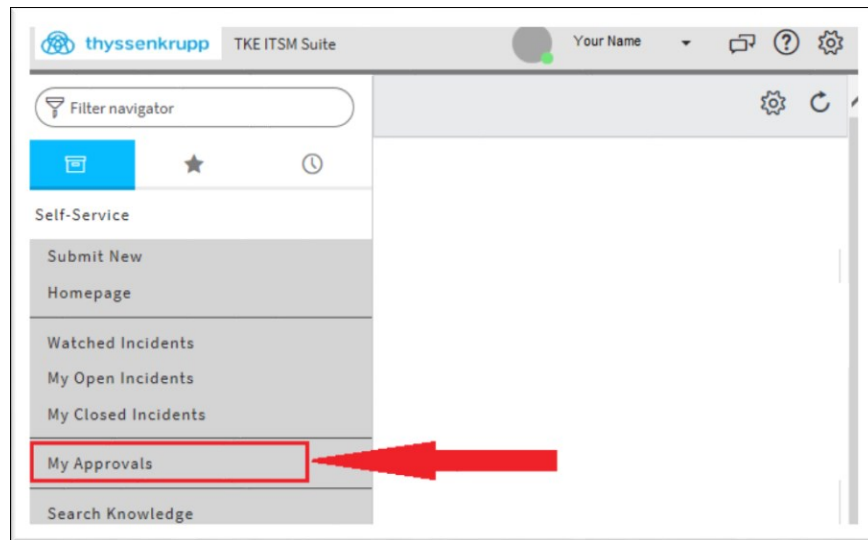


Approving Changes in ServiceNow

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.

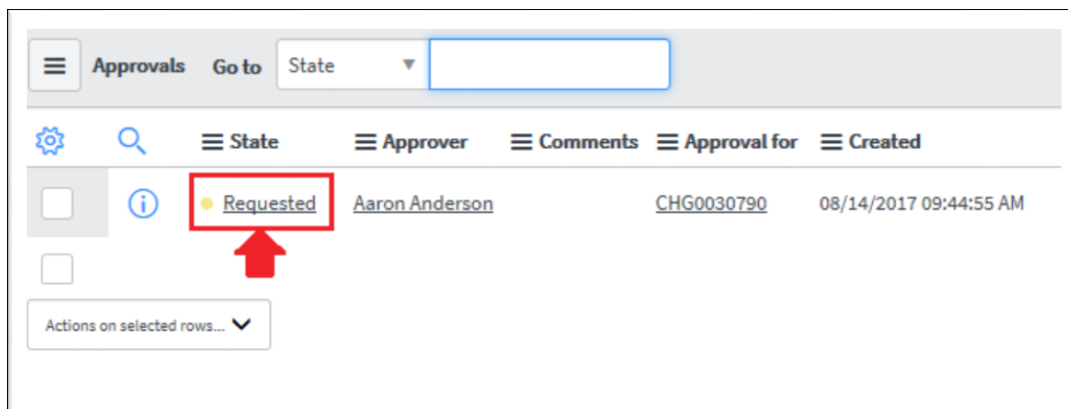
To approve changes:

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**.



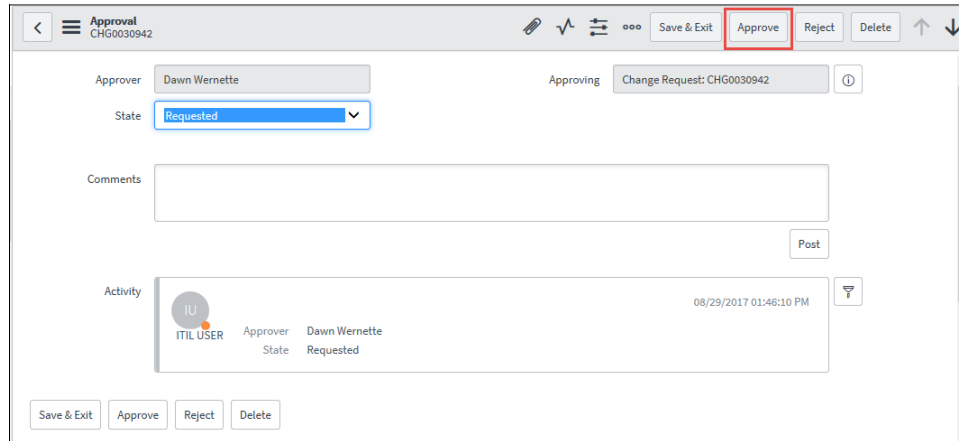
ServiceNow displays a list of changes for approval.


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



Managing Non-Production Changes in ServiceNow

ServiceNow displays the Change Request for you to review.

The screenshot shows the 'Approval' page for Change Request CHG0030942. At the top, there are buttons for 'Save & Exit', 'Approve' (highlighted with a red box), 'Reject', and 'Delete'. Below this, the 'Approver' is listed as 'Dawn Wernette' and the 'Approving' item is 'Change Request: CHG0030942'. The 'State' is set to 'Requested' with a dropdown arrow. There is a 'Comments' text area with a 'Post' button. An 'Activity' section shows a log entry from 'ITIL USER' as the 'Approver' and 'Dawn Wernette' as the 'State', with the action 'Requested' on '08/29/2017 01:46:10 PM'. At the bottom, there are buttons for 'Save & Exit', 'Approve', 'Reject', and 'Delete'.

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.

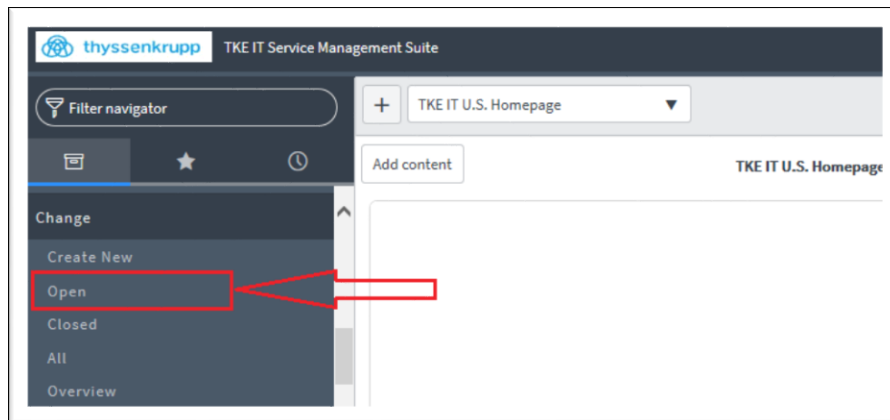
Note: You can also click the **Reject** button if you want to Reject this request. Remember to change the state to Rejected.

Implementing a Scheduled Change Request

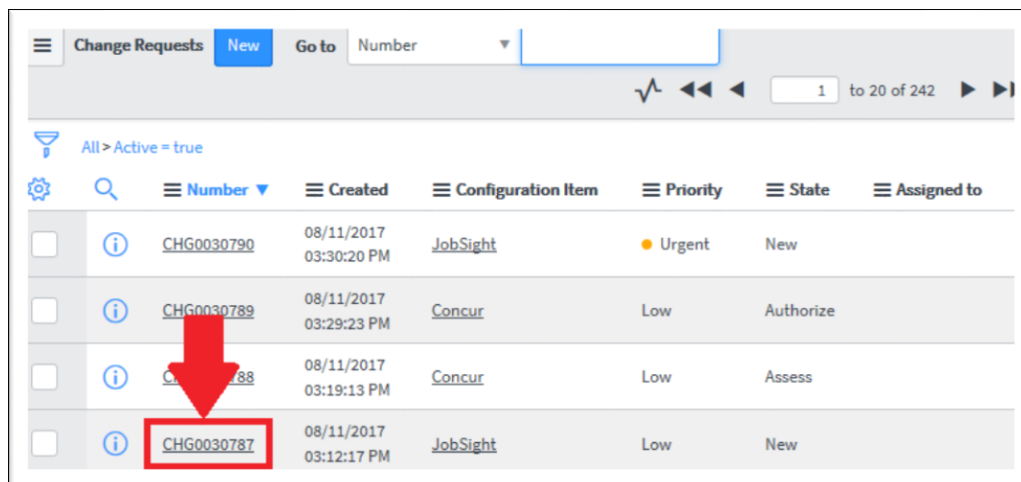
Once a Change Request has been scheduled, it is ready to be implemented. Once the implementation is completed, the Change Request progresses to the In-Progress stage.

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.

Managing Non-Production Changes in ServiceNow

Change Request
CHG0039900

Press F11 to exit full screen

Follow Implement Update Copy Change

Draft ✓ Approval ✓ Scheduled In Progress Review Closed Canceled

Number: CHG0039900 Environment: PRODUCTION
Requested by: ITIL USER Type: Normal - CAB
Change Trigger Category: Maintenance State: Scheduled
Configuration Item: Doterra Assignment group: SOM
Priority: Routine Additional Approval Required: No
Risk: High
Short Description:
Description:

Planning Schedule* Notes Conflicts

Implementation plan: sd
Backout plan: sdig

Implement Update Copy Change

Related Links
Show Workflow

Approvers (3) Change Tasks (1) Test Plans/Results (1) Affected CIs (3) Problems Incidents Pending Change (1) Incidents Caused By Change Non-Production CR

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



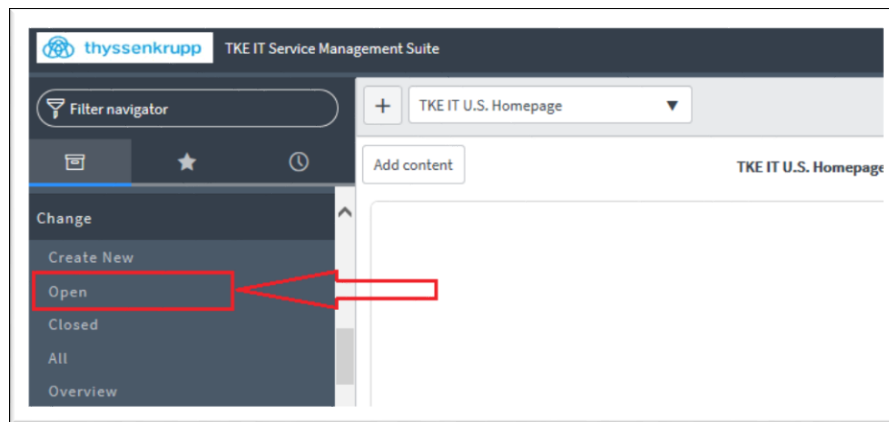
Closing Change Tasks

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.

A screenshot of the ServiceNow 'Change Requests' list. The table has columns: Number, Created, Configuration Item, Priority, State, and Assigned to. The first four rows are visible. The fourth row, with Number 'CHG0030787', is highlighted with a red rectangular box, and a large red arrow points down to it from the row above.

	Number	Created	Configuration Item	Priority	State	Assigned to
<input type="checkbox"/>	CHG0030790	08/11/2017 03:30:20 PM	JobSight	Urgent	New	
<input type="checkbox"/>	CHG0030789	08/11/2017 03:29:23 PM	Concur	Low	Authorize	
<input type="checkbox"/>	CHG0030788	08/11/2017 03:19:13 PM	Concur	Low	Assess	
<input type="checkbox"/>	CHG0030787	08/11/2017 03:12:17 PM	JobSight	Low	New	

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.

Managing Non-Production Changes in ServiceNow

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

The screenshot shows the ServiceNow Change Request form for CHG0030790. The status is 'In Progress', which is highlighted with a red box. The form includes fields for Number, Requested by, Change Trigger Category, Configuration Item, Priority, Risk, Environment, Type, State, Assignment group, Additional Approval Required, and Deferred?. The Short Description is 'New change request - documentation.' and the Description is 'This change request is being created for documentation purposes.' Below the form, there are tabs for Planning, Schedule, Notes, and Conflicts. The 'Related Links' section shows a list of links, with 'Change Tasks (1)' highlighted by a red arrow. The 'Change Tasks (1)' tab is selected, showing a table of change tasks.

State	Approver	Comments	Created
Approved	Aaron Anderson	08/15/2017 02:31:25 PM - Aaron Anderson	08/14/2017 09:44:55 AM
Approved	Don Young	08/15/2017 02:39:29 PM	08/15/2017 02:39:29 PM
Approved	Manohar Amin	08/15/2017 02:39:19 PM - Manohar Amin (C	08/15/2017 11:32:51 AM

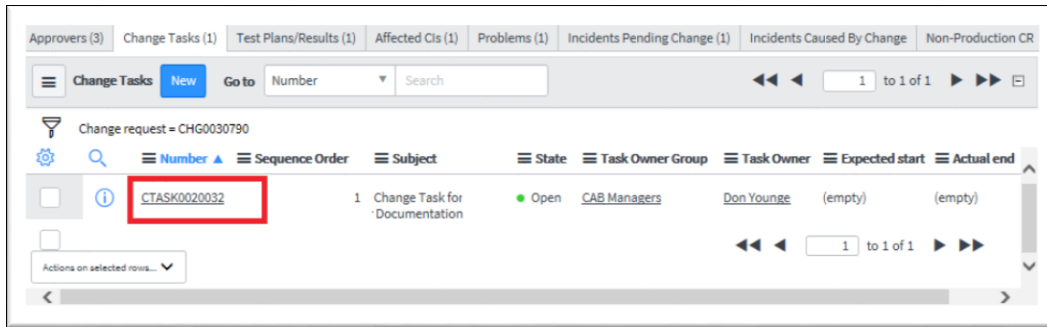
ServiceNow displays a list of change tasks for you to review and close when they are completed.

The screenshot shows the ServiceNow Change Tasks table for change request CHG0030942. The table has columns for Number, Sequence Order, Subject, State, Task Owner Group, Task Owner, Expected start, and Actual start. There is one task listed with ID CTASK0020170, subject ASDF, state Open, and task owner Domain Manager.

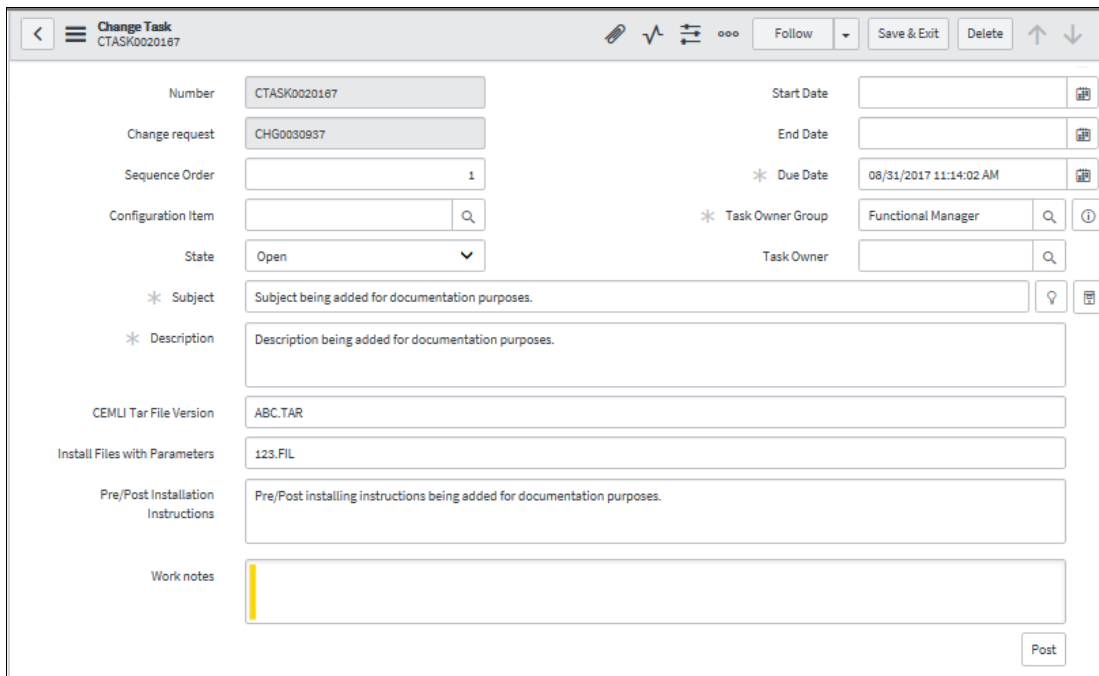
Number	Sequence Order	Subject	State	Task Owner Group	Task Owner	Expected start	Actual start
CTASK0020170	1	ASDF	Open	Domain Manager		(empty)	(empty)

Managing Non-Production Changes in ServiceNow

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



ServiceNow displays a copy of the Change Task you selected.



- 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*

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

Managing Non-Production Changes in ServiceNow

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.

Change Request
CHG0030937

Follow Review Save & Exit Copy Change Save Delete

Draft ✓ Approval ✓ Scheduled ✓ In Progress Review Closed Canceled

Number: CHG0030937 Instance: NON-PRODUCTION
Requested by: ITIL USER Type: Normal Non-Prod
Change Trigger Category: Enhancement State: Implement
Configuration Item: Dexterra Assignment group: SOM
Priority: Routine Additional Approval Required: No
Risk: Minimal Deferred?: No

Approvers (2) Change Tasks (1) Test Plans/Results Affected CIs (1)

Change Tasks New Go to Number Search 1 to 1 of 1

Change request = CHG0030937

Number	Sequence Order	Subject	State	Task Owner Group	Task Owner	Expected start	Actual end
CTASK0020167	1	Subject being added for documentation purposes.	Closed Complete	Functional Manager	ITIL USER	(empty)	08/30/2017 08:19:50 AM

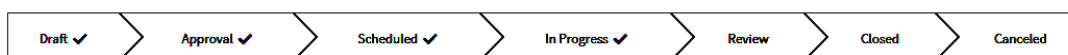
9. Click **Review**.

Change Request
CHG0030937

Follow Review Update Copy Change

Draft ✓ Approval ✓ Scheduled ✓ In Progress Review Closed Canceled

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



Closing Post Implementation Review Tasks

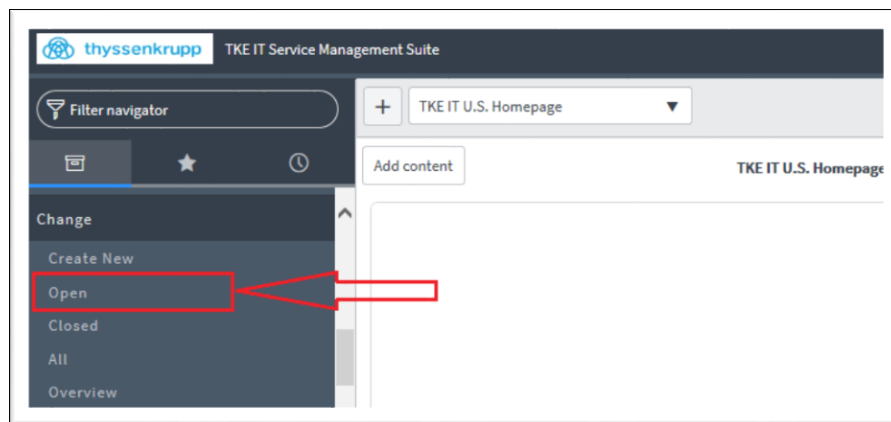
By default, ServiceNow assigns a Post Implementation Review (PIR) task to the change owner. The Change Owner completes the PIR task and closes the task.

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:

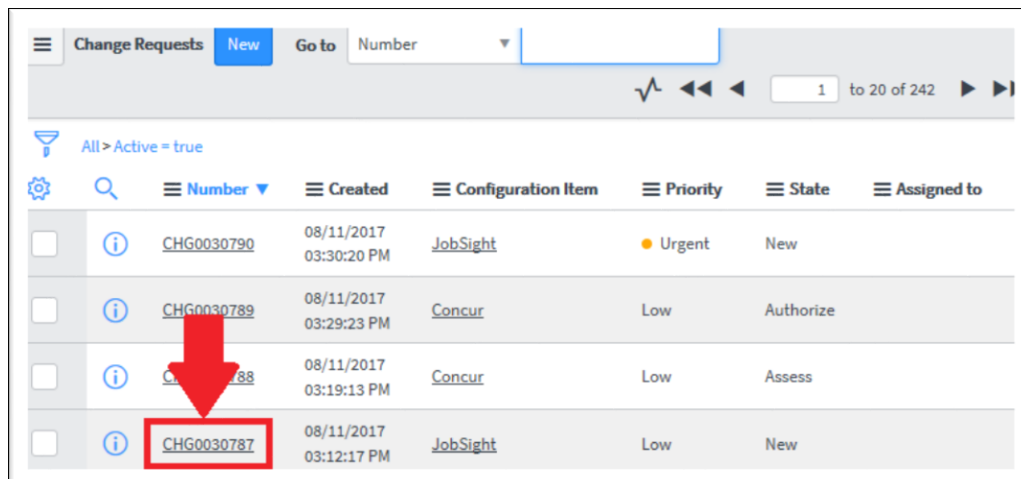
1. Log on to ServiceNow, if not already logged on.

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.



Managing Non-Production Changes in ServiceNow

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

The screenshot shows the ServiceNow Change Request form for request CHG0030937. The form is in the 'Review' state, which is highlighted with a red box in the top navigation bar. The form includes fields for Number, Instance, Requested by, Type, Change Trigger Category, State, Configuration Item, Assignment group, Priority, Additional Approval Required, Risk, and Deferred?. Below these fields are tabs for Planning, Schedule, Notes, Closure Information, and Conflicts. The Planning tab is active, showing Implementation and Backout plans. At the bottom, there is a 'Related Links' section and a 'Change Tasks' table. The 'Change Tasks' table has a red box around the 'PIR Task' row, which is in the 'Open' state.

Change request = CHG0030937							
CTASK0020167	1	Subject being added for documentation purposes.	Closed Complete	Functional Manager	ITIL USER	(empty)	08/30/2017 08:19:50 AM
CTASK0020177		PIR Task	Open		ITIL USER	08/30/2017 08:36:11 AM	(empty)

Managing Non-Production Changes in ServiceNow

- Click the PIR change task assigned to you.

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

Change Task
CTASK0020177

Number: CTASK0020177
Change request: CHG0030937
Configuration Item: [Search]
State: Open
Start Date: [Calendar]
End Date: [Calendar]
Due Date: [Calendar]
Task Owner Group: [Search]
Task Owner: ITIL USER [Search]

Subject: PIR Task
Description: [Text Area]
CEMLI Tar File Version: [Text Area]
Install Files with Parameters: [Text Area]
Pre/Post Installation Instructions: [Text Area]
Work notes: [Text Area]
Activity: Ron Kissiah (08/30/2017 08:36:11 AM)
Task Owner: ITIL USER
Impact: (4)
Opened by: Ron Kissiah
Priority: 5 - Planning
State: Open

Save & Exit Delete

Affected Cls [New] [Edit] Go to [Configuration Item] [Search]

Task = CTASK0020177

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

Approvers (2) Change Tasks (2) Test Plans/Results (1) Affected Cls (1) Problems Incidents Pending Change Incidents Caused By Change Non-Production CR

Test Plans/Results [New] Search for text [Search]

Change Request = CHG0030890

Actions on selected rows... [Search]

1 to 1 of 1

Managing Non-Production Changes in ServiceNow

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

ServiceNow displays the Test Plans/Results New Record window.

The screenshot shows the 'Test Plans/Results' 'New record' form in ServiceNow. The form contains the following fields and values:

- Number(number)**: Empty text field.
- * Change Request**: CHG0030890 (with an information icon).
- * Sequence Order**: 1.
- * Subject**: Subject for documentation purposes. (with a help icon and a copy icon).
- * Test Date**: 08/22/2017 11:11:12 AM (with a calendar icon).
- * Test Owner**: ITIL USER (with a search icon and an information icon).
- * Test Object**: Object.
- * Test Description**: 1. Step 1.
2. Step 2.
3. Step 3.
- * Test Results**: Results 1.
Results 2.
Results 3.
- * Pass/Fail**: Pass (with a dropdown arrow).
- CEMLI Tar File Version**: ABC.TAR.
- Install Files with Parameters**: 123.FIL.

A 'Submit' button is located at the bottom left of the form.

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.

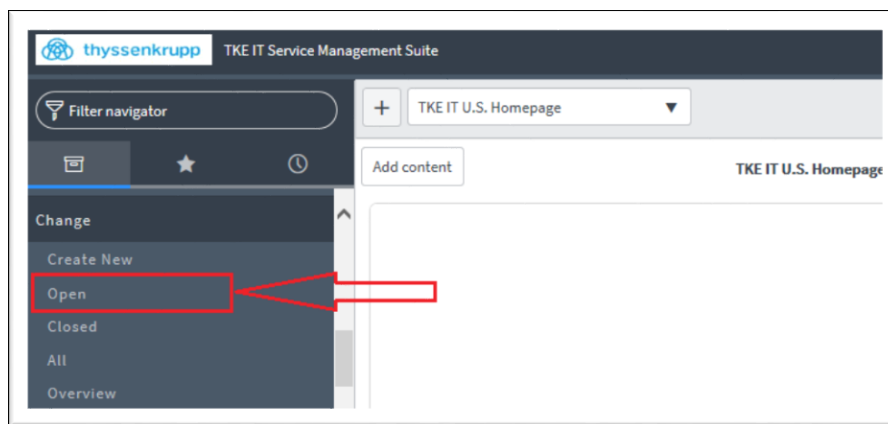
You are now ready to close the change request.

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.

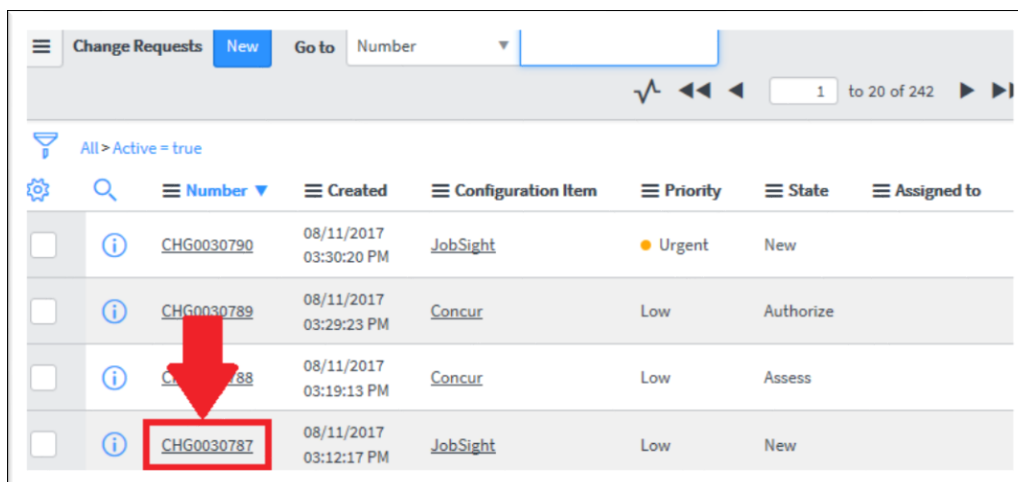
To close a Change Request:

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.



Managing Non-Production Changes in ServiceNow

ServiceNow displays the Change Request you selected.

The screenshot shows the ServiceNow Change Request form for CHG0030937. The form is in the 'Review' state. The 'Closure Information' tab is highlighted with a red box. Below the form, the 'Test Plans/Results' section is visible, showing a single test plan with a 'Pass' result.

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

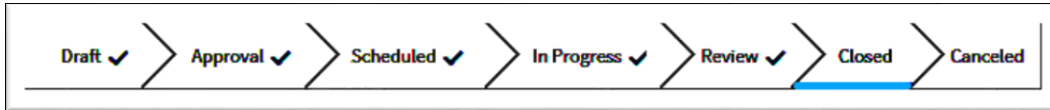
ServiceNow displays the Closure Information fields.

The screenshot shows the ServiceNow Closure Information fields. The 'Close code' field is set to '-- None --' and the 'Close notes' field is empty.

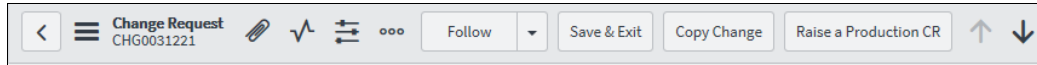
5. Click the down arrow in the **Close Code** field and choose one of the following options:
 - Successful
 - Successful with issues
 - Unsuccessful
6. Click in the **Notes** field and enter any notes associated with the closure of the Change Request.
7. Click the **Close** button.

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

Managing Non-Production Changes in ServiceNow



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.

