✅ **Mini Project: Change Management System in ServiceNow**

**✅ Project Objective**

To design and configure a **Change Management System** in ServiceNow that guides change requests through a structured lifecycle. The application supports approval routing, form validations, dynamic field behaviors, and custom workflows to minimize risk and ensure change accountability.

**🧩 Step 1: Use Global Application Scope**

Since Change Management is part of the **Global scope** in ServiceNow:

* No need to create a new scoped app
* Work directly with the existing **change\_request** table and modules

**🗃️ Step 2: Configure Fields & Form Layout**

**Table Used**: change\_request

**Key Fields Added / Configured**:

| **Field Name** | **Type** | **Description** |
| --- | --- | --- |
| Business Impact | Choice | Level of business disruption |
| Risk Level | Choice (Low, Medium, High) | Determines approval path |
| Implementation Plan | Multi Line Text | Strategy to execute the change |
| Backout Plan | Multi Line Text | Rollback steps in case of failure |
| CAB Approval Required | Boolean/CheckBox | Indicates whether CAB approval is needed |

**📝 Step 3: Implement UI Policies**

✅ **UI Policy 1 – Backout Plan Mandatory when Risk = High**

* Table: Change Request
* Condition: Risk Level = High
* Action: Backout Plan → Mandatory = ✅

✅ **UI Policy 2 – Make Fields Read-Only when State = Closed**

* Table: Change Request
* Condition: State is Closed
* Action: All custom fields → Read-Only = ✅

**⚙️ Step 4: Implement Business Rules**

✅ **Business Rule – Validate Backout Plan on High Risk**

* Name: Validate Backout for High Risk
* Table: Change Request
* When: Before → Insert/Update
* Condition: Risk Level = High & Backout Plan is empty
* Result: Show error message and prevent submission

✅ **Business Rule – Auto Move to Assess when Assigned**

* Name: Auto Move to Assess
* When: Before Update
* Condition: Assigned To is filled & State is New
* Result: Set State = Assess

**🔁 Step 5: Configure Change Lifecycle Workflow**

Designed a custom workflow in **Workflow Editor** (no Flow Designer required).

**Lifecycle Stages**:

* New – Change initiated
* Assess – Review by manager
* Authorize – Approval stage
* Scheduled – Change planned
* Implement – Change in progress
* Review – Post-change evaluation
* Closed – Verified and completed

Custom approval logic added:

* Low Risk → Auto Approved
* Medium Risk → Manager Approval
* High Risk → CAB + Manager Approval

**🧪 Step 6: Testing the Flow**

| **Test Case** | **Action** | **Expected Result** | **✅** |
| --- | --- | --- | --- |
| Create new Change | Fill form and submit | State = New | ✅ |
| Assign user | Change Assigned To | State auto changes to Assess | ✅ |
| Set Risk = High | Submit with empty Backout Plan | Error shown, can't proceed | ✅ |
| Fill Backout & Resubmit | Backout Plan filled | Form submits successfully | ✅ |
| Set state to Implement | Progress through stages | Field visibility updates as per rules | ✅ |
| Set state to Closed | Finalize request | All fields read-only | ✅ |