Functional Requirements Specification
on
Change Management

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1. Introduction

The IT Service Management (ITSM) solution provides scalable workflows to manage and deliver IT services to your users all through a single cloud-based platform. The ServiceNow Change Management application provides a systematic approach to control the life cycle of all changes, facilitating beneficial changes to be made with minimum disruption to IT services.

1.1 Background

IT Change Management is the IT service Management (ITSM) process that helps to follow standard procedures and practices for effectively managing requests to drastically minimize the risk and disruptions a change can have on IT and business operations. This project includes a standard process to be used by any customer in a Single Tenant instance along with Notification, flow, etc. This document includes Functional Requirements for Change Management as per ITIL standards.

Instance: https://dev124602.service-now.com
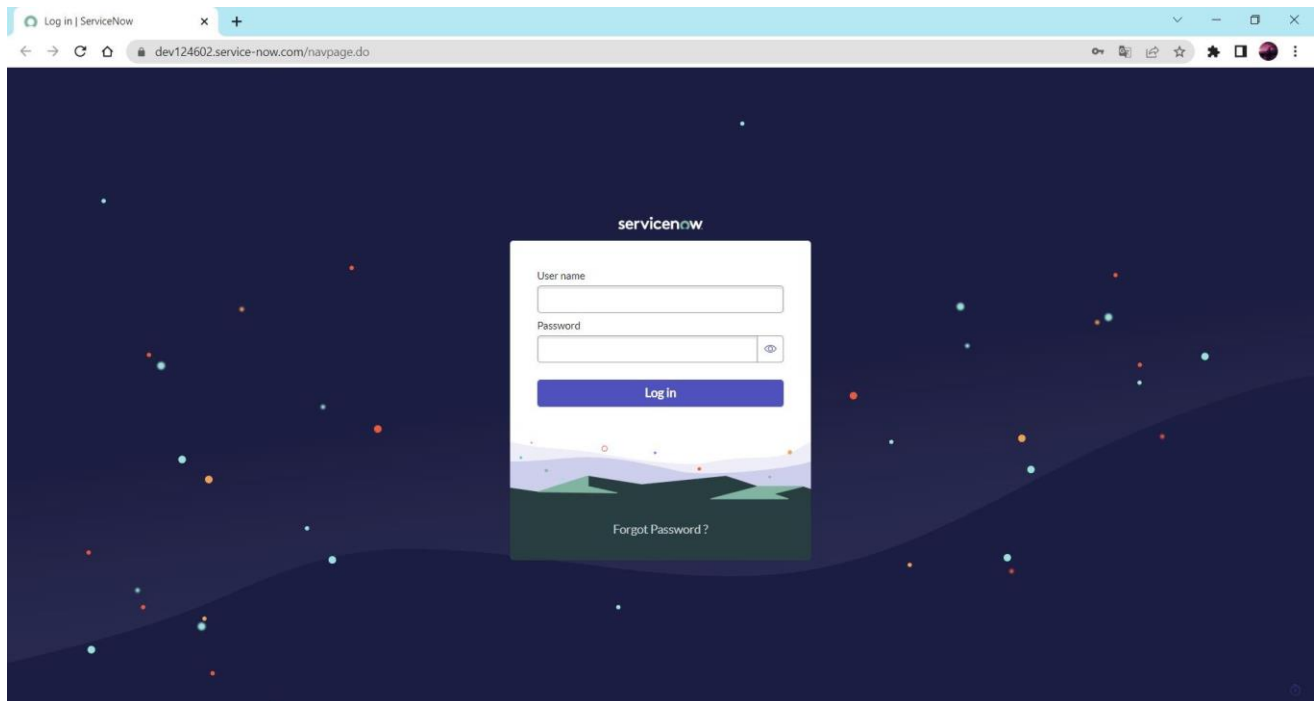
1.2 Purpose

This Functional Requirements Specification document will develop a repeatable step-by-step process to customize the ServiceNow Change Management. The customization process defined here will help enhance the customer's ServiceNow experience.

1.3 Product Scope

Successfully update the Change Management form with functionality. Creating/removing fields, tabs, and related links for each of the states on the form. The updates will be based on the role and the requirements of the organization

1.4 Release Date

This product will be released on

1.5 Document Conventions

Convention	Description
RED	Indicates Mandatory fields
BLUE	Indicates Read-Only Fields

2. Functionality Requirement

ServiceNow has the core functionalities necessary. We offer a more robust user experience and increased Change Management processes.

2.1 Form Design

With form design, you can accomplish the same tasks that you can with form layout in a graphical tool called the form designer. You can also access field properties and add information from macros or previously scripted UI elements.
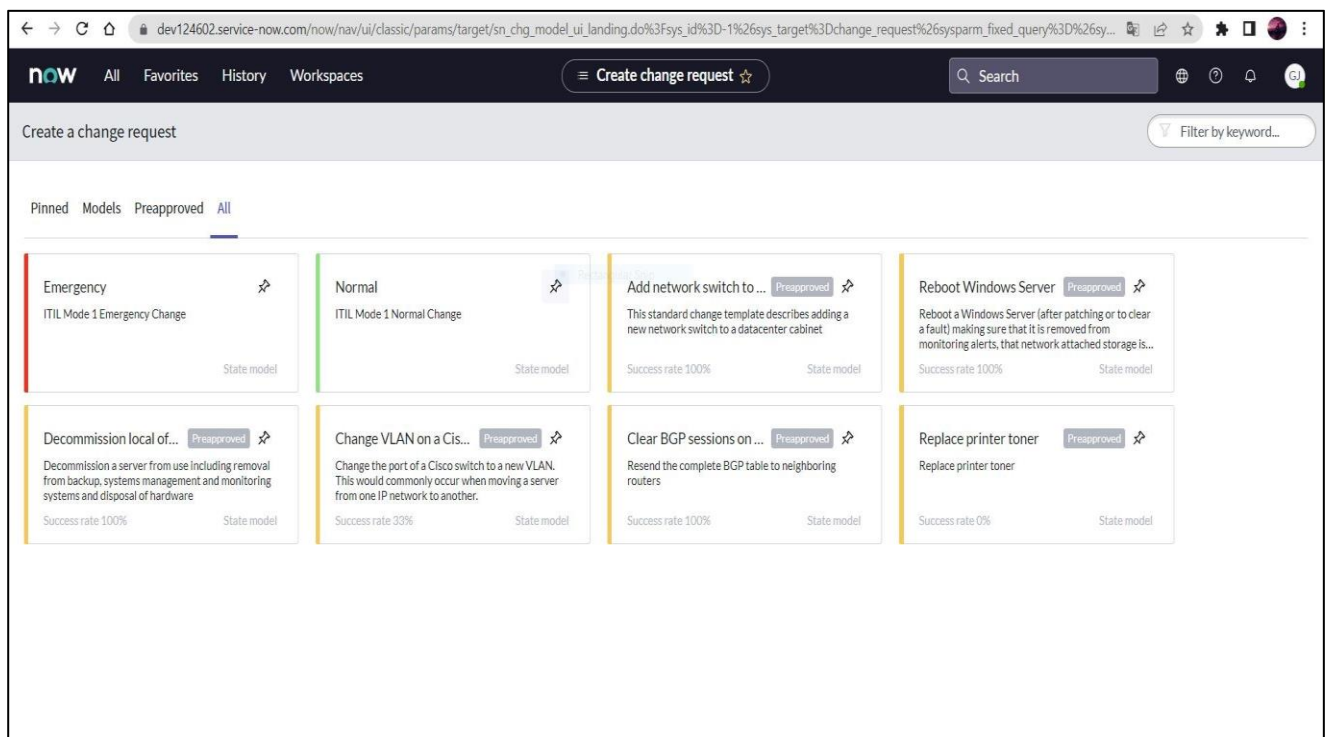
Form design is an alternative to configuring forms that combines several configuration options into one tool. It is available by default for new instances and requires Core UI. Administrators who upgrade from a previous version must activate the Form Designer (com.glide.ui.ng.fd) plugin to use the feature.

2.1.1 Change Models

Type	Description
Standard Change	A standard change is a pre-authorized change that is low risk, relatively common and follows a specified procedure or work instruction. These change requests are accessed through their own module in the left navigation.
Emergency Change	A change that must be implemented as soon as possible, for example to resolve an incident stopping service or to implement a critical security patch. This change is of such a high priority that it bypasses group and peer review and approval and goes straight to the Authorization state for approval by the Change Advisory Board.
Normal Change	Any service change that is not a standard change or an emergency change.
Major Change	A major change will substantially change the business operations. Because of the impact of the change, the planning stage is vast and more detailed than would be possible at the initial creation of the request. The Major Change Module expands the planning section by creating tasks for Implementation Plan, Risk and Impact Analysis, Backout Plan and Test Plan.

2.1.2 Create New Record (all models)

A change request allows you to implement a controlled process for the addition, modification, or removal of approved and supported configuration items (CIs). A change request records the detailed information about the change, such as the reason of the change, the priority, the risk, the type of change, and the change category.

2.1.3 Change Request Task Form (all models)

You can create change tasks for a change request. 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.

2.1.3.1. Create New (Standard)

Standard changes are pre-approved, low risk changes with a proven history of success. The standard change catalog contains the changes that have been approved by the Change Management application as standard changes. Standard changes are logically grouped under specific categories. These categories are displayed to users based on user criteria such as user role, geographical location, and department. The Change Management application uses a proposal process to control which changes become available in the standard change catalog.

2.1.4 Update Record

If you upgraded from a release prior to Geneva, you must update old state labels to new state labels after you activate the Change Management state model.

2.2 Form Fields

2.2.1 Create New Record

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Change ID	String	-	No	40	Yes	javascript:getNextObjNumberPadded();	System generated sequentially Used to be Number
Request By	Reference	sys_user	No	32	Yes	javascript:gs.getUserID()	Auto-populated by signed in user
Change Category	String	-	Yes	40	No	Other	Choice List -Database -Hardware -Network -Other -ServiceNow Deployment -Software
Priority	Integer	-	No	40	Yes	3	Choice List 3 - Medium
Urgency	Integer	-	No	40	No	3	Choice List 1 - High 2 - Medium 3 - Low
Business Impact	Integer	-	No	40	No	3	Choice List 1 - High 2 - Medium 3 - Low
Implementation Risk	Integer	-	No	40	No	3	Choice List 1 - High 2 - Medium 3 - Low
Model	Reference	chg_model	No	32	No	Major	

State	Integer	-	No	40	No	New	Choice List
Working Group	Reference	sys_user_group	No	32	Yes	Change Management	Populated from Change Model Major Record Presets
Assigned to	Reference	sys_user	No	32	No	-	-
Configuration item	Reference	cmdb_ci	No	32	No	-	-
Service	Reference	cmdb_ci_service	No	32	No	-	-
Service offering	Reference	service_offering	No	32	No	-	-
Short Description	String	-	Yes	160	No	-	-
Detailed Description	String	-	No	4000	No	-	-

2.2.1.1 Planning Section

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Justification	String	N/A	Y	4000	N	N/A	
Implementation Plan	String	N/A	N	4000	N	N/A	Auto-Populate with Implementation Task Description when task is Closed
Risk and Impact	String	N/A	N	4000	N	N/A	Auto-Populate with Risk and Impact Task Description when task is Closed
Backout Plan	String	N/A	N	4000	N	N/A	Auto-Populate with Backout Plan Task Description when task is Closed
Test Plan	String	N/A	N	4000	N	N/A	Auto-Populate with Test Plan Task Description when task is Closed

2.2.1.2 Schedule Section

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Planned Start Date	glide_date_time	N/A	Y	40	N	N/A	-
Planned End Date	glide_date_time	N/A	Y	40	N	N/A	-
Actual Start Date	glide_date_time	N/A	N	40	N	N/A	-
Actual End Date	glide_date_time	N/A	N	40	N	N/A	-

2.2.1.3 Notes Section

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Additional Comments	journal_input	N/A	N	4000	N	N/A	-
Work Notes	Journal_input	N/A	N	4000	N	N/A	-

2.2.2 Task Form Fields

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Number	String	N/A	N	40	Y	javascript:getNextObjNumberPadded();	System generated sequentially Used to be Number
Change Request	Reference	change request	N	32	Y	Current Change Request	Generated from the change request associated with the task
State	Choice List	N/A	N	40	N	1	Choice List 1 - Open 2 - In Progress 3 - Closed 4 - Canceled -5 - Pending
On Hold	Boolean	N/A	N	40	N	false	
Assignment Group	Reference	sys_user_group	N	32	N	N/A	
Assigned to	Reference	sys_user	N	32	N	N/A	Dependent of Assignment Group
Short Description	String	N/A	Y	160	N	Dependent on Workflow	Workflow will generate the plans Short Description
Description	String	N/A	Y	4000	N	Dependent on Workflow	Workflow will generate the plans Description
Work Notes	String	N/A	N	4000	N	N/A	
Close Notes	String	N/A	N	4000	N	N/A	

2.2.3 Update Record Fields

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Change ID	String	N/A	N	40	Y	javascript:getNextObjNumberPadded();	System generated sequentially Used to be Number
Request By	Reference	sys_user	N	32	Y	javascript:gs.getUserID()	Auto-populated by signed in user
Change Category	String	N/A	Y	40	N	Other	Choice List -Database -Hardware -Network -Other -ServiceNow Deployment -Software
Priority	Integer	N/A	N	40	Y	3	Choice List 3 - Medium
Urgency	Integer	N/A	N	40	N	3	Choice List 1 - High 2 - Medium 3 - Low
Business Impact	Integer	N/A	N	40	N	3	Choice List 1 - High 2 - Medium 3 - Low
Implementation Risk	Integer	N/A	N	40	N	3	Choice List 1 - High 2 - Medium 3 - Low
Model	Reference	chg_model	N	32	N	Major	
State	Integer	N/A	No	40	No	New	Choice List

Working Group	Reference	sys_user_group	No	32	Yes	Change Management	Populated from Change Model Major Record Presets
Assigned to	Reference	sys_user	No	32	No	N/A	-
Configuration item	Reference	cmdb_ci	No	32	No	N/A	-
Service	Reference	cmdb_ci_service	No	32	No	N/A	-
Service offering	Reference	service_offering	No	32	No	N/A	-
Short Description	String	N/A	Yes	160	No	N/A	-
Detailed Description	String	N/A	No	4000	No	N/A	-

2.2.3.1 Planning Section Form Fields

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Justification	String	N/A	Yes	4000	No	N/A	
Implementation Plan	String	N/A	No	4000	No	N/A	Auto-Populate with Implementation Task Description when task is Closed
Risk and Impact	String	N/A	No	4000	No	N/A	Auto-Populate with Risk and Impact Task Description when task is Closed
Backout Plan	String	N/A	No	4000	No	N/A	Auto-Populate with Backout Plan Task Description when task is Closed
Test Plan	String	N/A	No	4000	No	N/A	Auto-Populate with Test Plan Task Description when task is Closed

2.2.3.2 Schedule Section Form Fields

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Planned Start Date	glide_date_time	N/A	Yes	40	No	N/A	
Planned End Date	glide_date_time	N/A	Yes	40	No	N/A	
Actual Start Date	glide_date_time	N/A	No	40	No	N/A	
Actual End Date	glide_date_time	N/A	No	40	No	N/A	

2.2.3.3 Notes Section Form Fields

Field	Type	Reference	Mandatory	Max Length	Read-Only	Default Values	Remarks
Additional Comments	journal_input	N/A	No	4000	No	N/A	
Work Notes	Journal_input	N/A	No	4000	No	N/A	

2.3 Change Functionality

2.3.1 Change States

States	Description
New	Saved, Not submitted for authorization or review.
Assess	Change details technical review
Authorize	CAB and Change Management team schedule change and give final authorization.
Scheduled	Fully scheduled and authorized awaiting planned start date notify the requestor.
Implement	Change implementation in progress notifies the requestor.
Review	Change implementation work is completed determining if change is successful. Notify requestor
Closed	Change implementation completely.
Cancelled	Cancelled and notified the requestor.

2.3.2 Change State Progress Matrix

2.3.2.1 Normal Change State Progress Matrix

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Cancelled
New		Y						Y
Assess	Y		Y					Y
Authorized	Y			Y				Y
Scheduled					Y			Y
Implement						Y		Y
Review					Y		Y	

2.3.2.2 Standard Change State Progress Matrix

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Cancelled
New				Y				Y
Scheduled					Y			Y
Implement						Y		Y
Review					Y		Y	

2.3.2.3 Emergency Change Progress Matrix

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Cancelled
New			Y					Y
Authorized	Y			Y				Y
Scheduled					Y			Y
Implement						Y		Y
Review					Y		Y	

2.3.2.4 Major Change Progress Matrix

	New	Assess	Authorize	Scheduled	Implement	Review	Closed	Cancelled
New		Y						Y
Assess	Y		Y					Y
Authorized	Y			Y				Y
Scheduled					Y			Y
Implement						Y		Y
Review					Y		Y	

2.3.3 Change Creation

Change requests are created either manually or from a problem, incident, or CI.

2.3.3.1 Problem

To create a change request from a problem go to the problem record Problem > Open. Open the context menu and select either create normal change or create emergency change.

2.3.3.2 Incident

To create a change from an incident, navigate to **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.

1. From the list, click **Incidents** > **Open**.
2. Open the incident record from which you want to create a change.
3. Click the more actions icon ( )

2.3.3.3 CI (Configuration Items)

To create a change from a CI, you can create a change request from a list of CIs, or add selected CIs from a list to a change record.

1. Select a list of CIs. For example, navigate to **Configuration** > **Servers** > **Unix**.
2. Select one or more CIs from the list.
3. Select one of the following options from the **Actions** list.

Option	Description
Add to existing Change Request	Select this option to associate the CIs with an existing change request.
Add to new Change Request	Select this option to associate the CIs with a new change request.

2.3.3.4 Copy Change Button

You can copy details of an active or cancelled change request to a new change request.

2.3.3.5 Manual

To manually create a change request, go to the Change App> Create New and choose change type.

Standard changes can be created through the Change App > Standard Change > Standard Change Catalog.

Standard Change Catalog

Standard Change Requests

Standard Change Requests - Server

2.4 Change Lifecycle Walkthrough (Record States for All Changes)

ServiceNow Change Management adds a systematic way to control the life cycle of all changes. Change Management facilitates the change process with minimal disruption to IT services (ServiceNow, 2021). Each change may not go through all stages of the life cycle.

2.4.1 New: Submitting a Change Request

A change request is created by an individual or a group of people. Change request is not yet submitted for review and authorization. A change requester can save a change request as many times as necessary while building out the details of the change prior to submission.

2.4.2 Assess: Assessing a Change

Peer review and technical approval of the change details are performed during this state. (Skipped in emergency and standard requests.)

2.4.3 Authorize: Requesting Approval for a Change

Change Management and the CAB schedule the change and provide final authorization to proceed. (Skipped in standard requests.)

2.4.4 Scheduled: Authorizing a Change

The change is fully scheduled and authorized, and is waiting for the planned start date. An email notification is sent to the user who requested the change.

2.4.5 Implement: Implementing a Change

The planned start date has approached and the actual work to implement the change is being conducted. An email notification is sent to the user, who requested the change. Change tasks are created to confirm implementation and testing.

2.4.6 Review: Reviewing a Change

The work has been completed. The change requester determines whether the change was successful. A post-implementation review can be conducted during this state. An email notification is sent to the user who requested the change. You cannot cancel the change request if it is in the Review state.

2.4.7 Closed: Closing a Change

All review work is complete. The change is closed with no further action required.

2.4.8 Cancel: Canceling a Change

A change can be cancelled at any point when it is no longer required. However, a change cannot be cancelled from a **Closed** state. An email notification is sent to the user who requested the change.

2.5 Change Management Application and Modules

The ServiceNow Change Management application provides a systematic approach to control the life cycle of all changes, facilitating beneficial changes to be made with minimum disruption to IT services.

To access the modules for Change Requests you must enter change into the application navigator. Once entered it will give you access to the change application. In the change application it has many modules including Create New, Open, Closed, All, Standard Change, Change Advisory Board, and etc.
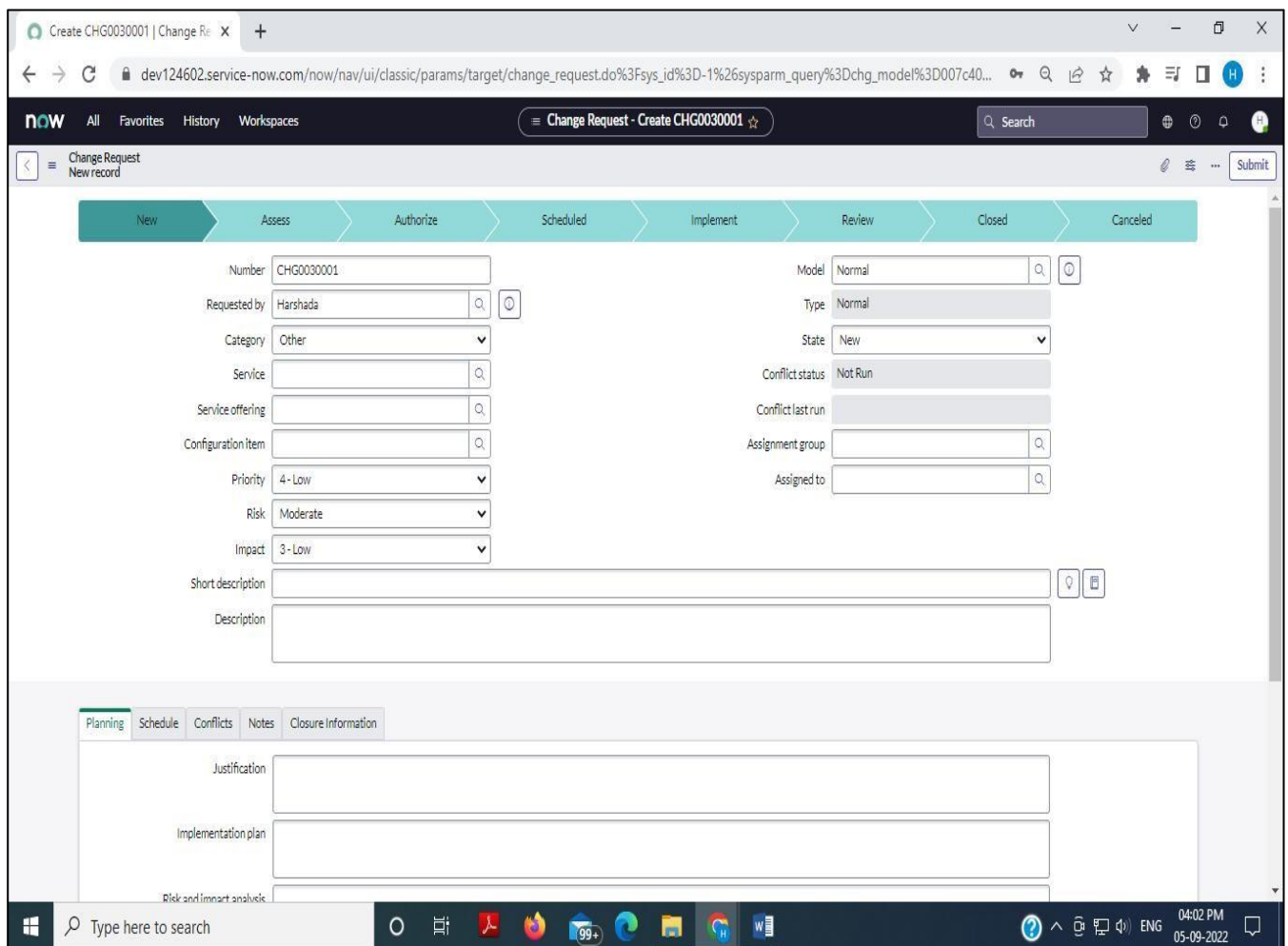
Change management Application and modules
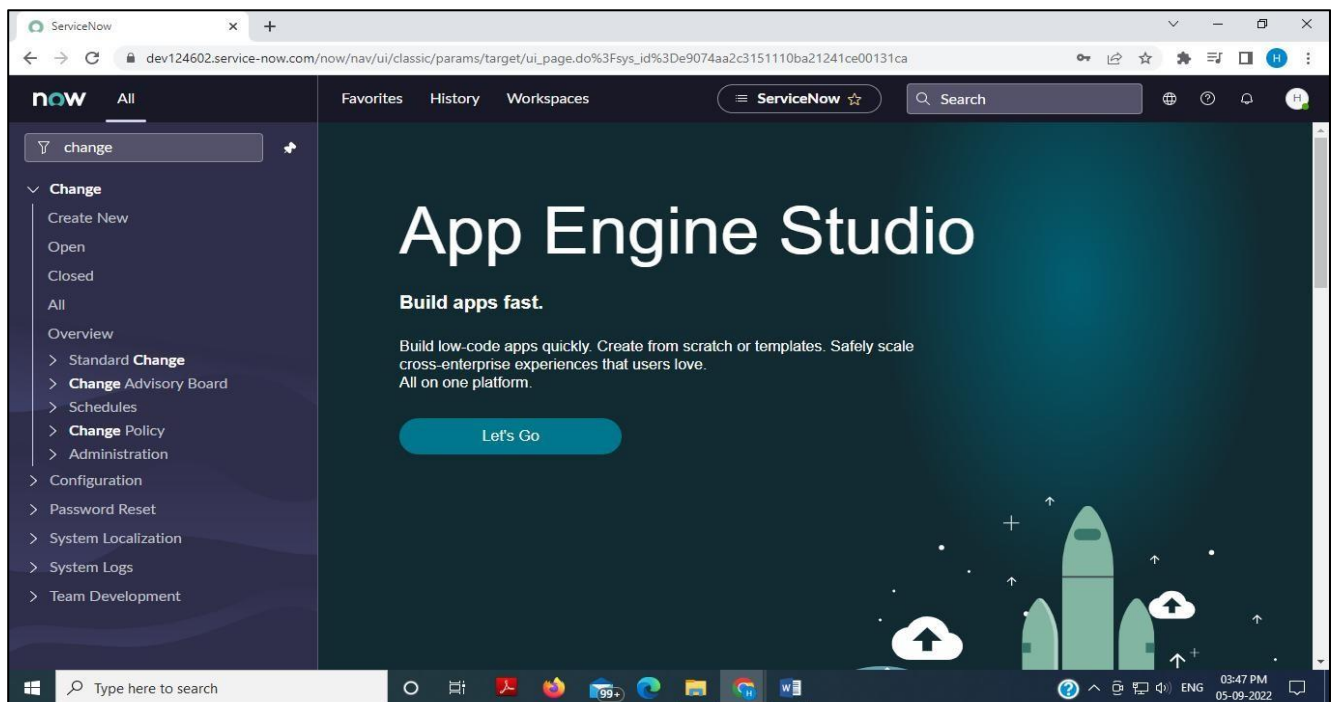
Module	Brief Description
Create New	Create all new change requests, Standard change requests are through included Standard Change Catalog
Open	Open existing change records
Closed	Access all canceled or closed state change records
All	Access all change request records
Overview	Dashboard with counts, graphs and calendar for quick reference
Standard Change	Access standard change templates
Change Advisory Board	Access CAB modules
Schedules	Access schedule rules and definitions
Change Policy	Workflows and definitions based on business rules
Administration	Define models, properties and conditions, also access ATF suite

2.6 Change Management Views

Change request form views include Approval, cab_workbench, Default view, Emergency, Mobile, sys_popup, and Workspace.

3. Form Fields (Tables)

3.1 New Change Record Table

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
Number	String	N/A	N	40	Y	javascript:getNextObjNumberPadded();	System generated sequentially Used to be Number
Requested By	Reference	sys_user	N	40	Y	javascript:gs.getUserID()	auto -populated by signed in user
Category	String	N/A	N	40	N	Other	Choice List
Service	Reference	cmdb_ci_service	N	40	N	N/A	
Service Offering	Reference	service_offering	N	40	N	N/A	
Configuration Item	Reference	cmdb_ci	N	40	N	N/A	
Risk	Integer	N/A	N	40	N	3	Use to be risk
Impact	Integer	N/A	N	40	N	3	Use to be impact

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
Urgency	Integer	N/A	N	40	N	3	Add
Priority	Integer	N/A	N	40	N	4	Choice List: Make read only if Only emergency change sets P1; Default setting 3 for Major, 2 for Standard
Model	Reference	chg_model	N	32	N	javascript:ChangeModel.getDefaultModelValue()	
Type	String	N/A	N	40	Y	javascript:ChangeModel.getDefaultTypeValue()	Auto-populated by system
State	Integer	N/A	N	40	Y	1	Choice list
Conflict Status	String	N/A	N	40	Y	Not Run	Auto-populated by Conflict detection
Conflict Last Run	Date/Time	N/A	N	40	Y	N/A	Auto-populated by conflict detection
Assignment Group	Reference	sys_user_group	N	32	N	N/A	Use to be Assigned Group
Assigned To	Reference	sys_user	N	32	N	N/A	
Short Description	String	N/A	Y	160	N	N/A	Use short desc

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read -Only	Default Values	Remarks
Detailed Description	String	N/A	N	4000	N	N/A	Use to be description

Label	Choices
Category	Hardware, Software, Service, System Software, Applications Software, Network, Telecom, Documentation, Other
Impact	1 - High, 2 - Medium, 3 - Low
Urgency	1 - High, 2 - Medium, 3 - Low
Priority	1- Critical, 2 - High, 3 - Moderate, 4 - Low
Risk	Low, Moderate, High

3.1.1 Planning Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Justification	String	N/A	Y in the Assess state	500	N	N/A
Implementation Plan	String	N/A	Y in the Assess state	4000	N	N/A
Risk and Impact Analysis	String	N/A	N	4000	N	N/A
Backout Plan	String	N/A	Y in the Assess state	4000	N	N/A
Test Plan	String	N/A	N	4000	N	N/A

3.1.2 Schedule Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Planned Start Date	glide_date _time	N/A	Y in the Assess state	40	N	N/A
Planned End Date	glide_date _time	N/A	Y in the Assess state	40	N	N/A
CAB Required	Boolean	N/A	N	40	N	False
CAB Date	glide_date	N/A	N	40	N	N/A
Actual Start Date	glide_date _time	N/A	N	40	N	N/A
Actual End Date	glide_date _time	N/A	N	40	N	N/A
CAB Delegate	reference	sys_user	N	32	N	N/A

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Planned Start Date	glide_date_time	N/A	Y in the Assess state	40	N	N/A
CAB Recommendation	String	N/A	N	4000	N	N/A

3.1.3 Conflicts Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Check Conflicts	Formatter	N/A	N	N/A	N	N/A
Conflicts Detected	Embedded List	N/A	N	N/A	N	N/A

3.1.4 Notes Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
Watch List	glide_list	sys_user	N	4000	N	N/A	
Work Notes List	glide_list	sys_user	N	4000	N	N/A	
Work Notes	Journal	N/A	Y in the Implement State	4000	N	Work notes	
Additional comments	Journal	N/A	N	N/A	Y	N/A	

3.1.5 Closure Information

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Close Code	String	N/A	Y on Implement State	40	N	N/A
Close Notes	String	N/A	Y on Implement State	4000	N	N/A

3.1.6 Choice List

Label	Choices
Close Code	Successful, Successful with Issues, Unsuccessful

3.2 Update Change Record Table

Field	Type	Reference	Mandatory (Y/N)	Former Max Length	New Max Length	Default Values
Number	String	N/A	N	40	Y	javascript:getNextObjNumberPadded();
Requested By	Reference	sys_user	N	32	Y	javascript:gs.getUserID()
Category	String	N/A	N	40	N	Other
Service	Reference	cmdb_ci_service	N	32	N	N/A
Service Offering	Reference	service_offering	N	32	N	N/A
Configuration Item	Reference	cmdb_ci	N	32	Y	N/A
Implementation Risk	Integer	N/A	N	40	N	3
Impact	Integer	N/A	N	40	N	3
Urgency	Integer	N/A	N	40	N	3
Priority	Integer	N/A	N	40	Y	4
Model	Reference	chg_model	N	32	Y	javascript:ChangeModel.getDefaultModelValue()
Type	String	N/A	N	40	Y	javascript:ChangeModel.getDefaultTypeValue()
State	Integer	N/A	N	40	Y	1
Conflict Status	String	N/A	N	40	Y	Not Run

Field	Type	Reference	Mandatory (Y/N)	Former Max Length	New Max Length	Default Values
Conflict Last Run	Date/Time	N/A	N	40	Y	N/A
Assignment Group	Reference	sys_user_group	Y	32	N	N/A
Assigned To	Reference	sys_user	N	32	N	N/A
Short Description	String	N/A	N	160	N	N/A
Description	String	N/A	N	4000	N	N/A

3.3 UI Changes

3.3.1 Nomenclature Changes

From the "Out-of-the-Box" ServiceNow platform some of the nomenclature is not specific enough for some users. We customized the nomenclature for some fields to better clarify the purpose of the field and what the value it has represents.

Prior Column Label	Custom Column Label
Number(Dictionary Override)	Change ID
Category(Dictionary Override)	Change Category
Description(Dictionary Override)	Detailed Description
Assignment Group(Dictionary Override)	Working Group
Risk	Implementation Risk
Impact(Dictionary Override)	Business Impact

3.3.2 UI Policy (applied to change_request table)

UI policies dynamically change the behavior of fields on a form. For example, you can use UI policies to make the number field on a form read-only, make the short description field mandatory, and hide other fields. Basic UI policies do not require any scripting, however for more advanced actions, use the run scripts option. You can also use client scripts to perform all of these actions, but for faster load times use UI policies when possible. Create a UI policy to implement controls in the Incident form when the state changes to **Resolved**.

Role required: ui_policy_admin

New Change Request Form					
Global	**On Load**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	Yes	Change ID	Read Only=True	none	Custom label
Yes	Yes	Requested By	Read Only=True	none	Logged in user
Yes	Yes	Change Category	Mandatory=True	none	Custom label
Yes	Yes	Priority	Read only based on Model	none	Emergency = 1, Normal default 3, Major default 3, Standard default 2
Yes	Yes	State	Read Only=True	none	Set in workflow
Yes	Yes	Short Description	Mandatory=True	none	
Yes	Yes	Type	Visible=False	none	
Yes	Yes	Description	Mandatory=False	none	Custom label
Yes	Yes	Email	Read Only=True	none	Populated in CS
Yes	Yes	Conflict Status	Visible=False	none	
Yes	Yes	Conflict Last Run	Visible=False	none	
Yes	Yes	Assignment Group	Read Only=True	none	Custom label; Set by business rule
Yes	Yes	CAB Date	Hidden=True	CAB Required is empty or false	
Yes	Yes	Visible Revision	Hidden=True	CAB Required is empty or false	
Yes	Yes	Planned Start Date	Validation	Date not less than today	
Yes	Yes	Implementation Plan	Mandatory=True	Created is not empty	Fields mandatory after record is inserted

New Change Request Form					
Global	**On Load**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	Yes	Test Plan	Mandatory=True	Created is not empty	Fields mandatory after record is inserted
Yes	Yes	Risk Impact Analysis	Mandatory=True	Created is not empty	Fields mandatory after record is inserted
Yes	Yes	Blackout Plan	Mandatory=True	Created is not empty	Fields mandatory after record is inserted

Assess State					
Global	**On Load**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	No	Justification	Mandatory=True	State is Assess	
Yes	No	Check Conflicts	Mandatory=True	State is Assess	
Yes	No	Planned Start Date	Mandatory=True	State is Assess	
Yes	No	Planned End Date	Mandatory=True	State is Assess	
Yes	Yes	Implement Plan, Risk Impact Analysis, Blackout Plan Test Plan	Mandatory = True	State is New Model is Major	Adds placeholder text for Major Change

Scheduled State					
Global	**OnLoad**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	No	Justification	Read Only=True	State is one of Scheduled, Implement, Review, Closed or Canceled	Mandatory in prior state
Yes	No	Implementation Plan	Read Only=True	State is one of Scheduled, Implement, Review, Closed or Canceled	Mandatory in prior state
Yes	No	Risk and Impact Analysis	Read Only=True	State is one of Scheduled, Implement, Review, Closed or Canceled	Mandatory in prior state
Yes	No	Blackout Plan	Read Only=True	State is one of Scheduled, Implement, Review, Closed or Canceled	Mandatory in prior state
Yes	No	Test Plan	Read Only=True	State is one of Scheduled, Implement, Review, Closed or Canceled	Mandatory in prior state

Implement State					
Global	**On Load**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	No	Work Notes	Mandatory=True	State is Implement	

Review State					
Global	**On Load**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	No	Close Code	Mandatory=True	State is Review	
Yes	No	Close Notes	Mandatory=True	State is Review	

Closed State					
Global	**OnLoad**	**Field**	**Change**	**Filter Conditions**	**Remarks**
Yes	No	All fields except detailed description and additional notes	Read-Only=True	State is Closed/Cancelled	

3.3.3 UI Action (change_request)

UI actions include the buttons, links, and context menu items on forms and lists. Configure UI actions to make the UI more interactive, customized, and specific to user activities. Administrators and users with the ui_action_admin role can define UI actions.

The following table contains all the UI actions for change_request at this time.

Name	UI Action	Description	Remarks
Cancel change	Cancel Button	Customized banner button on the form that places change into a canceled state.	Updated Cancel Change. Table change_request. Add Form Button
Revert to New	Form Context menu	Pull a change back to the new state to make updates without having to copy/cancel	
Conflict Calendar	Form button	Shows calendar view	
Disable Scheduling Conflict Message	Form context menu	Disable showing message when scheduling conflict is detected	
Refresh impacted services	Form context menu	Refresh list of Business Services impacted by the associated CI	

Name	UI Action	Description	Remarks
Create outage	Workspace form menu	Create an outage record to track the duration of down time or degradation of service	
Review	Form Button	Progresses change to Review state	
Workflow context	Form link		
Copy Change	Form Context menu	Copies current change record and redirects to the new unsaved change	
Implement	Form Button	Progresses change to Implement state	
Request Approval	Form button	Progresses change to the Assess state	
Calculate Risk	Calculate Risk	Calculates the risk of the current change based on risk and impact.	Form link
New	List Banner Button	Related Lists	
Create Change Task	Workspace Form Menu	Create a change task against the current change request	
Show Flow	Form Link		
Apply Proposed Changes	Form Button		
Edit Risk Conditions	Form Context menu		
New	List banner Button	Normal lists	
Add	List Banner button		
Show workflow	Form link		
Propose a standard change template	Form context menu	Propose a standard change template from	

Name	UI Action	Description	Remarks
		the current Change Request.	
Create Outage	Form Context menu	Create an outage record to track the duration of down time or degradation of service	
Request Approval	Form button	Progresses change to the Authorize state	
Assign to me	List context menu		
Enable scheduling a conflict message	Form context menu	Enable showing message when scheduling conflict is detected	
Close	Form button	Progresses change to Close state	

3.3.4 Related Lists

List Name	Description	Remarks
Affected CIs	List that displays configuration items that are affected by the change.	-
Impacted Services/CIs	List that displays the configuration items and services impacted by the change.	-
Approvers	Shows the CAB board and approval status from each.	-
Change Tasks	List of all the change tasks related to the change	-
Problems	Links to the problem table	-
Incidents Fixed by Change	List of incidents that are resolved by the actions taken	-

List Name	Description	Remarks
	in the change.	
Incidents Caused by Change	List of incidents caused by the actions taken in the change.	-
Task SLAs	Service Level Agreements related to the change.	-
Outages	List of known outages in the system/CIs related to the change.	-

3.4 Dictionary Entries

Table	Name	Type	Default Value	Options
change_request	CAB Outcome	Choice List	-None-	-Approved -Rejected -Revised
change_request	Visible Revision	Integer	1	N/A, set by turn style count in workflow

3.5 Scripting

3.5.1 Business Rules

Business Rules are server-side logic that execute when database records are queried, updated, inserted, or deleted. Business Rules respond to database interactions regardless of access method: for example, users interacting with records through forms or lists, web services, or data imports (configurable). (ServiceNow, 2022).

Name	When	Filter Condition	Action
Change Request-Change Category Hardware	Before Insert and update	Change Category is Hardware	Set field values Working Group to Hardware
Change Request-Change Category Software	Before Insert and update	Change Category is Software	Set field values Working Group to Software
Change request change category Service	Before Insert and update	Change Category is Service	Set field values Working Group to Service
Change request change category System Software	Before Insert and update	Change Category is System Software	Set field values Working Group to System Software
Change Request-Change Category App Soft	Before insert and update	Change category is Applications software	Set field values Working Group to App Software
Change Request-Change Category Network	Before insert and update	Change category is Network	Set field values Working Group to Network
Change Request-Change Category Telecom	Before insert and update	Change category is Telecom	Set field values Working Group to Telecom
Change Request-Change Category Other	Before insert and update	Change category is other	Set field values Working Group to Other
Set fields Planning Section from Tasks	After Update	State changes to Closed or Description Changes	Script: Set the values on change request from the change tasks.
Make Implement On Hold	Before Update	State is implemented	Script

3.5.2 Script Includes

Script Includes are reusable server-side script logic that define a function or class. Script Includes execute their script logic only when explicitly called by other scripts. There are different types of Script Includes:

- On demand/classless
- Extend an existing class
- Define a new class (ServiceNow, 2021).

Name	Description	Client Callable	Remarks
changeRequestStateModel_major	This script includes represents the state model for major changes.		Defines state transitions and control the transitioning between states for a major change
ChangeRequestStateHandler	This script include controls the transitioning between states using one of the defined models to determine which transitions are allowed.		
ChangeRequestStateModelSNC_major			

3.5.3 Client Scripts

Type	Name	Action
OnLoad	StateScheduledRO	When the form enters the scheduled state, it would make the fields in Schedule Planned Start Date and Planned End Date read only.
onChange	Closure Tab only on Review/Closed/Cancel	On the change request form, there is a form section closure information. We made that form section hidden until needed in the Review, Closed, and Cancelled states.

3.5.4 Data Lookup Change Request Priority

Since we have a priority field in the change request it was only fair to make it uniform with incidents where priority is set by impact and urgency. Out of the box on the change request form it did not change priority based on impact and urgency, so we implemented a data lookup. Now it sets priority based on Business Impact and Urgency.

Business Impact	Urgency	Priority
1 - High	1 - High	1 - Critical
1 - High	2 - Medium	2 - High
1 - High	3 - Low	3 - Moderate
2 - Medium	1 - High	2 - High
2 - Medium	2 - Medium	3 - Moderate
2 - Medium	3 - Low	4 -Low
3 - Low	1 - High	3 - Moderate
3 - Low	2 - Medium	4 - Low
3 - Low	3 - Low	4 - Low

3.6 New Change Model: Major Change

3.6.1 Create a New Change Model

Field	Type	Value
Name	String	Major
Default Change Model	Boolean	False
Active	Boolean	True
Available in 'Create New'	Boolean	True
Description	String	Major Change
Record Preset	Template_value	Type = Major Change Priority = 3 - Moderate Working Group = Change Management

3.6.2 Major Change Request Tasks

State	Task	Remarks
Assess	Major Change Implementation	Generated by workflow
Assess	Risk and Impact Analysis	Generated by workflow
Assess	Major Change Test Plan	Generated by workflow
Assess	Major Change Backout Plan	Generated by workflow
Implement	Implementation	Generated by workflow
Implement	Testing	Generated by workflow

3.7 Change Task Form

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
Change ID	String	N/A	N	40	Y	javascript:getNextObjNumberPadded();	System generated from change request
Change Request	Reference	change_request	N	32	Y	javascript:gs.getUserID()	auto-populated by change request
Configuration Item	Reference	cmdb_ci	N	32	N	N/A	
Planned Start Date	glide_date_time	N/A	Y in the Assess state	40	N	N/A	
Planned End Date	glide_date_time	N/A	Y in the Assess state	40	N	N/A	
Type	String	N/A	N	40	Y	javascript:ChangeModel.getDefaultTypeValue()	Auto populated by system
State	Integer	N/A	N	40	Y	1	Choice list

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
On Hold	Boolean	N/A	N	40	N	False	
Working Group	Reference	sys_user_group	N	32	N	N/A	Use to be Assigned Group
Assigned To	Reference	sys_user	N	32	N	N/A	
Short Description	String	N/A	N	160	N	N/A	
Detailed Description	String	N/A	N	4000	N	N/A	Use to be description

3.7.1 Notes Form Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values	Remarks
Work Notes List	glide_list	sys_user	N	4000	N	N/A	
Work Notes	Journal	N/A	Y in the Implement State	4000	N	N/A	

3.7.2 Closure Information Form Section

Field	Type	Reference	Mandatory (Y/N)	Max Length	Read-Only	Default Values
Close Notes	String	N/A	Y on Implement State	4000	N	N/A

4 Flow logic

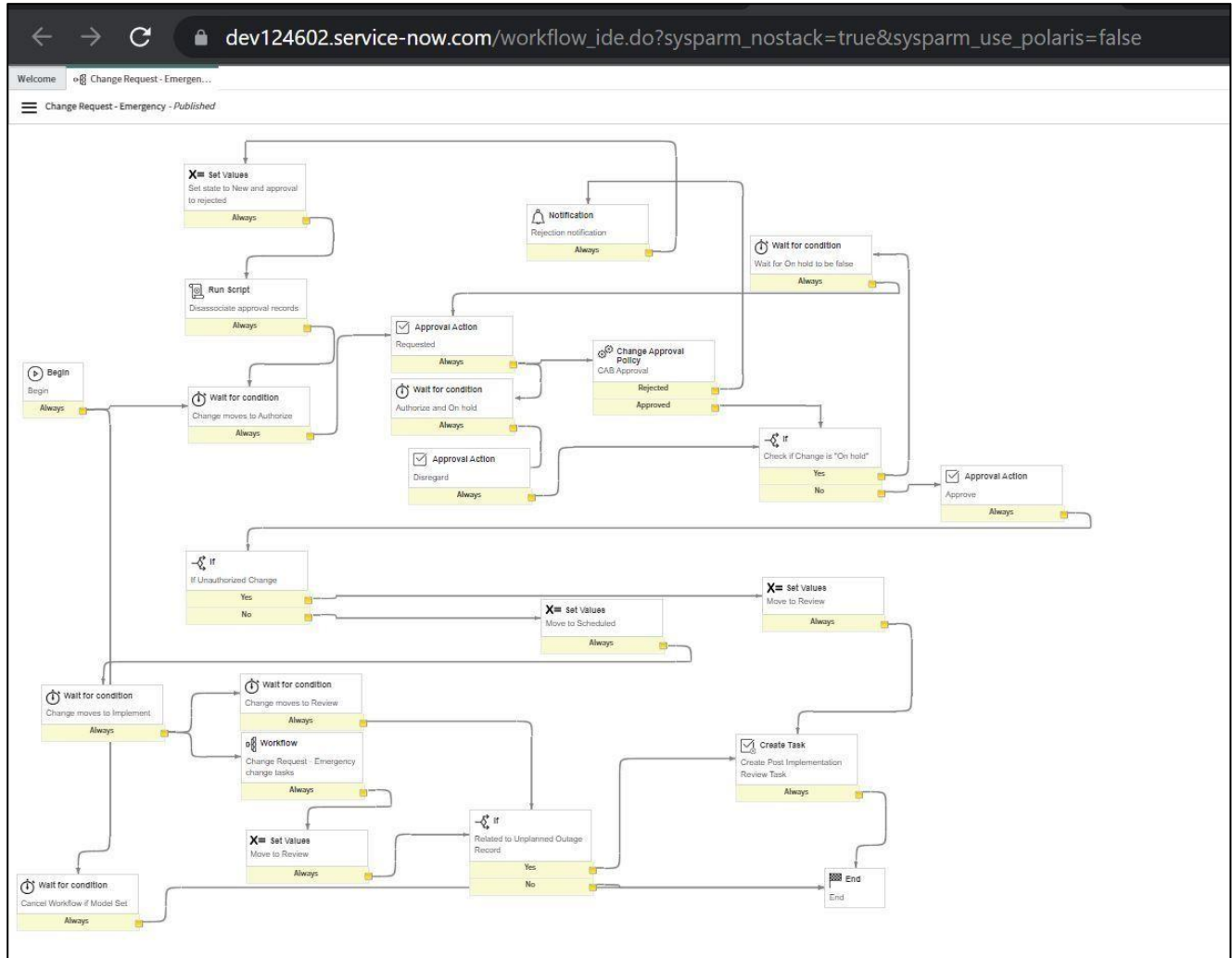## 4.1 Standard Change
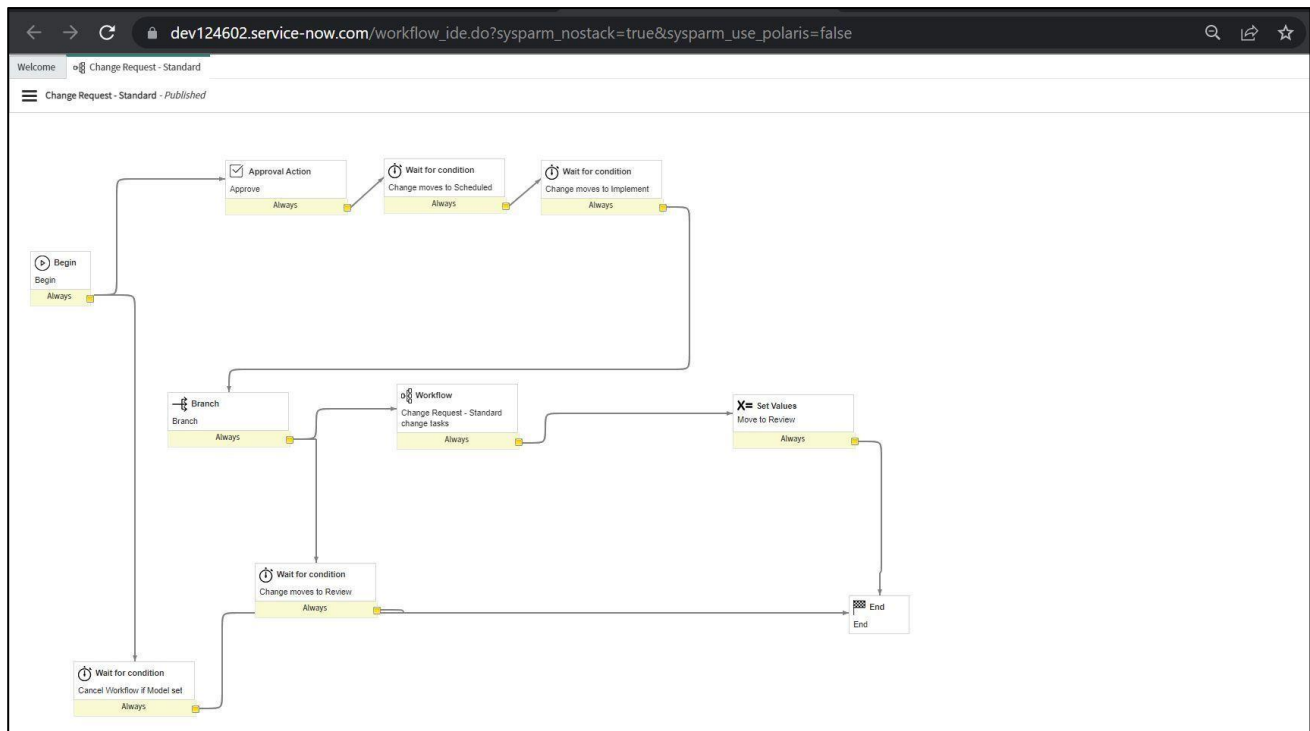
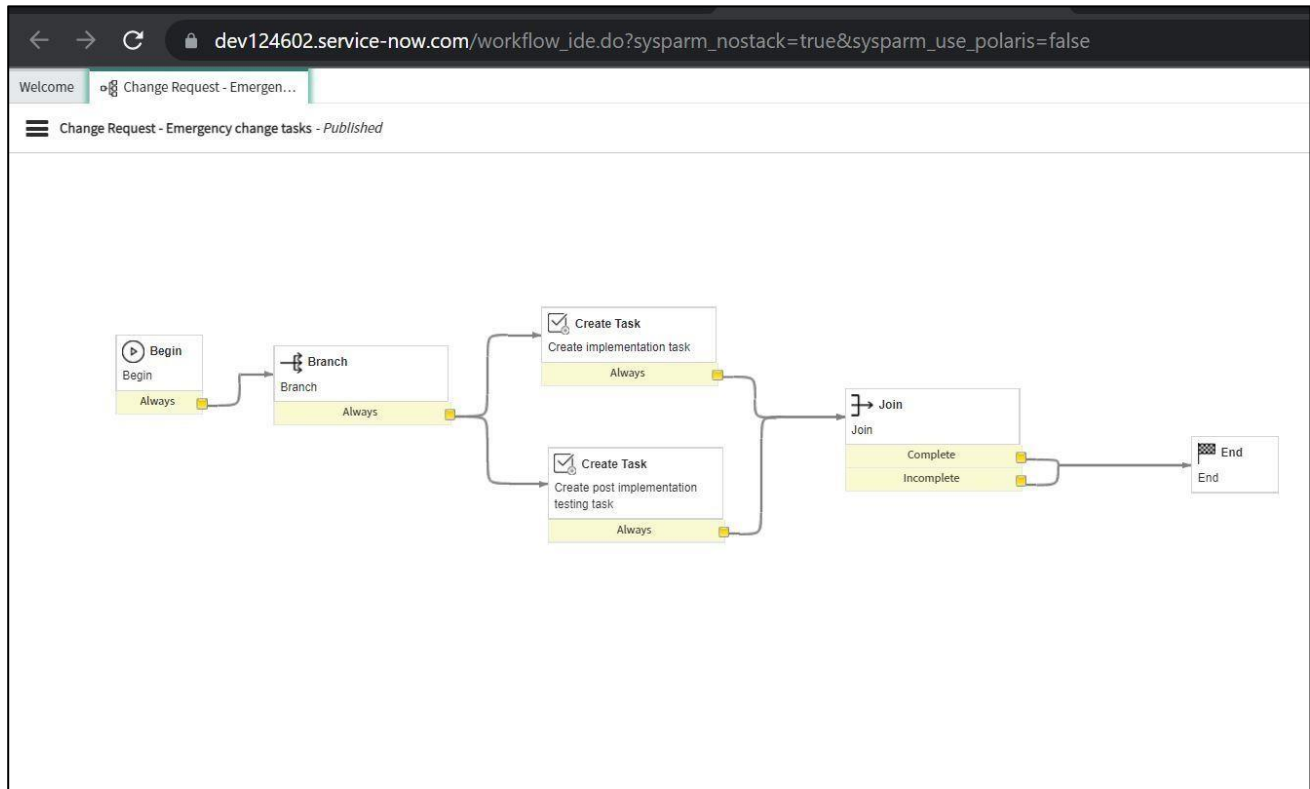## 4.1.2 Standard Change Tasks
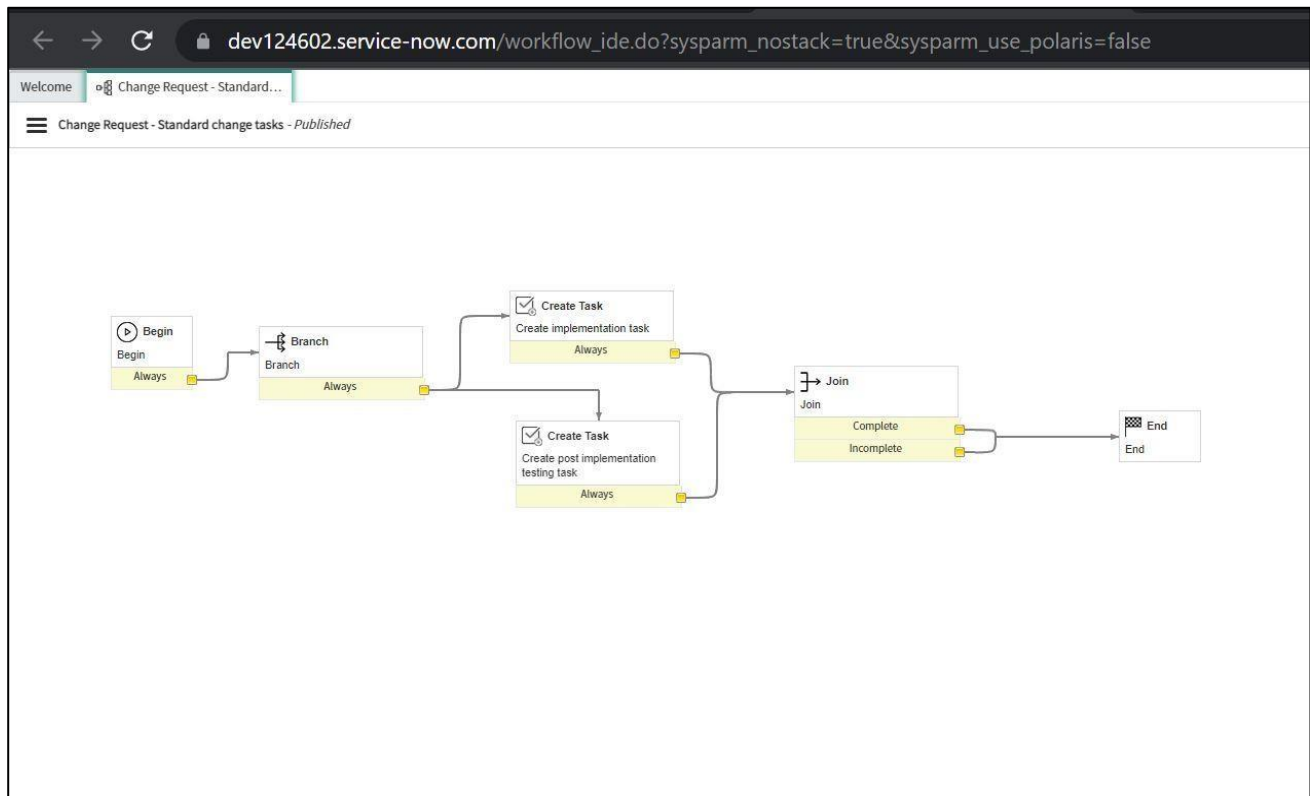
4.2 Emergency Change

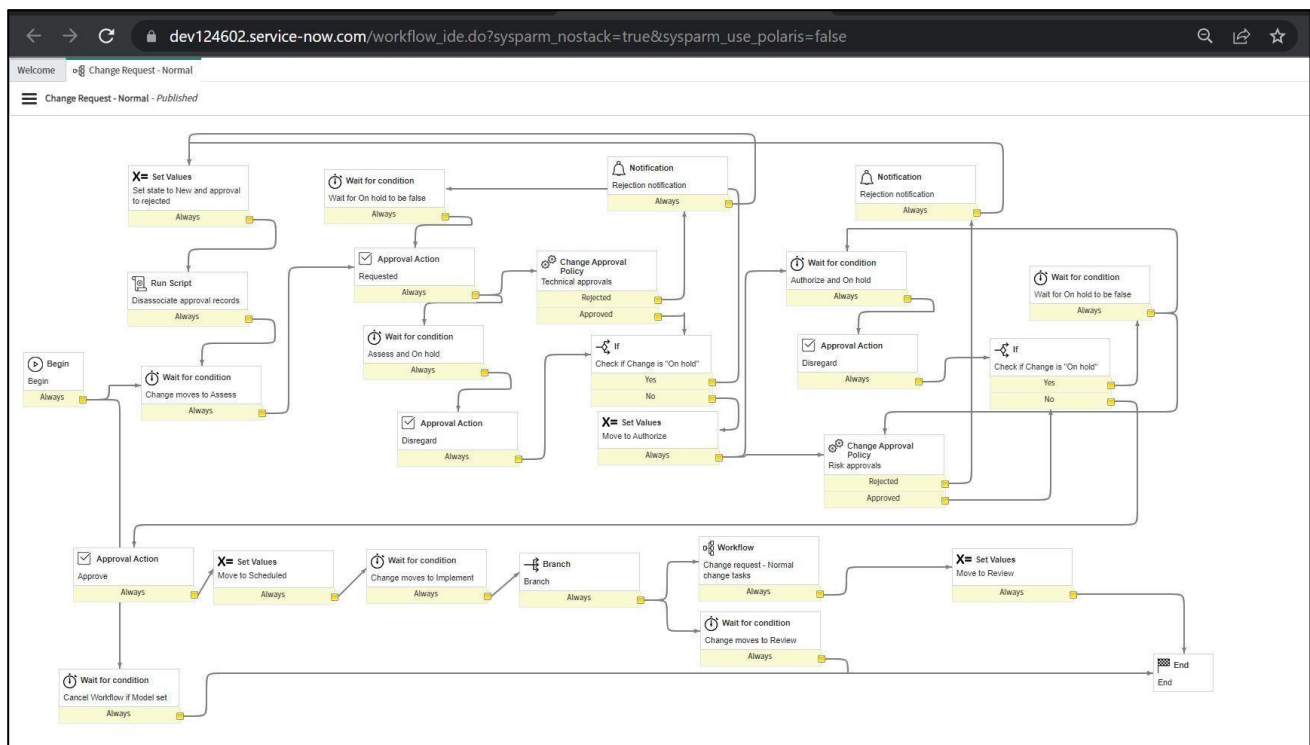### 4.2.1 Emergency Change Flow

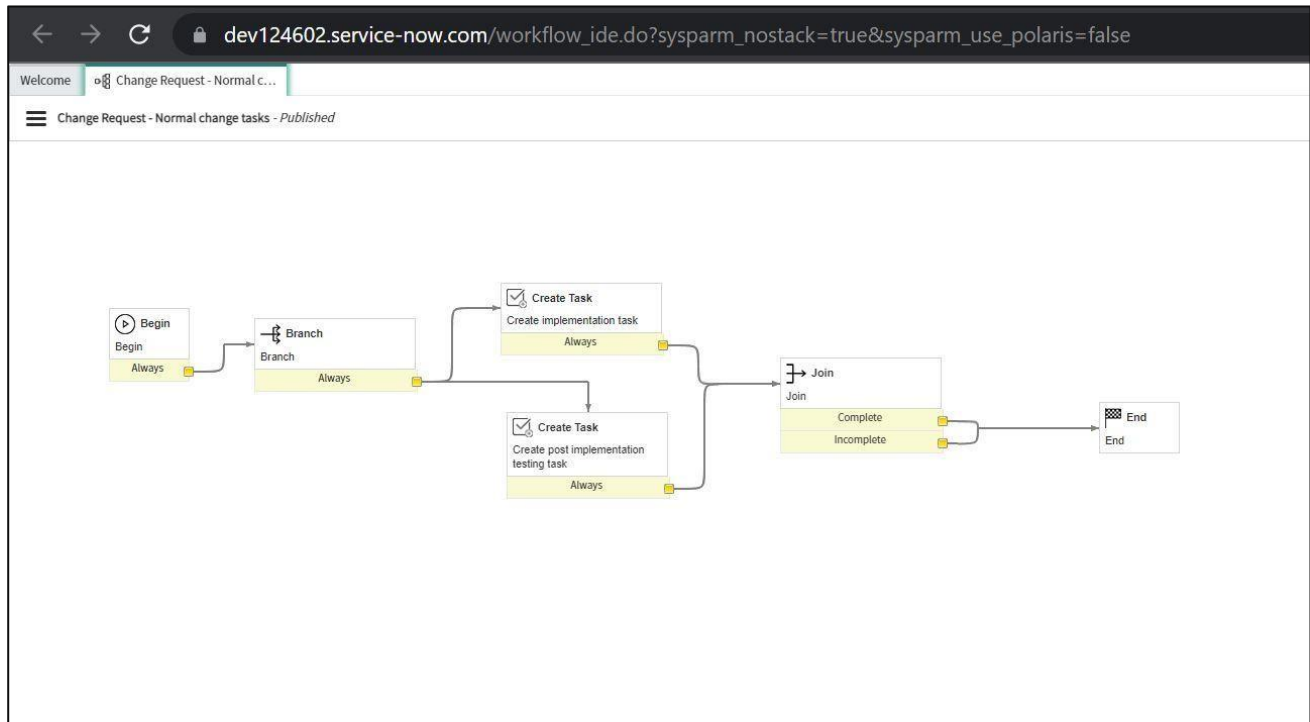## 4.2.2 Emergency Change Tasks

4.3 Normal Change

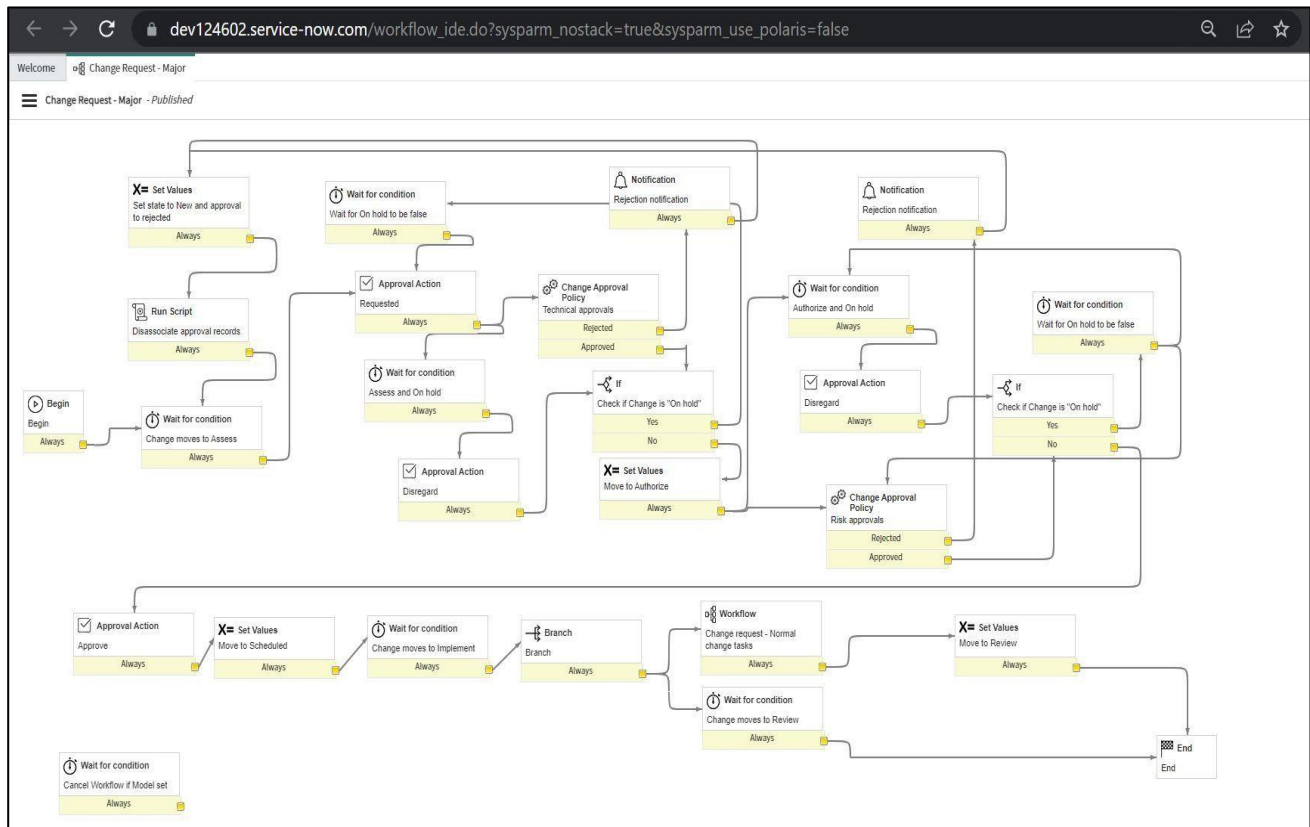## 4.3.1 Normal Change Flow

4.3.2 Normal Change Tasks

4.4 Major Change

4.4.1 Major Change Flow

4.4.2 Major Change Task Flow
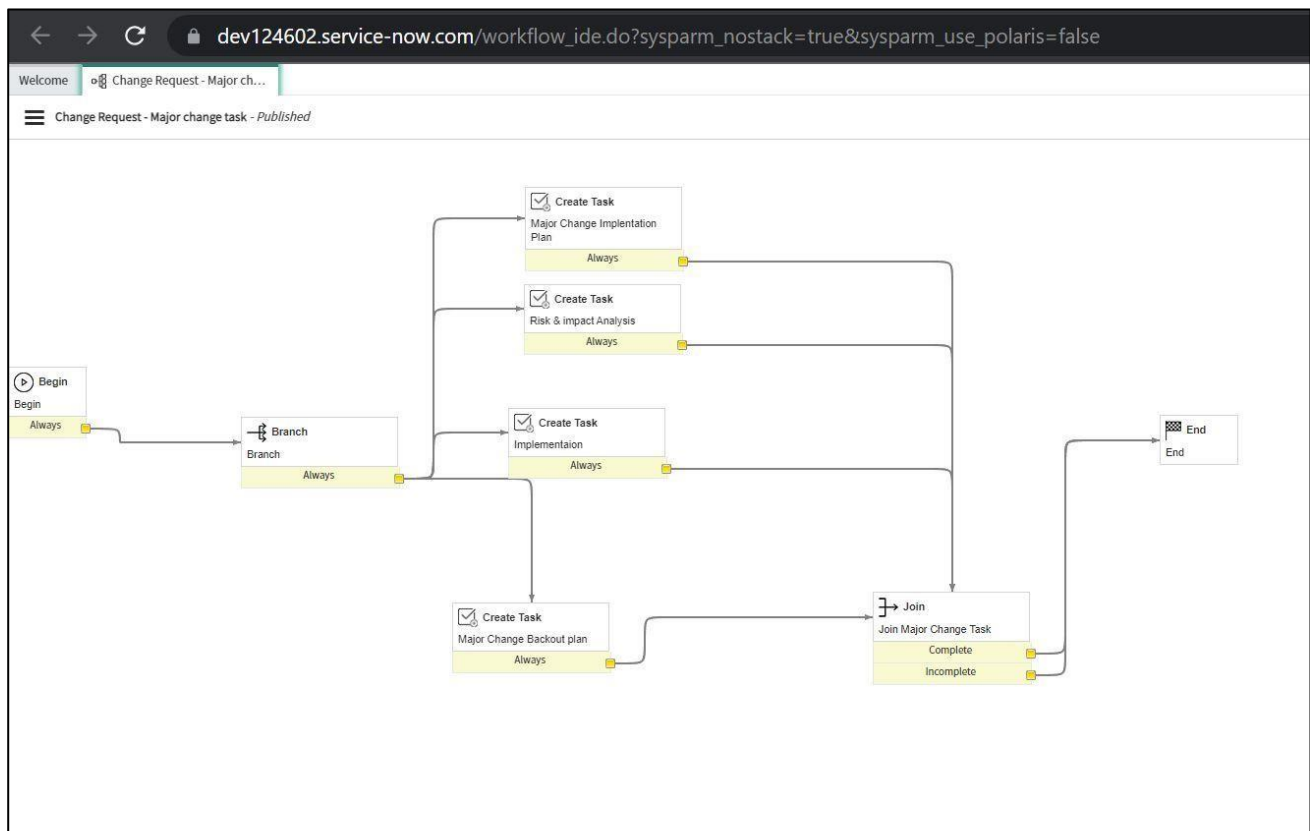
5 Notifications

Action	Conditions	Event	Subject	Body
Record Inserted	none	Send email to Requested by	New Change #Change ID	Your change request (change ID) has been submitted. Request will be processed ASAP.
Record Updated	Department is Anything	Send email to Department	New Change #Change ID	Your group has been assigned a new change (change ID). Please log in to ServiceNow to view.
Record Updated	CAB required is True	Send Email to CAB	New Change #Change ID requires approval	Change request (change ID) requires CAB approval before it can proceed. Please process ASAP.
Record Updated	CAB decision is approved, or CAB required is false	Send Email to Group	Change #ChangeID has been approved	Change request (Change ID) has been approved. Please complete the change process.
Record Updated	State is one of Closed or Canceled	Send Email to Requested By	Change #ChangeID has been processed	Change request (Change ID) has been processed. Thank you.

6. Reference

ServiceNow Change Management Documentation
https://docs.servicenow.com/bundle/sandiego-it-service-management/page/product/change-management/concept/c_ITILChangeManagement.html

ServiceNow Documentation
https://docs.servicenow.com/

ServiceNow Community
https://community.servicenow.com/community

ServiceNow. UI policies.
UI policies (servicenow.com)