Panasonic

Change Request Management (ChaRM)
SAP Solution Manager 7.2

End User Training

advisory | digital | managed services

GyanSys

Training Outline

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- What's is SAP ChaRM
- ChaRM Scope
- As IS / To BE Process
- Process Flow
- ChaRM User Roles
- ChaRM Document Types
- Fiori Launchpad Tiles
- ChaRM CRM_UI Overview
- Processing Normal Change
- Processing Normal Change Preliminary Import
- Processing Urgent Change
- Reporting / Search

Training Outline

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- What’s Change Request Management (ChaRM) ?

Confidential & Proprietary

Change Control Management with ChaRM

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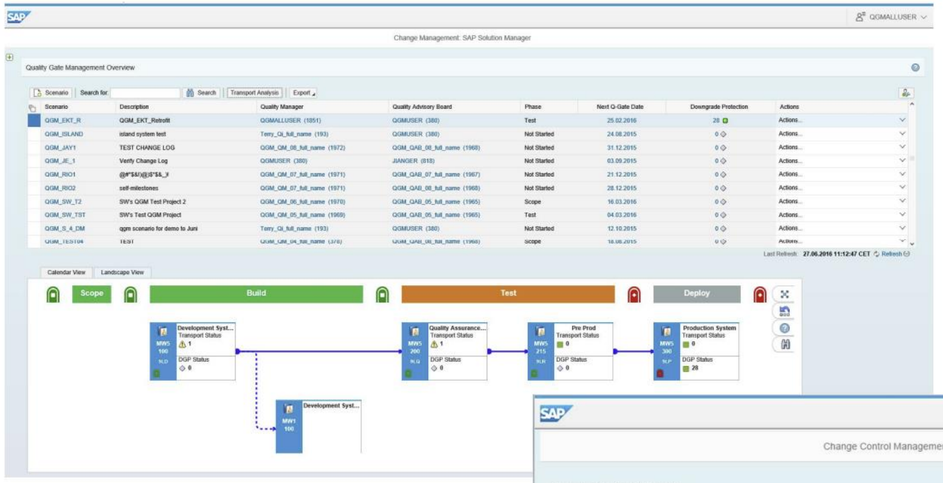
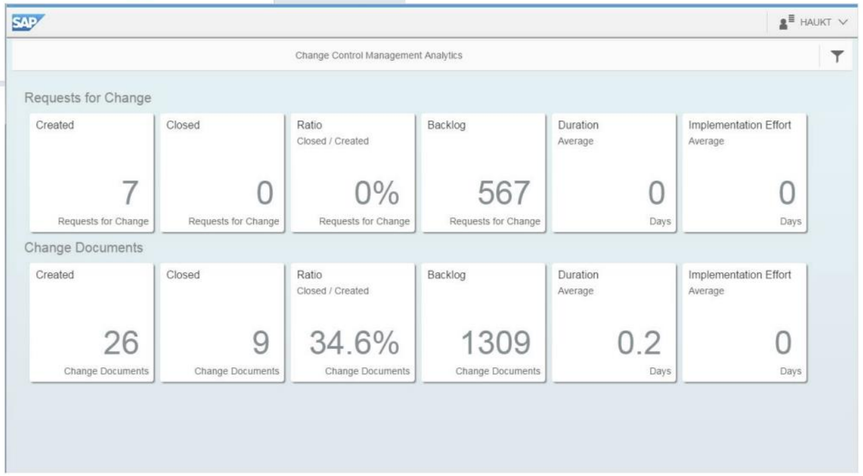
With SAP Solution Manager Change Control Management standardized processes, methods and tools will ensure high transparency and continuous quality of the change process during the entire application life cycle.





Main Benefits of ChaRM:

- Improve efficiency and transparency of change management processes.
- Minimize business disruptions.
- Store documentation of implemented changes.
- Track and monitor changes.
- Improve audit process.
- Reduce the risk of correction and project failures.

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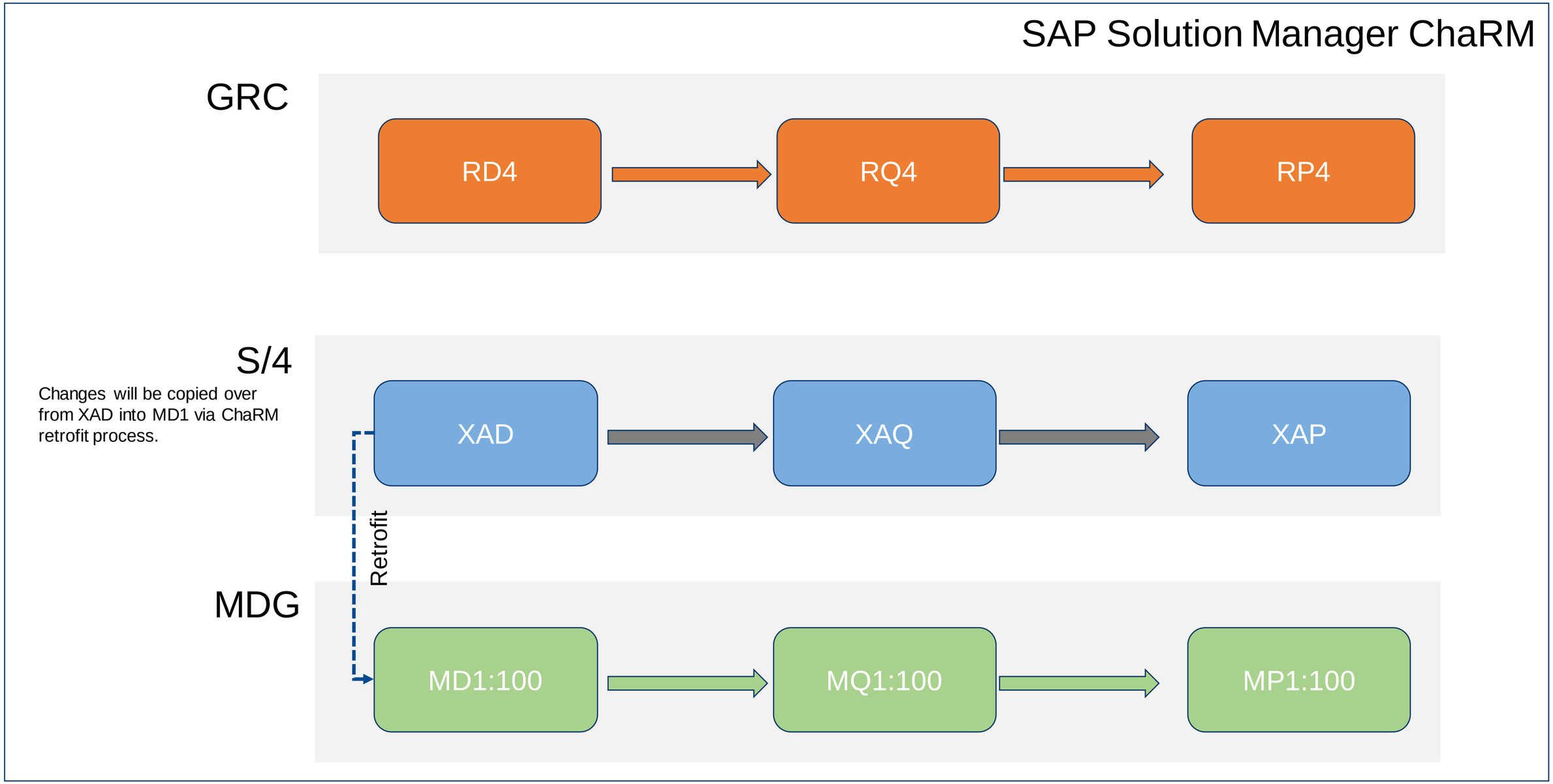
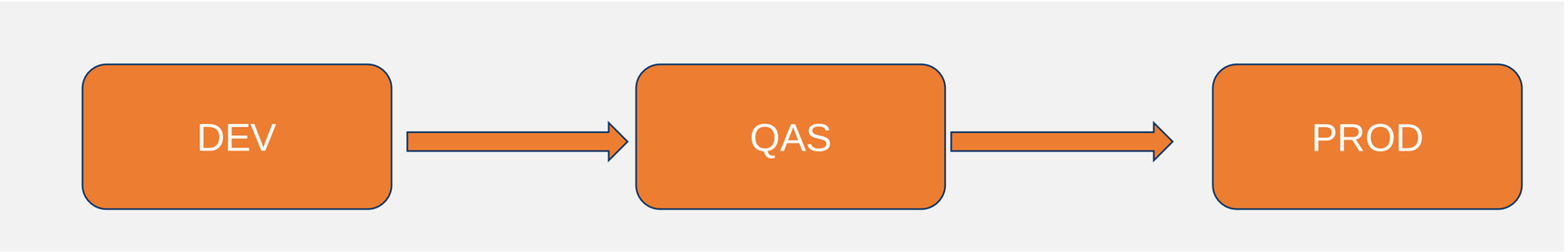
Landscapes in Scope for ChaRM – Development Track



AS IS Process

GRC
S/4
MD1



1. Developer manually creates Transports in DEV system
2. Saves Changes in the Transport
3. Release Transport Request (Main and TRs and Tasks)
4. Upon approval Basis manually import transport into QAS

TO BE Process ➡ Development Track - Process Overview

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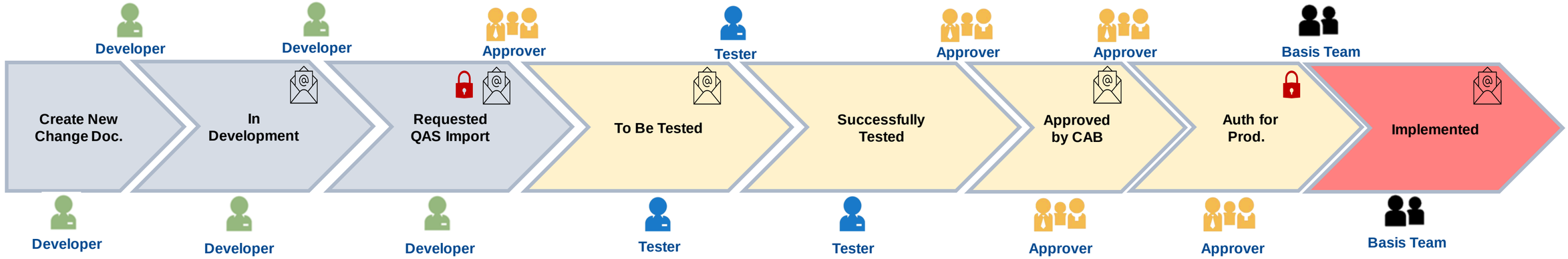

Input ServiceNOW project ID

Create transport request or assign existing transport.

Upload Unit test result

Set document to status “Requested QAS import”

Transport of copy (TOC) gets released. And automatically imported into QAS

Upload UAT Results

Transport gets released into QA buffer.
Optional Auto Import

Ready for cutover

Dev landscape	Quality Landscape	Production Landscape

Role responsible to work and change status

Gate

Outbound e-mail

Transport

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Roles with ChaRM

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Below are user role types to required operate ChaRM end-to-end.

- **Developer**
  - Create Change Request Document in ChaRM
  - Create/Assign/Delete Transports in ChaRM Change Document
  - Perform development work/Unit Testing
  - Request Import of Changes to QAS
- **Tester**
  - Reset change document back to “In Development” during testing phase
  - Create/Assign/Delete Transports in ChaRM Change Document
  - Pass change to “Successfully Tested” status
- **(Approver) Release Manager**
  - Approve Change documents to QAS and Production
  - Pass Change to Testing systems as ToC (Transport of Copies)
  - Bundle approved Change documents into a Release
  - Update change cycles status as per project release phase
  - Create new change cycles
  - Reject/Withdraw Change Documents
- **Basis Team**
  - Import and Schedule Changes to Quality and Production Systems

Roles with ChaRM

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- **ChaRM Admin**
  - Trouble Shooting/How To's
  - Assist Release Manager with system preparation for creating Projects/Create/Close Cycles
  - Schedule QAS and Production import jobs
  - End User Training as needed
  - Monitor Solution Manager ChaRM
  - ChaRM Support
  - Maintain ChaRM Config.

Change Document Types

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To support Panasonic Change Management process via ChaRM we have enabled 3 different type of changes:

- Normal Change Project
- Normal Change Maintenance
- Urgent Change

Normal Change - Project

- Enhancements / Project
  - Major Changes
  - Enhancements
  - Should go as part of a release

Approved changes move to Production system as per release calendar.

Normal Change - Maintenance

- Support Maintenance Landscape:
  - Break Fixes
  - Minor Changes
  - Master Data

Approved changes moves to Production system weekly on Thursday at 6PM

Urgent Change

- Emergency Changes
  - Production outage
  - Critical business process affected
- Optimized for fast processing (Exclude CAB Approval)

Ability to move to production independently of the change cycle import calendar.

Role Developer

Login to Solution Manager as Developer

Processing Normal Change

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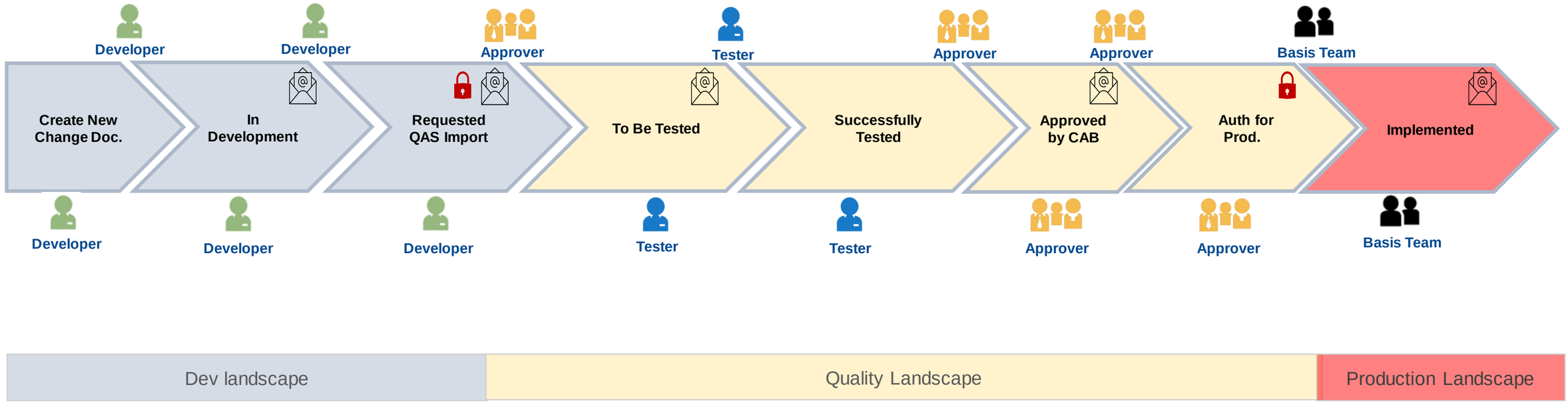
Use this change type to make normal changes in your maintenance landscape and to implement features in your development landscape.



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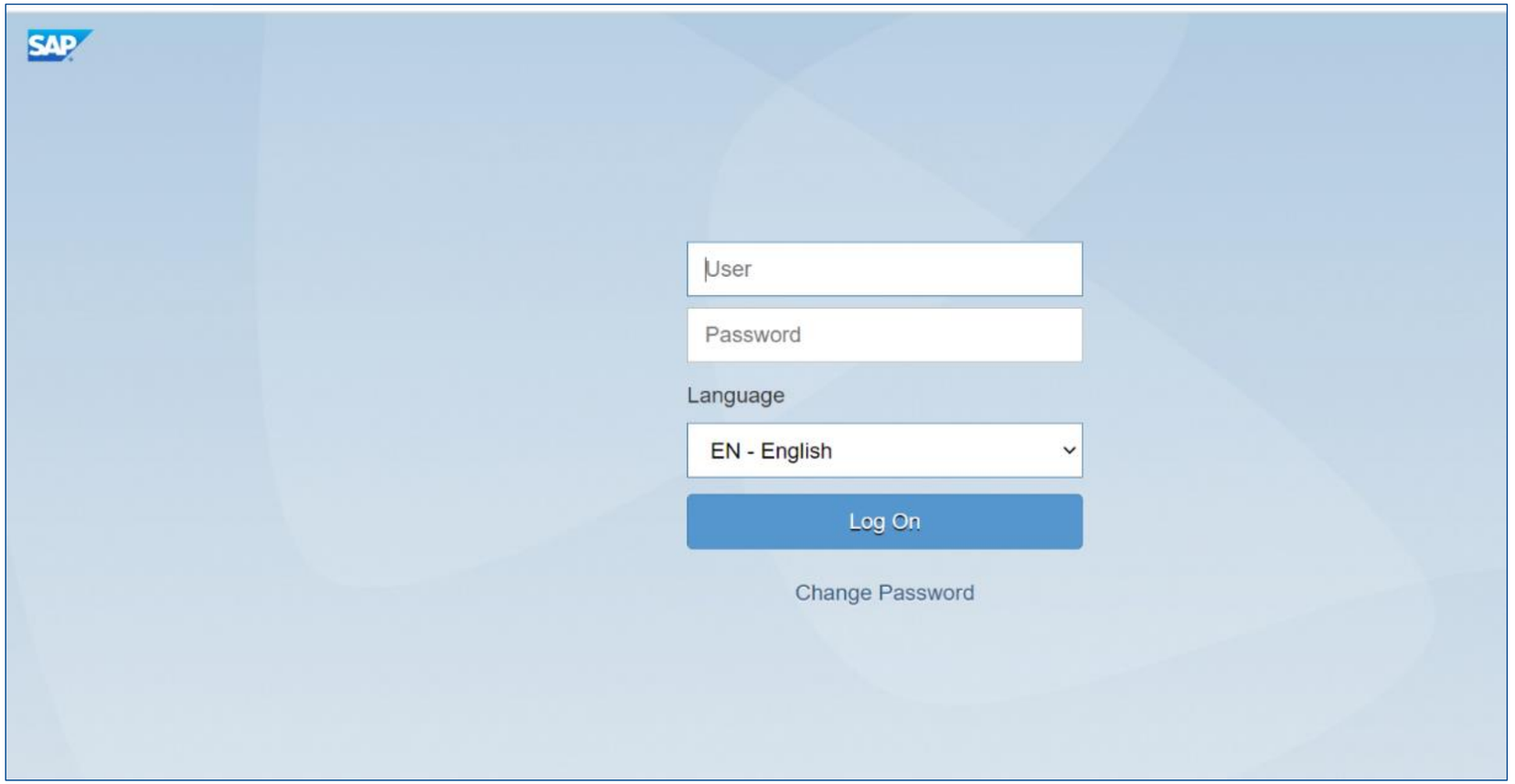
Login to ChaRM as DEVELOPER



1. Open the URL: https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN

2. Enter your user and password

- **USER: CH_DEV<XX>**
- **PASSWORD:**

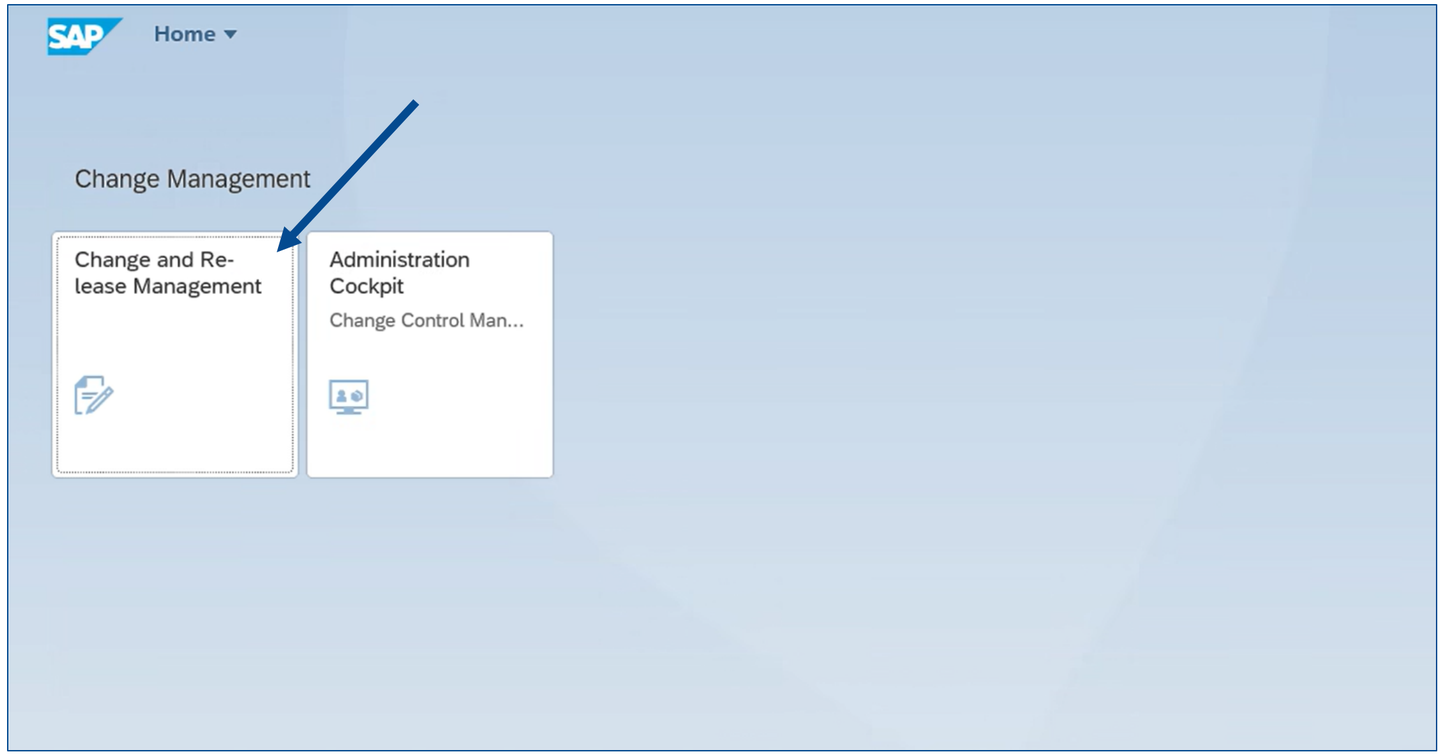
3. Click on “Log On” button

Link to Test ID spreadsheet: Test_IDS.xlsx

Fiori Launchpad Change Management

Fiori launchpad contains two tiles as part of the Change Management module in SAP Solution Manager:

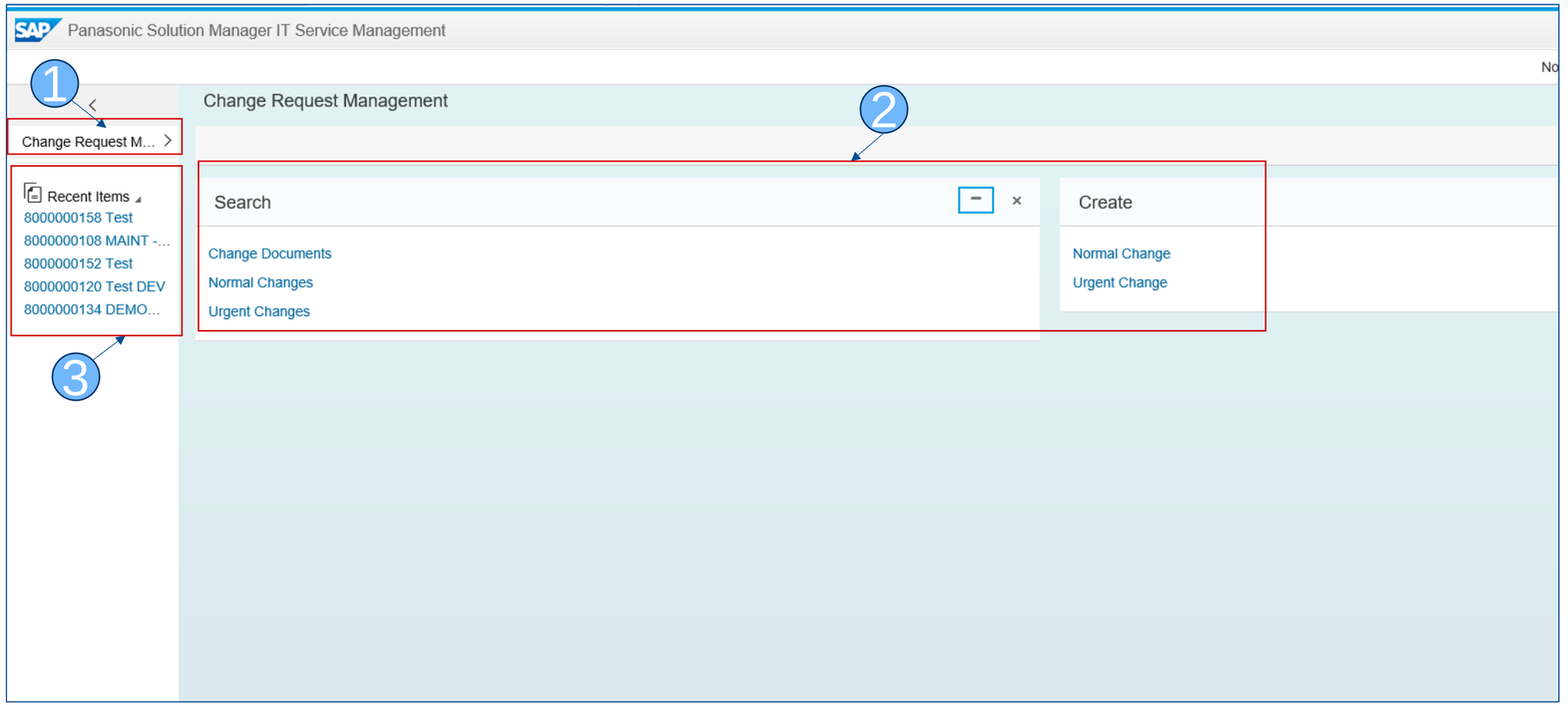
- Change Request Management -> Provides access to CRM_UI for all users ChaRM related activities.
- Admin. Cockpit -> Provide ChaRM Admin user and Release Managers access to configuration areas and advanced reporting.



Open CRM_UI

- Click on Change and Release Management Tile" to open the CRM_UI
- The CRM_UI it's where ChaRM users will be able to:
  - Create new change documents
  - Process change documents
  - Search for change documents

CRM_UI Overview



1 - Main Menu

Menu items that drive the content of the main window:

- **Change Request Management -** Takes you to the change request management (Search and Create) submenu items.

2 – Main Window

Where all content is displayed and sub links:

Search: Search for Change Document

Create: Create Change Document

3 – Recent Items

Shows the most recent documents worked by the user giving them the option to open it as quick alternative to get back to the document.

Search Change Document

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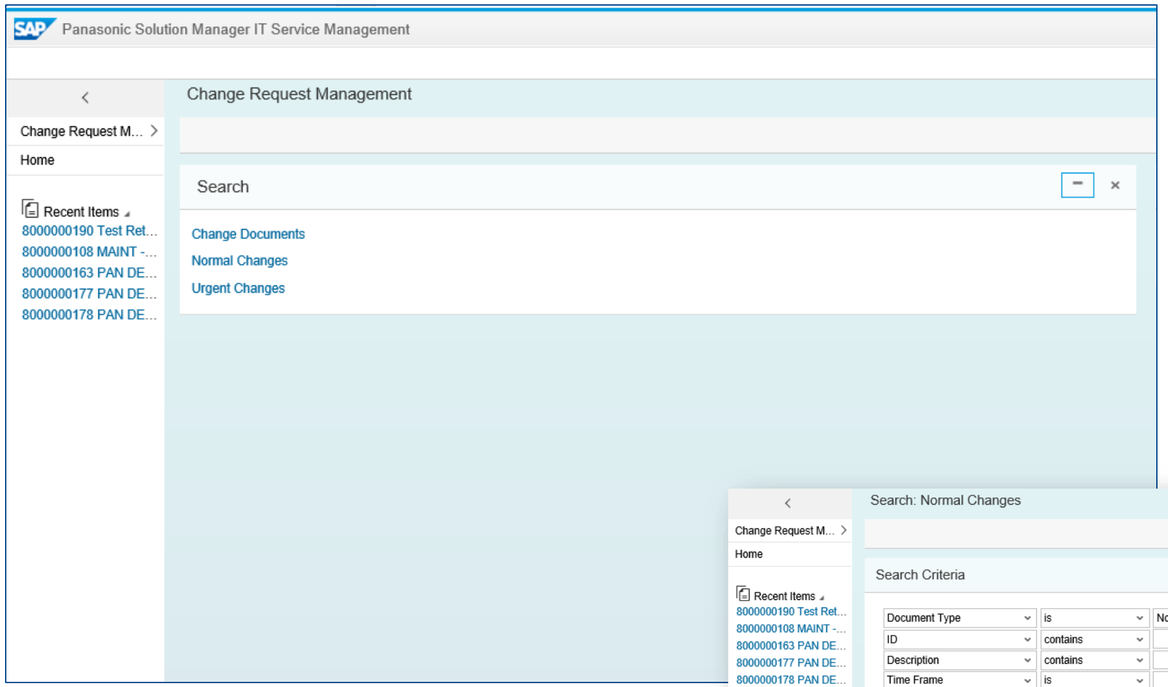

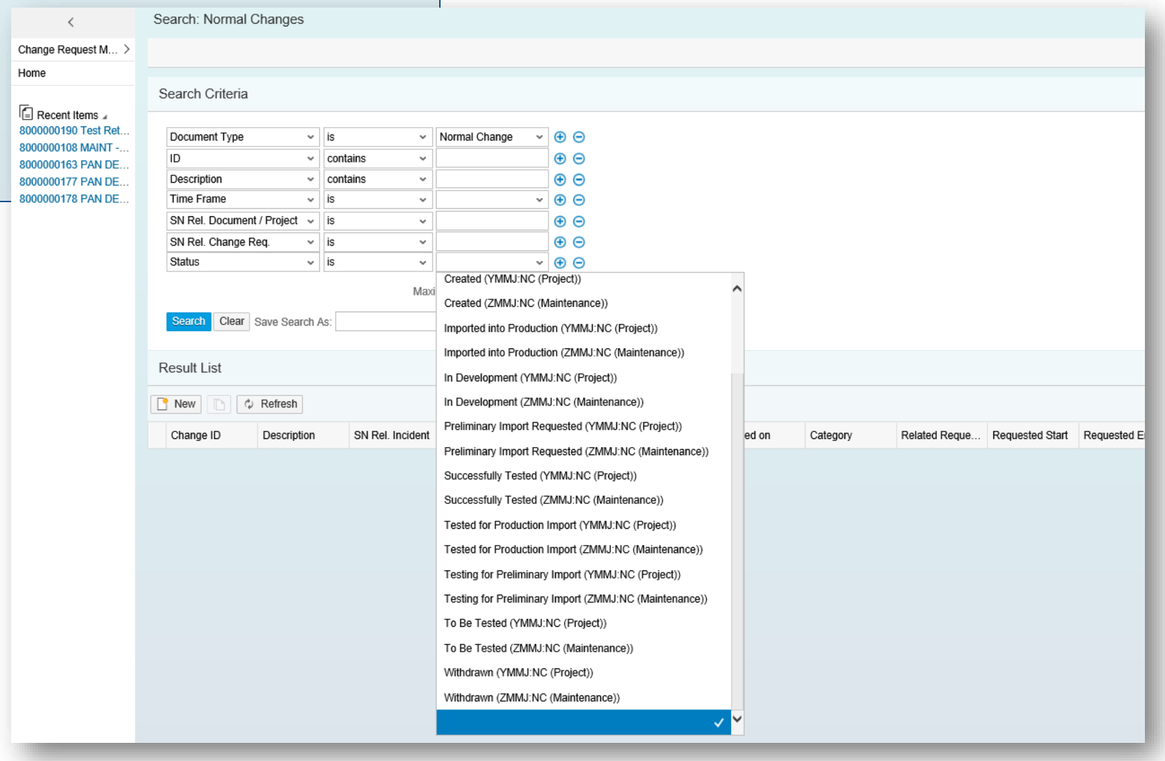

Search Document

CRM_UI “Search” provides several different criteria to search for the “One” or “Multiple” change documents as needed.

1. Select the criteria required to find the change document(s) e.g., “Status” = “Successfully Tested”, the criteria will change based who is person processing the change document.
2. Click on “Search”
3. Open change document from result list

More details on how to use the search capabilities will be explained later on in this training.

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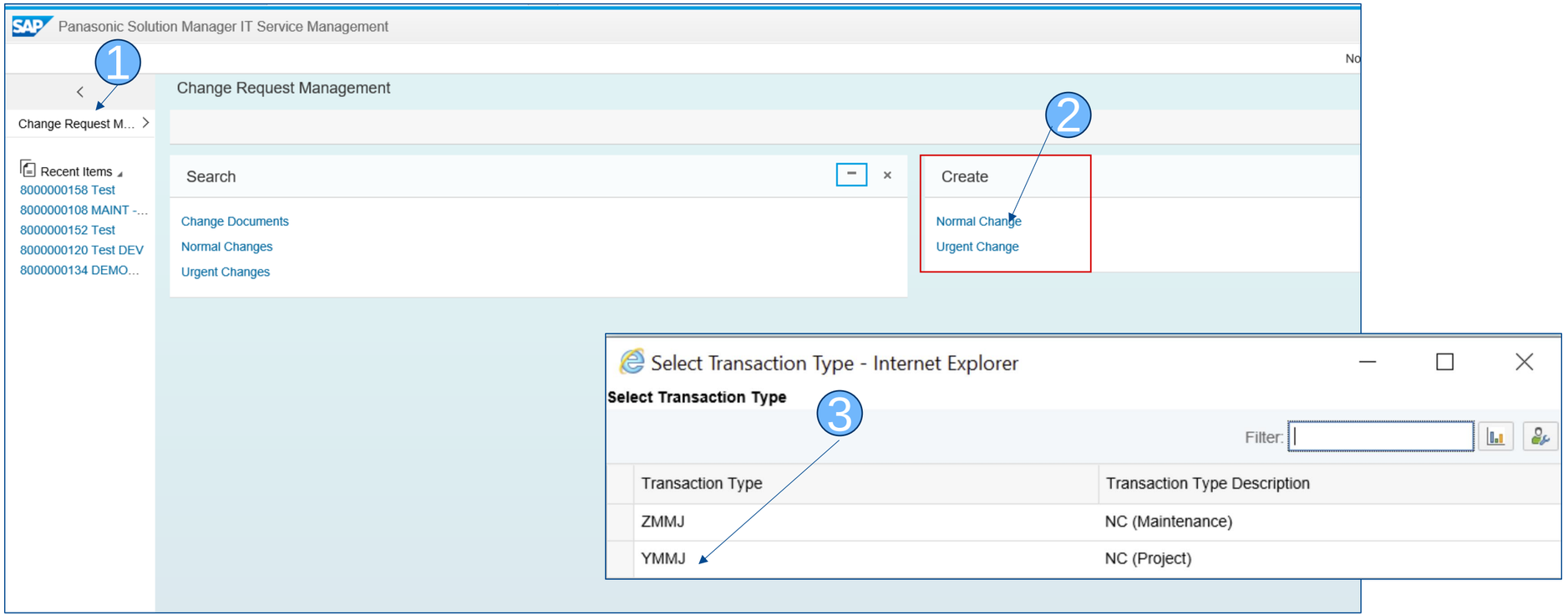
Create Change Document

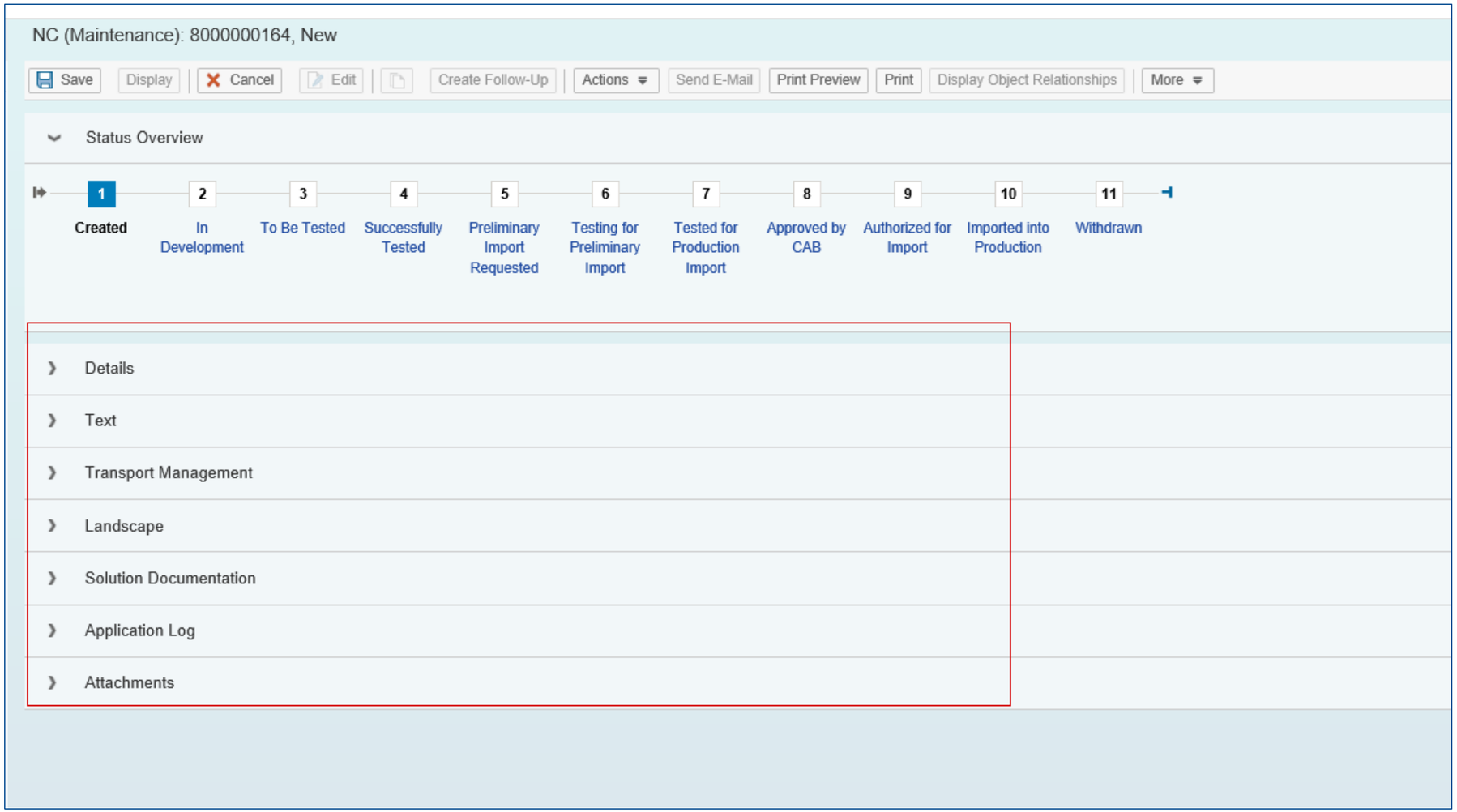


Create Change Doc.

1. Click on left menu “Change Request Management”
2. Under Create section -> Click on “Normal Change”
3. Select from popup window “NC Project”

For training we will use NC Project. For ChaRM Production please check the change management policy to determine which change type.

ChaRM Change Doc. Form UI



Assignment Blocks

Status Overview
- Show the current status of the change document

Details
- Header of the change document

Text
- Input area for new information
- Text logs from the change history

Transport Management
- Contains transport information

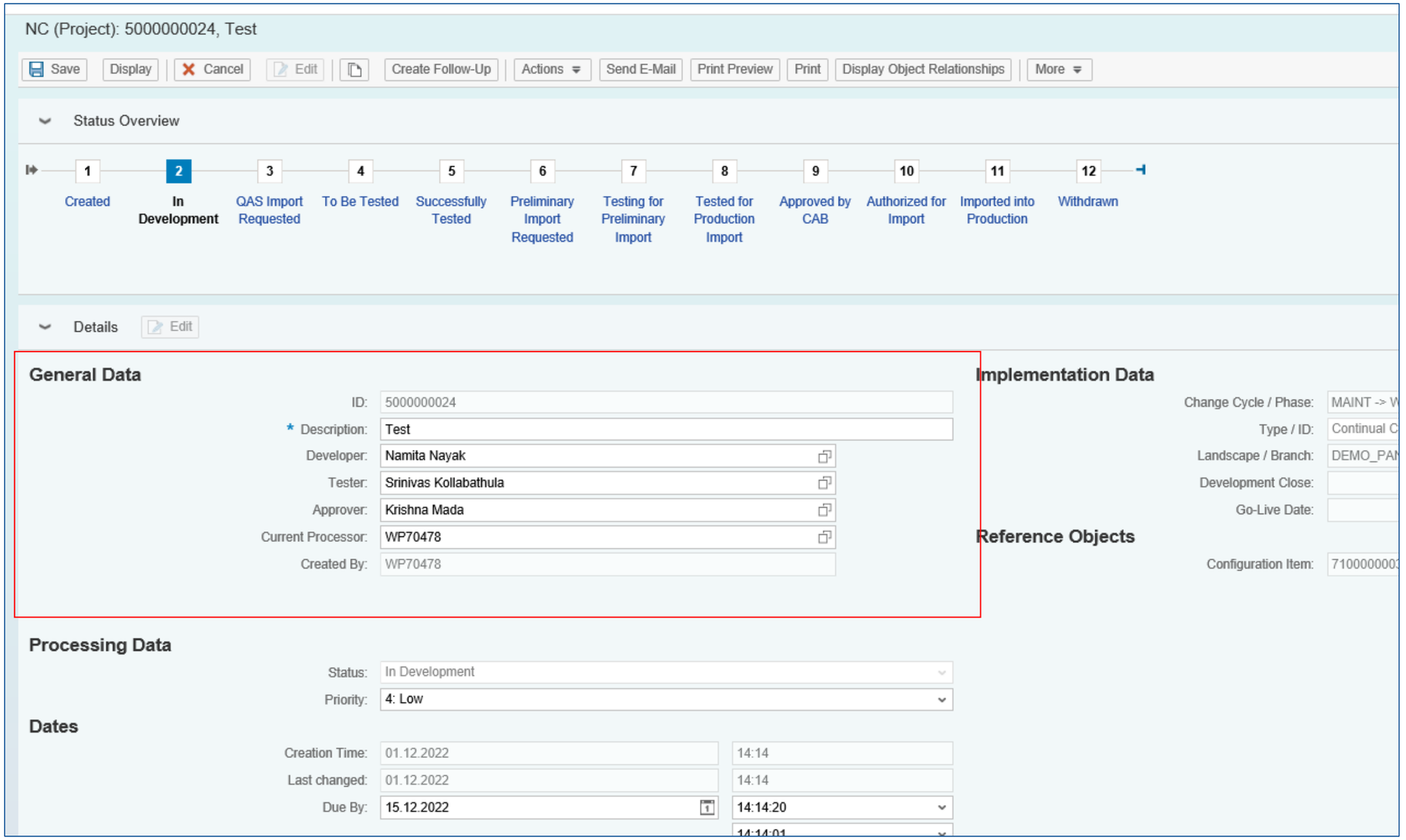
Landscape
- Shows all the systems in scope associated change cycle selected

Solution Documentation
- Once integrated with SolDoc show associated elements

Application Logs
- Show all system logs for the change document, It helps the for debugging issues

Attachments
- Area for documents attachments

Create Change Document



General Data

1. **ID**: Change document number - auto generated

2. **Description**: Enter the description of the Change Document

Select / Enter:

1. **Developer / Dev. Group**
2. **Tester / Test Group**
3. **Approver**

   a) You can search by clicking on

   b) Or Entering First and Last Name

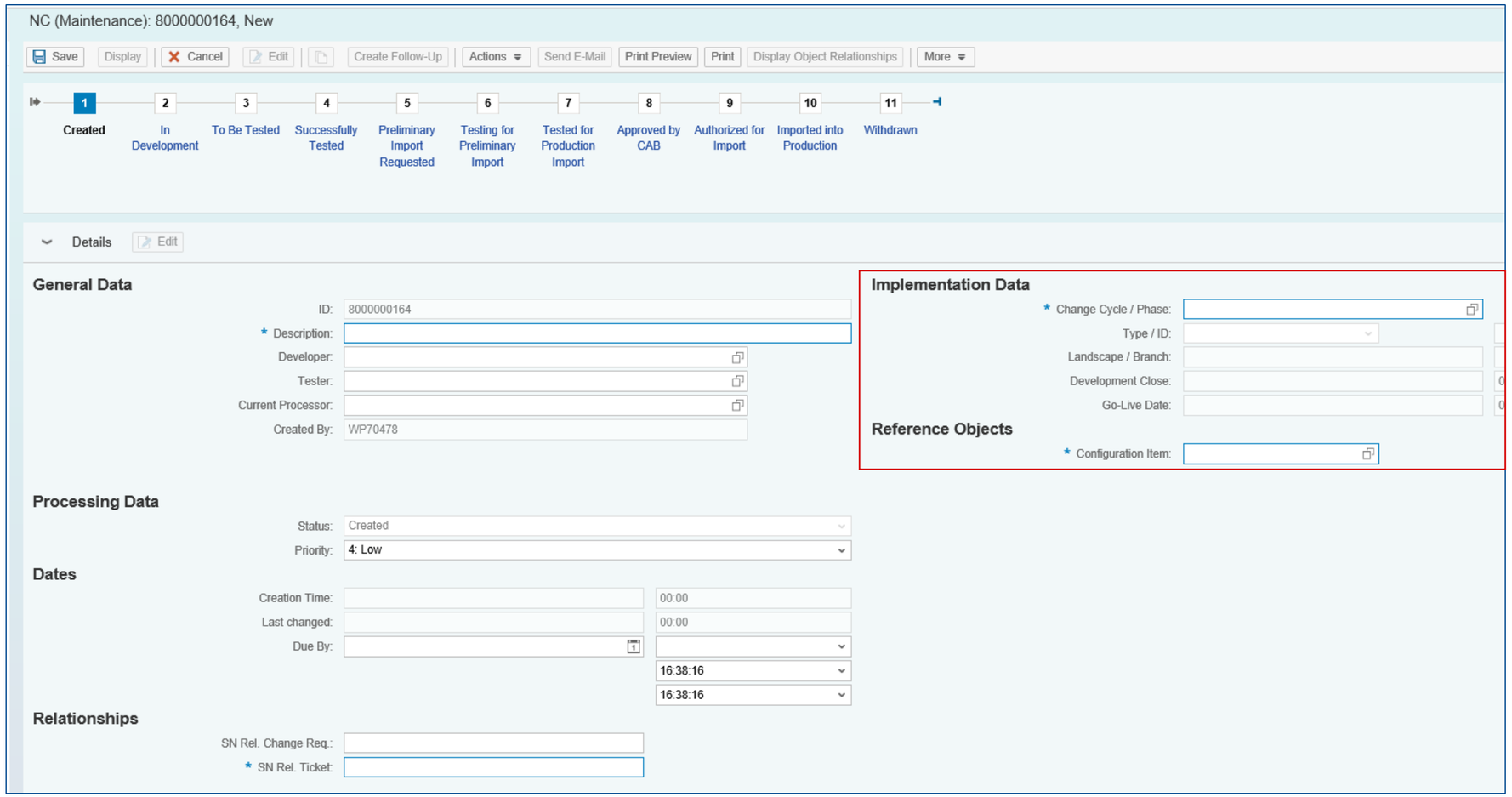
   c) Or User ID

4. **Current Processor:** Shows most recent user working on the document

5. **Created by:** User that created the Change Document

NOTE : Partner functions Developer, Tester and Approver are required to be populated for emails to be triggered during the workflow.

Create Change Document



Implementation Data

1. Select which change cycle (Release) this change will be part of.

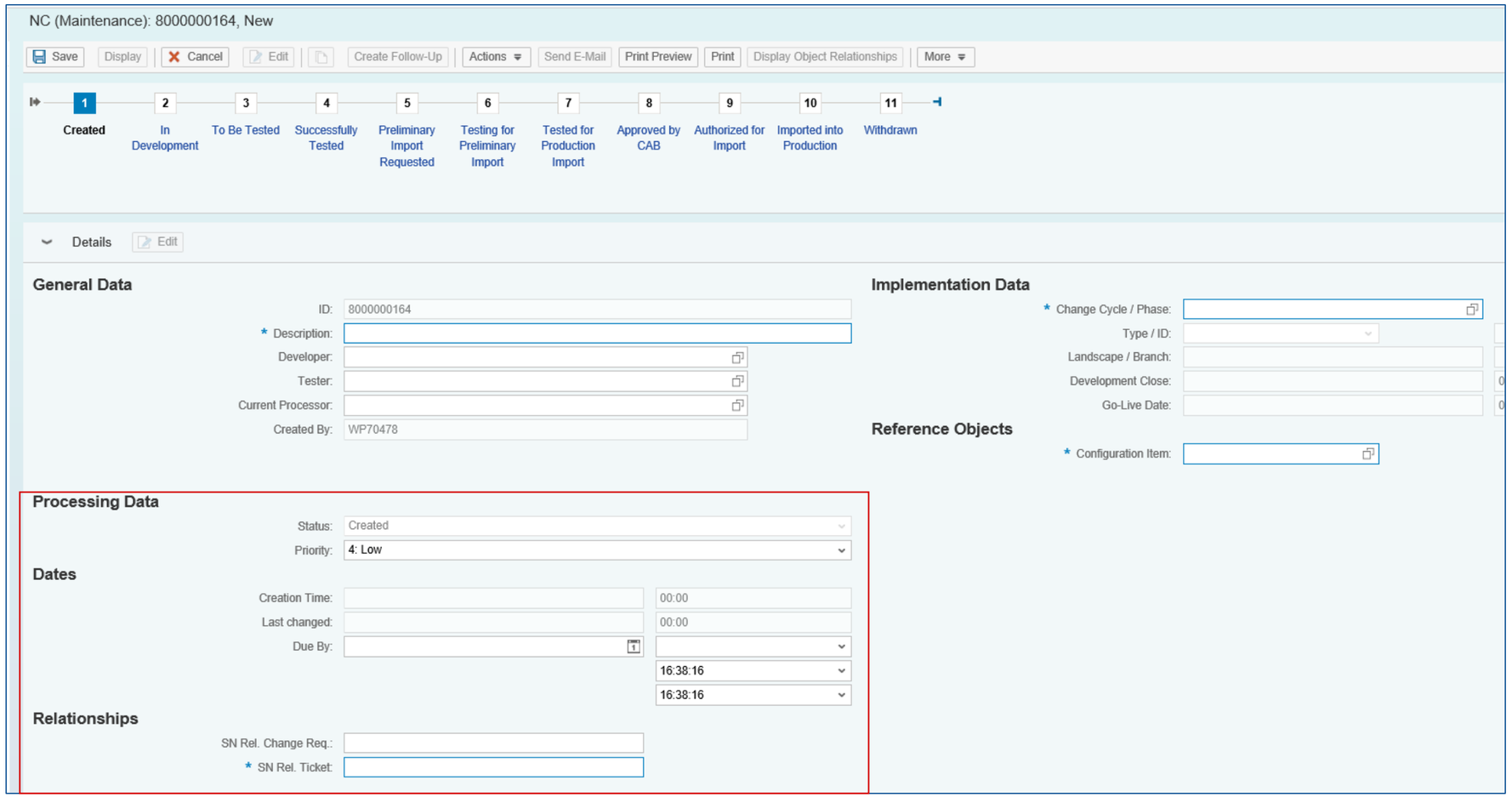
For training ChaRM system Select any Cycle that contains “MAINT -> Weekly Change Cycle” in the Description”

In the **Productive ChaRM** system please check with your Project Manager or IT Manager for information on which Cycle (Release) your changes should be associated with.

Reference Objects

1. Configuration Item (Productive system) which the change will be implemented

Create Change Document



Processing Data

1. **Priority:** Select the priority of the change document Default 4 (Low)

Dates

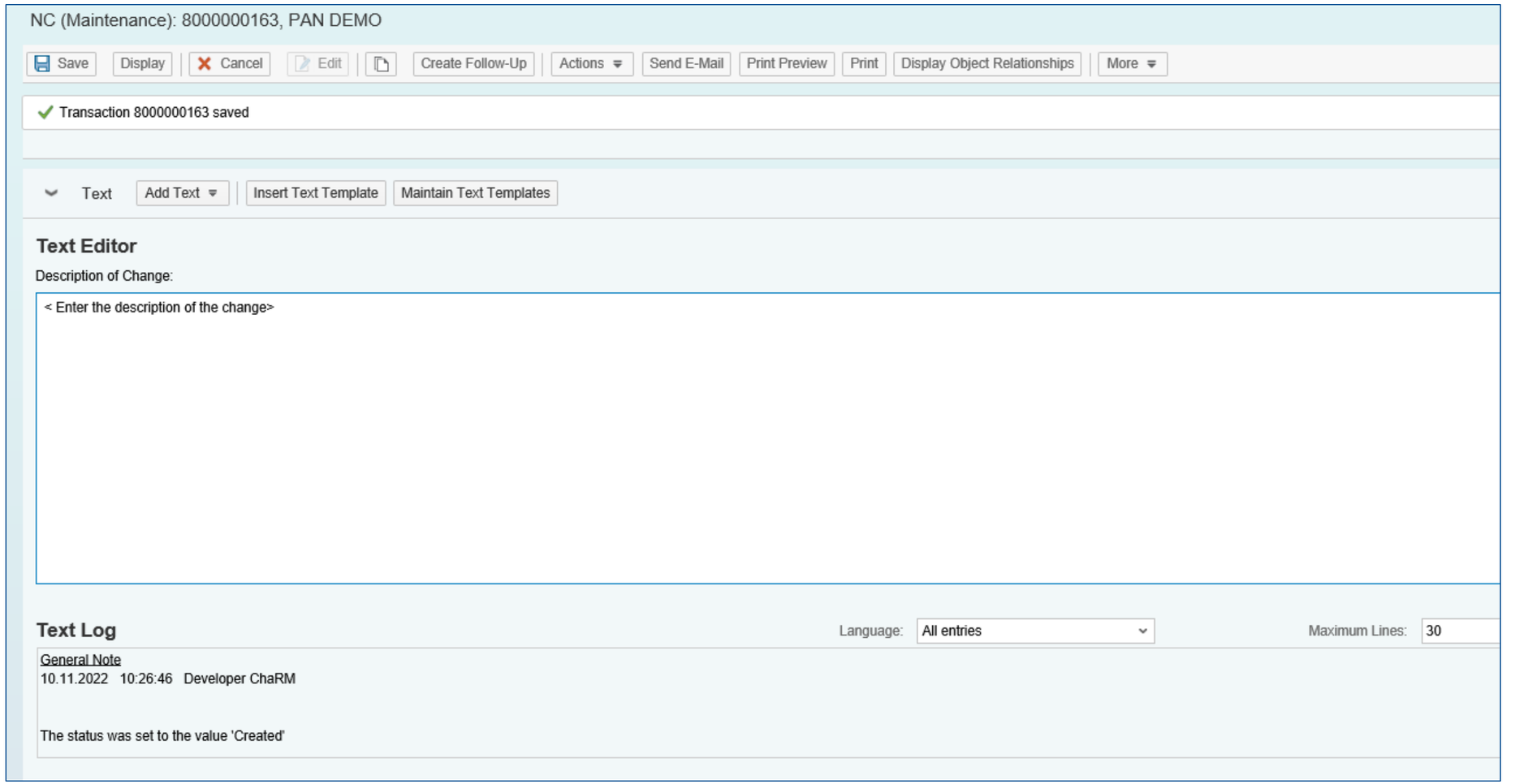
1. **Due By:** Enter the deadline date for the delivery of the BRD, if applicable

Relationships

1. SN Rel. Change Request
   Prior getting your Change document approved to Production a ServiceNow Change Request is required. Please enter the **Change Request number** as soon as it available.

2. SN Related Document
   It's mandatory to provide ServiceNow Project
   or
   SN Related Document as part of the change being made.

Create Change Document

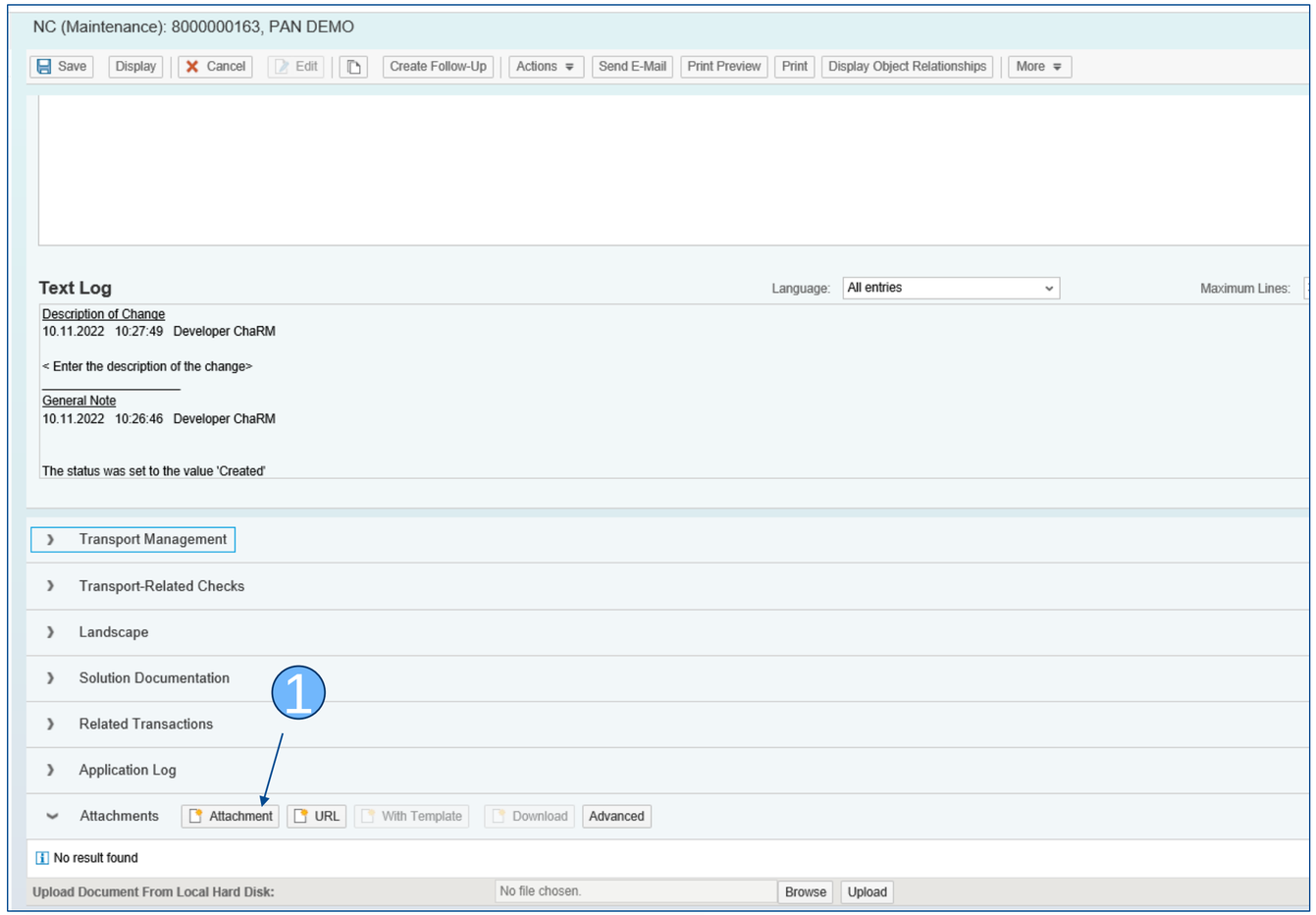


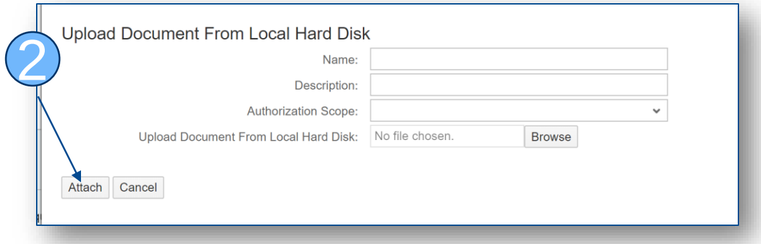
Text

1. Scroll down to the Text assignment block

2. **Description of Change:** Enter a longer description of the change.

Create Change Document





Attachment

1) Scroll down to the attachment assignment block

Users can attach files to the change document:

2) Click on “Attachment” button
- Enter the file name
- Description
- And choose the file from your computer
- Click on “Attach” button

Create Change Document

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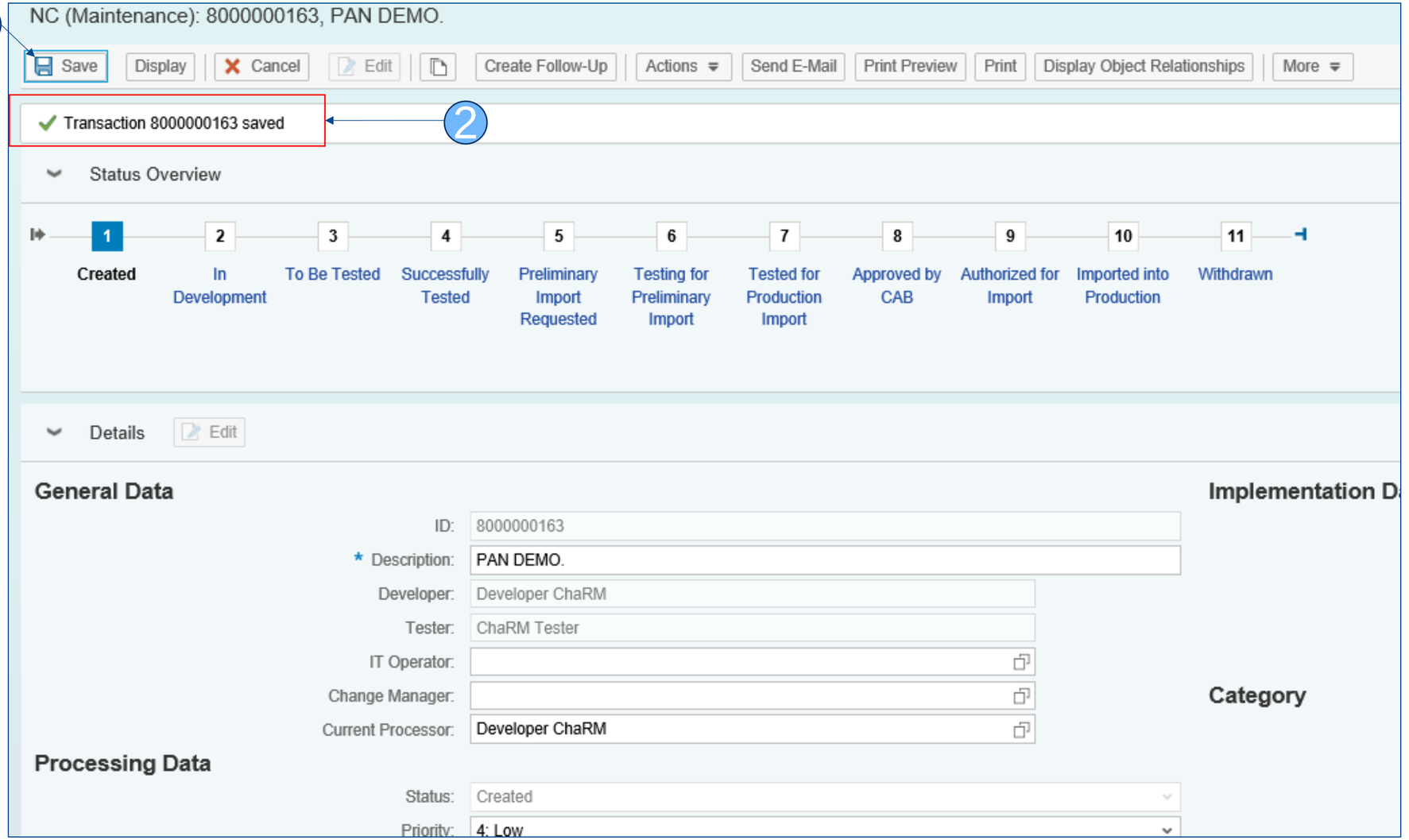
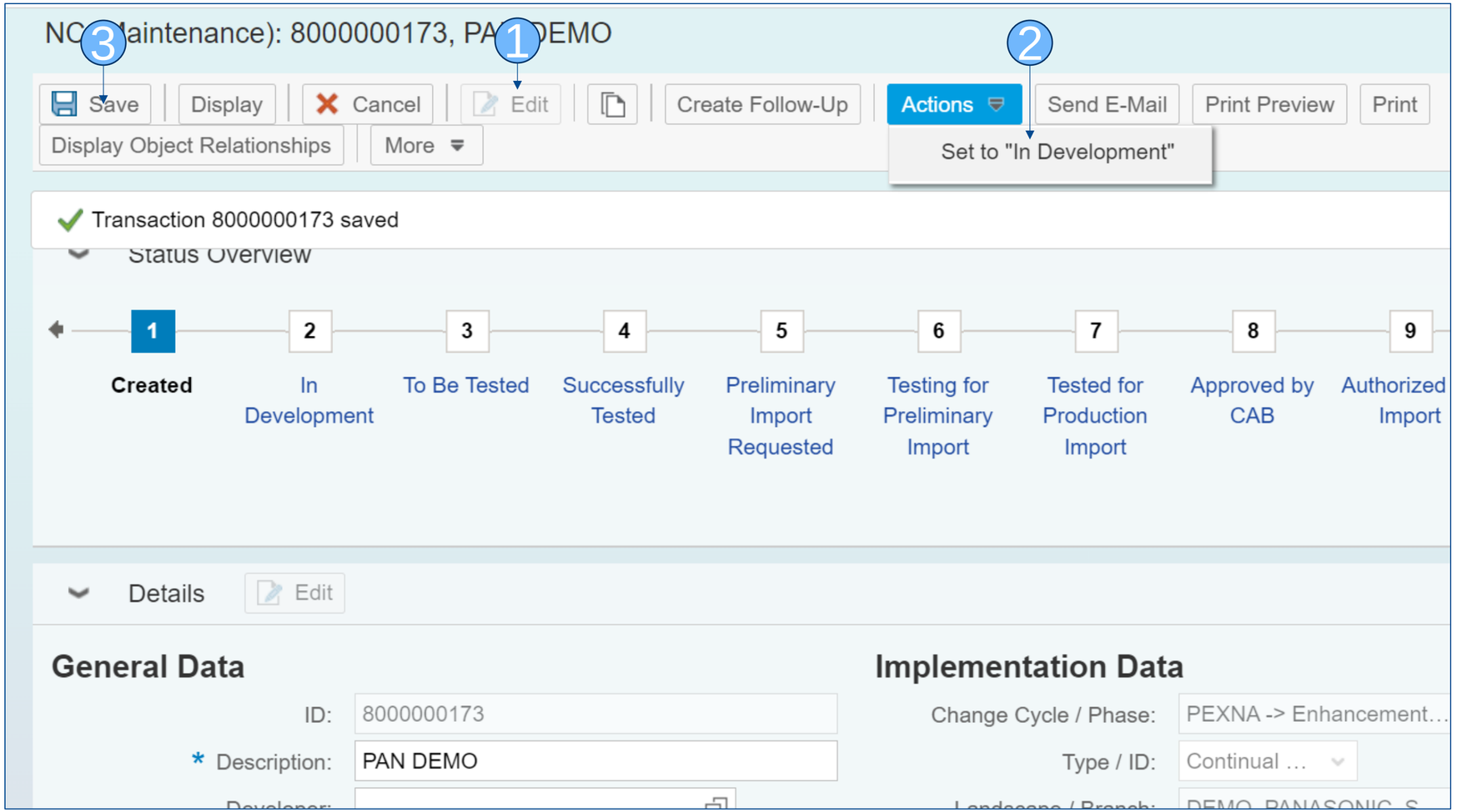


Save

1. Once the user has provided all details
2. On top menu bar, Click on “Save” button
3. Message confirming that the change has been saved appears on the top of the screen

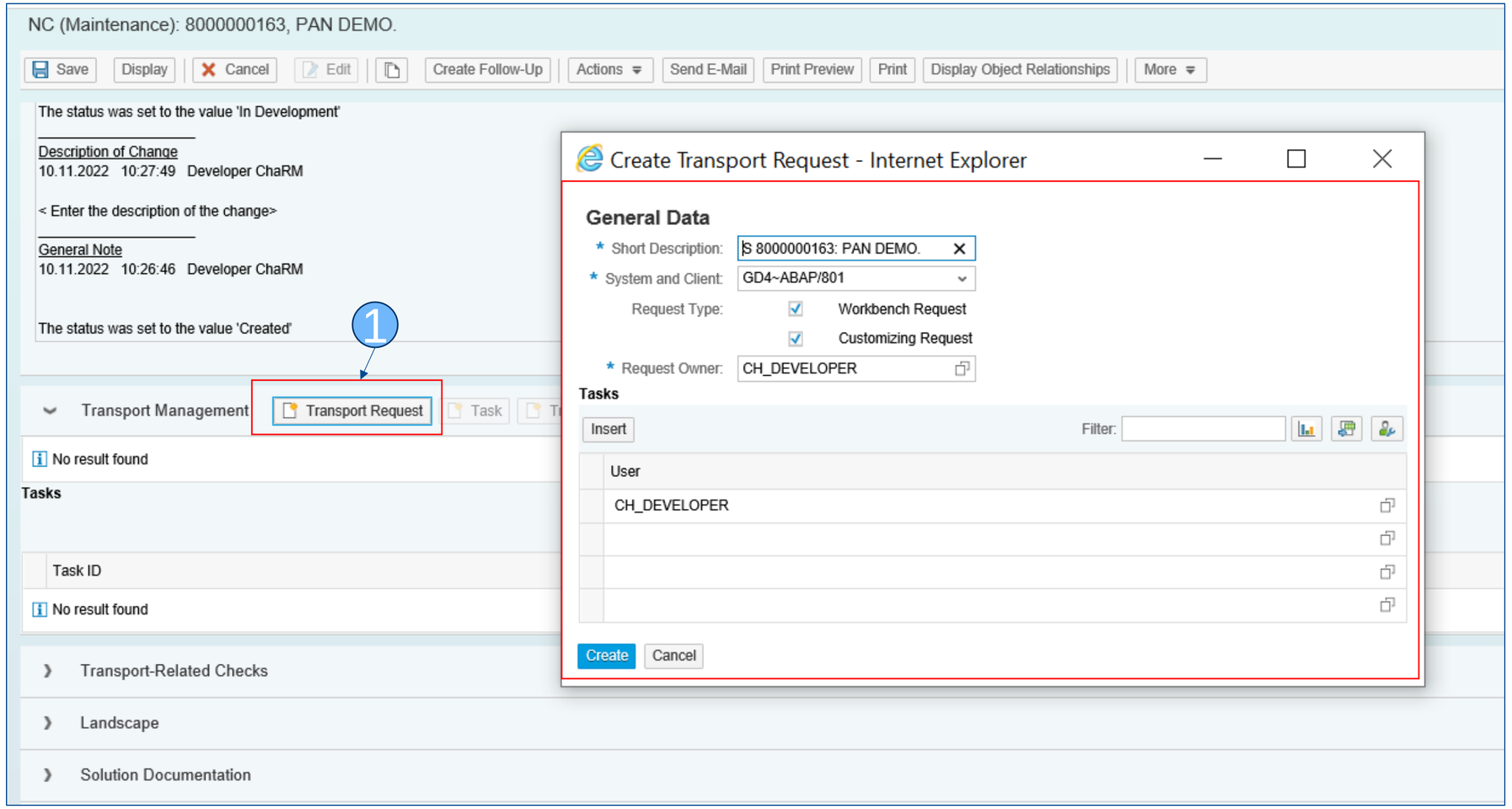
Change Document -> Set In Development



Set In Development

1. Click on “Edit” button
2. Click on “Actions” -> Select “Set to In Development”
3. Click on “Save” button

Change Document -> Create Transports



Create Transport(s)

1. Navigate to Transport Management assignment block and Click on “Transport Request” button

2. **Short Description:** It comes with the same description of the Change Document. Developer can change the description as needed.

3. **System and Client:** Select which system and client to create the transport request

4. **Request Type:** Checkbox which transport types will be required for the work, if not sure you can leave both marked and system will delete the unused one.

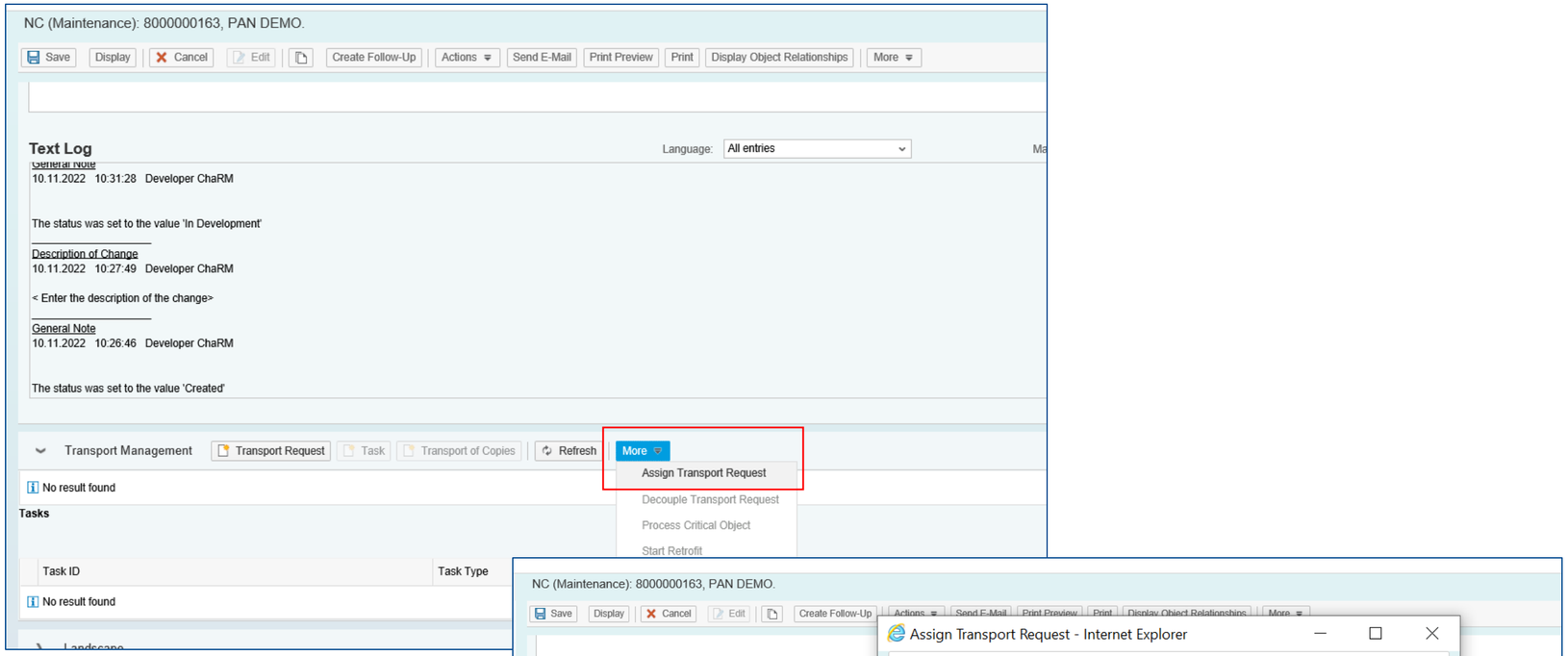
5. **Request Owner:** By default, the current user creating the transport, you can change if needed.

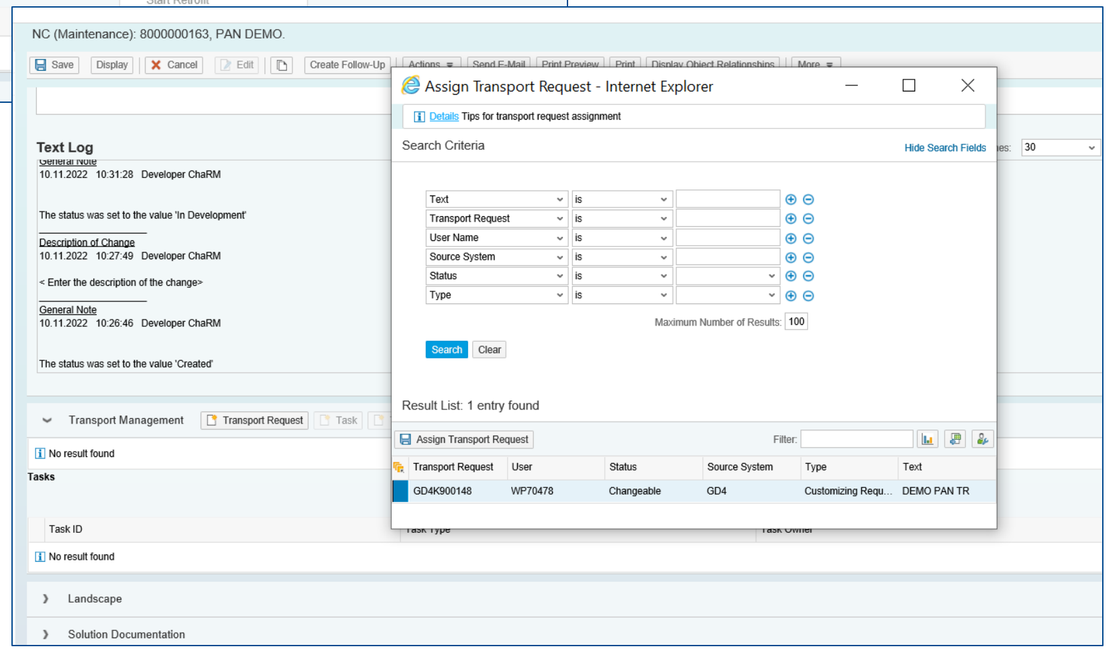
6. **Tasks:** By default, it will create one tasks with the with the user creating the transport, Developer can add additional tasks if needed.

7. Click on “Create” button

Note: Different from todays process where the Developer creates the transport request directly in the development system, The new process enforces the Developer to create the transport request first in ChaRM before they can start making modifications in the development system. Developers won’t have permission to create transports directly in the Development system anymore. **(Every transport request must be initiated via ChaRM process).**

Change Document -> Assign Existing Transports





Assign Existing Transport

Developers can assign existing "Modifiable" transports from managed systems into ChaRM Change Document.

Under Transport Management assignment block:

1. Click on More -> Select Assign Trasport Request

1. Search for Transport Request using the different criteria options, once results are listed.

2. Select the Transport(s) request

3. Click on "Assign Trasport Request" button

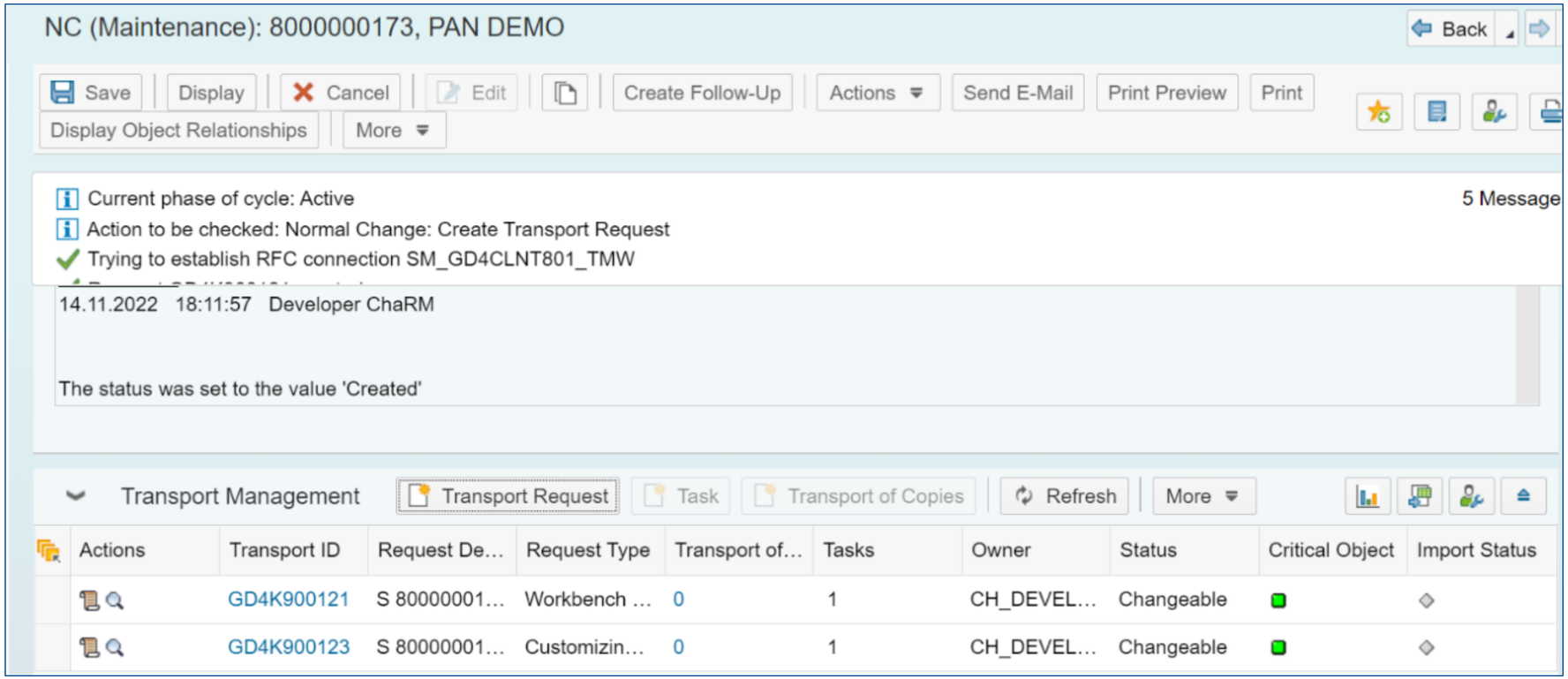
- Transports will be assigned to the Change Document

Decouple Transport from ChaRM Document

User can also decouple “Modifiable” transport(s) from change document. Under the same assignment block:

- Select Transport Request
- Click on “More” button -> Select “Decouple Transport Request”
- Confirm Action

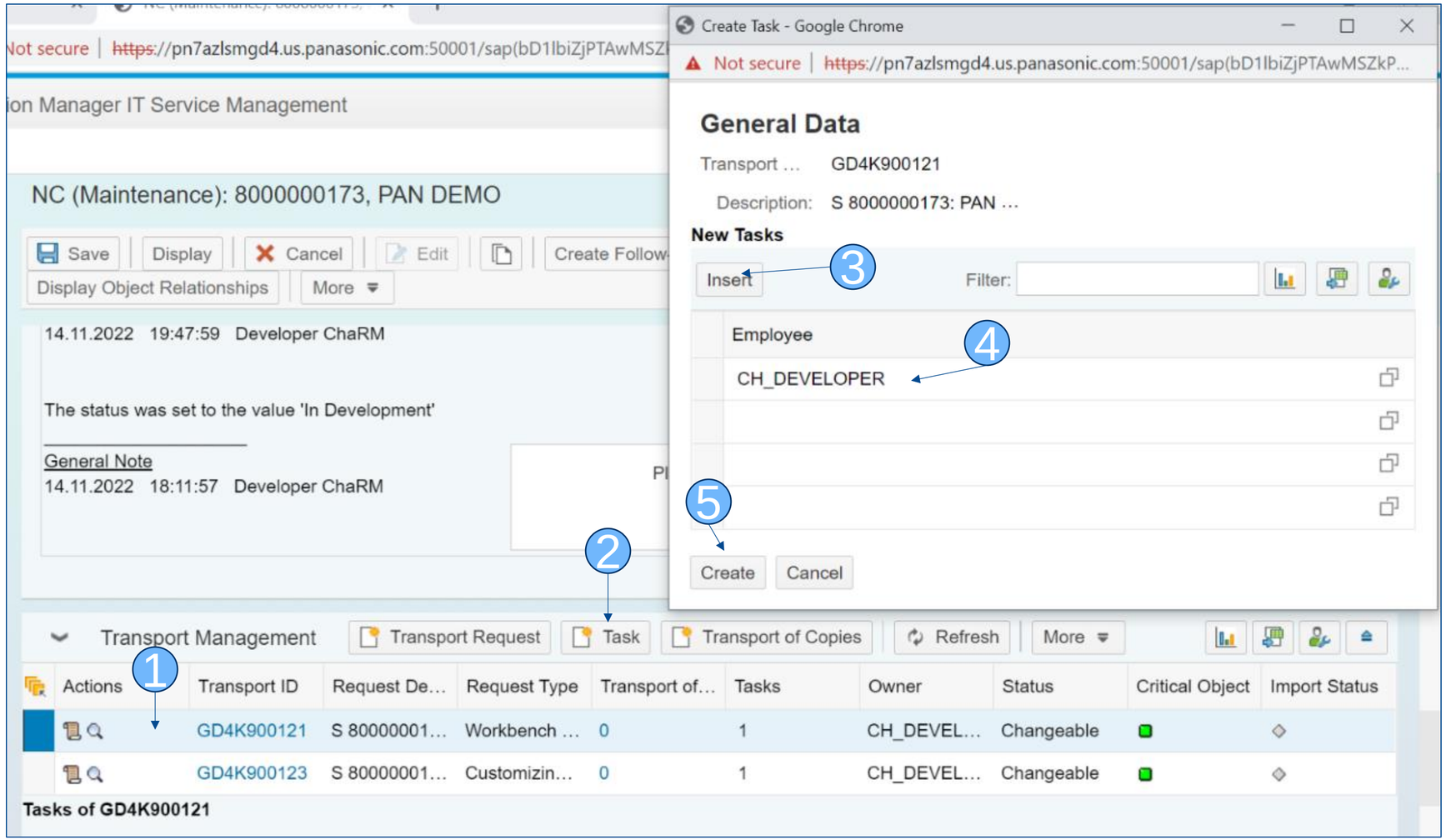
Change Document -> Transport Management



Transports Management

1. **Transport ID:** Transport number
2. **Request Type:** Shows the type of the request
3. **Transport of Copies:** Shows associated transport copies
4. **Tasks:** Shows how many tasks it's in the transport , user can click to check the details the task
5. **Owner:** Owner of the transport request
6. **Status:** Shows if transport is Modifiable or Released
7. **Critical Object :** ChaRM can be configured to flag an object as "Critical" based on predefine list, objects flagged as critical will require an additional approval to move.
8. **Import Status:** System will show the status the last transport imported into target system(s)

Change Document -> Create Additional Task

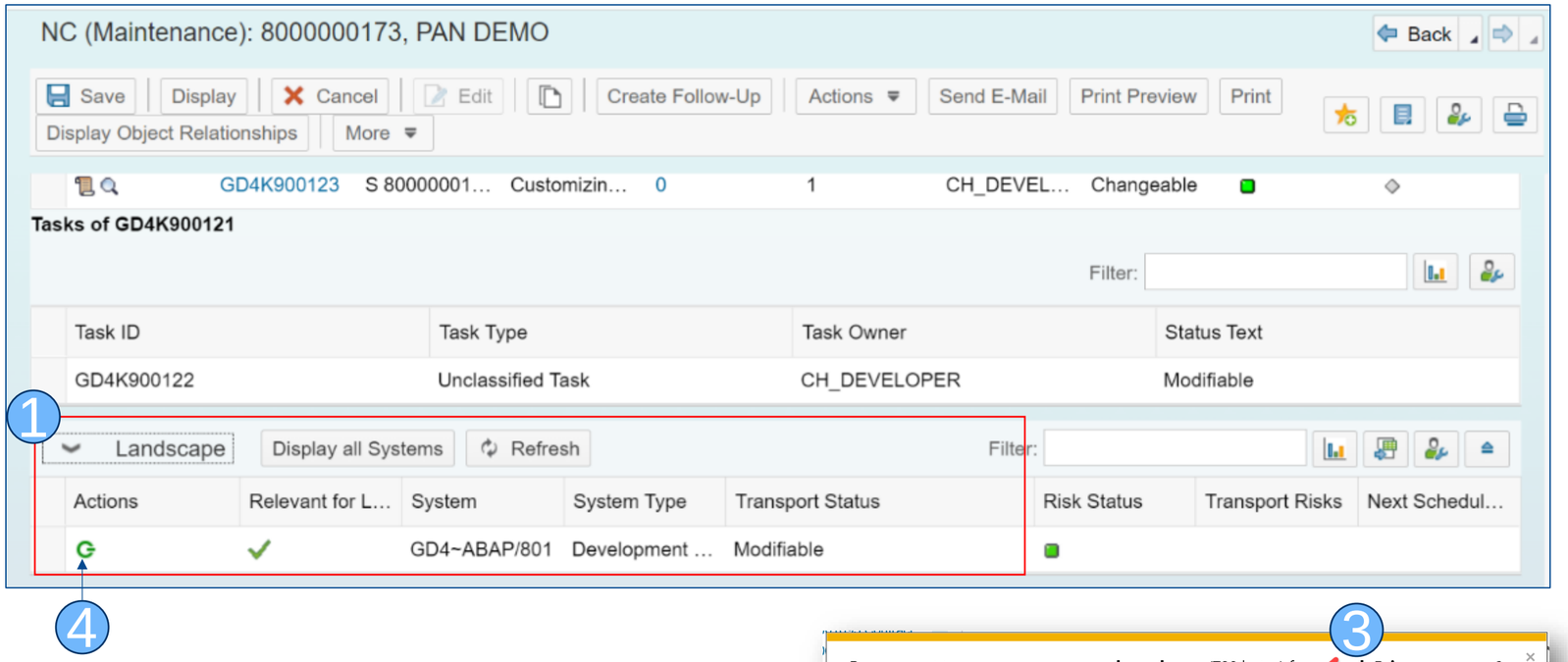


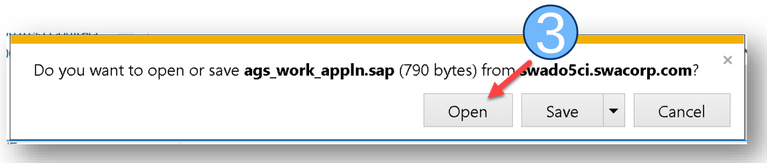
Adding New task

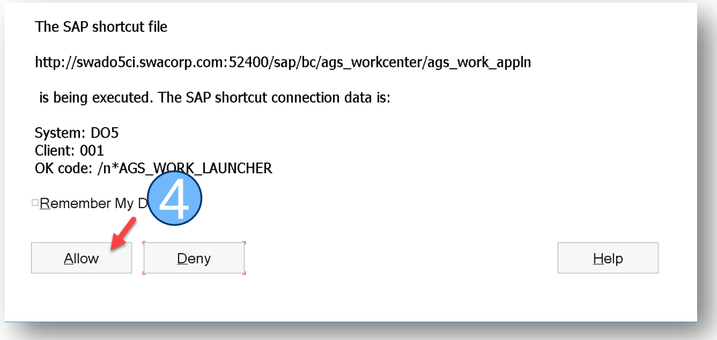
If Developer would like to add an additional tasks to the existing transport :

1. Select the transport
2. Click on “Task” button
3. On the new window -> Click on “Insert” button
4. Enter the developer in the employee list
5. Click on “Create” button

Change Document -> Login to Managed System





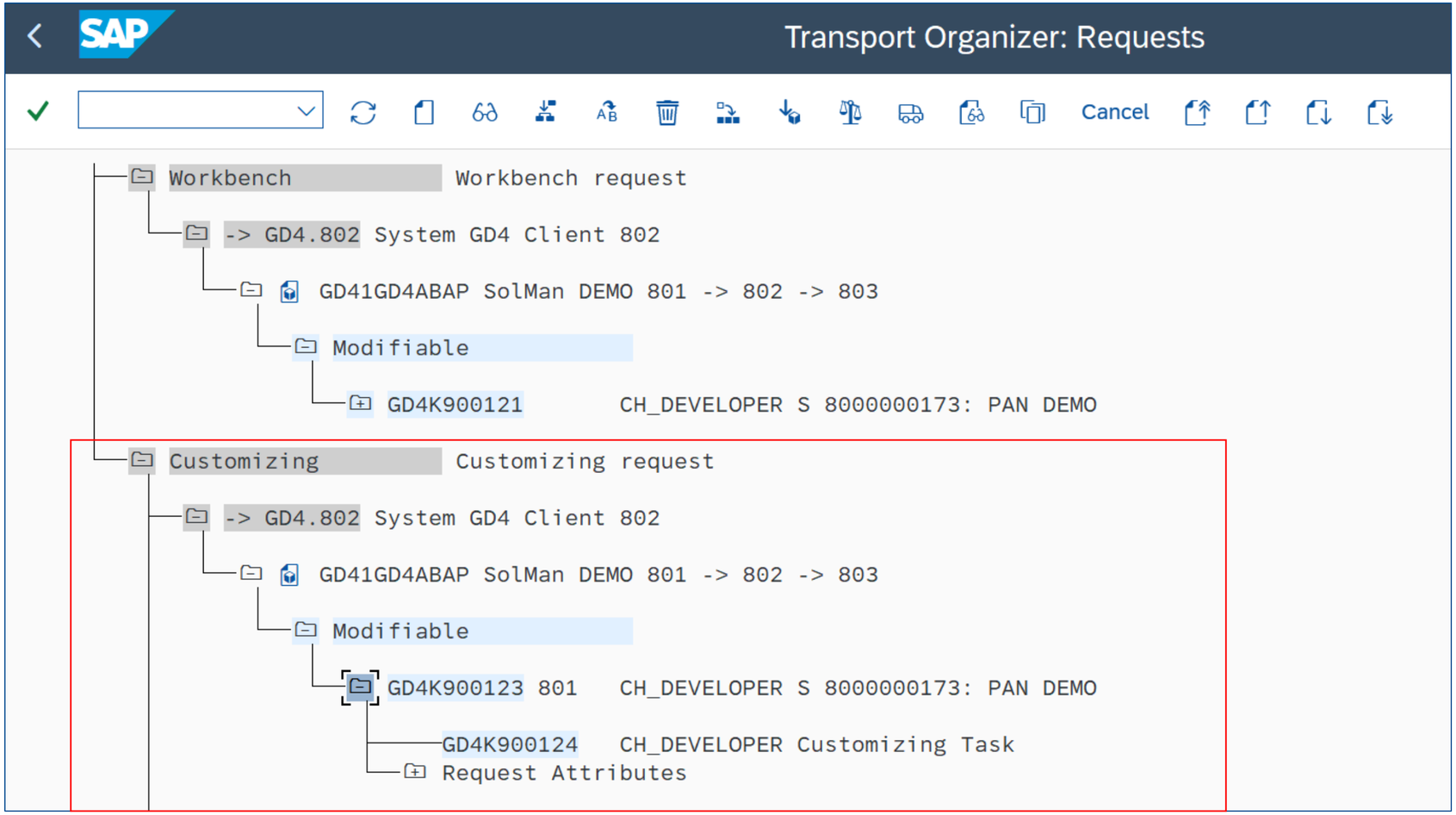


Login to Managed System (Dev System)

ChaRM give the option for Developers to login to managed system directly from the change document:

1. Navigate to “Landscape Assignment Block”
2. Click on of the Development System
3. Click on “Open” on the next popup window
4. Click on “Allow” on the second popup window

Change Document -> Release Task



Release Task

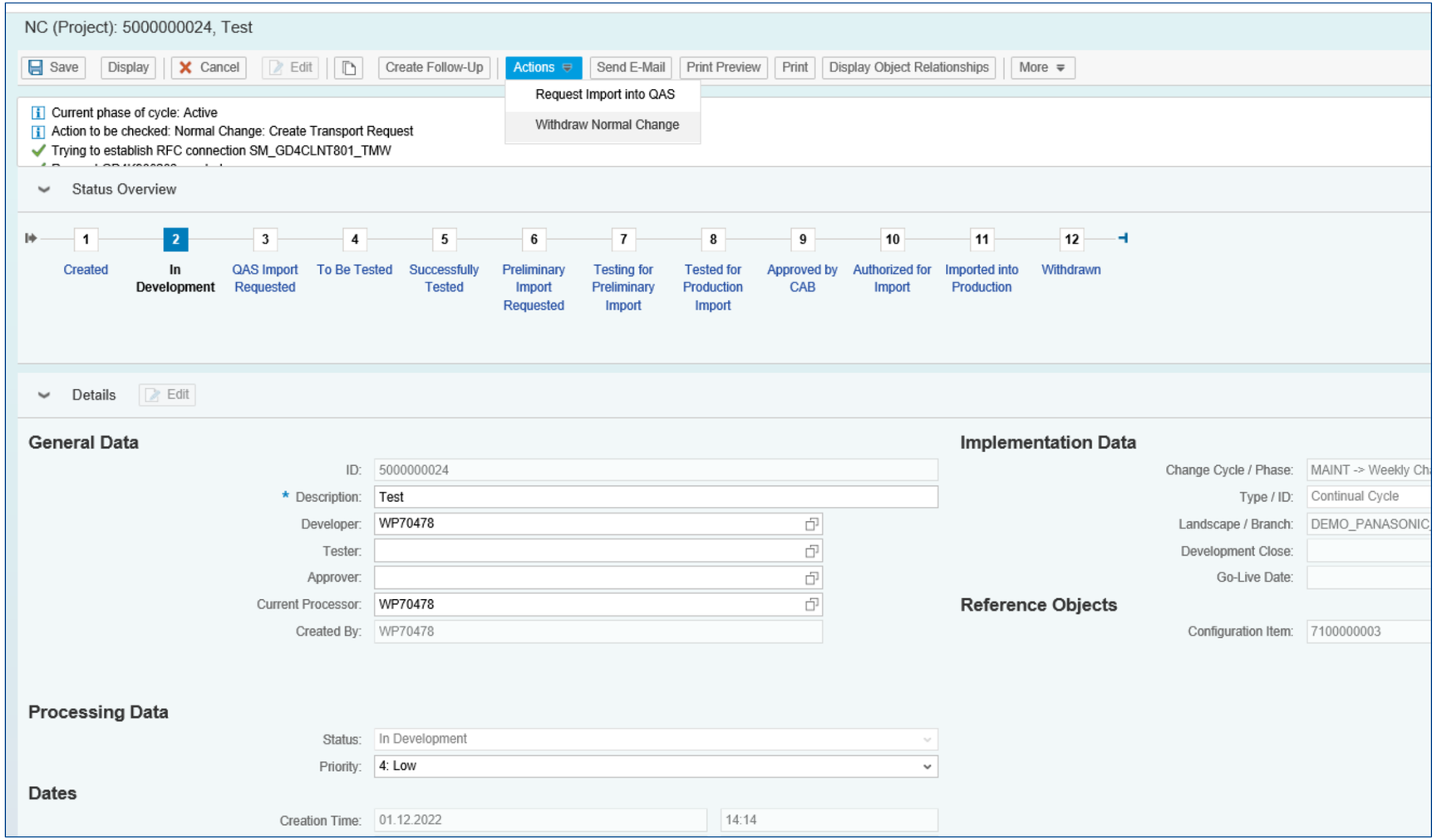
Once changes have been saved to the transport request(s) Developers will then release the transport task:

1. Go Tcode SE09
2. Find the Transport Request created previously
3. For this training example -> Select the Customizing Request
4. Expand the main transport node -> select the Task
5. Release the **task ONLY**

Note

The main transport will be released by ChaRM via the workflow.

Change Document -> Request Import to QAS



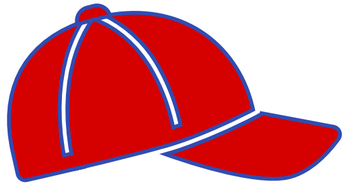
Request Import to QAS

Once all tasks are released and Unit Test documentation uploaded to ChaRM Document, Developer can request import of the changes to QAS system:

1. Open Change Document
2. Click on "Edit"
3. Click on -> Actions
4. Select Request Import into QAS
5. Save It

Change Document will change status to **"QAS Import Requested"**

Approver will get notified via email about the requested import.

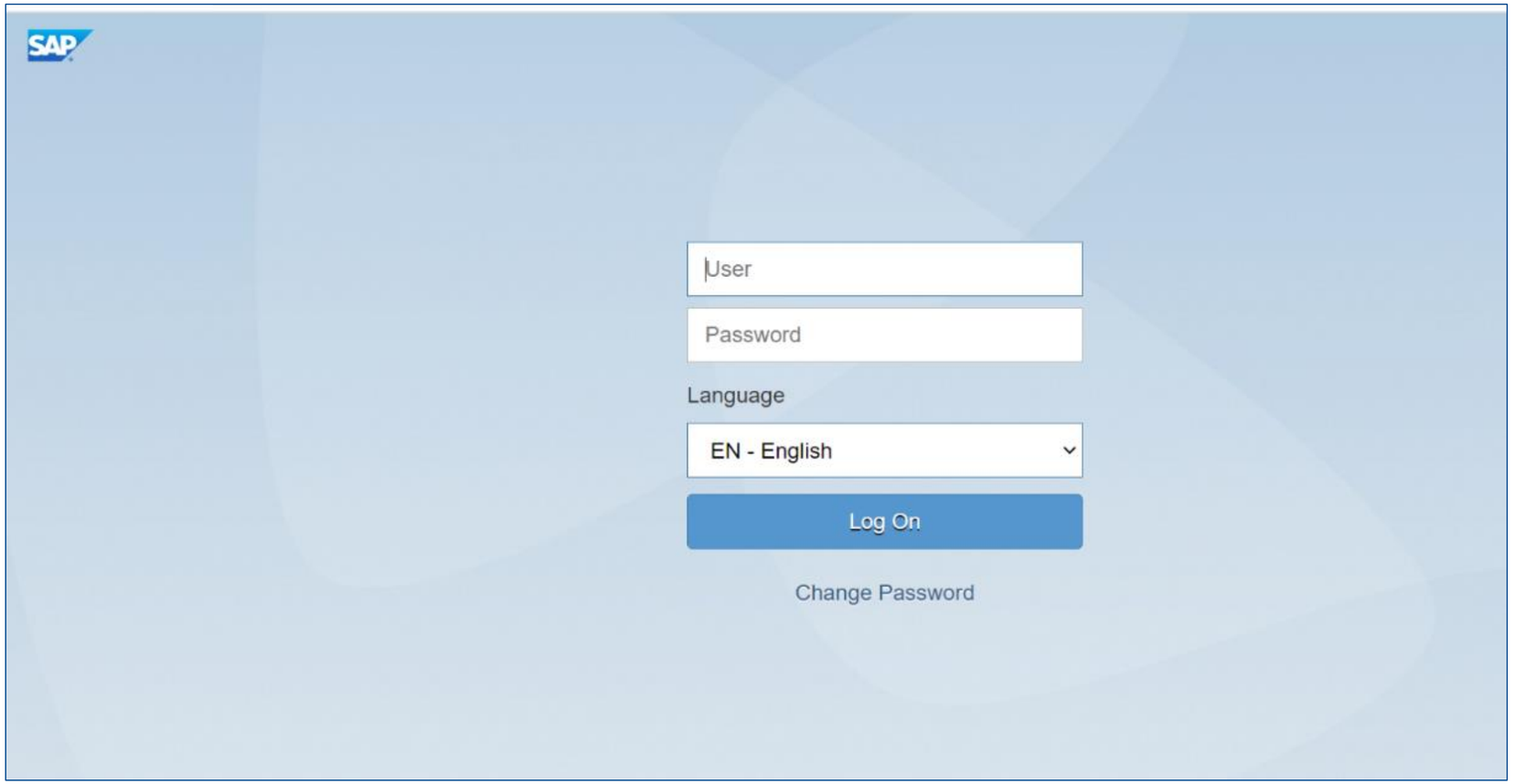


Approver

Login to Solution Manager as Approver

Login to ChaRM as APPROVER

Panasonic



1. Open the URL: https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN

2. Enter your user and password

- **USER: CH_APR<XX>**
- **PASSWORD:**

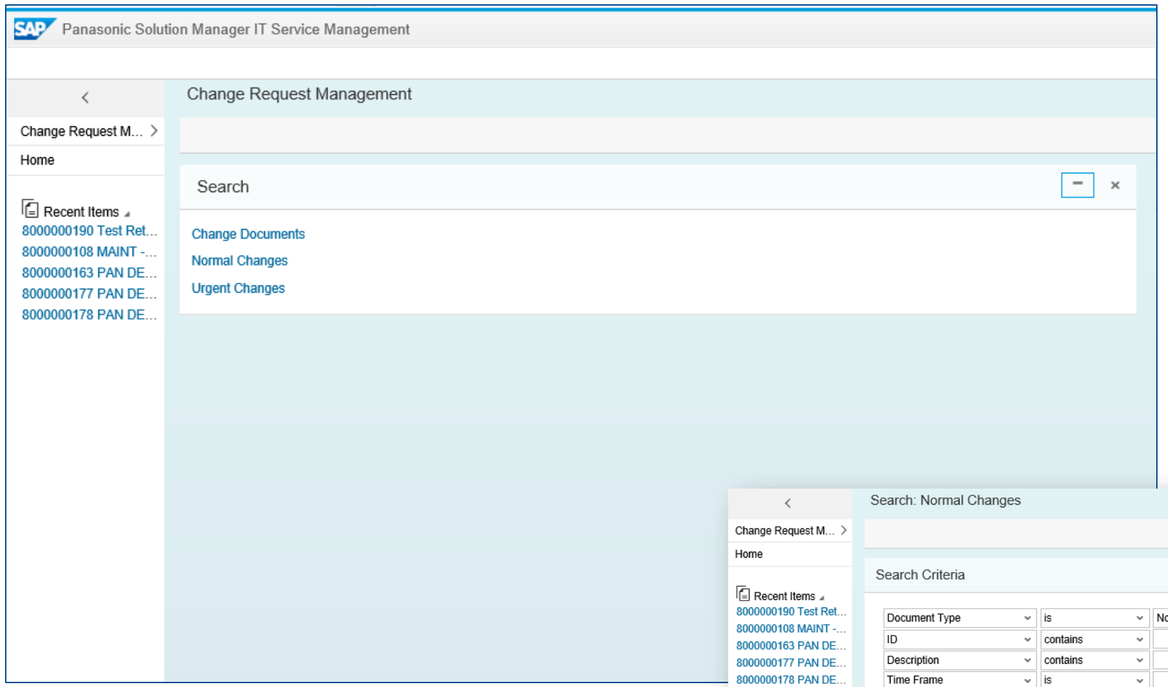
3. Click on “Log On” button

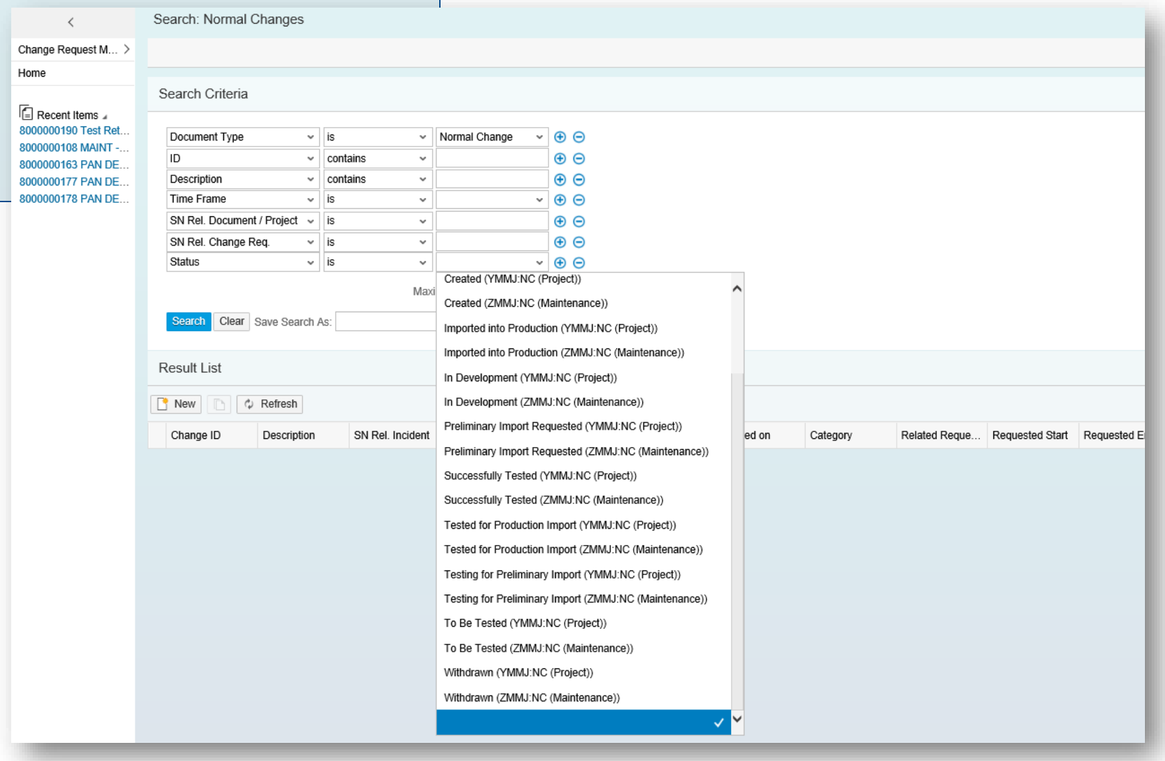
Link to Test ID spreadsheet: Test_IDS.xlsx

GyanSys

Search Change Document

Panasonic





Search Document

1. On Fiori Launchpad -> Open Change Request Management tile

2. On CRM_UI -> Click on Change Request Management from left menu

3. On Main window -> Search Area

4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ QAS Import Requested ”

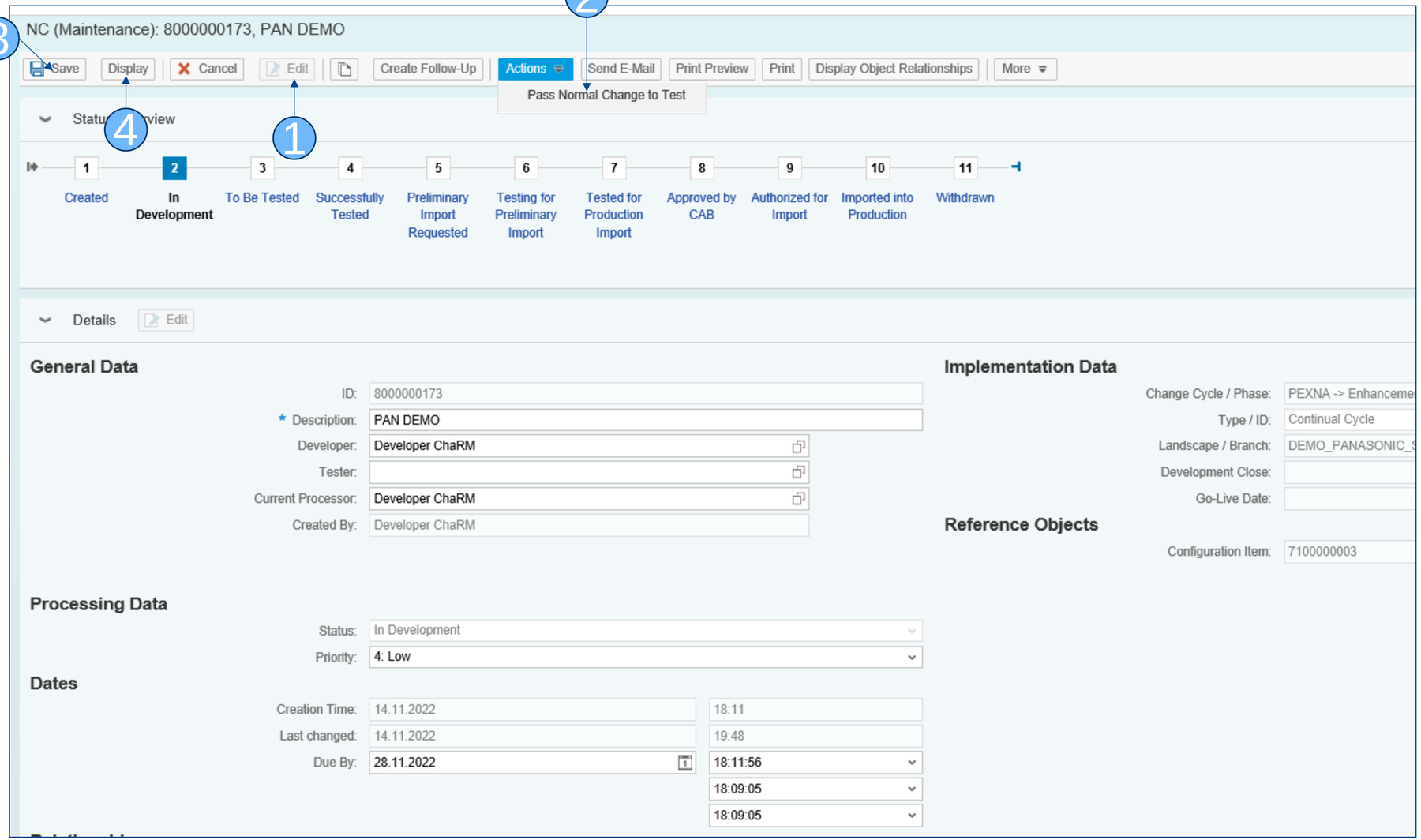
5. Click on “Search”

6. Open change document from result list

GyanSys

Panasonic

ChaRM Document -> Pass to QAS



Move Transport to Quality System

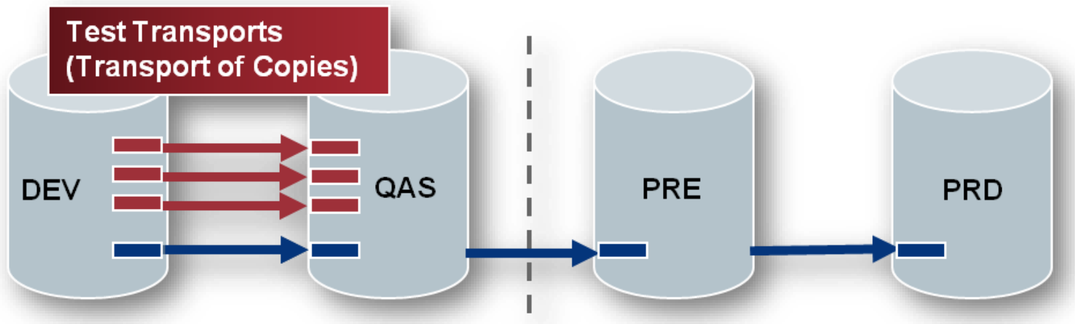
Developer now has completed the unit testing in DEV system and requested change to move to QAS system.

1. Open the Change Document
2. Click on “Edit” Button
3. Click on “Actions” -> Select “Pass Normal Change to Test”
4. Click on “Save” button
5. Click on “Display” button

- **System will create a “ToC” and import into QAS automatically** (Check next slide for details)
- **Tester will be notified via email about change is ready for testing**

Transport of Copies Overview

Panasonic



Transports of copies only applicable from DEV to QA system.

Advantages:

- Repository objects are locked as long as possible in the development system
- The number of transports in production is reduced
- Transports of copies are periodically imported into the QA system but do not follow the transport routes into follow-on systems
- Only the original transports can reach production

ToC Process Overview

Once ChaRM document reaches status **"To Be Tested"**

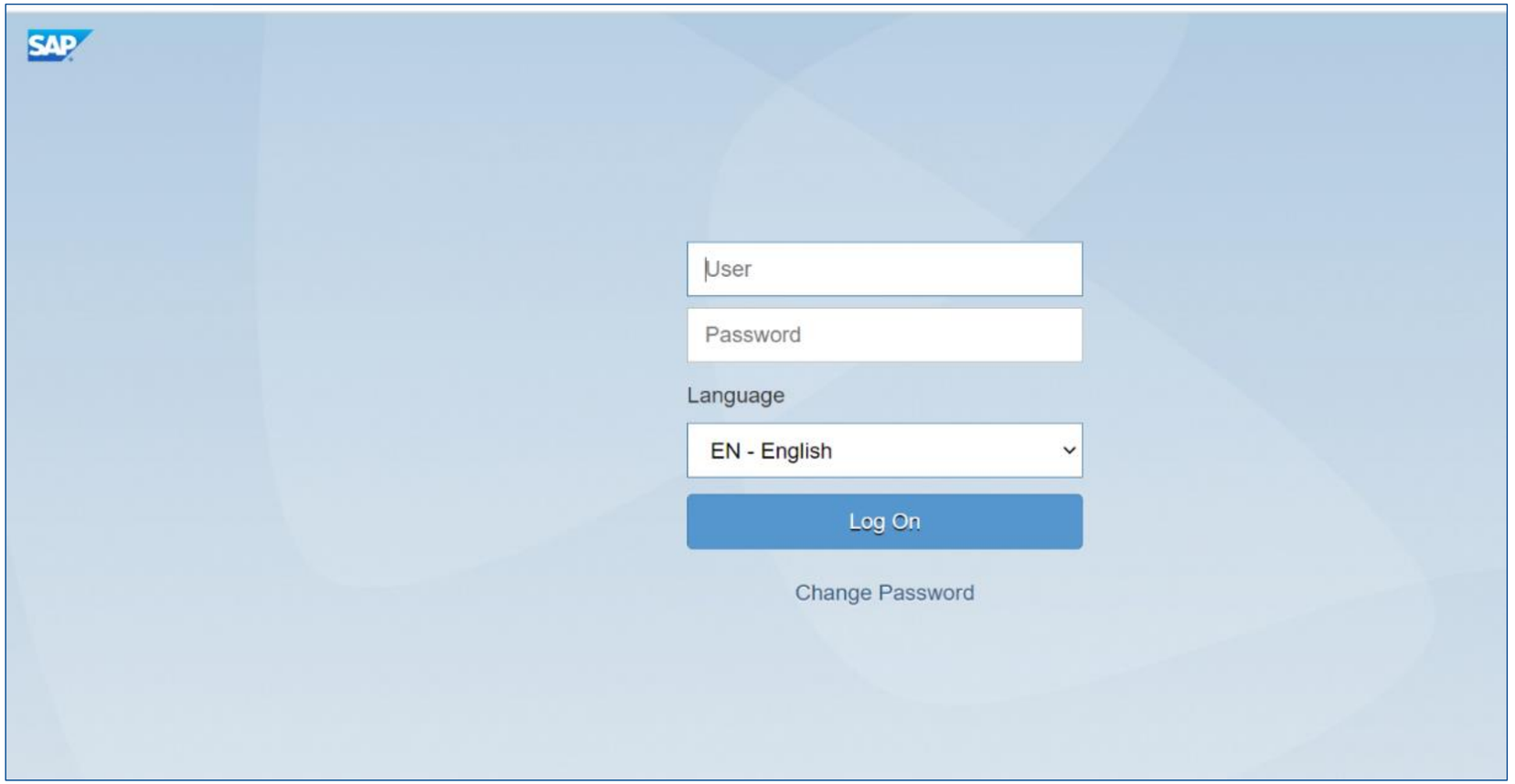
1. System creates a transport of copy from the main transport
2. System automatically import ToC into the quality system
3. Tester can perform testing in QAS:
   a) if something missing or defect found, Tester can send change back to "In Development"
   b) Otherwise, Tester, "Confirm Successful Test"
4. If Change is sent back to "In Development":
   a) Developer can create new transport or task under the original transport request
   b) Developer make necessary correction
   c) Release the task
   d) Set the change "To Be Tested"
   e) New ToC will be created containing the latest task
   f) ToC gets imported automatically into QAS
   g) Tester can test changes in QAS

Role Tester

Login to Solution Manager as Tester

Login to ChaRM as TESTER

Panasonic



1. Open the URL: https://pn7azlsmgd4.us.panasonic.com:50001/sap/bc/ui2/flp?sap-system-login-oninputprocessing=onProceed&sap-client=001&sap-language=EN

2. Enter your user and password

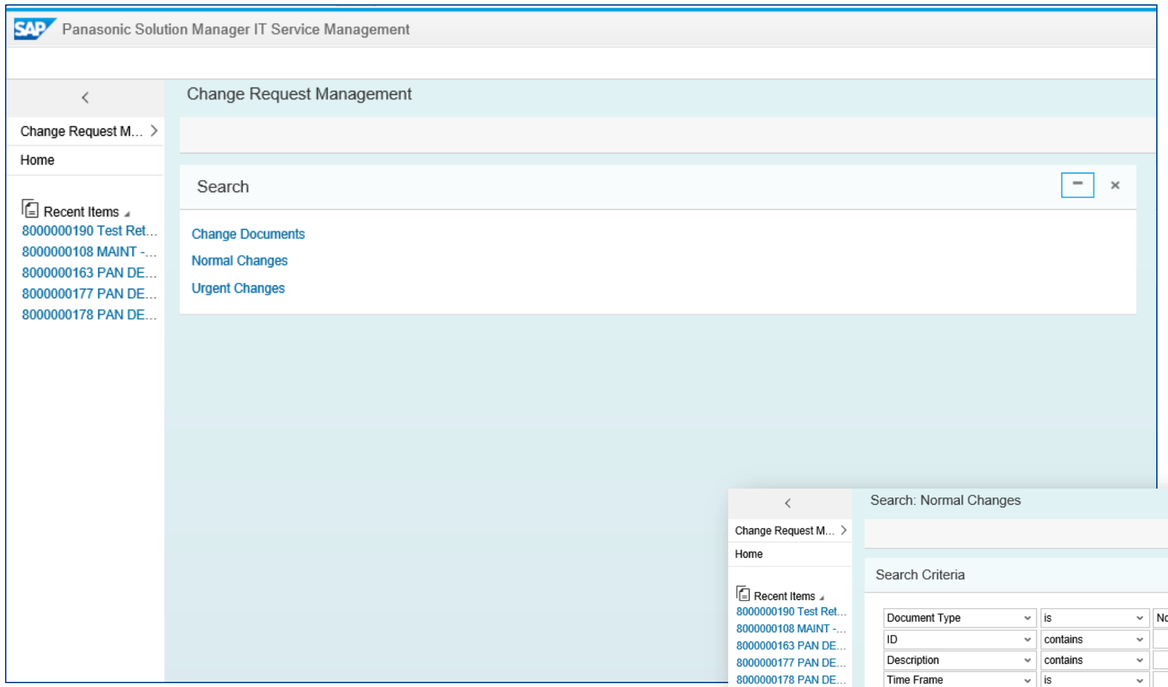
- **USER: CH_TESTER<XX>**
- **PASSWORD:**

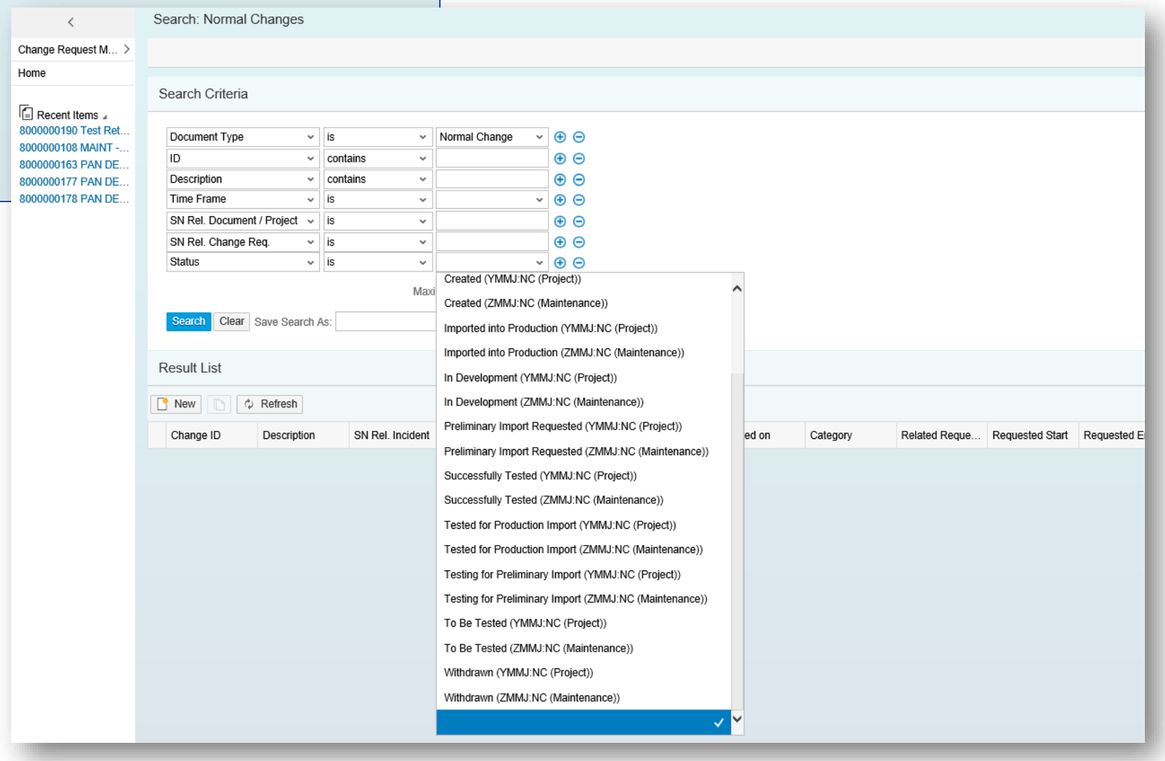
3. Click on “Log On” button

Link to Test ID spreadsheet: Test_IDS.xlsx

Search Change Document

Panasonic





Search Document

1. On Fiori Launchpad -> Open Change Request Management tile

2. On CRM_UI -> Click on Change Request Management from left menu

3. On Main window -> Search Area

4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ To Be Tested”

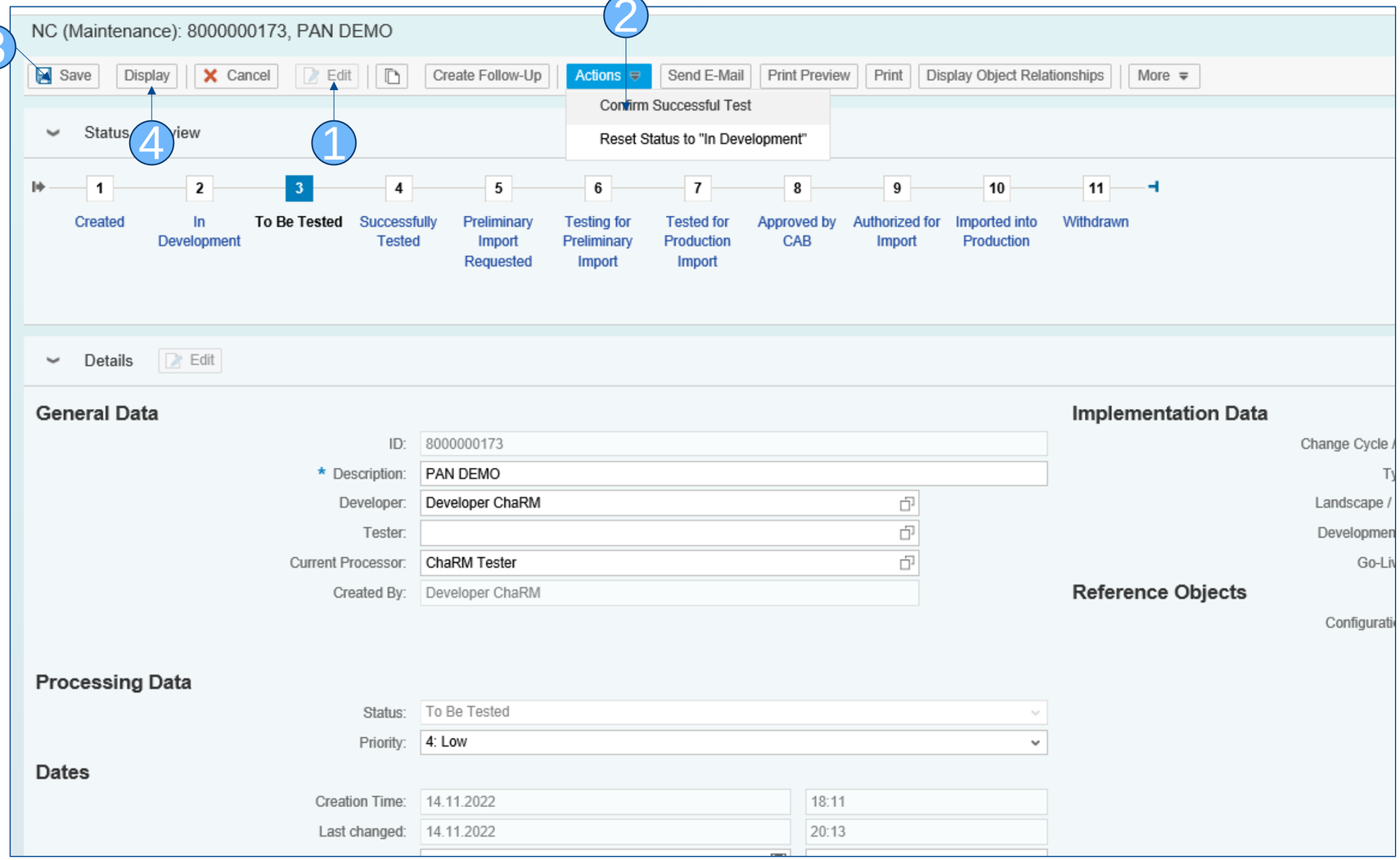
5. Click on “Search”

6. Open change document from result list

GyanSys

Panasonic

ChaRM Document – Testing



Note: Once the change document reaches status “Successfully Tested” the main transport request gets released by ChaRM and automatically imported into QAS every **15min** via auto import job.

“Confirm Successful Test”

Developer verified that changes moved QA successfully and “Confirm Successful Test”:

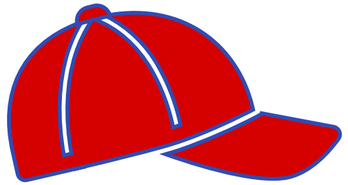
1. Click on “Edit” Button
2. Click on “Actions” -> Select “Confirm Successful Test”
3. Click on “Save” button
4. Click on “Display” button

OR

Reset status to “In Development”

Developer found some issue or requires additional work; In this case they can send change document back to “In Development” to create additional transports/tasks:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Reset Status to “In Development”
3. Click on “Save” button
4. Click on “Display” button

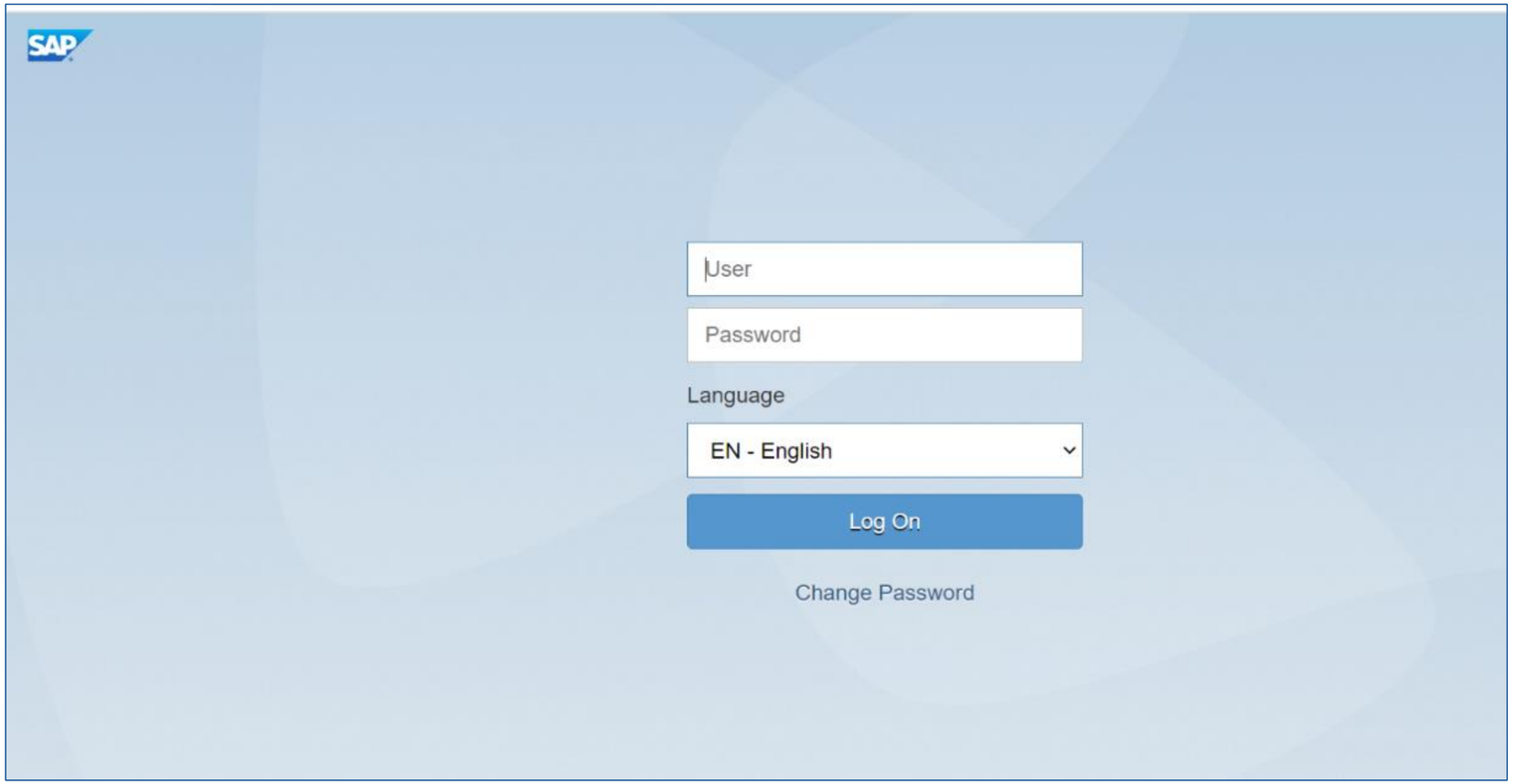


Approver

Login to Solution Manager as Approver

Login to ChaRM as APPROVER

Panasonic



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2. Enter your user and password

- **USER: CH_APR<XX>**
- **PASSWORD:**

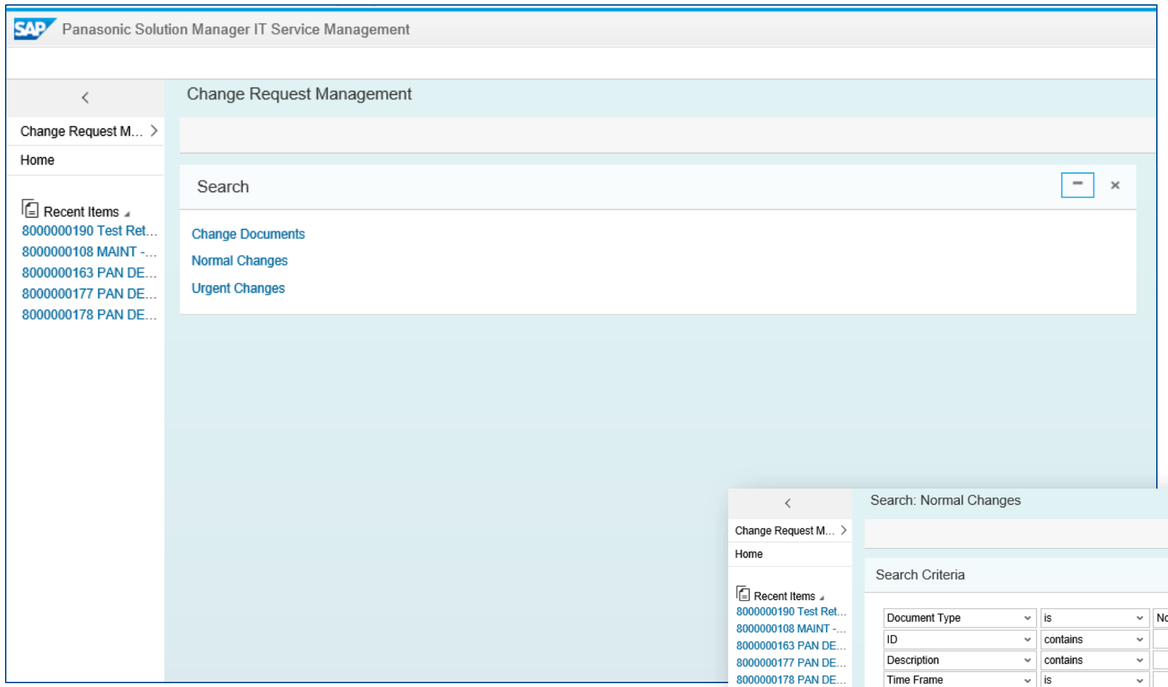
3. Click on “Log On” button

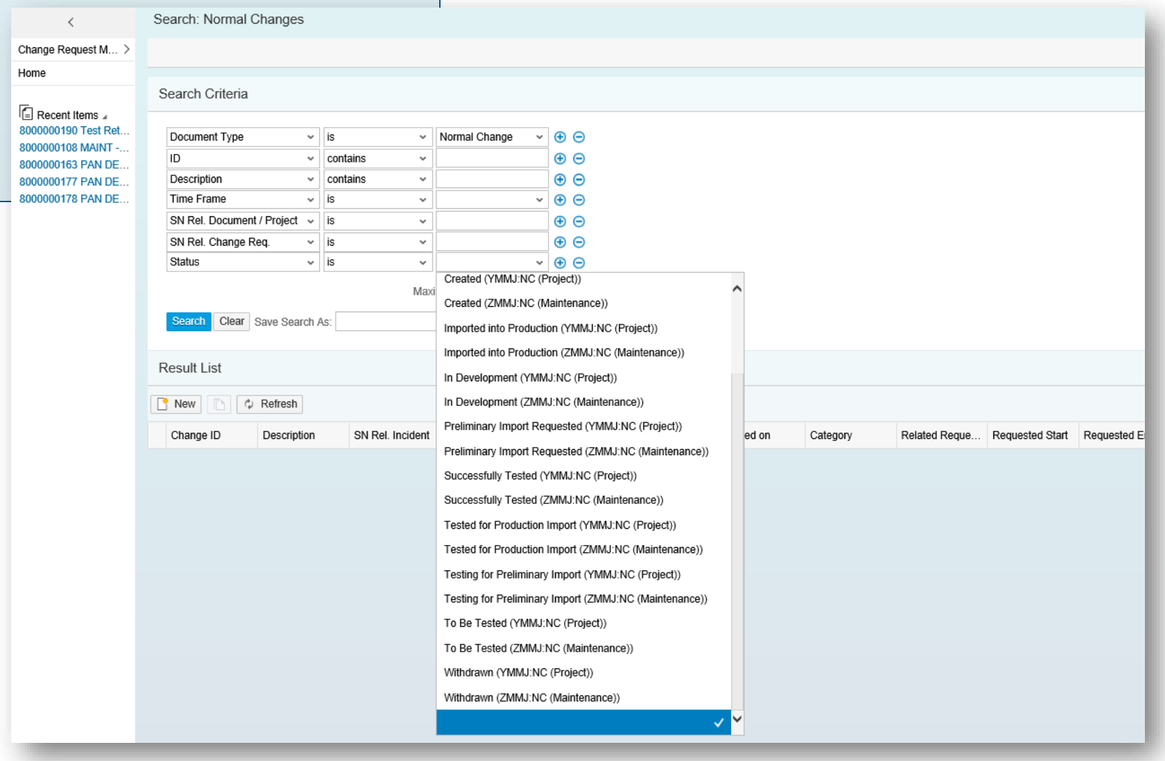
Link to Test ID spreadsheet: Test_IDS.xlsx

GyanSys

Search Change Document

Panasonic





Search Document

1. On Fiori Launchpad -> Open Change Request Management tile

2. On CRM_UI -> Click on Change Request Management from left menu

3. On Main window -> Search Area

4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Approver:

Status = “ZMMJ Successfully Tested”

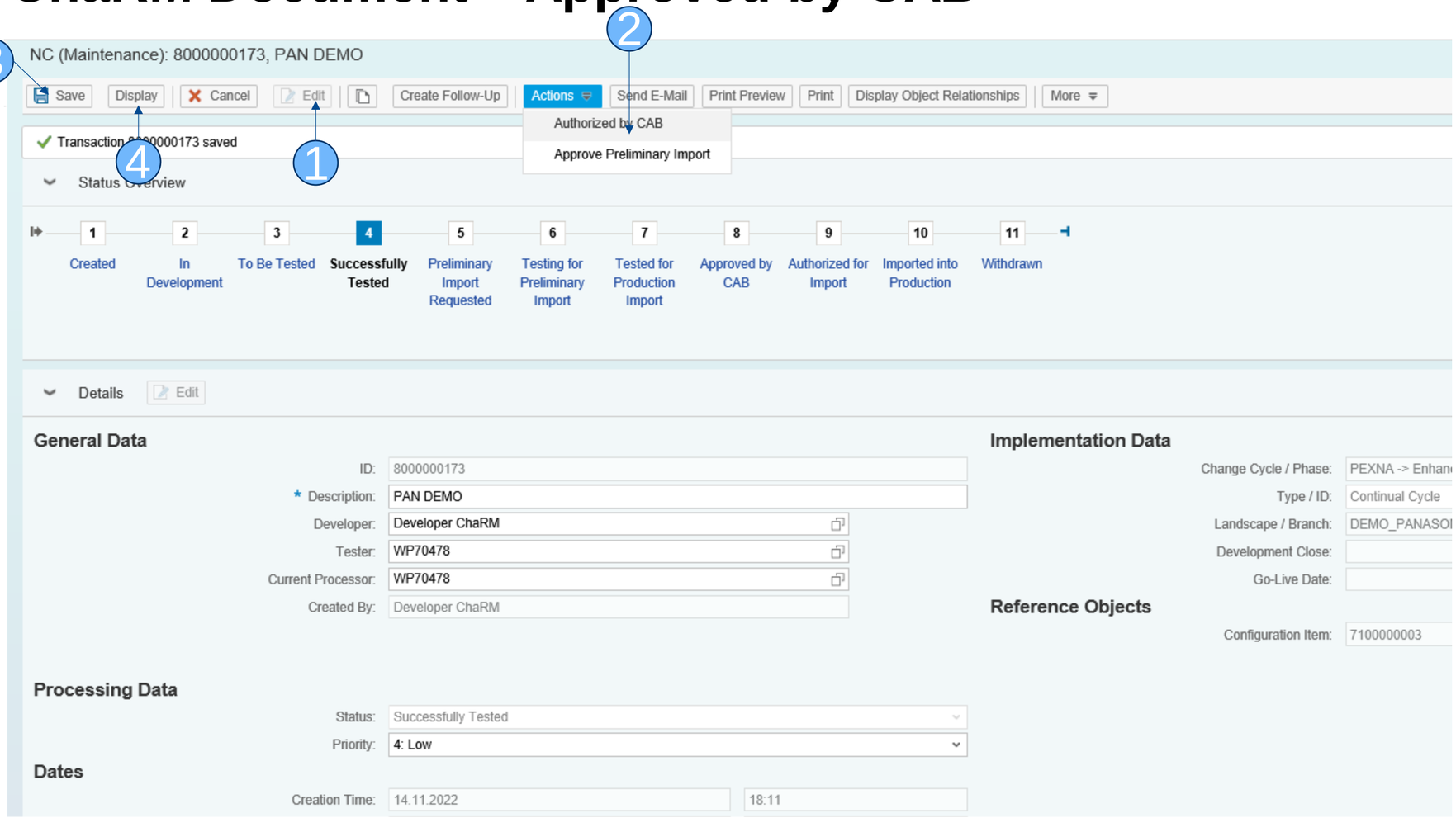
5. Click on “Search”

6. Open change document from result list

GyanSys

Panasonic

ChaRM Document – Approved by CAB



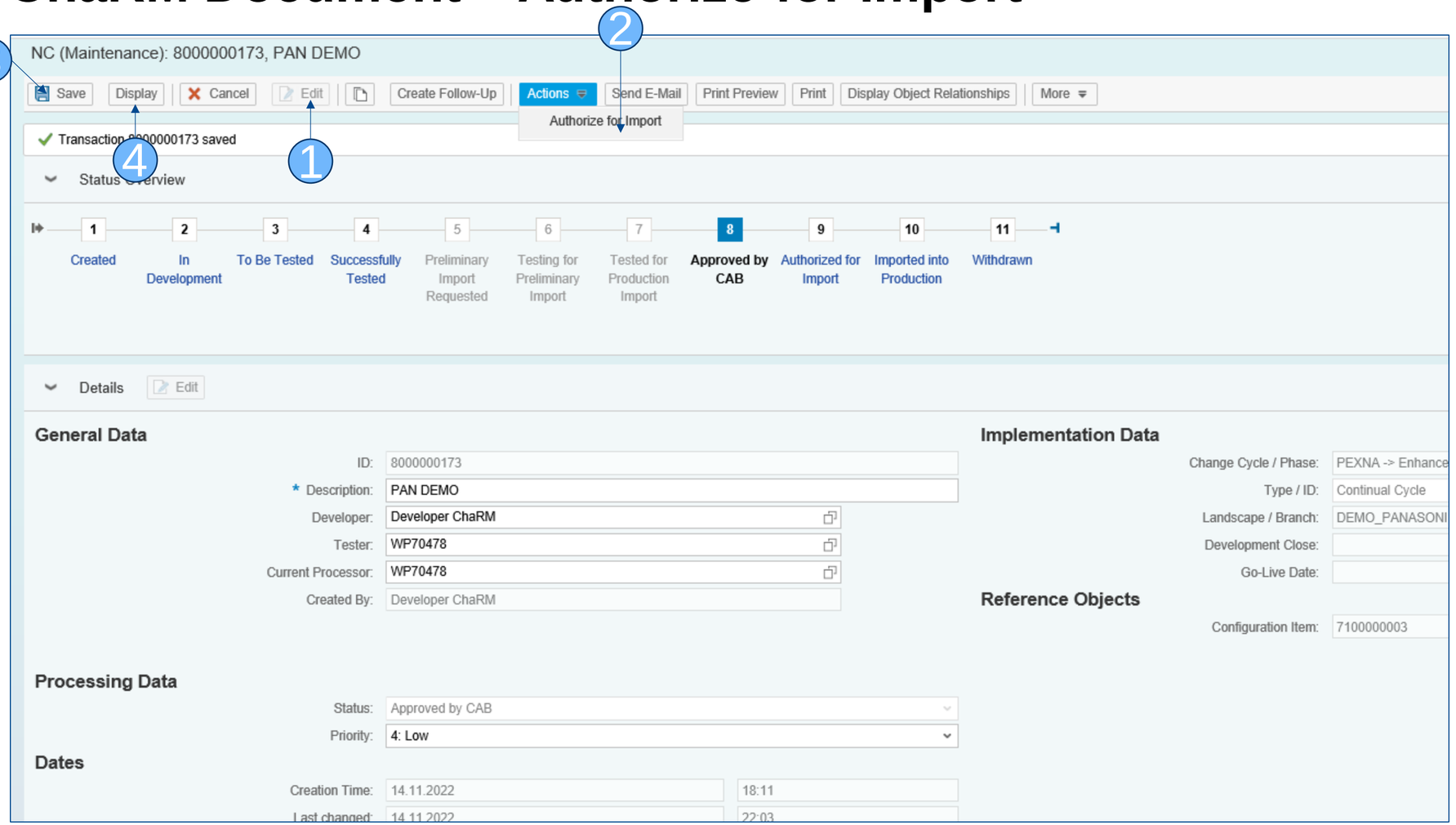
“Approve by CAB”

CAB review changes in status “Successfully Tested”, if all required details and documents have provided as per Panasonic “Change Management Policy”, CAB then can approve the change document by:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Authorized by CAB”
3. Click on “Save” button
4. Click on “Display” button

Once Change document is “Approved by CAB” <XXX User> will create a ServiceNow Change Request and pursue approval to move it to production.

ChaRM Document – Authorize for Import



"Authorize for Import"

Release Manager review changes in status "Authorized by CAB" and check if the associated ServiceNow change request is approved, if yes then:

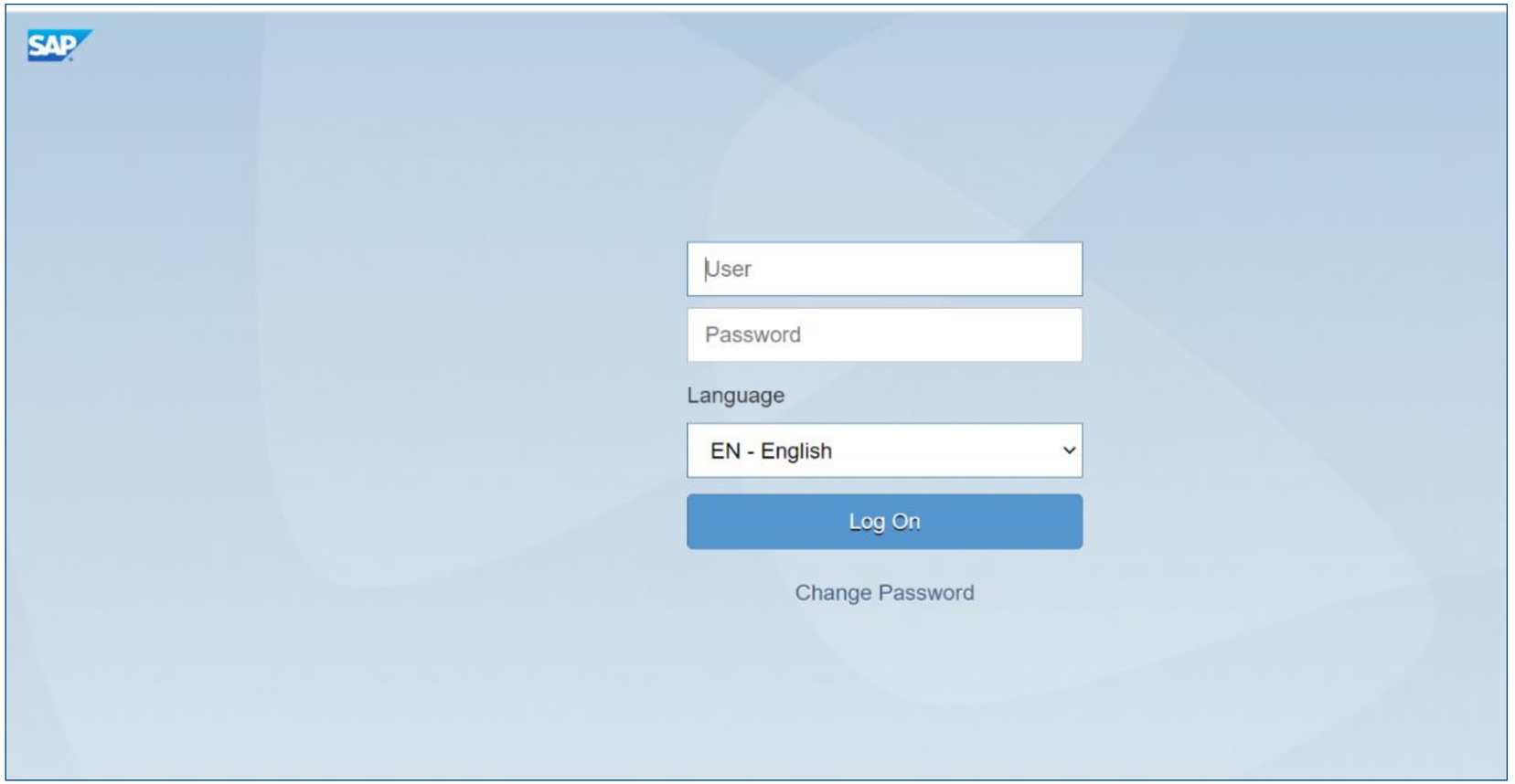
1. Click on "Edit" Button
2. Click on "Actions" -> Select "Authorized for Import"
3. Click on "Save" button
4. Click on "Display" button

Basis Team

Login to Solution Manager as Basis Team

Login to ChaRM as BASIS

Panasonic



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2. Enter your user and password

- **USER: CH_BASIS<XX>**
- **PASSWORD:**

3. Click on “Log On” button

Link to Test ID spreadsheet: Test_IDS.xlsx

Fiori Launchpad Change Management

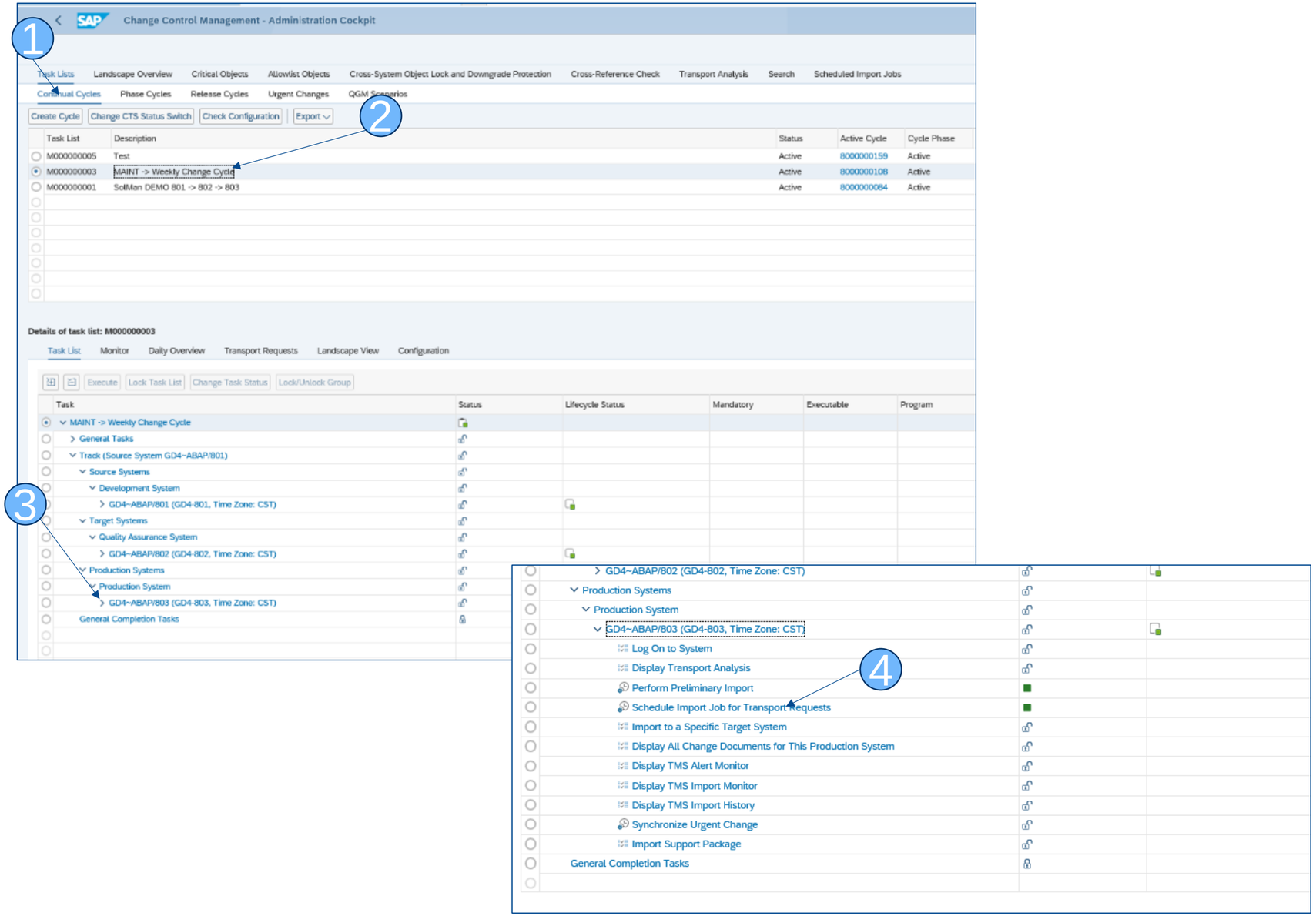
Fiori launchpad contains two tiles as part of the Change Management module in SAP Solution Manager:

- Admin. Cockpit -> Provide ChaRM Admin, Basis Team user and Release Managers access to configuration areas, task list and advanced reporting.

Open Admin Cockpit

- As Basis user we will use “Administration Cockpit” tile to perform the import task

Admin Cockpit – Import Change to Production



“Import Change into Production”

In the Admin cockpit Basis user will select the respective Change Cycle.

For this training we will select continual cycle “MAINT -> Weekly Change Cycle”

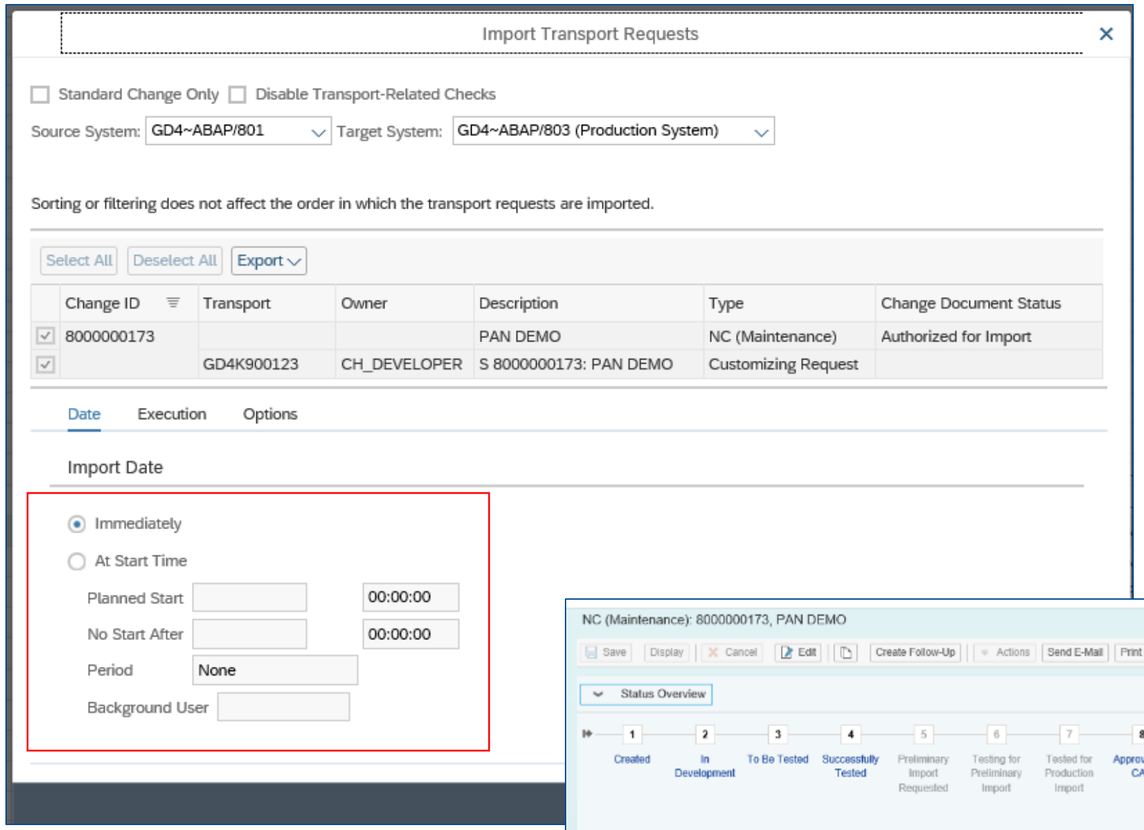
For ChaRM Production please check with Release Management team which to perform import.

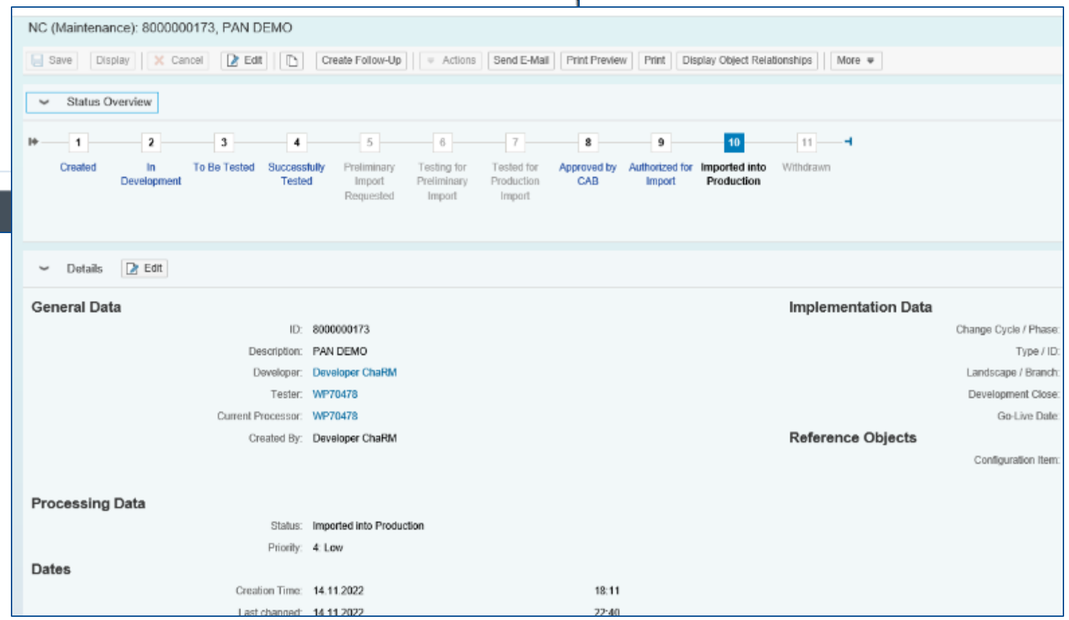
To import transport via ChaRM:

1. Click on “Continual Cycles”
2. Select the Change Cycle from the list
3. Expend the Production system node
4. Click on “Schedule Import Job for Transport Request”

Next Slide ….

ChaRM Document – Import Change to Production





“Import Change into Production”

Popup window will list all change documents that has transport request in the Production buffer “Waiting for Import”

Basis user can only select the change documents in status “Authorized for Import”, this will prevent from moving unauthorized changes into the production system.

Basis user can initiate import into Production:

- Immediately, Or
- Schedule the import using the parameters on the window

Click OK to confirm and import will execute based on values selected.

Once imported is complete ChaRM automatically will set the change document in status “Imported into Production”

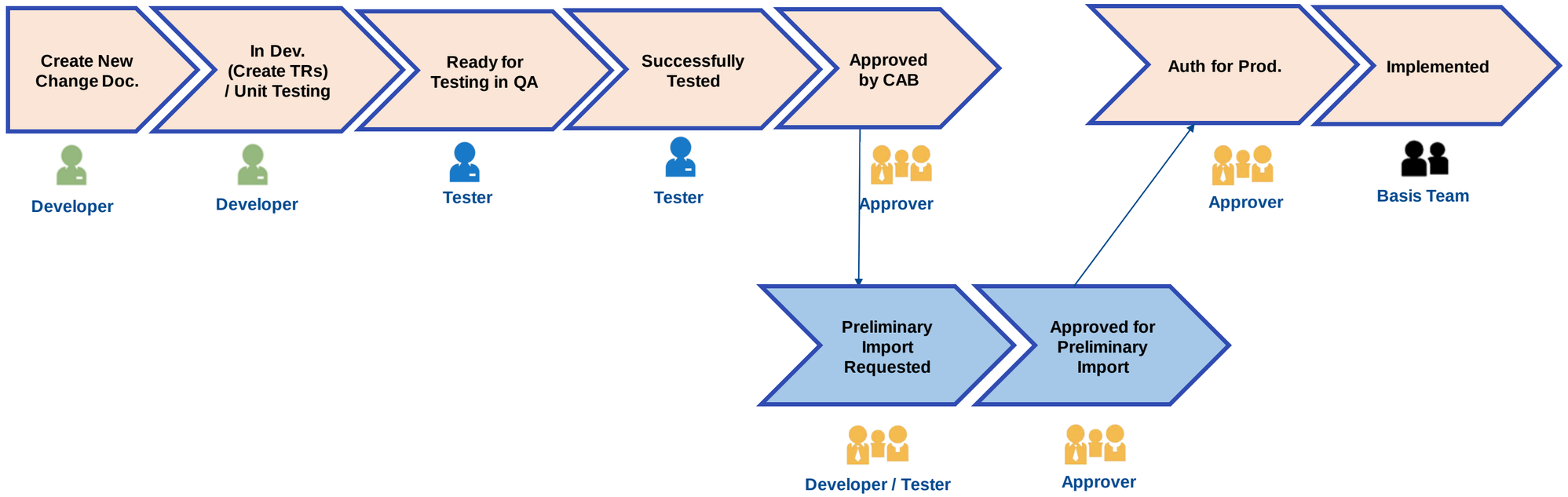
More details on import options will be provided in the Admin Guide.

Preliminary Import for Normal Change

Panasonic

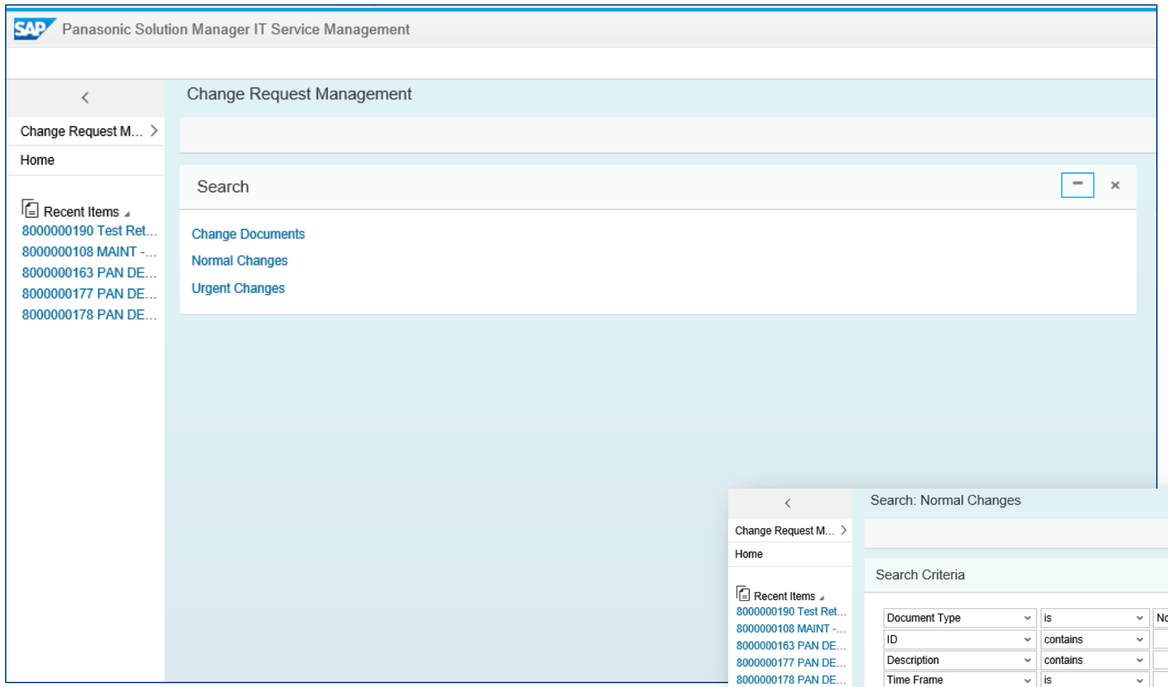
To accelerate the import process for normal changes, you can request the preliminary import of a normal change into a follow-on system. This means that the import of the transport requests associated with the normal change is carried out at once, independent of any mass import into the follow-on system.

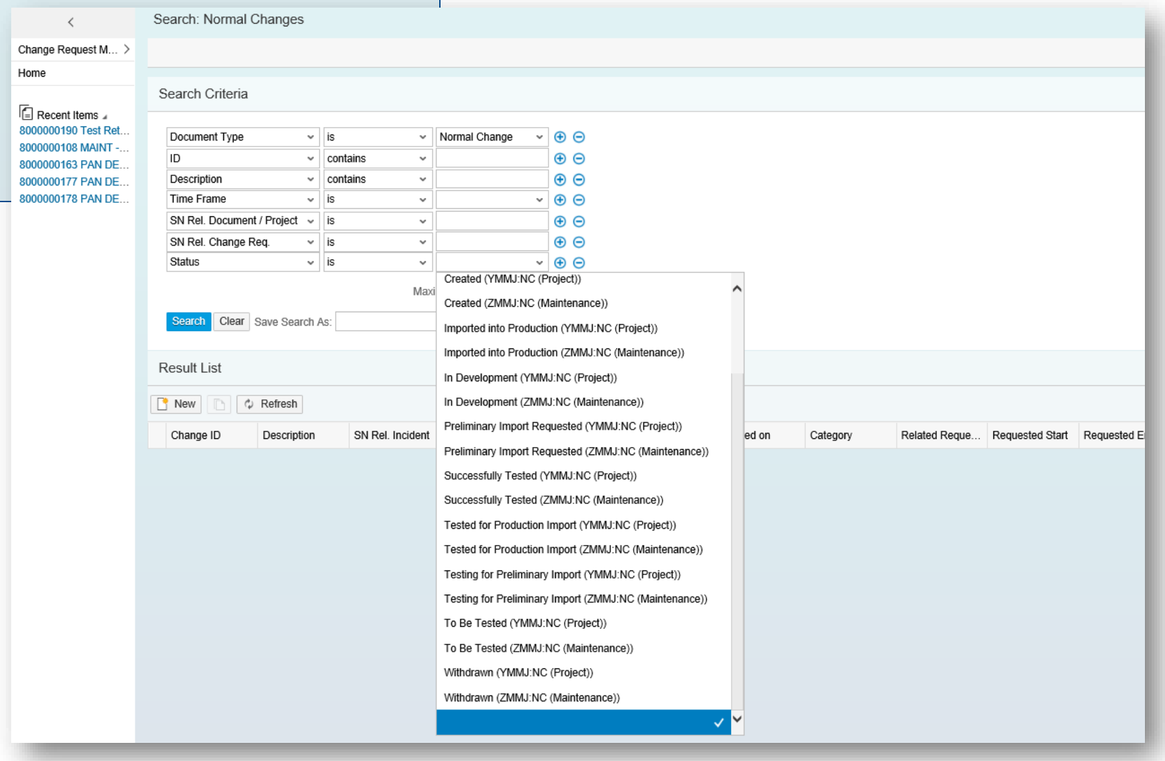
Normal Change Preliminary Import Workflow



Search Change Document

Panasonic





Search Document

1. On Fiori Launchpad -> Open Change Request Management tile

2. On CRM_UI -> Click on Change Request Management from left menu

3. On Main window -> Search Area

4. Click on “Normal Change”

CRM_UI provides several criteria to search for the “One” or “Multiple” change documents as needed.

Fill out the criteria below to search for the change document(s) ready for Tester:

Status = “ZMMJ Approved by CAB”

5. Click on “Search”

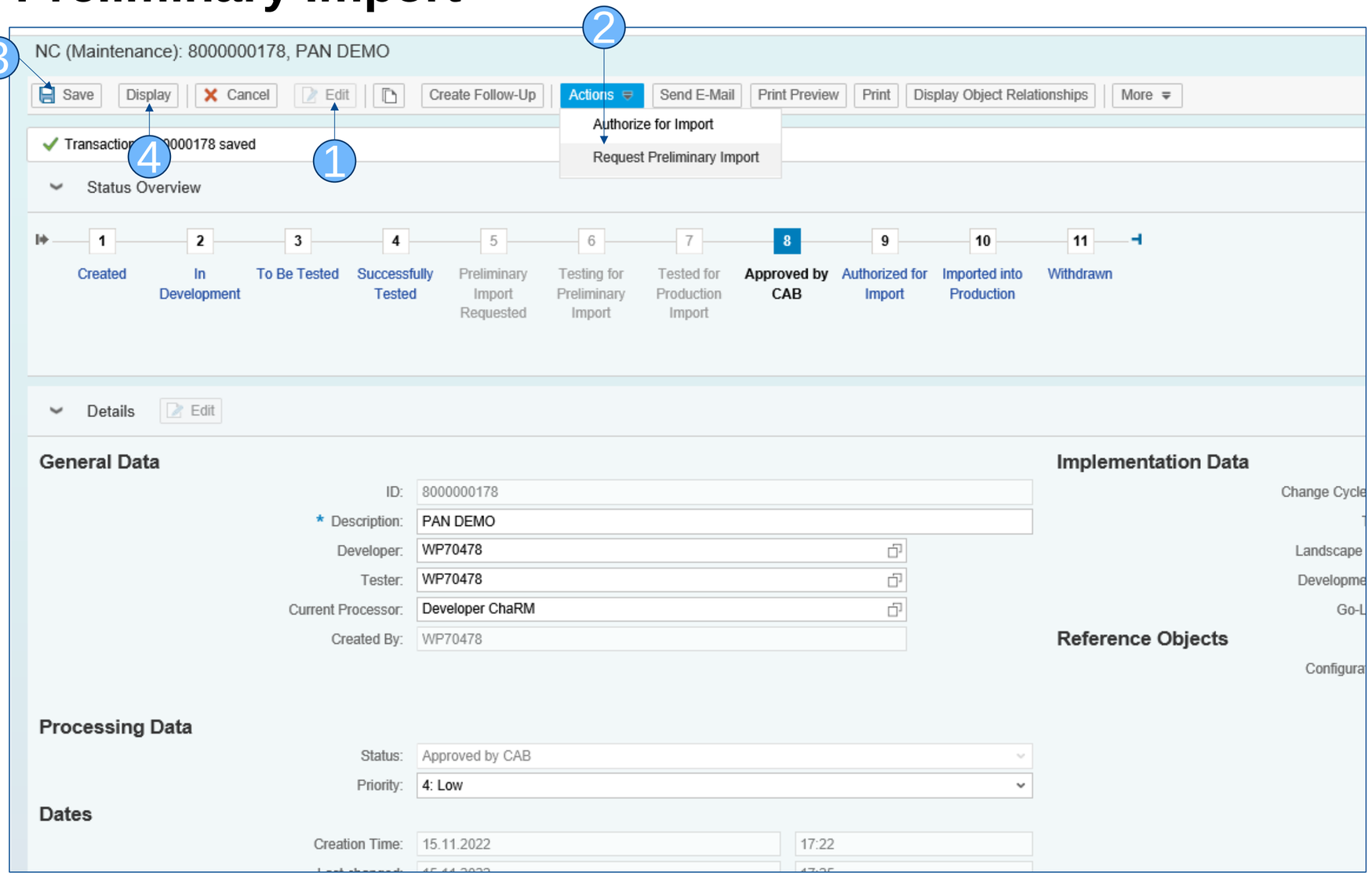
6. Open change document from result list

GyanSys

Preliminary Import

Developer
Tester

Panasonic



“Request Preliminary Import”

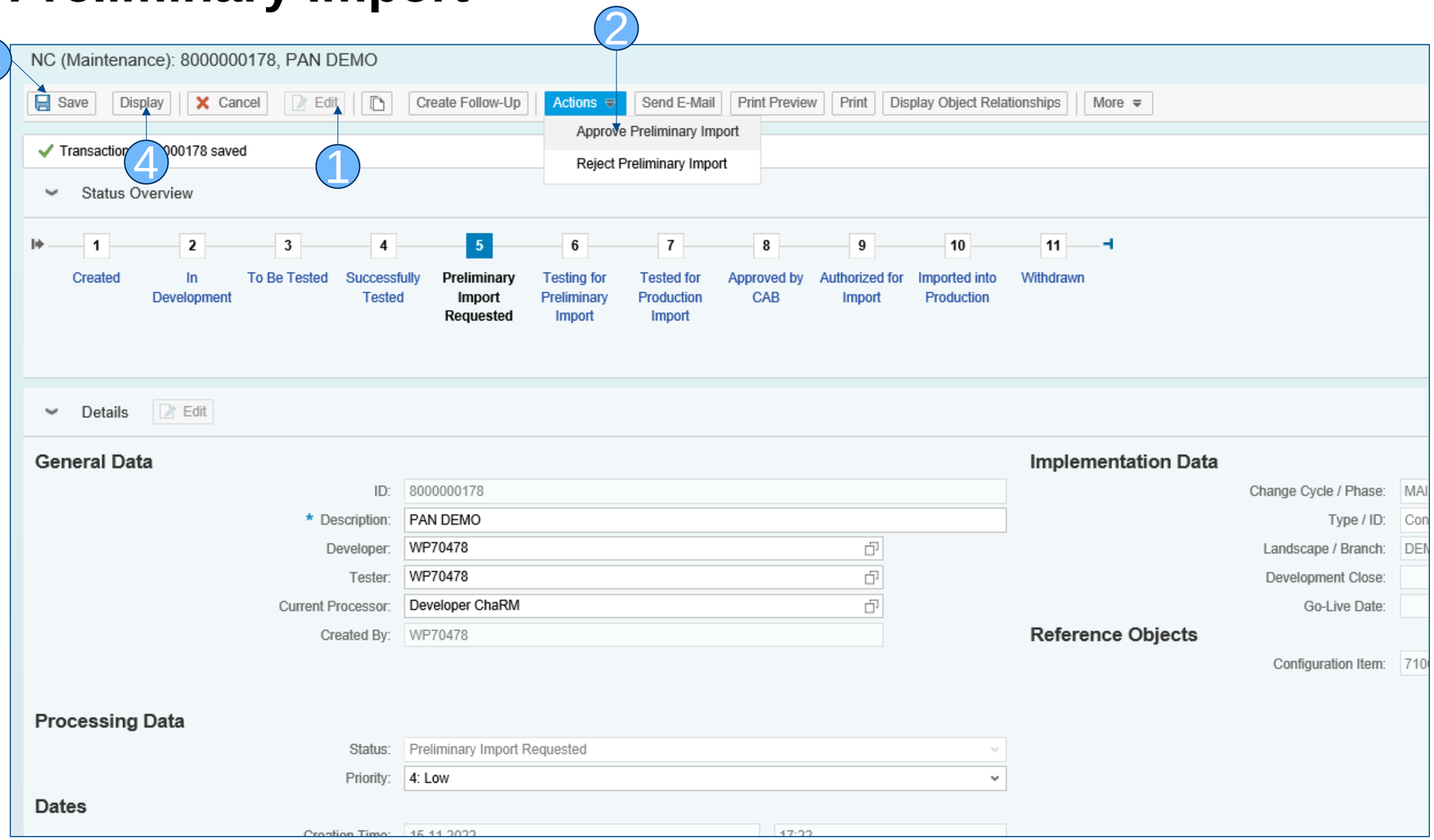
Developer or Tester can request preliminary approval once Change Document reaches status “Approved by CAB”.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Request Preliminary Import”
3. Click on “Save” button
4. Click on “Display” button

Panasonic

Preliminary Import



"Approve Preliminary Import"

Approver is required to approve any preliminary import request.

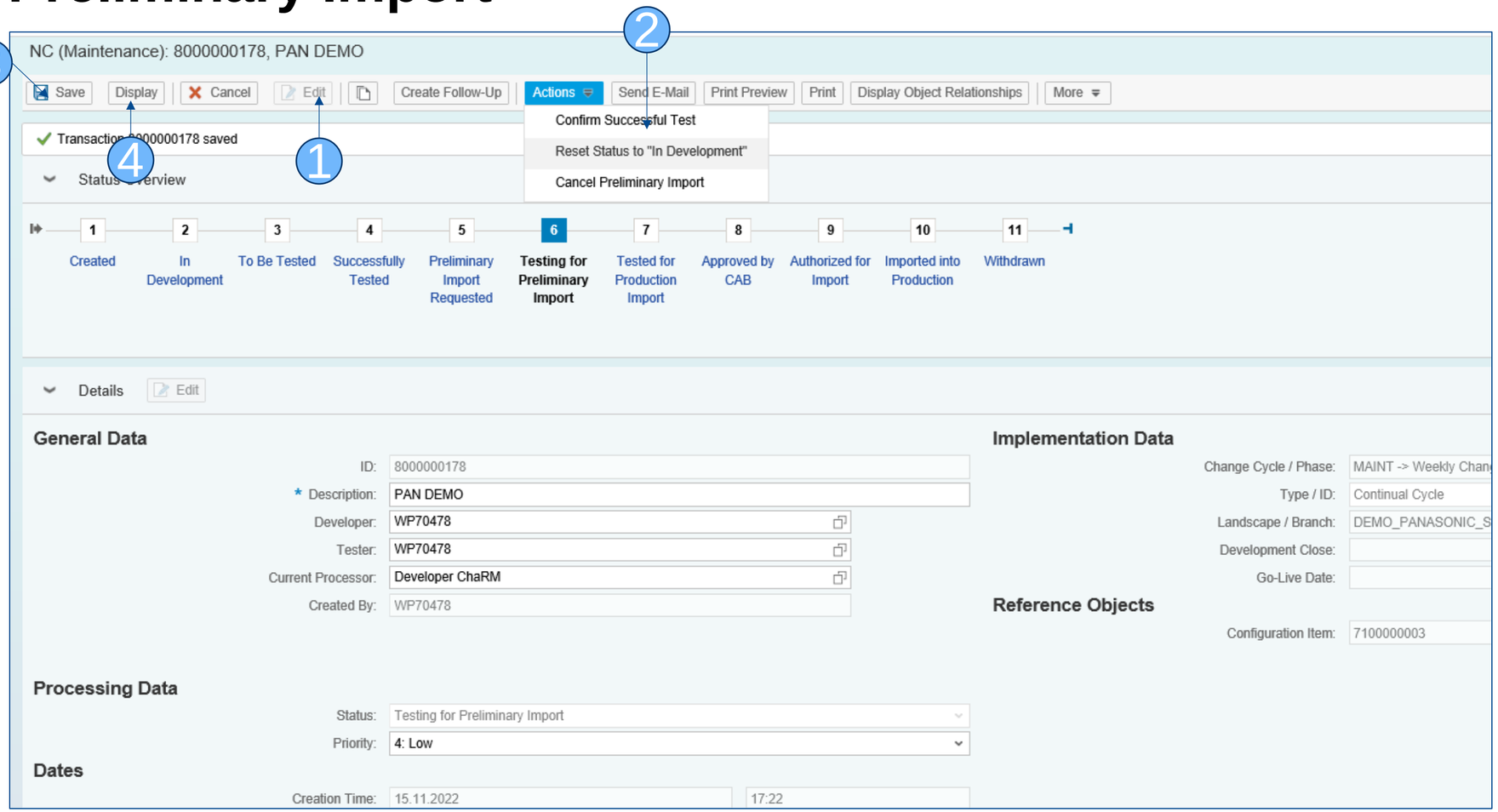
Search for respective document using CRM_UI -> Open change document:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Approve Preliminary Import"
3. Click on "Save" button
4. Click on "Display" button

The transport request for the normal change is automatically imported into the assigned follow-on system when applicable.

If the import was successful, the status of the normal change proceeds to **Testing for Preliminary Import.**

Preliminary Import



“Confirm Tested Preliminary Import”

After successful testing, the tester confirms successful test.

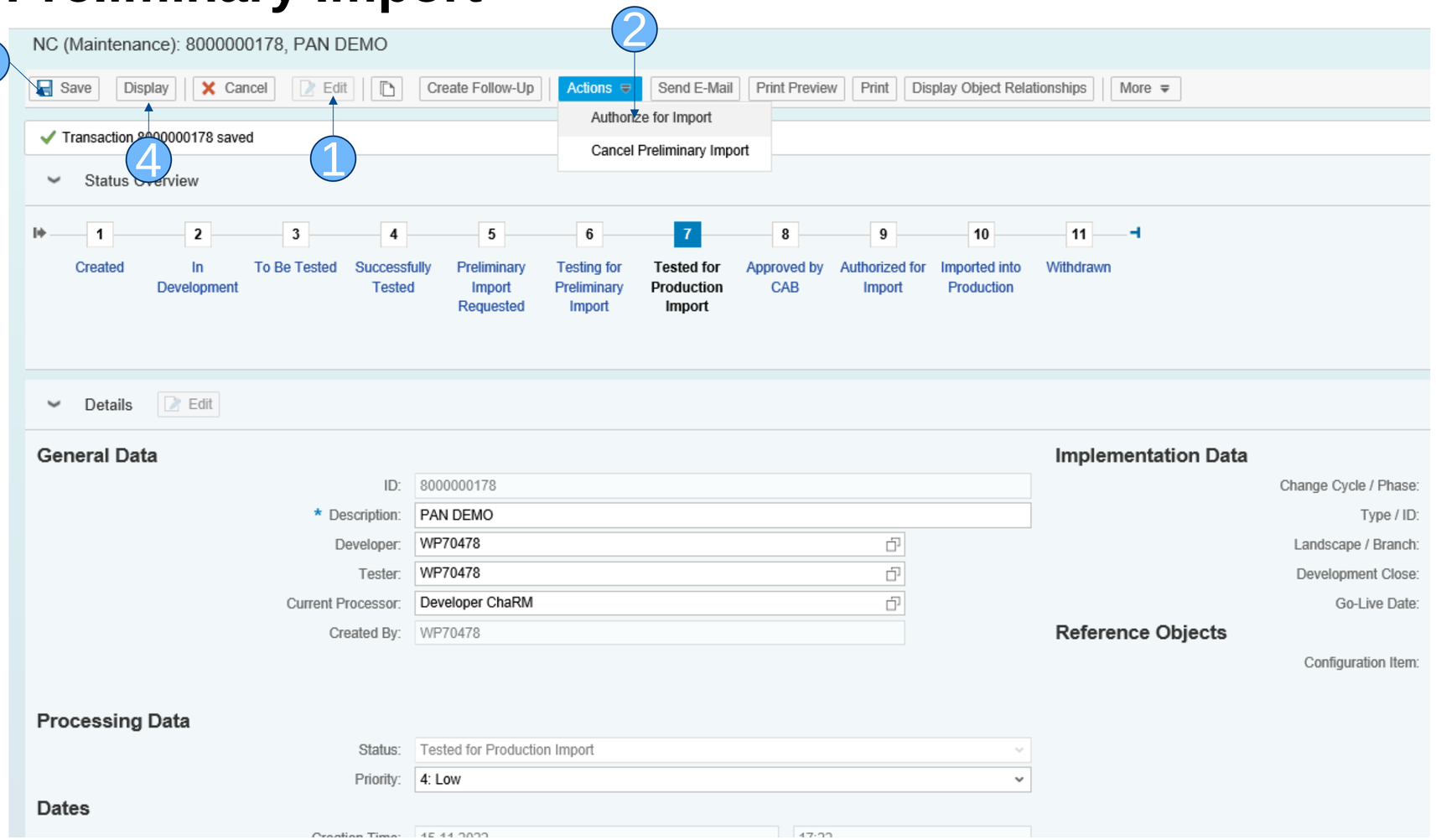
Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Confirms Successful Testing”
3. Click on “Save” button
4. Click on “Display” button

The transport request of the normal change is automatically imported into the next system in the landscape if applicable.

When the transport request is in the import queue of the production system, the normal change proceeds to status **Tested for Production Import**. Otherwise, it keeps status **Testing for Preliminary Import**.

Preliminary Import



“Authorize Preliminary Import”

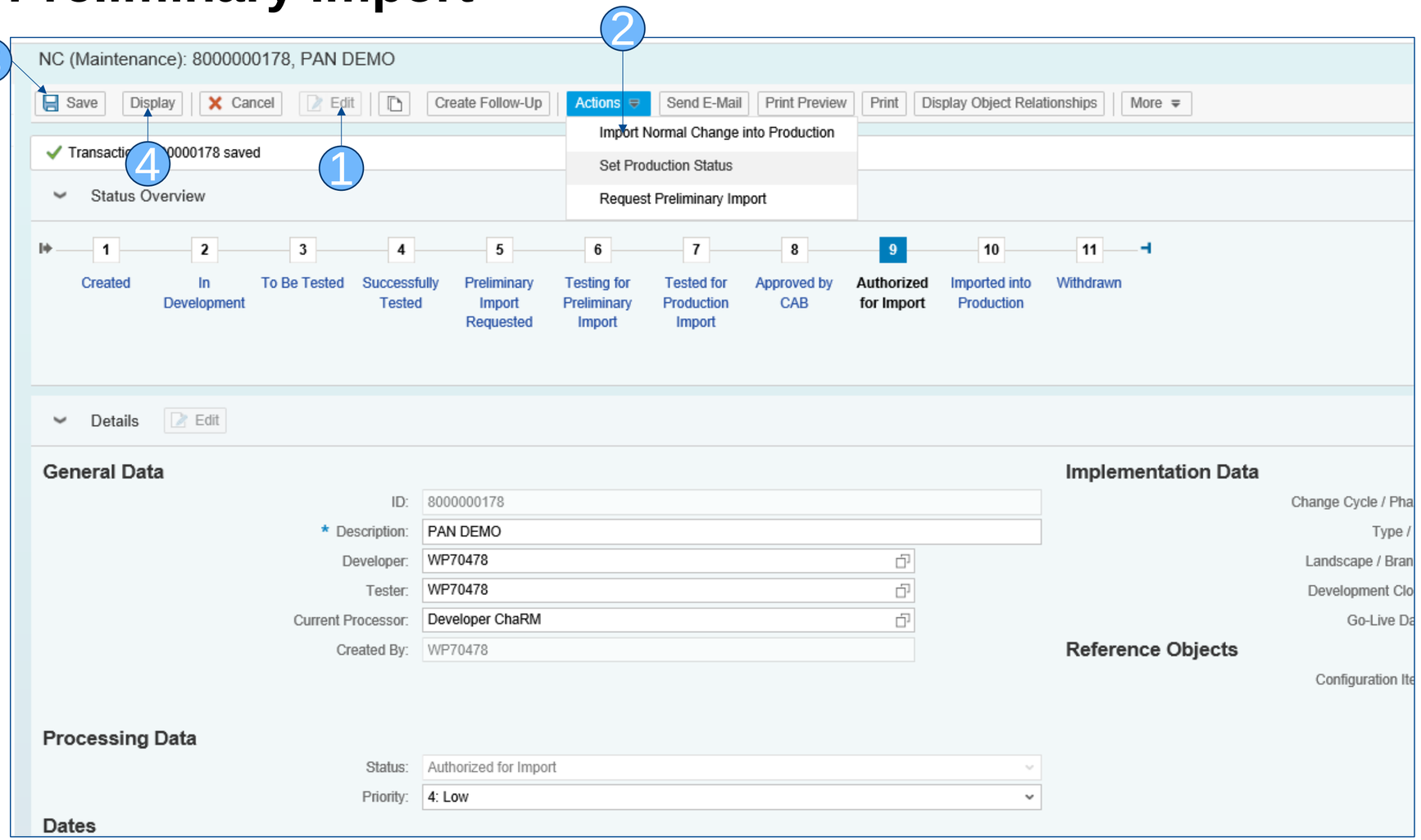
When the normal change is in status **Tested for Production Import**, the Approver can authorize the transport request for import to production.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Authorized by CAB”
3. Click on “Save” button
4. Click on “Display” button

The status proceeds to **Authorized for Import**.

Preliminary Import



"Perform Preliminary Import"

Finally, the Basis Team imports the normal change into production.

Search for respective document using CRM_UI -> Open change document:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Import Normal Change into Production"
3. Click on "Save" button
4. Click on "Display" button

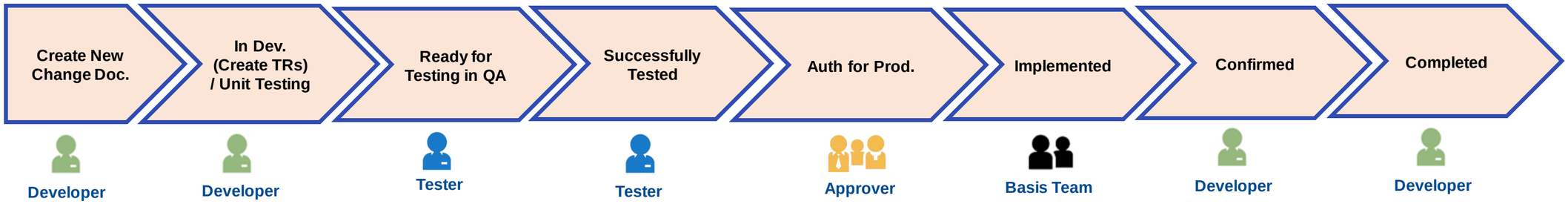
In the back-end system, the transport requests are imported into the production system.

Processing Urgent Change

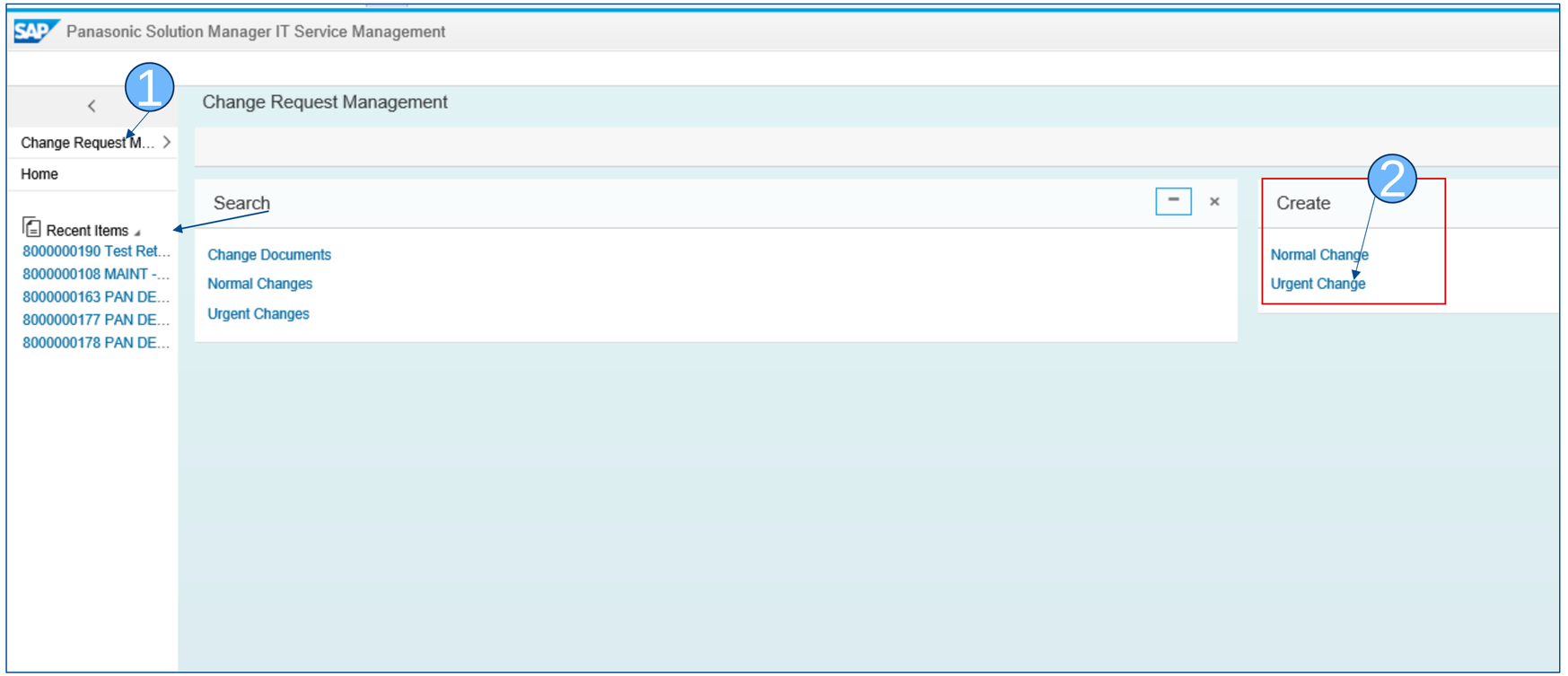
Panasonic

Urgent Changes are used for example, to fix an error in existing functionality that could jeopardize a production environment. The change is transported into the production system faster than a normal change.

Urgent Change Workflow



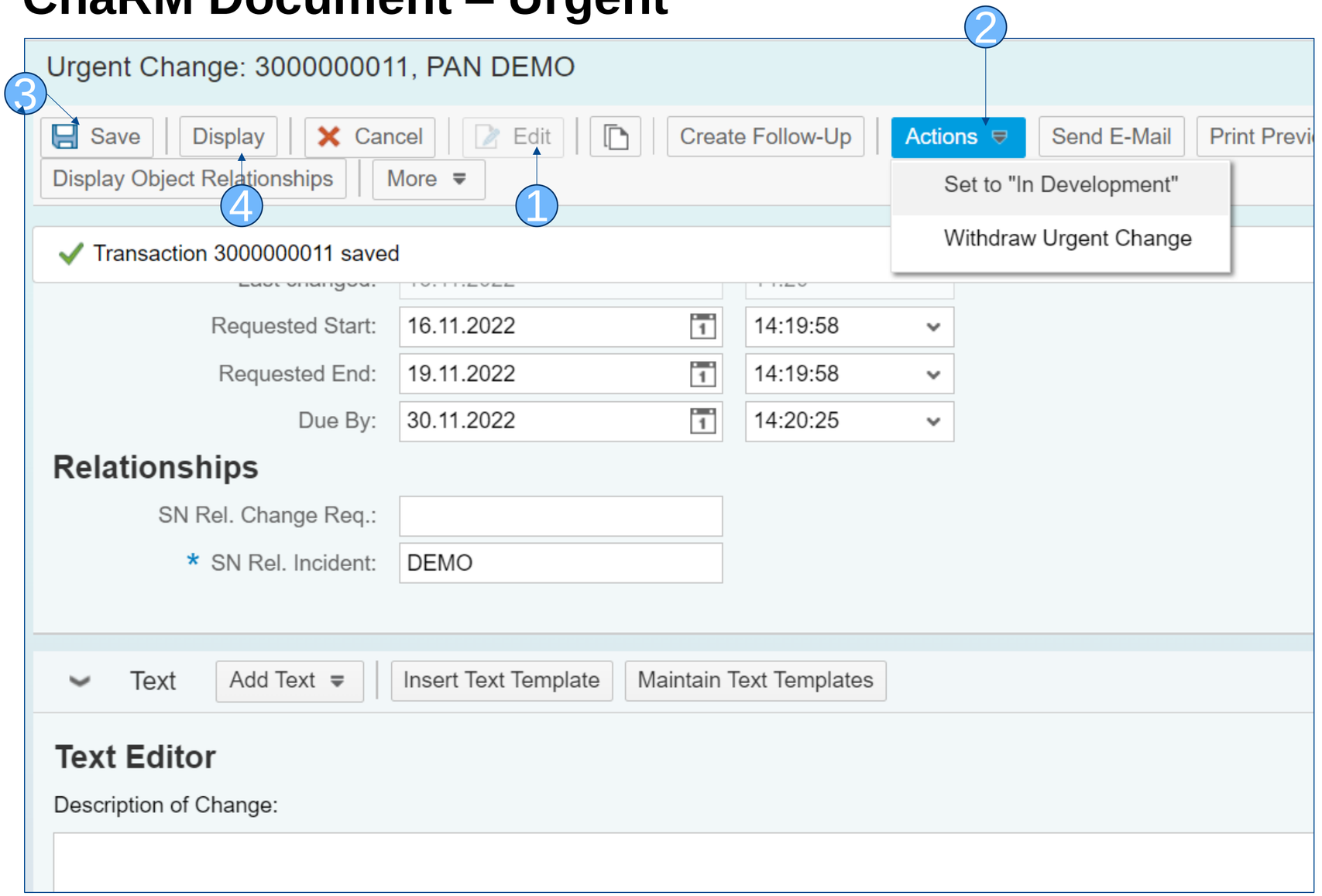
Create Change Document



Create Change Doc.

1. Click on left menu “Change Request Management”
2. Under Create section -> Click on “Urgent Change”.

ChaRM Document – Urgent



"Set In Development"

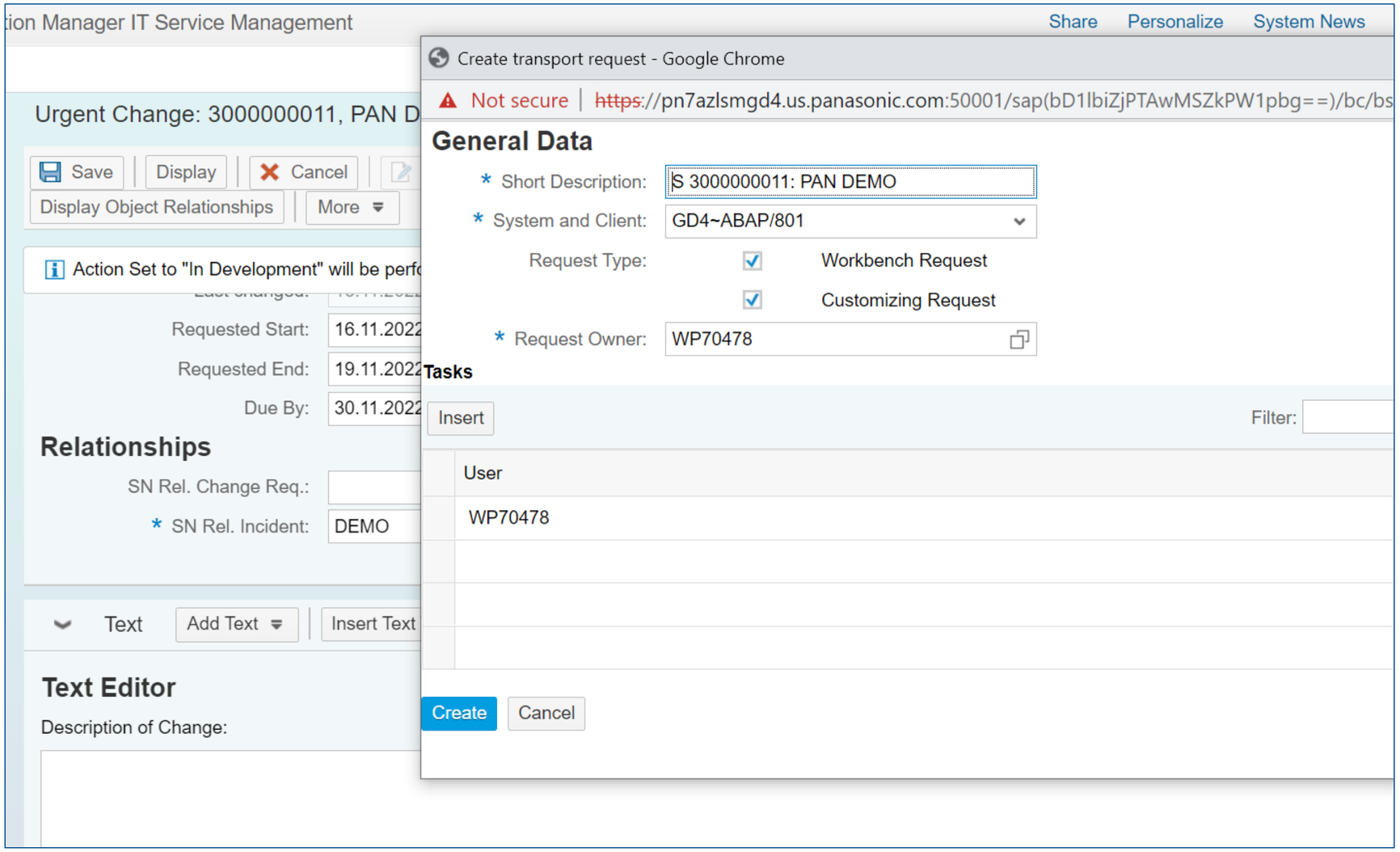
Developer creates an Urgent Change and fill out all the fields as same as explained for Normal Change.

Once urgent change document is created Developer can set to "In Development"

1. Click on "Edit" Button
2. Click on "Actions" -> Select "In Development"
3. Click on "Save" button
4. Click on "Display" button

A popup window will appear, check next slide for details.

ChaRM Document – Urgent



Create Transport(s)

1. **Short Description:** It comes with the same description of the Change Document. Developer can change the description as needed.

2. **System and Client:** Select which system and client to create the transport request

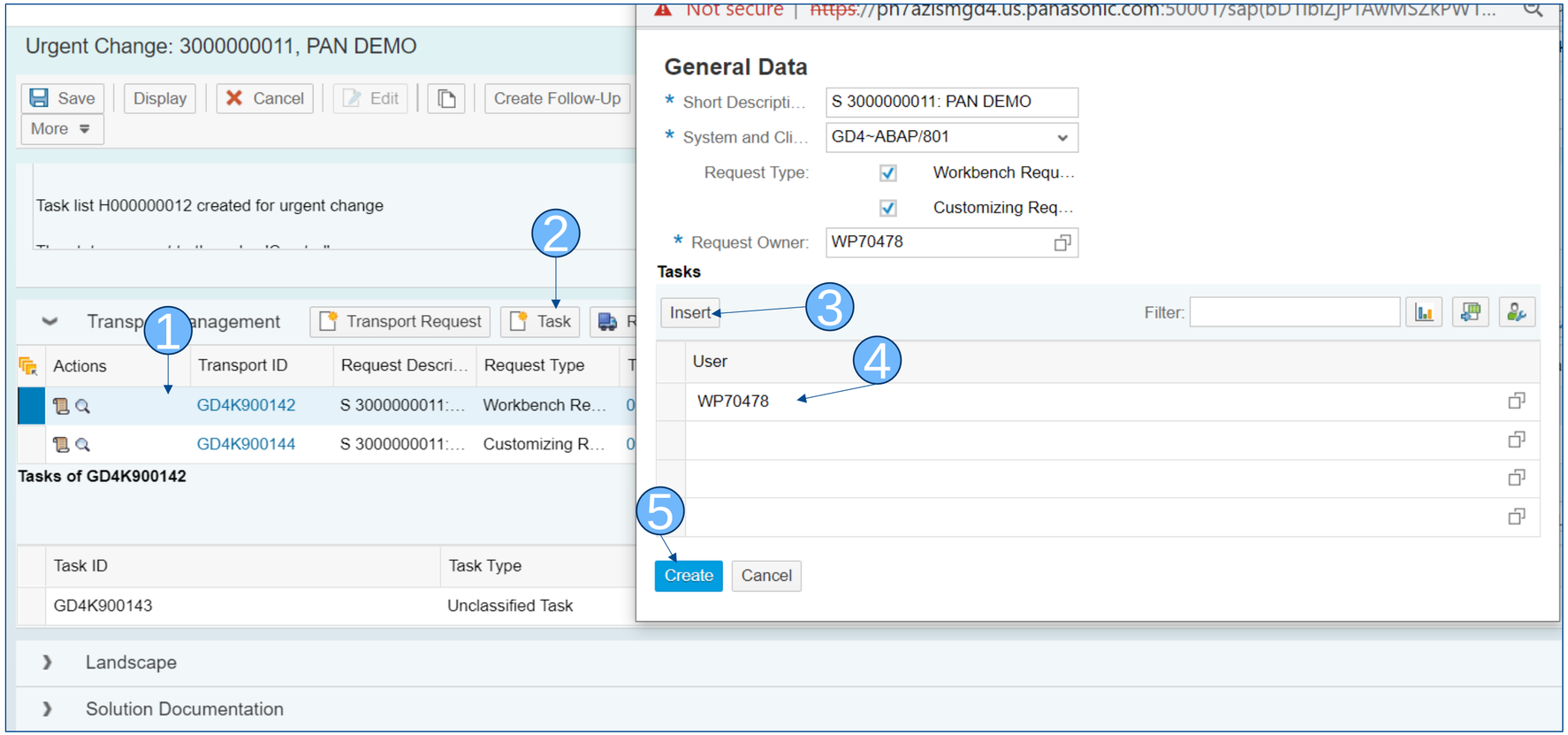
3. **Request Type:** Checkbox which transport types will be required for the work, if not sure you can leave both marked and system will delete the unused one.

4. **Request Owner:** By default, the current user creating the transport, you can change if needed.

5. **Tasks:** By default, it will create one tasks with the with the user creating the transport, Developer can add additional tasks if needed.

6. Click on “Create” button

Urgent Change -> Create Additional Task

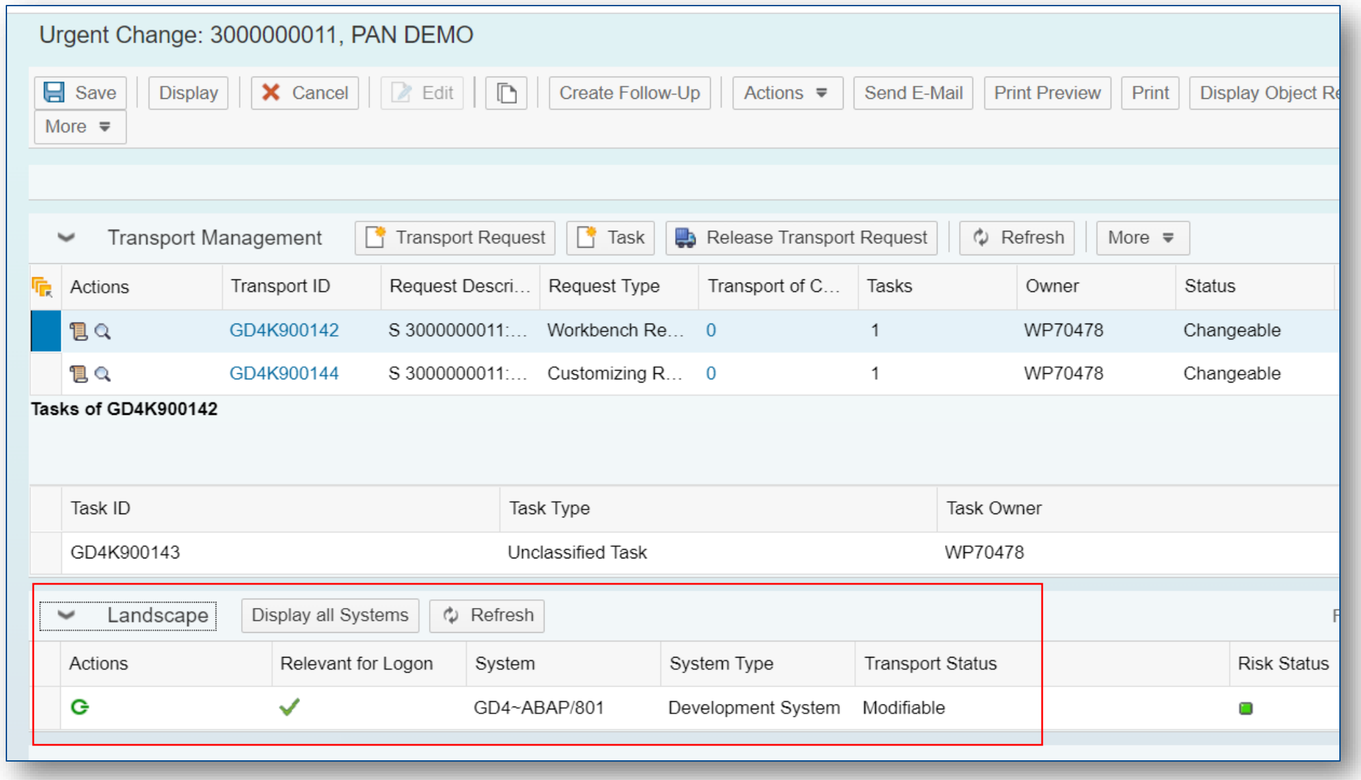


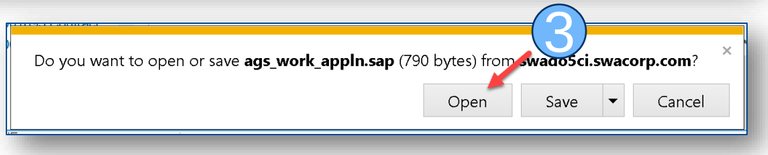
Adding New task

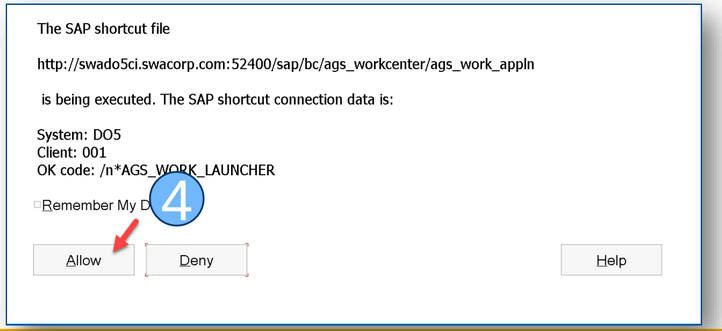
If Developer would like to add an additional tasks to the existing transport :

1. Select the transport
2. Click on “Task” button
3. On the new window -> Click on “Insert” button
4. Enter the developer in the employee list
5. Click on “Create” button

Urgent Change-> Login to Managed System





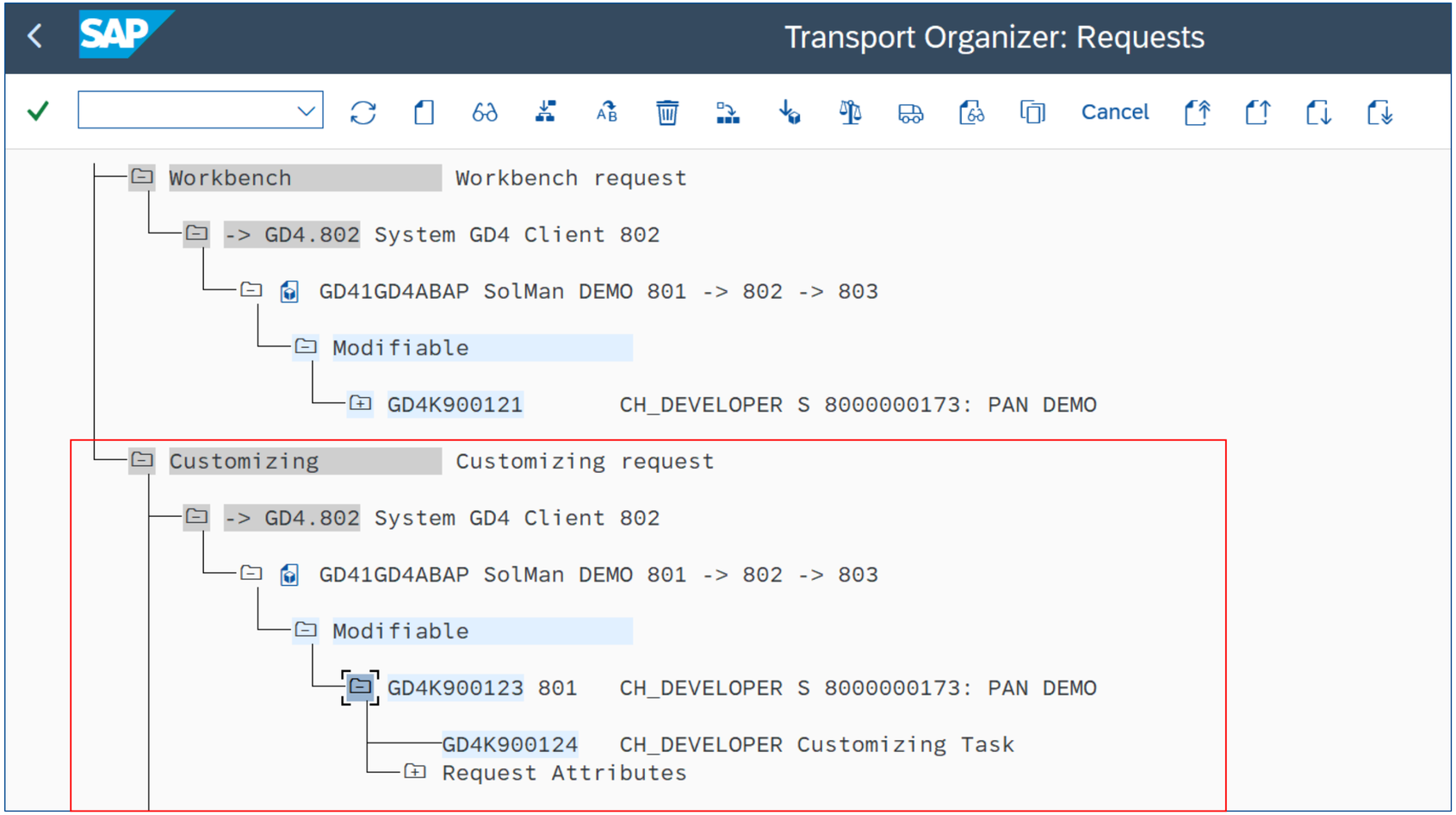


Login to Managed System (Dev System)

ChaRM give the option for Developers to login to managed system directly from the change document:

1. Navigate to “Landscape Assignment Block”
2. Click on of the Development System
3. Click on “Open” on the next popup window
4. Click on “Allow” on the second popup window

Urgent Change -> Release Task



Release Task

Once changes have been saved to the transport request(s) Developers will then release the transport task:

1. Go Tcode SE09
2. Find the Transport Request created previously
3. For this training example -> Select the Customizing Request
4. Expand the main transport node -> select the Task
5. Release the **task ONLY**

Note

The main transport will be released by ChaRM via the workflow.

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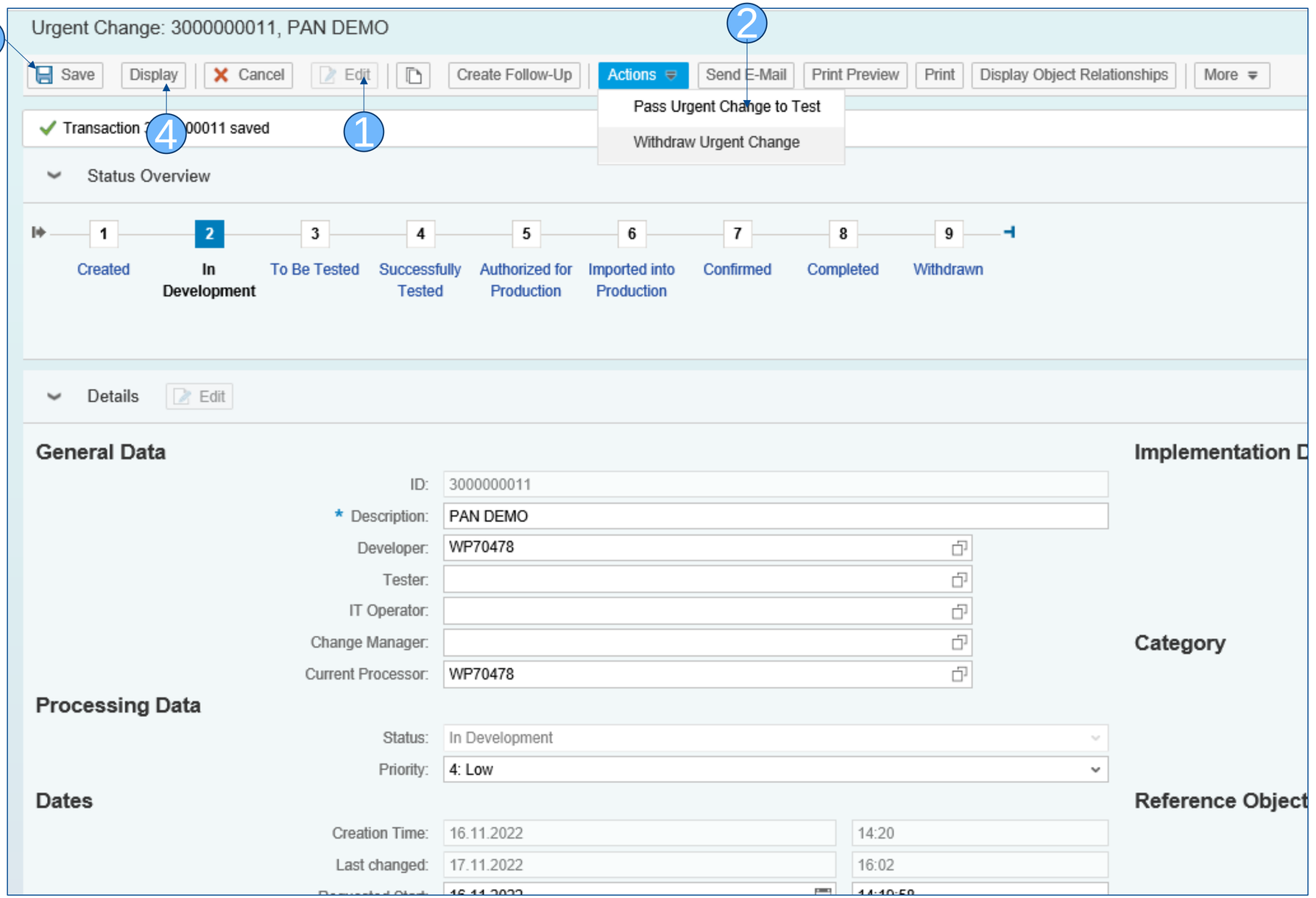
Urgent ChaRM -> Pass to QAS



Move Transport to Quality System

Developer now has completed the unit testing in DEV system and is ready to submit the change for testing in QAS:

Open the Change Document

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Pass Normal Change to Test”
3. Click on “Save” button
4. Click on “Display” button

- **Main Transport request(s) gets released and imported in QAS system.**
- **Tester will be notified via email about change is ready for testing**

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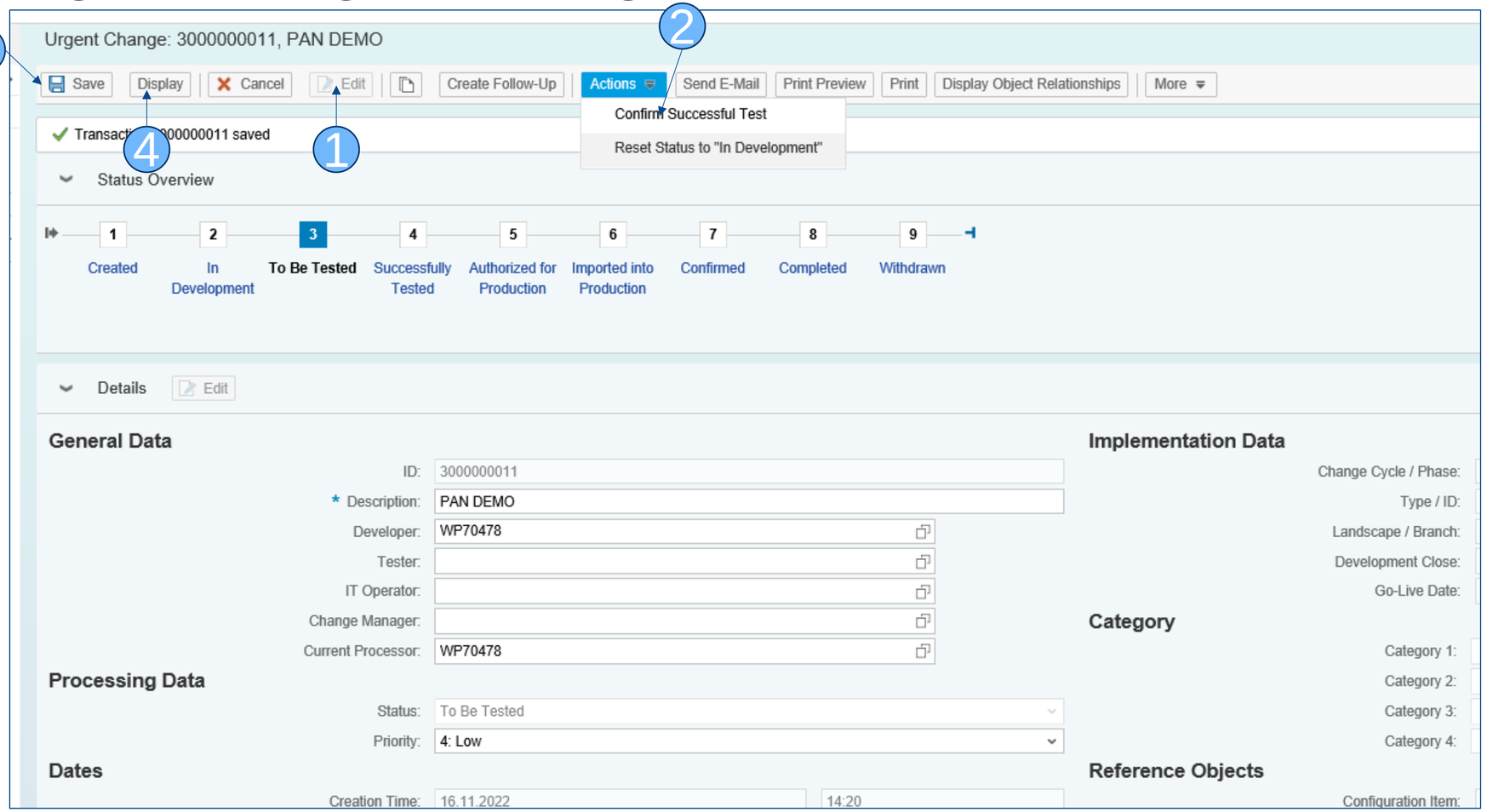
Urgent Change – Testing



"Confirm Successful Test"

Teste check that all changes in QAS system are successfully and then "Confirm Successful Test".

Search for respective document using CRM_UI -> Open change document:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Confirm Successful Test"
3. Click on "Save" button
4. Click on "Display" button

OR

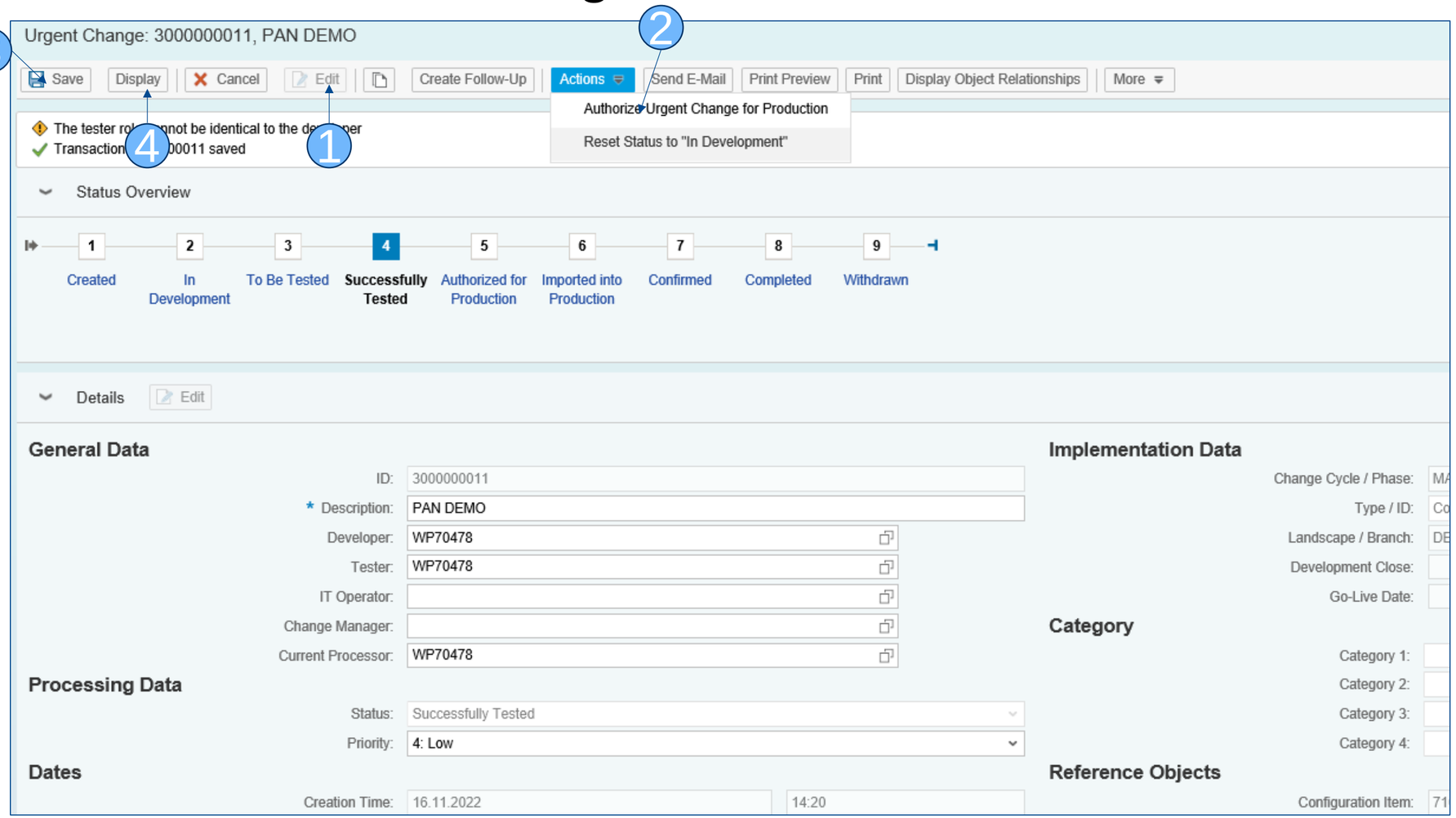
Reset status to "In Development"

Tester found some issue or requires additional work; In this case they can send change document back to "In Development" to create additional transports/tasks:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Reset Status to "In Development"
3. Click on "Save" button
4. Click on "Display" button

Panasonic

ChaRM Document – Urgent



"Authorize for Production

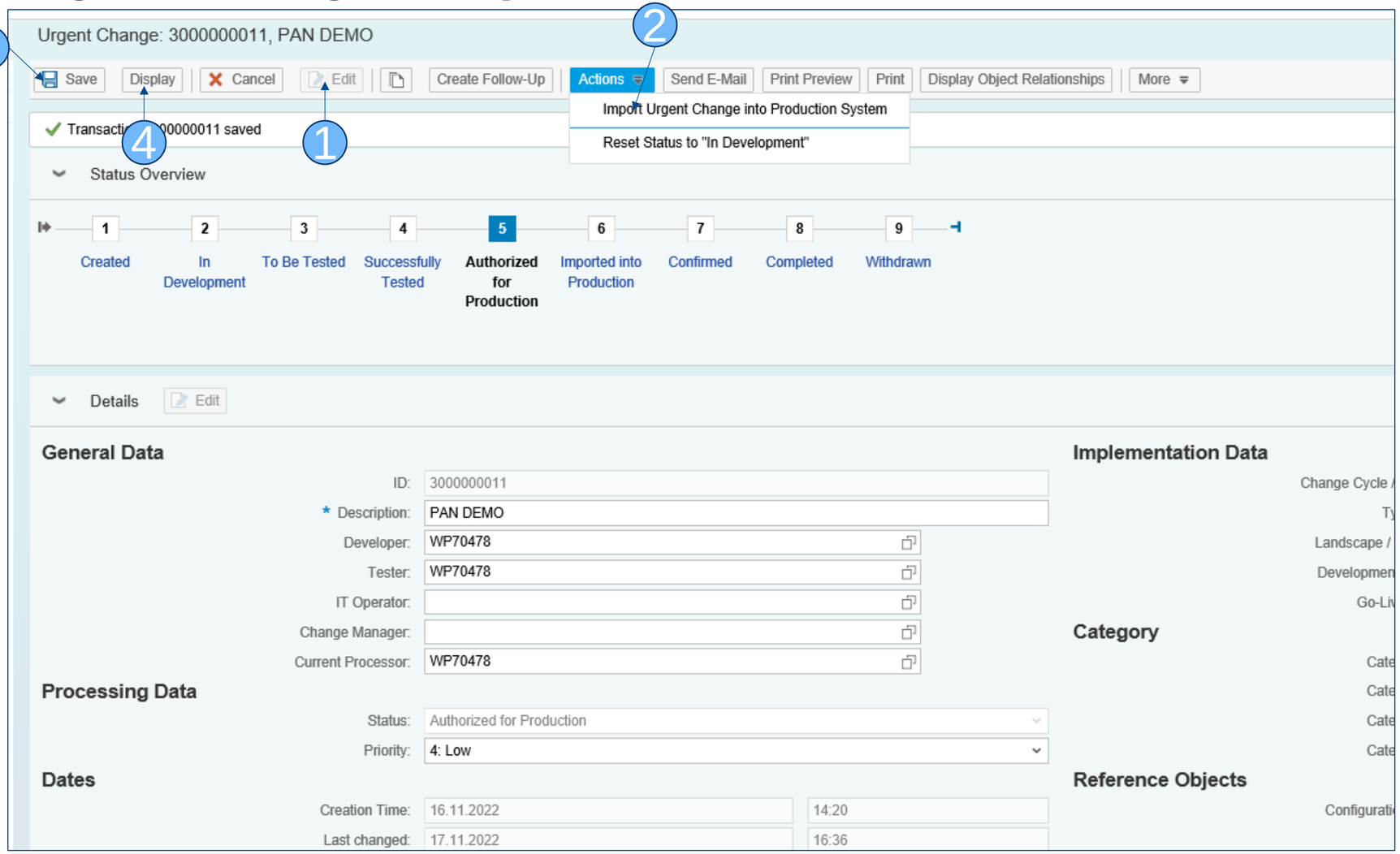
After successful testing, the Approver approves the urgent change for import into the production system.

Search for respective document using CRM_UI -> Open change document:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Authorized by CAB"
3. Click on "Save" button
4. Click on "Display" button

A ServiceNow Change Request is required before to move any changes to production system.

Urgent Change – Import



“Import into Production”

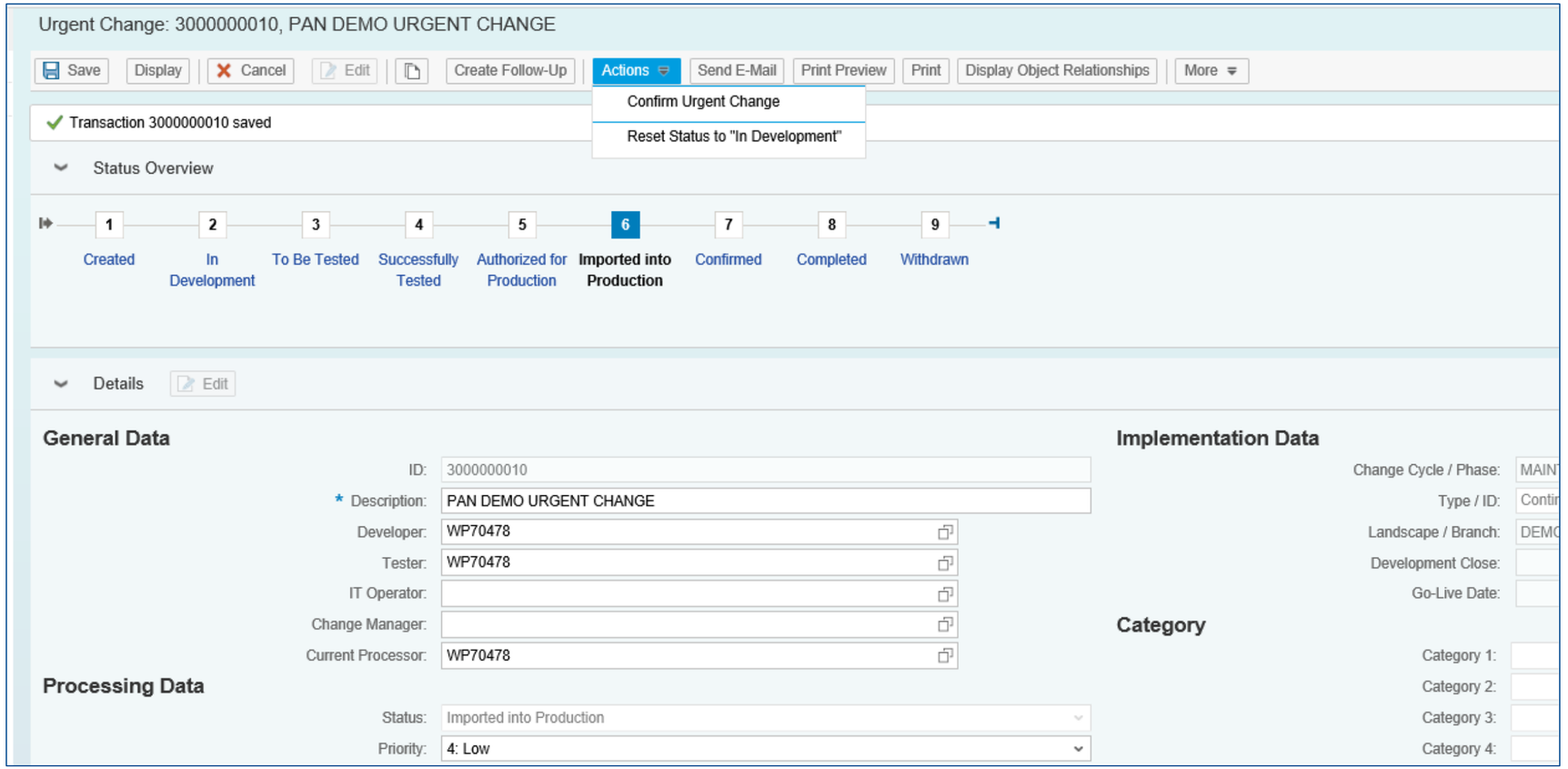
The Basis team opens the change document and starts the import of the urgent change into the production system.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Import Urgent Change to Production”
3. Click on “Save” button
4. Click on “Display” button

The urgent change proceeds to status **Imported into Production.**

Urgent Change – Confirm



“Confirm Urgent Change”

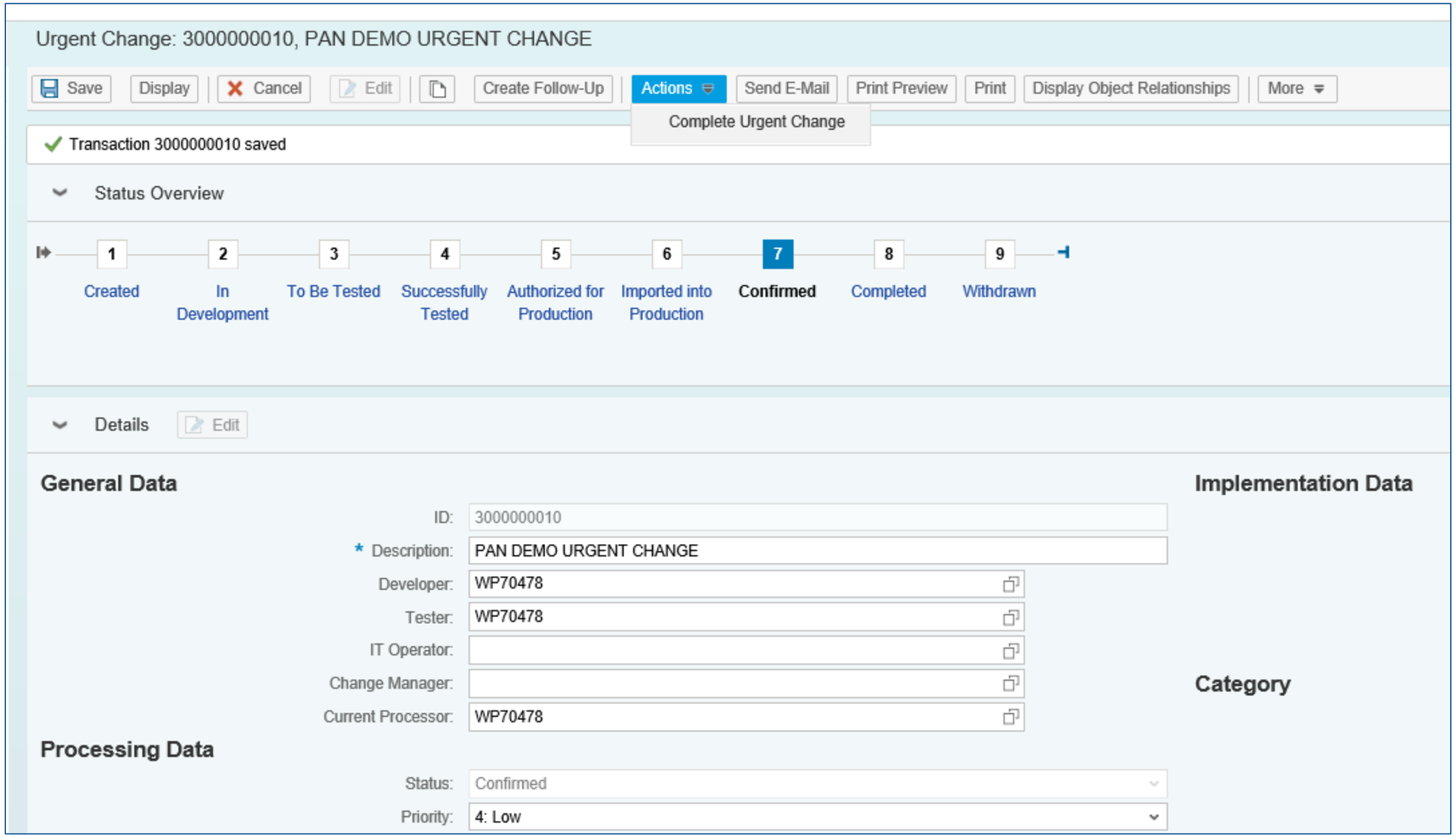
The developer confirms that the change has been made as desired.

Search for respective document using CRM_UI -> Open change document:

1. Click on “Edit” Button
2. Click on “Actions” -> Select “Confirm Urgent Change”
3. Click on “Save” button
4. Click on “Display” button

The urgent change proceeds to status Confirmed.

Urgent Change - Complete



"Complete Urgent Change"

To lock the urgent change for editing, the approver must set the change document to final status Completed.

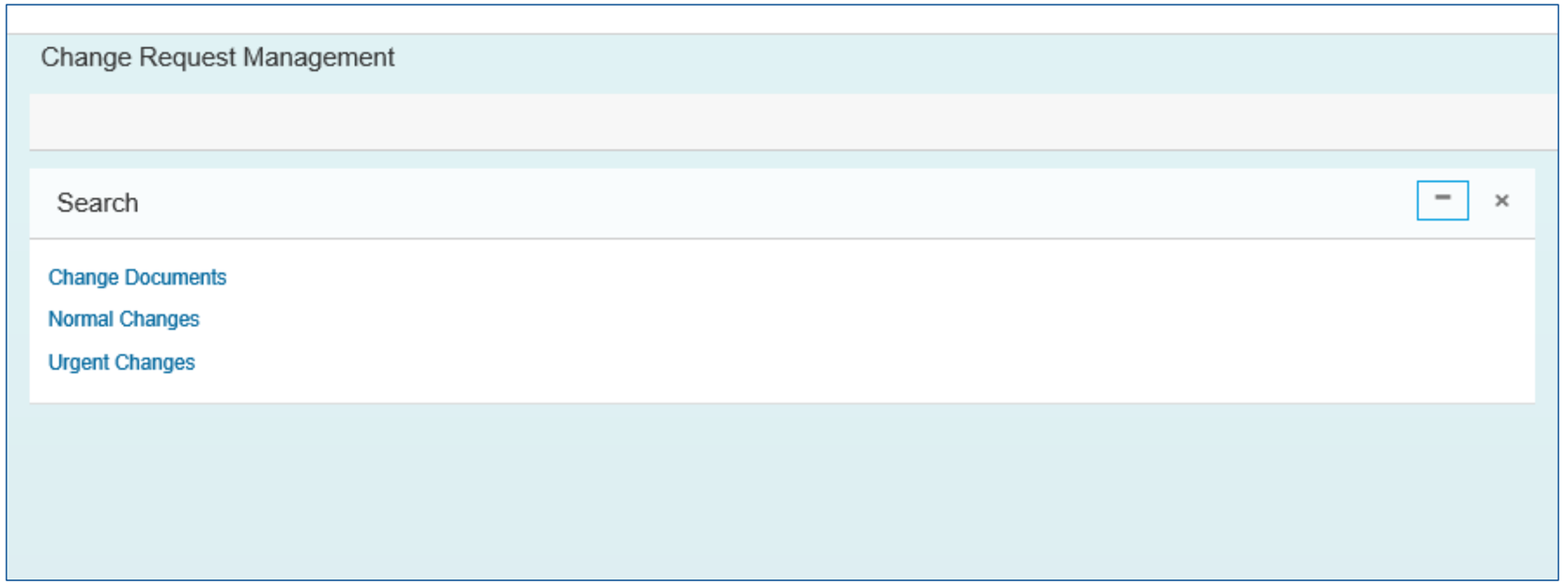
Search for respective document using CRM_UI -> Open change document:

1. Click on "Edit" Button
2. Click on "Actions" -> Select "Complete Urgent Change"
3. Click on "Save" button
4. Click on "Display" button

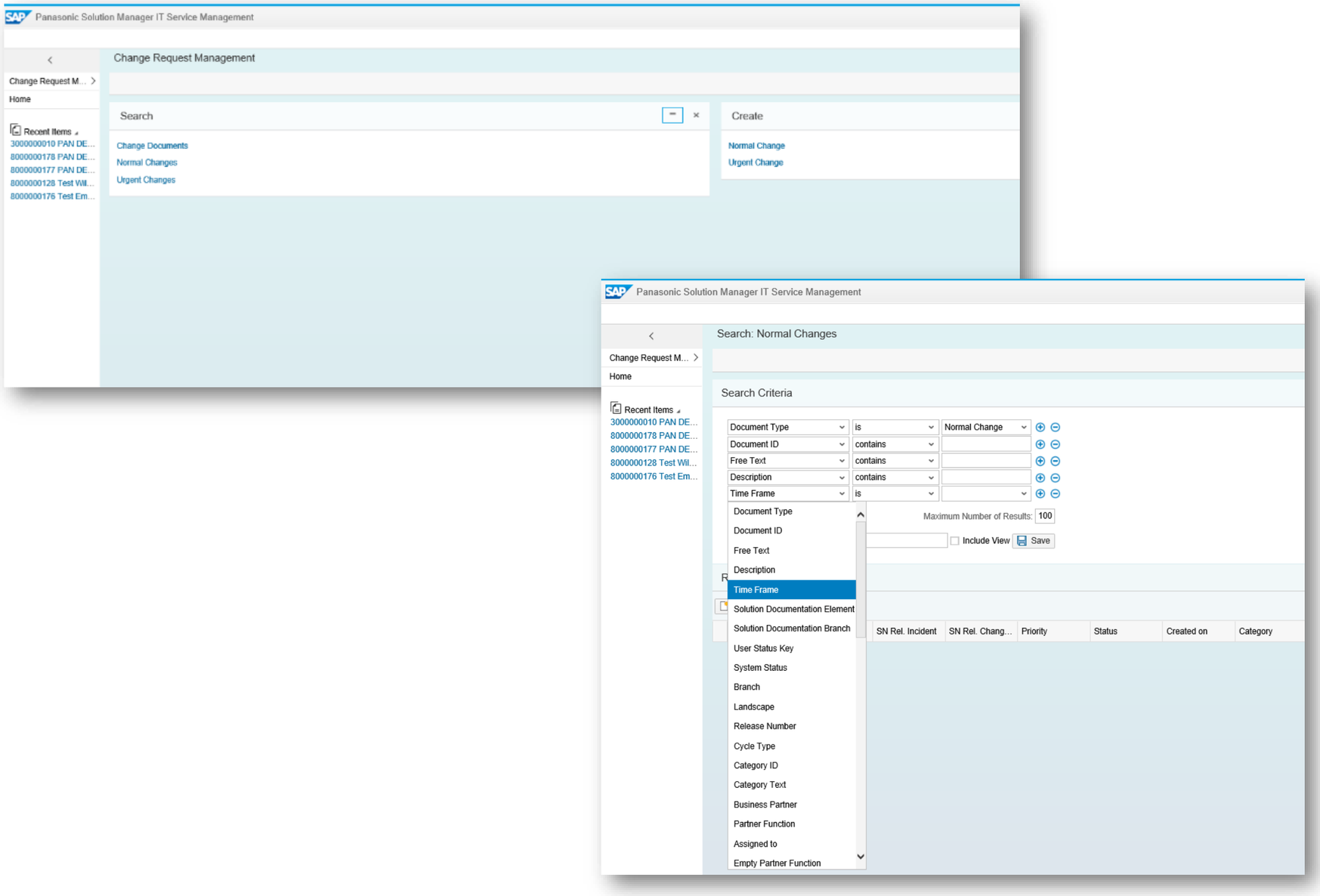
Note After the transport request of an urgent change is imported into the test and production systems, the transport request remains in the import buffer. This makes sure that the changes are not overwritten by other transport requests in the normal change cycle.

Panasonic

You can all transactions using the **Search** screen of the Web Client UI. The result of your search is displayed in the result list. A series of search operators is available for the search. Input help or search help in certain fields also assists you in your search.



Search for Change Documents



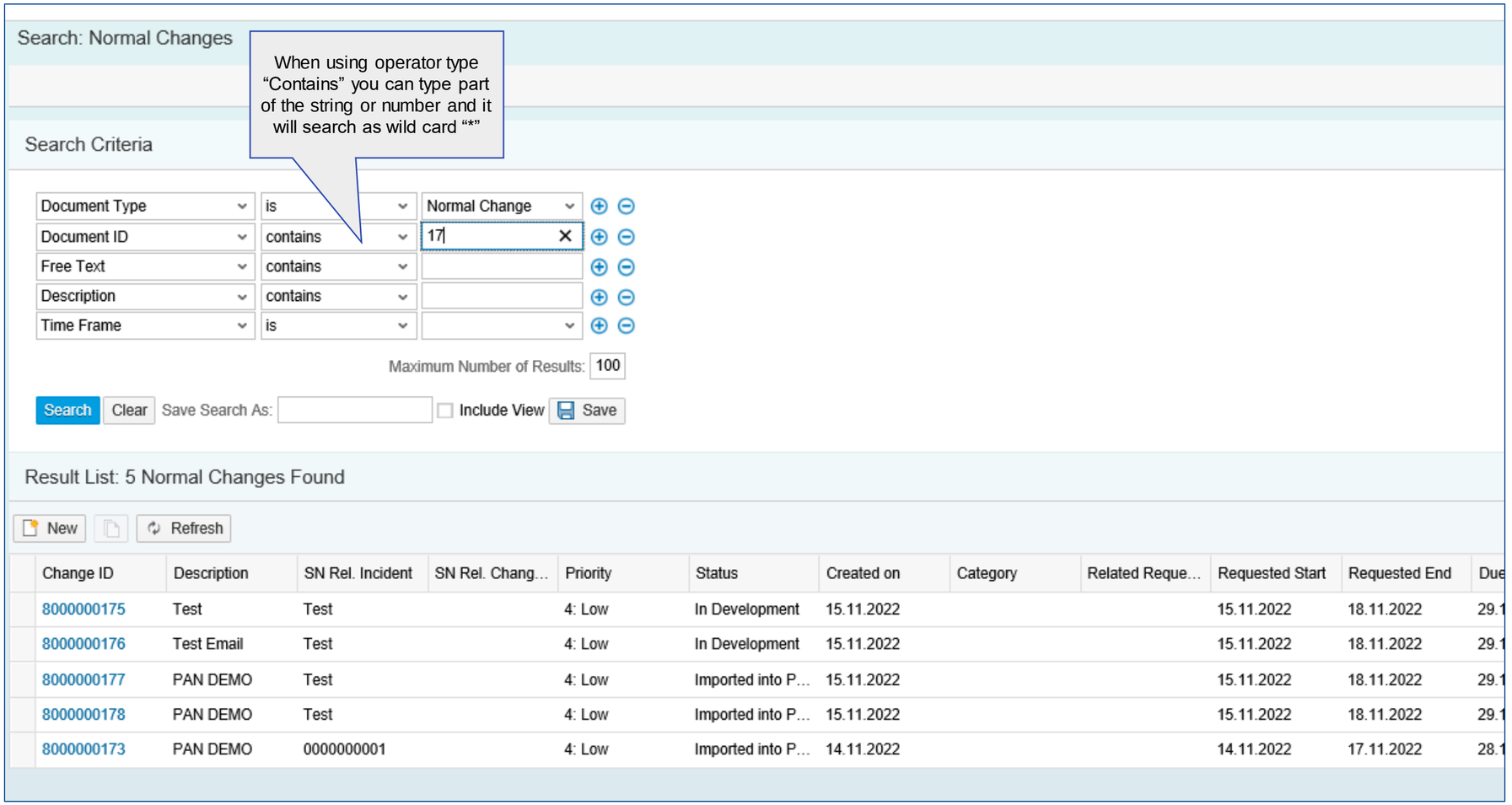
1. In the CRM_UI user can search for:
   - **Change Documents** (Wide open critical to search all change document types)
   - **Normal Change** (Predefined criteria to search only for Normal Documents)
   - **Urgent Change** (Predefined criteria to search only for Urgent Change Documents)

2. Select one the search hyperlinks e.g., **Normal Change**

3. Different criteria is available by clicking on first column drop down field

Search Change Document

Panasonic



E.g.: User would like to search a Change Document using the document number:

1. Select criteria: Change Document ID

1. Type Document number

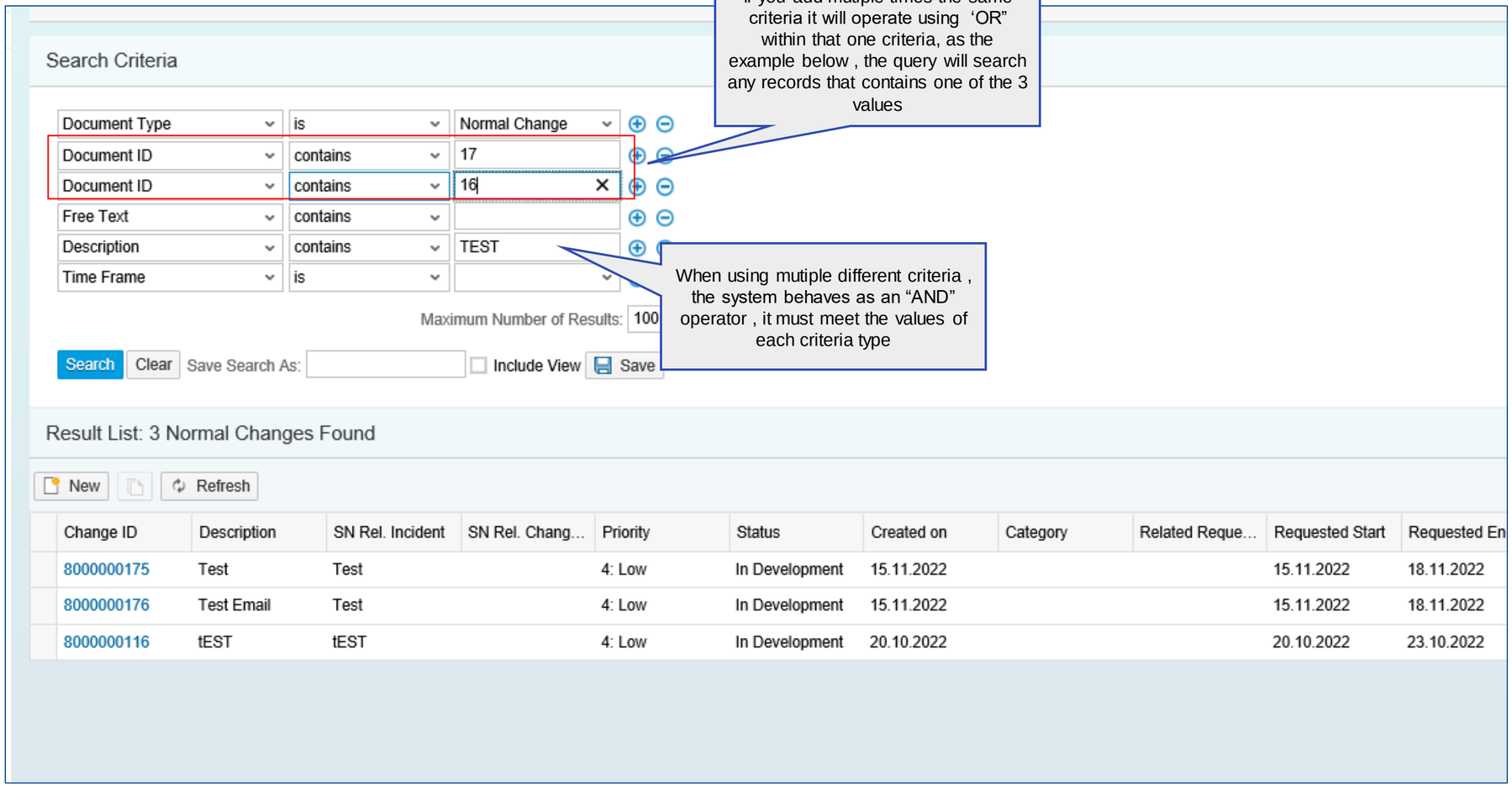
2. Click on Search button

3. If a matching record exists, it will appear in the results list

4. User can open the CD by clicking on the CD ID hyperlink from results list

Search Change Document

Panasonic



"AND" / "OR"

E.g.: User would like to search for Change Documents that has any of the following document IDs in the number:

- 17
- 16

AND

- Description containing TEST

1. Click on Search button
2. If a matching record exists, it will appear in the results list
3. User can open the Change Document by clicking on the Change Document ID hyperlink from results list

Save Search

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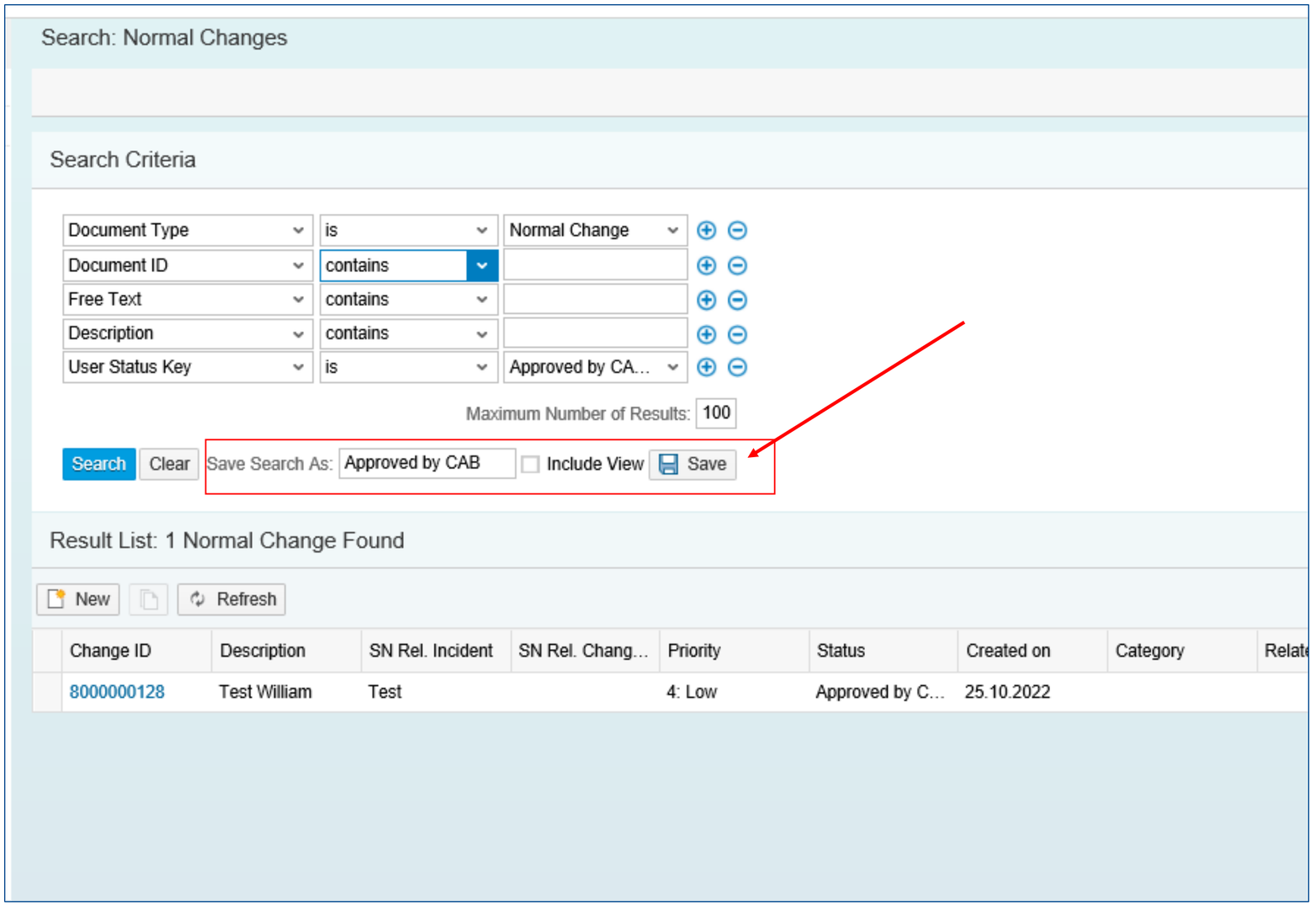


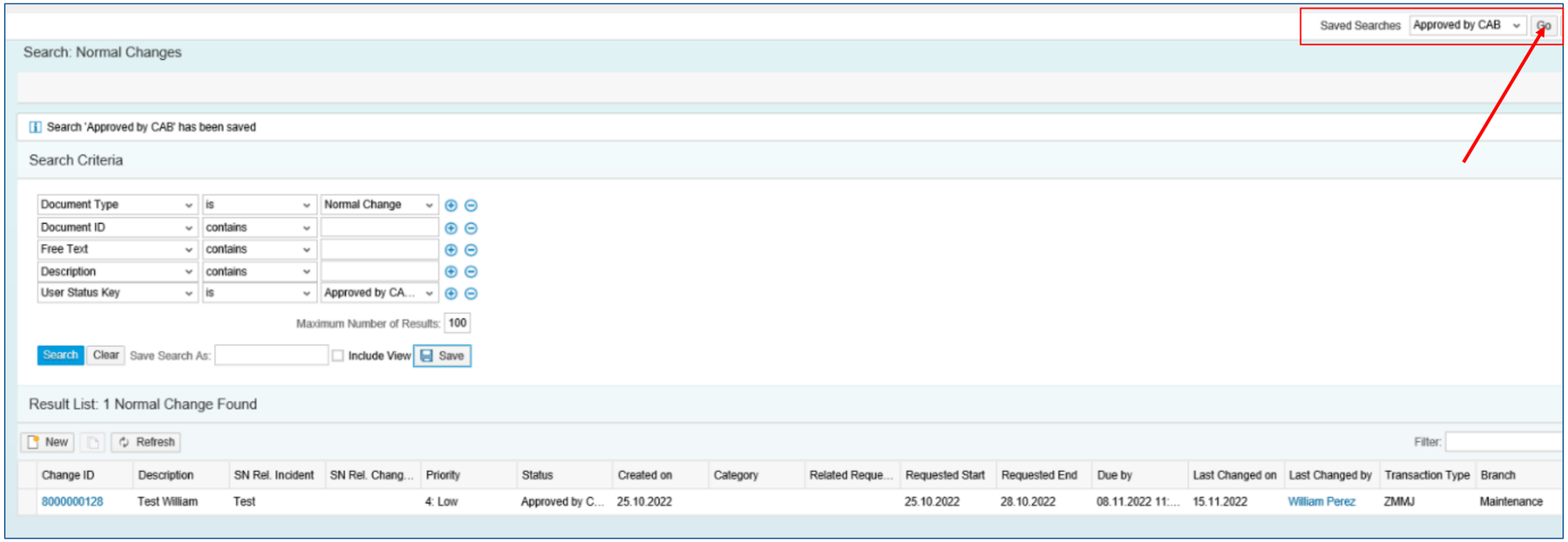
User may use the same criteria often. In this case, they can save the search for re-use:

1. Fill out at least one criteria

2. **Save Search As:** Enter the name of your search with something that makes it easy to identify the criteria defined in the query.

3. Click on Save

Save Search



Once a search has been saved it will appear under Saved Searches field (Right top corner).

To re-use it:

1. Click on Saved Searches drop down field

2. Select one of the available searches and click on “Go” button

Display/Edit Save Search

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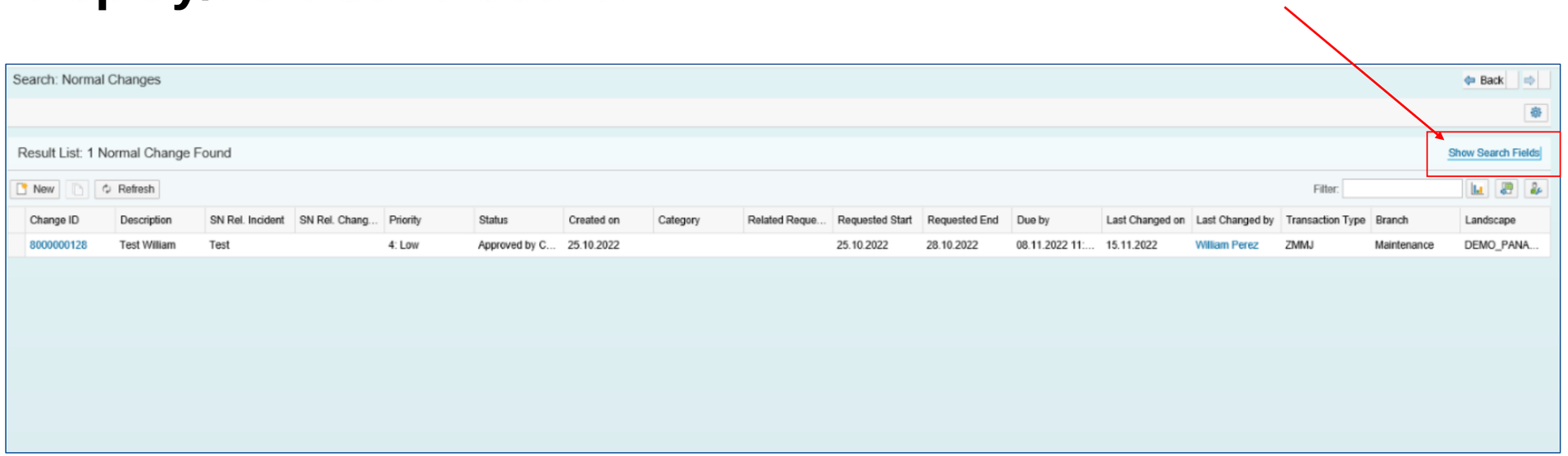
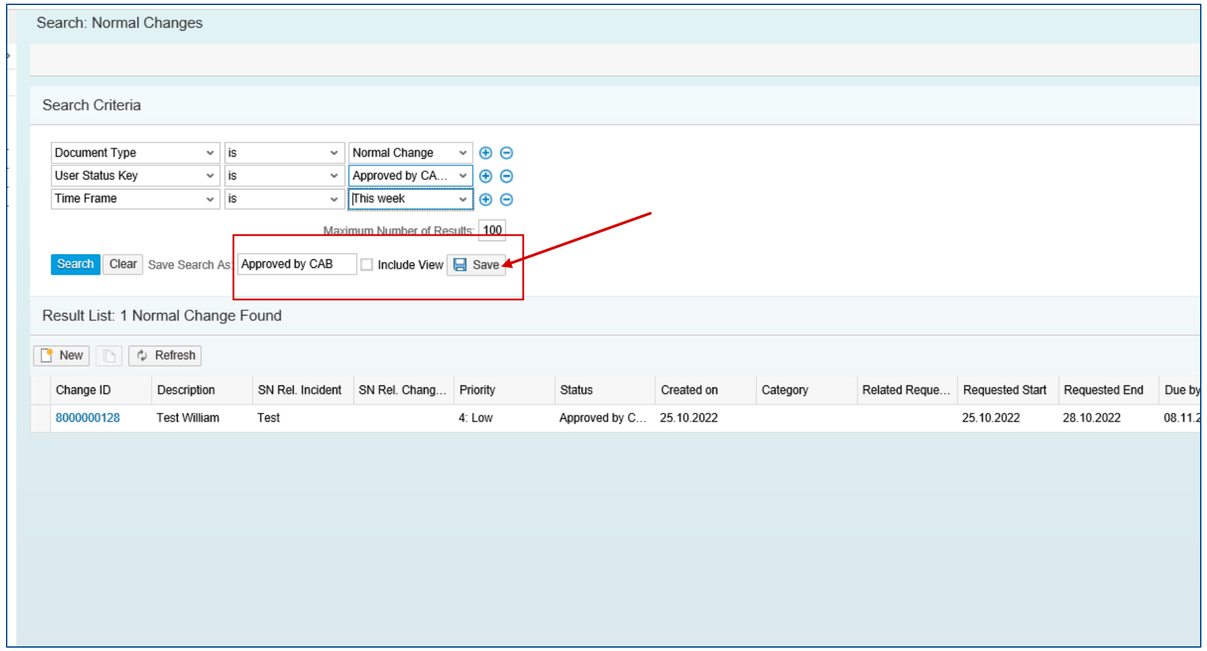


To see the current search criteria:

- click on “Show Search Fields”, You can add or remove any criteria from the existing query if needed



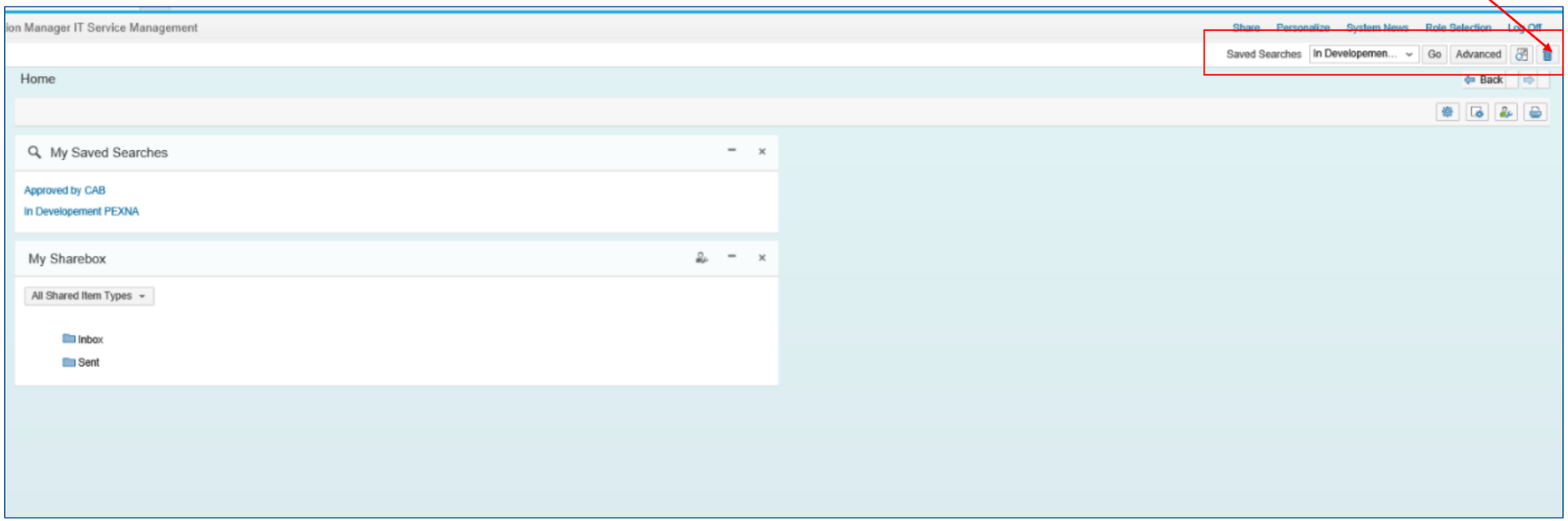
If you decide to modify the criteria:

1. Click On Save (Overwrites the current saved search)

Or

1. You can change the name and it will save as separate saved search.

Delete Saves Searches



To delete a saved search

1. Select the saved search from the top left corner
2. Click on “Trash Can” icon
3. Confirm Deletion

Home - Searches

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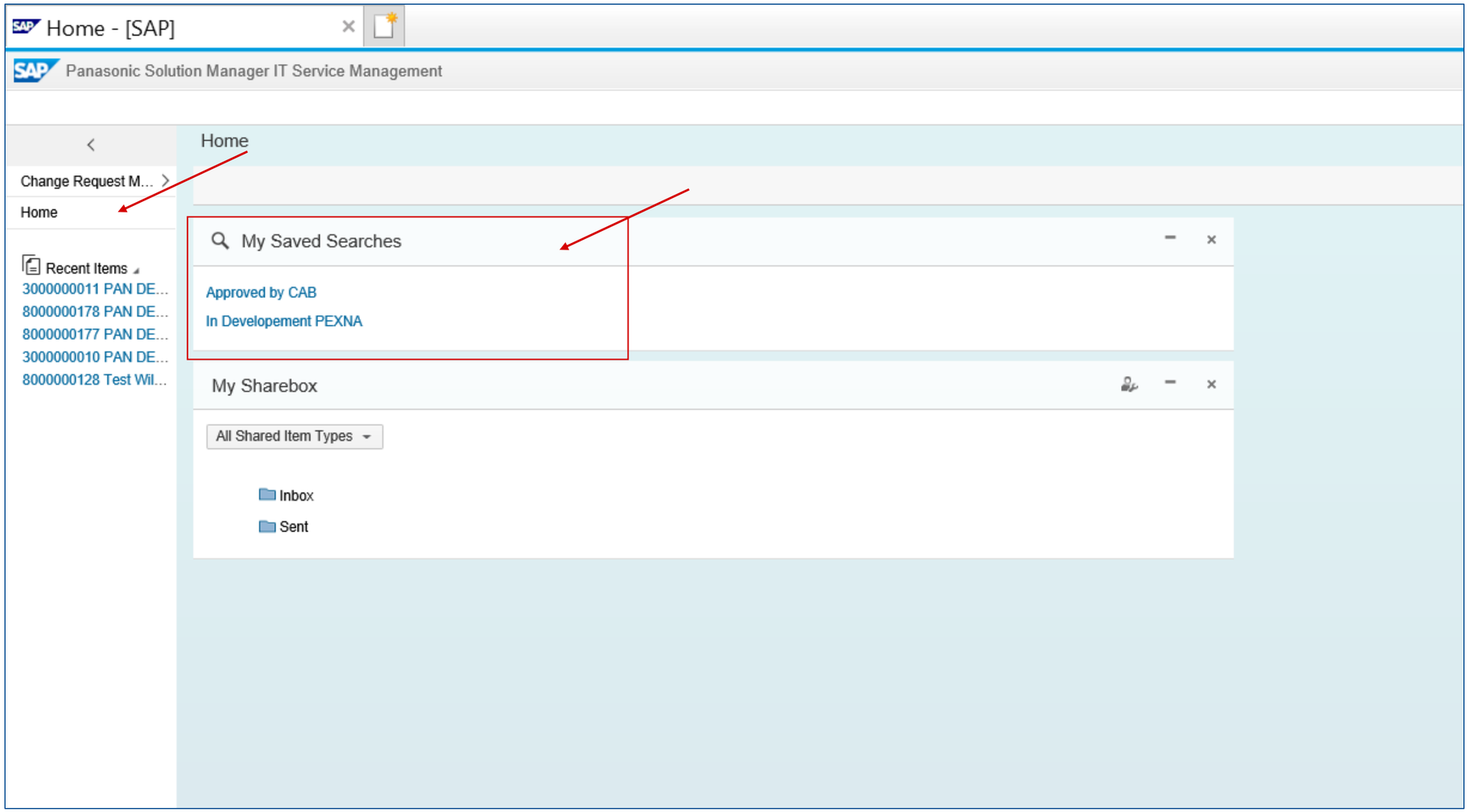

All Saved Searches will be available from HOME screen

Users can click and execute the queries directly from there

GyanSys

Panasonic

Q&A

GyanSys

Additional Information

Panasonic

Support

Login Issues to ChaRM ?

Need assistance with ChaRM ?

Demand Intake to Deploy - Process Overview – Planned April 2023

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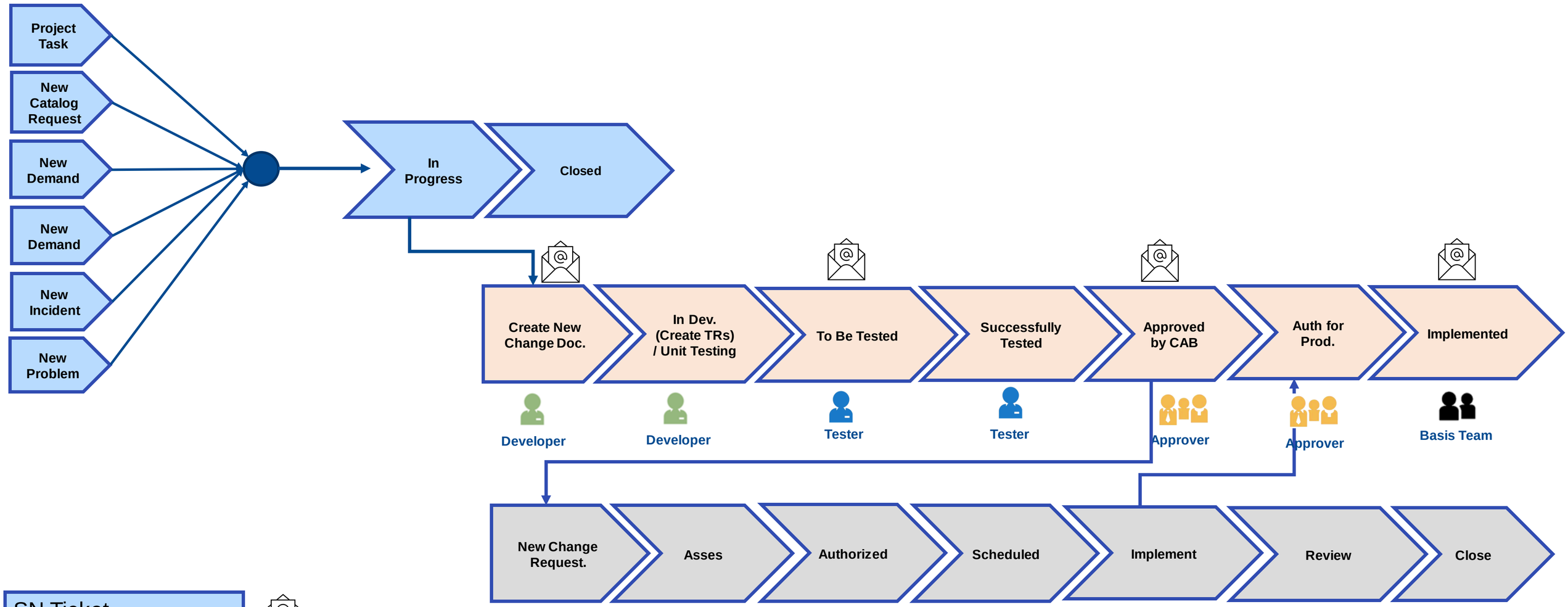


SN Ticket

ChaRM Change Doc.

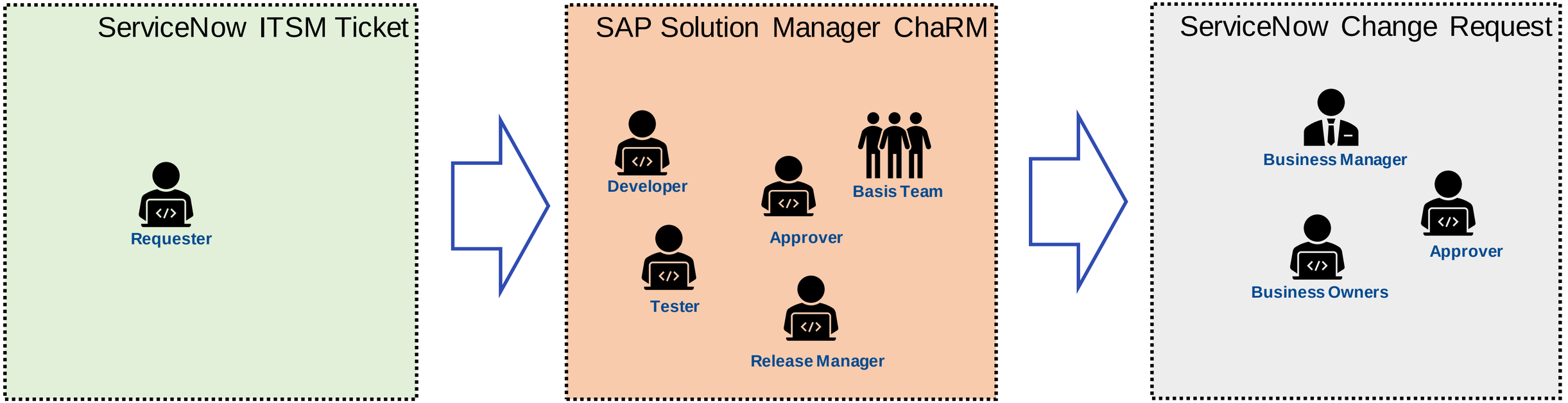
SN Change Req.

Email automatically triggered to the person or groups assigned in the change document as per matrix.

GyanSys

Demand Intake to Deploy Process

Panasonic



End User:

- Create ServiceNow Ticket (ChaRM Change Required)

- Developer:
  - Create new change document
  - Crete Transport Request
  - Unit Test
  - Release Transport into QAS
- Tester
  - Confirm Test in QAS
- Approver
  - Authorize changes into Production
- Basis
  - Import Authorized CDs into Production

- Change Owner
  - Creates ServiceNow Change Request
  - Pursue approval to move the related Change Documents into Production

Q&A