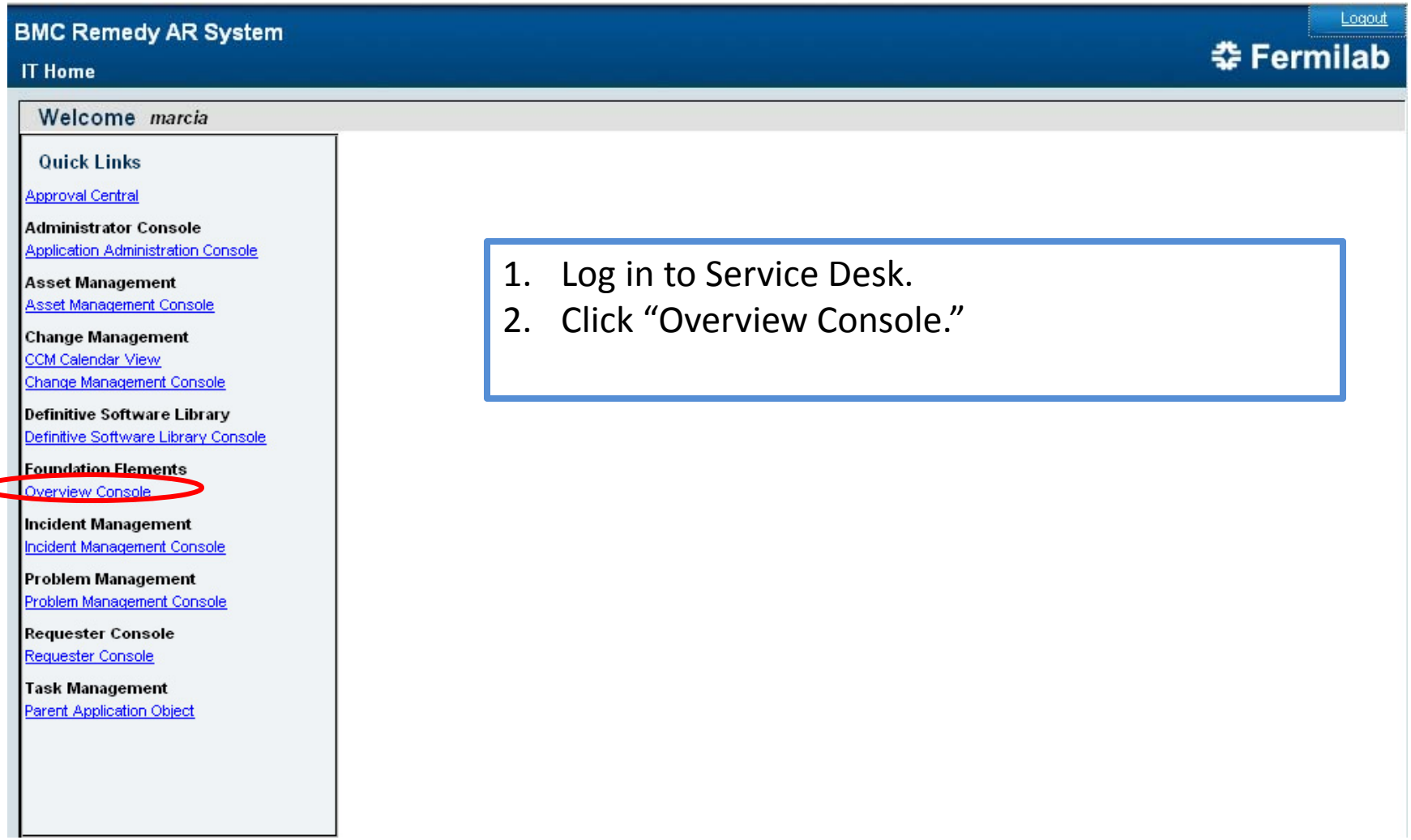
Change Management Tool Training

Setting Your Application Preferences

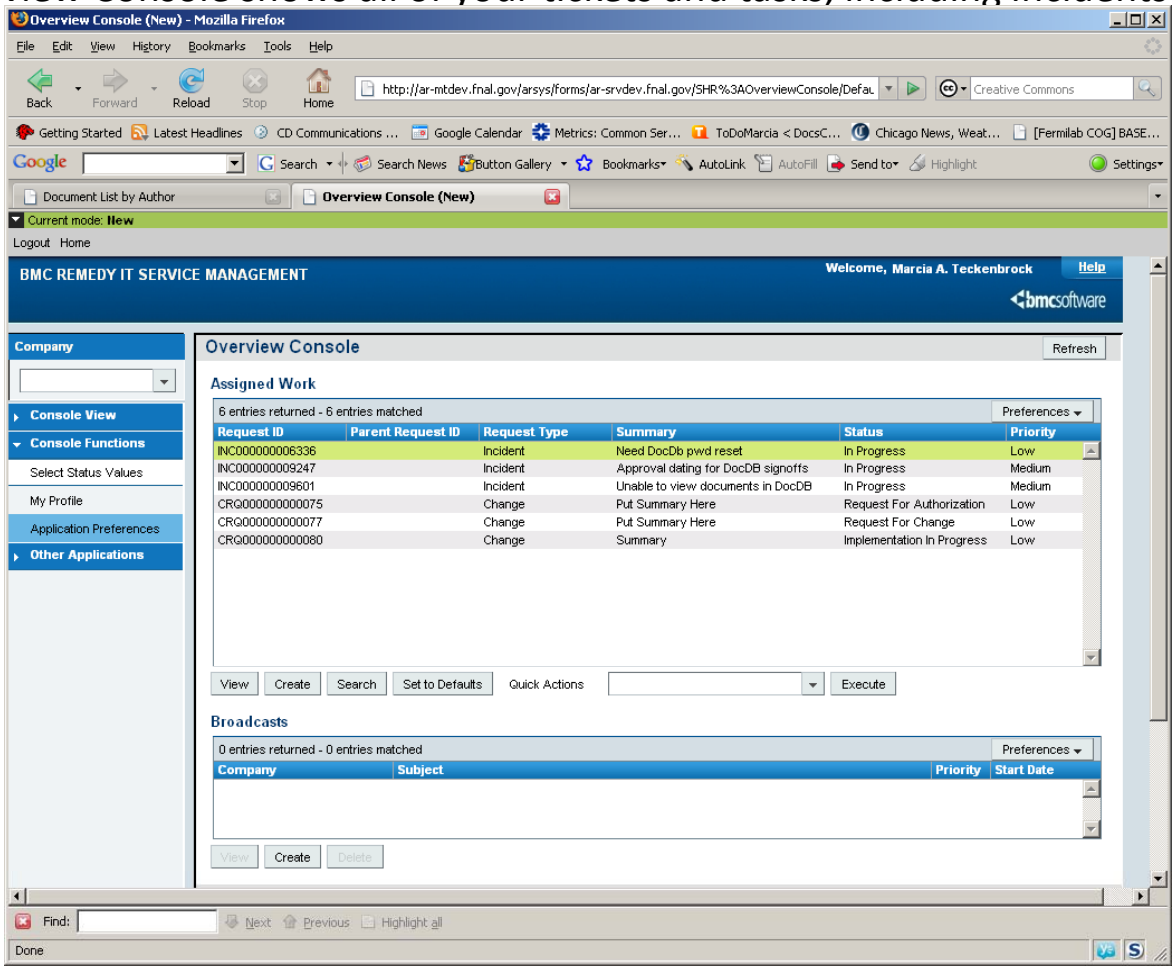


1. Log in to Service Desk.
2. Click “Overview Console.”

Setting Application Preferences

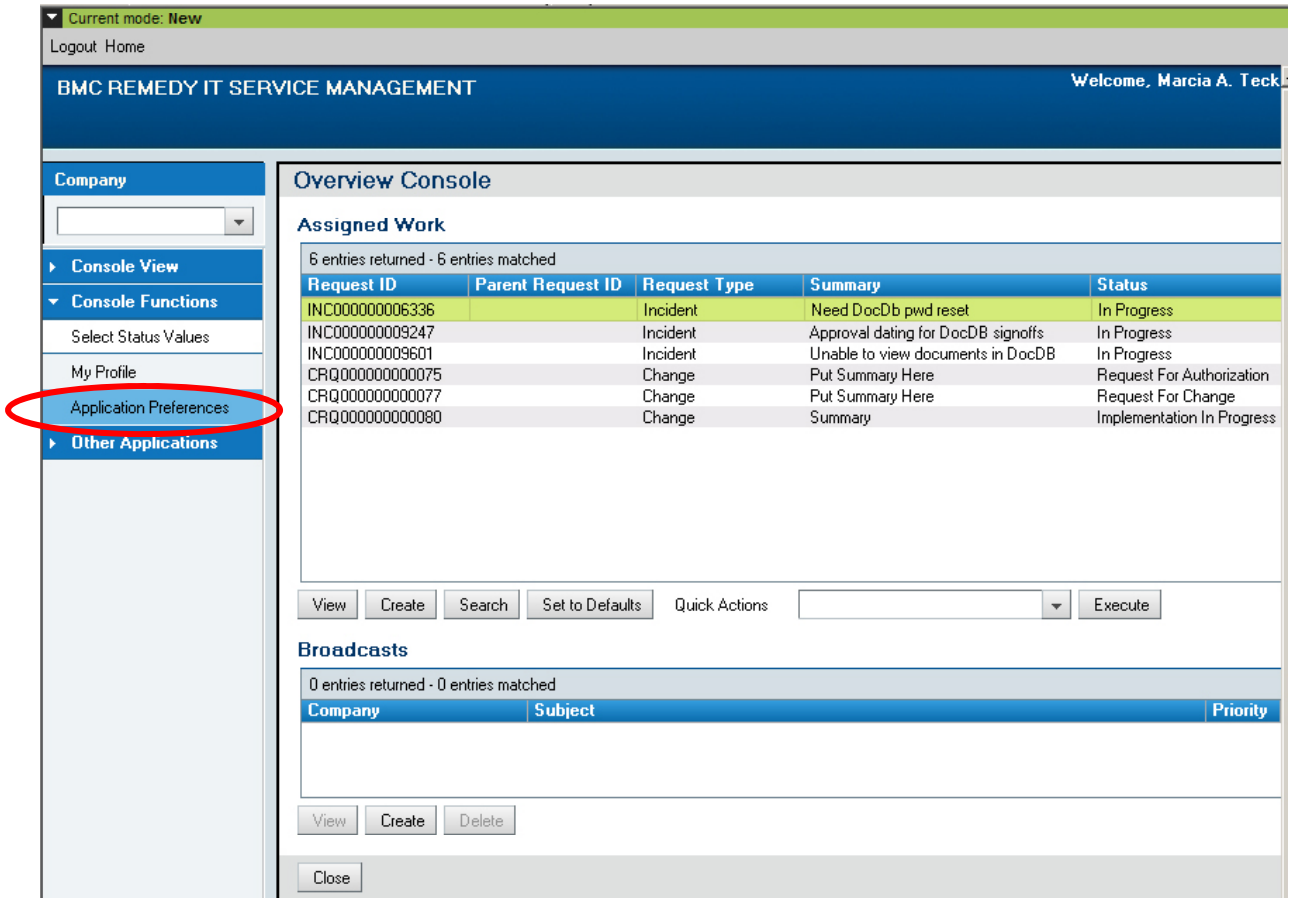
This is the Overview Console.

(The Overview Console shows all of your tickets and tasks, including Incidents and Changes.)



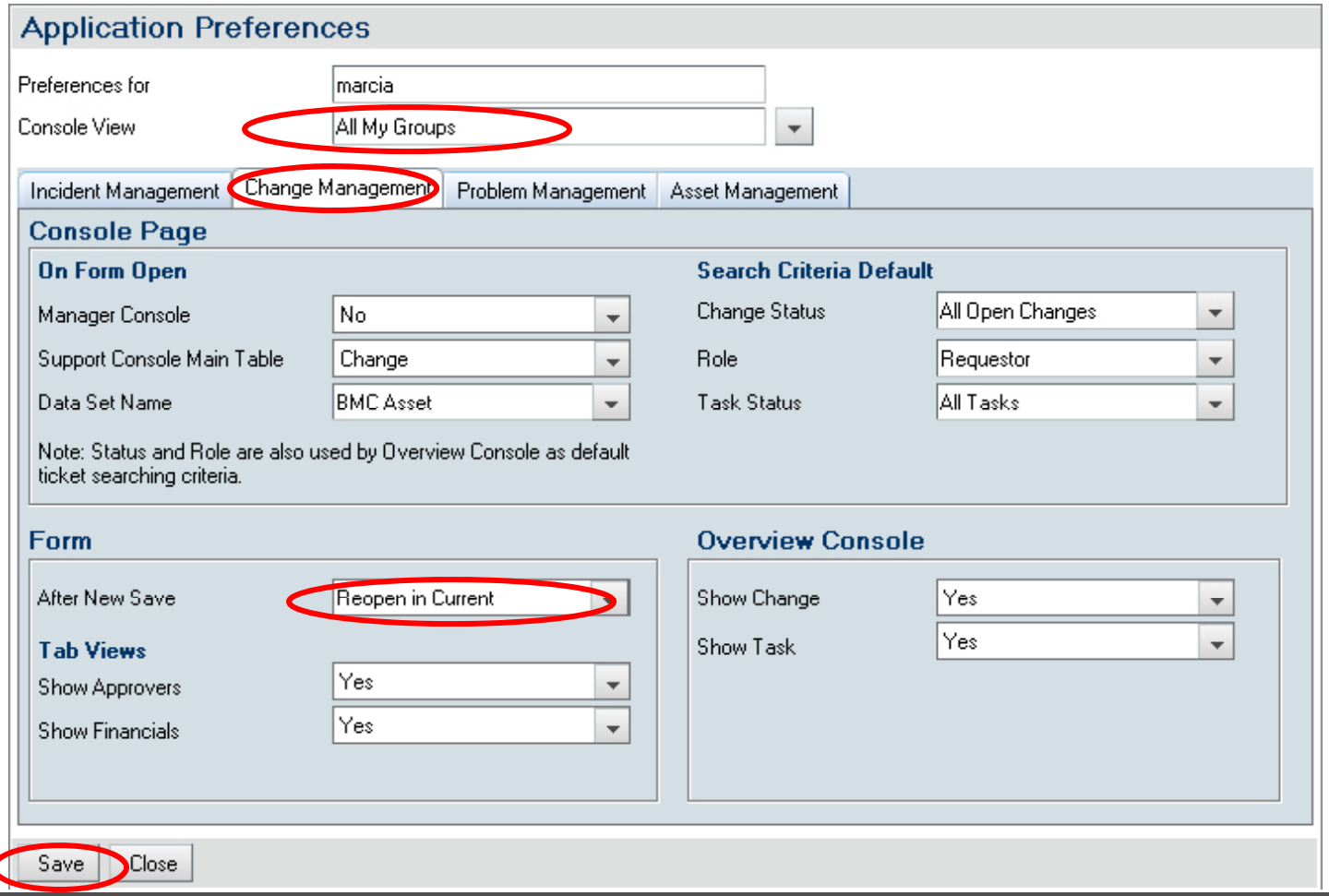
Setting Application Preferences

1. Click “Application Preferences.”
2. The Application Preferences pop-up window will appear.

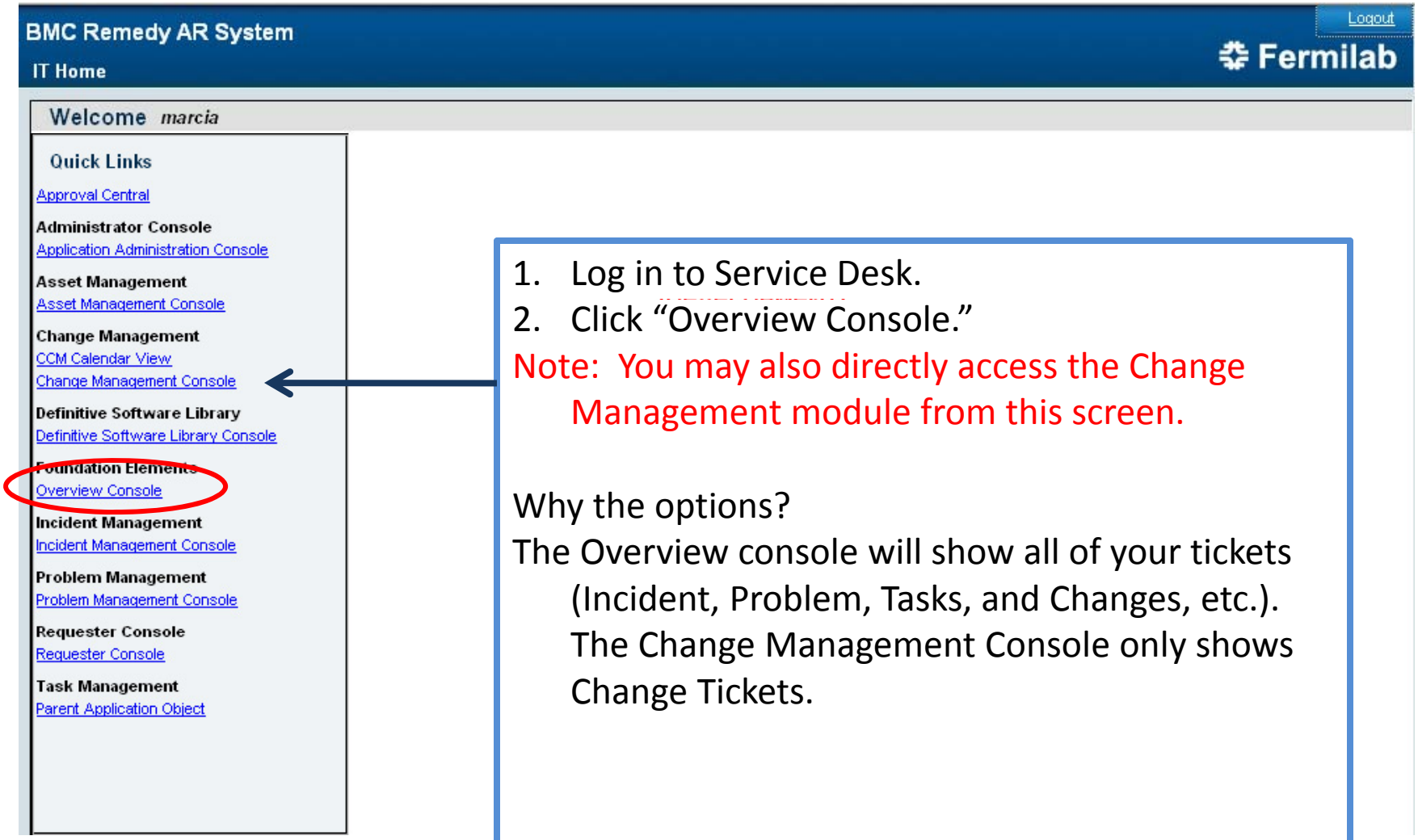


Setting Application Preferences

1. Select “All My Groups” for Console View.
2. Click “Change Management” tab.
3. Select “Reopen in Current” from the dropdown box for “After New Save.”
4. Click “Save.”



Opening Change Management



1. Log in to Service Desk.
2. Click "Overview Console."

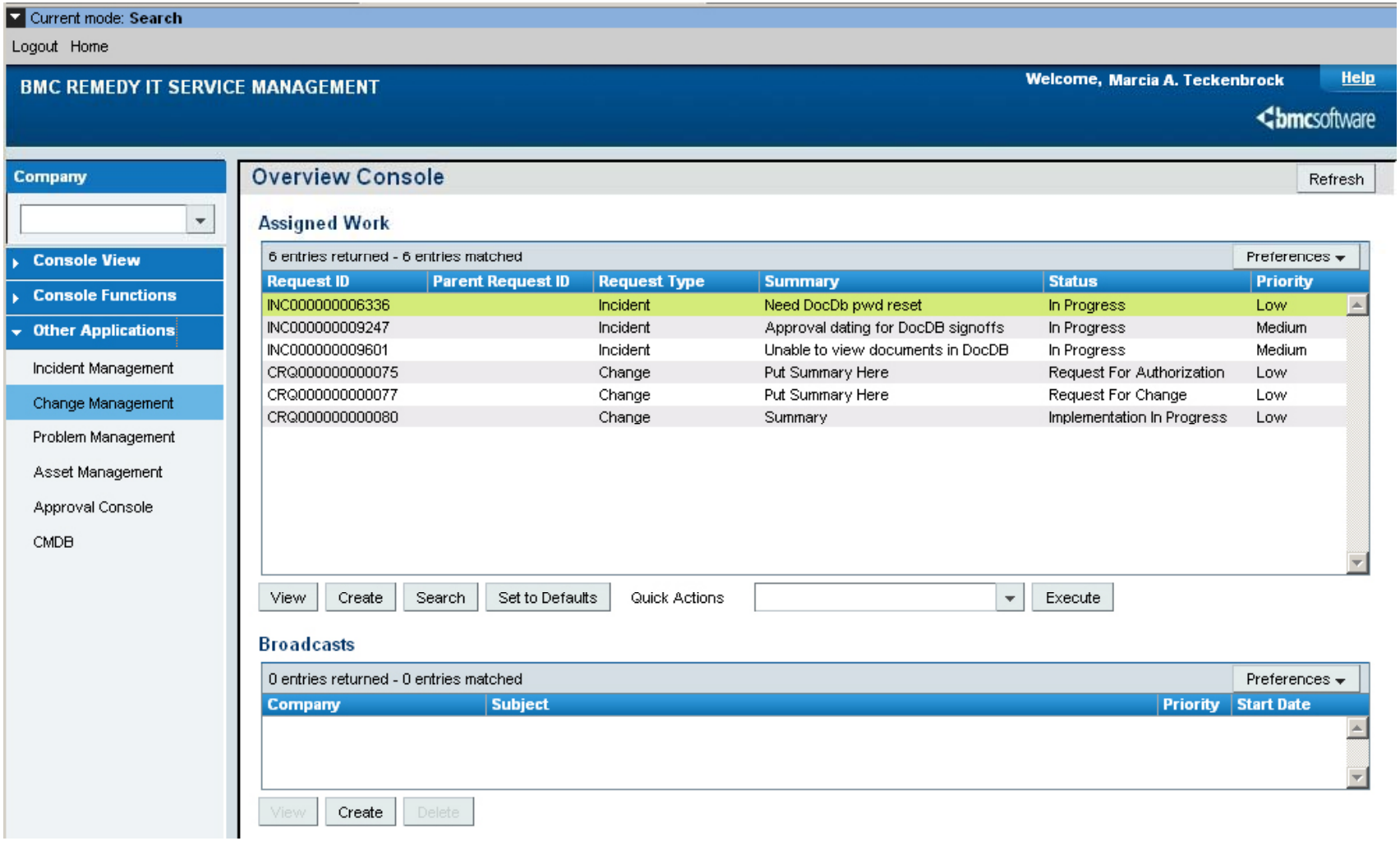
Note: You may also directly access the Change Management module from this screen.

Why the options?

The Overview console will show all of your tickets (Incident, Problem, Tasks, and Changes, etc.). The Change Management Console only shows Change Tickets.

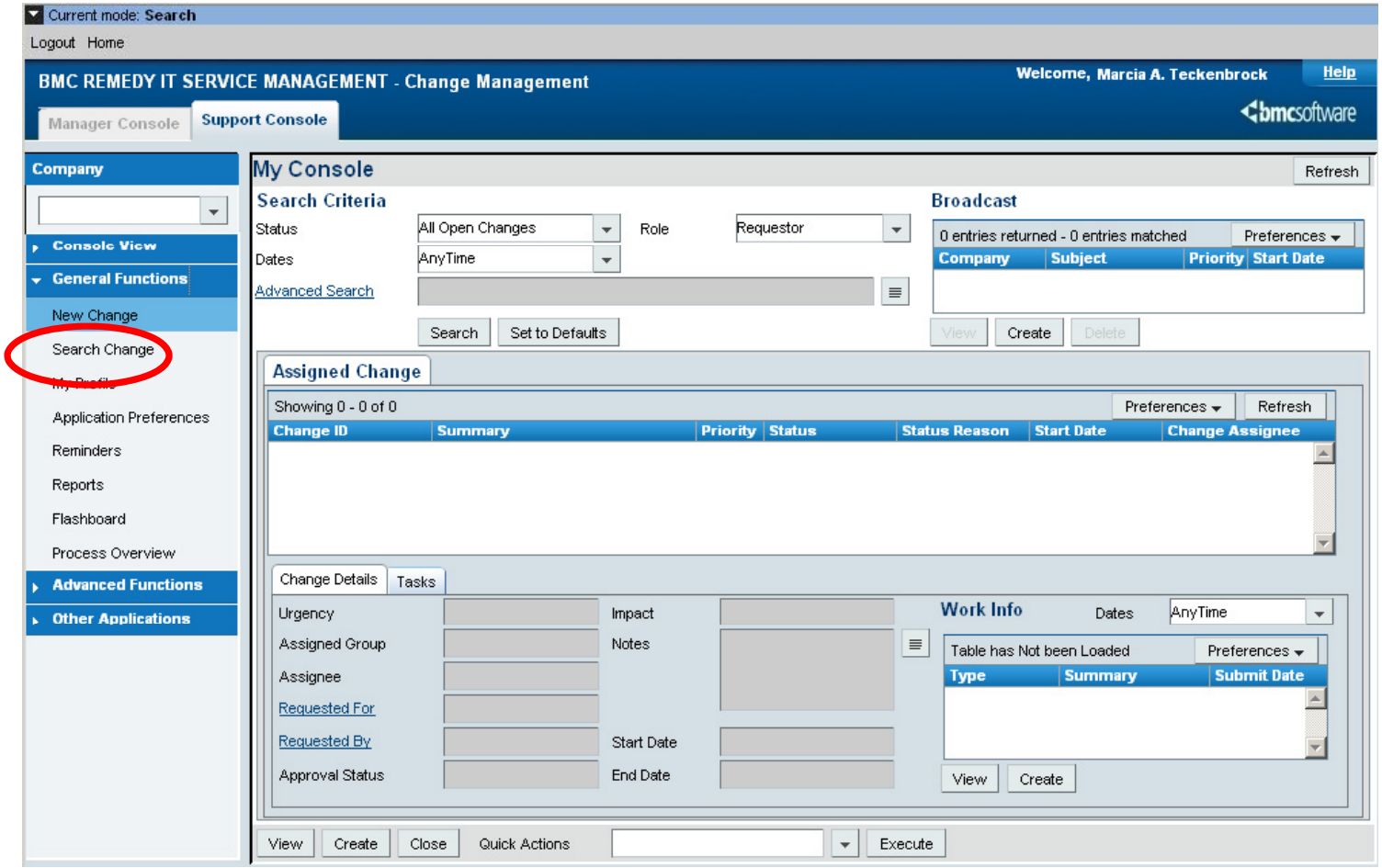
Opening Change Management

To open the “Change Management” module from the Overview Console, select “Other Applications,” then “Change Management.”



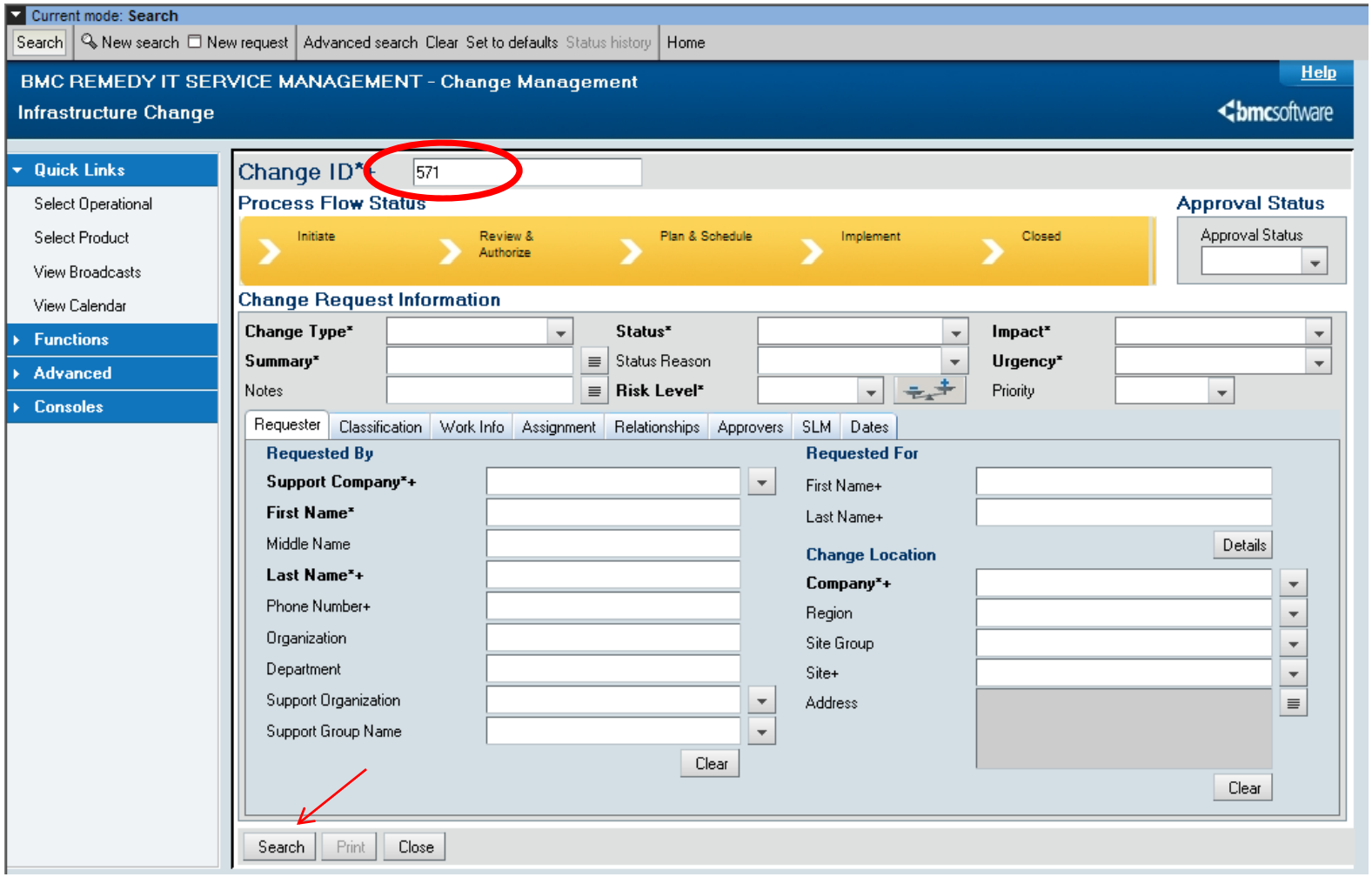
Searching For a Change

1. Click “General Functions.”
2. Click on “Search Change.”



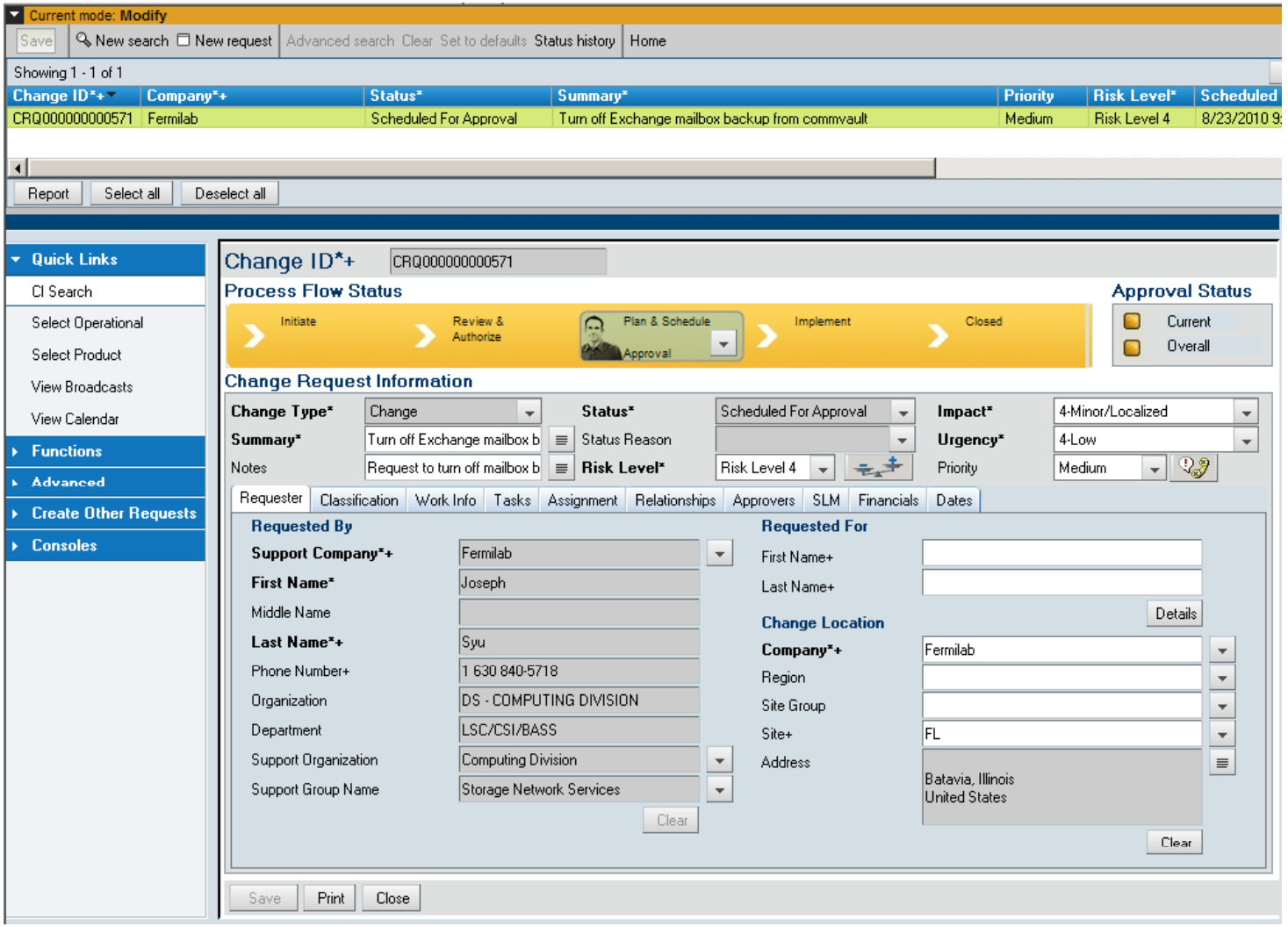
Searching For a Change

1. Enter the Field you want to search on
2. Click on “Search Change.”



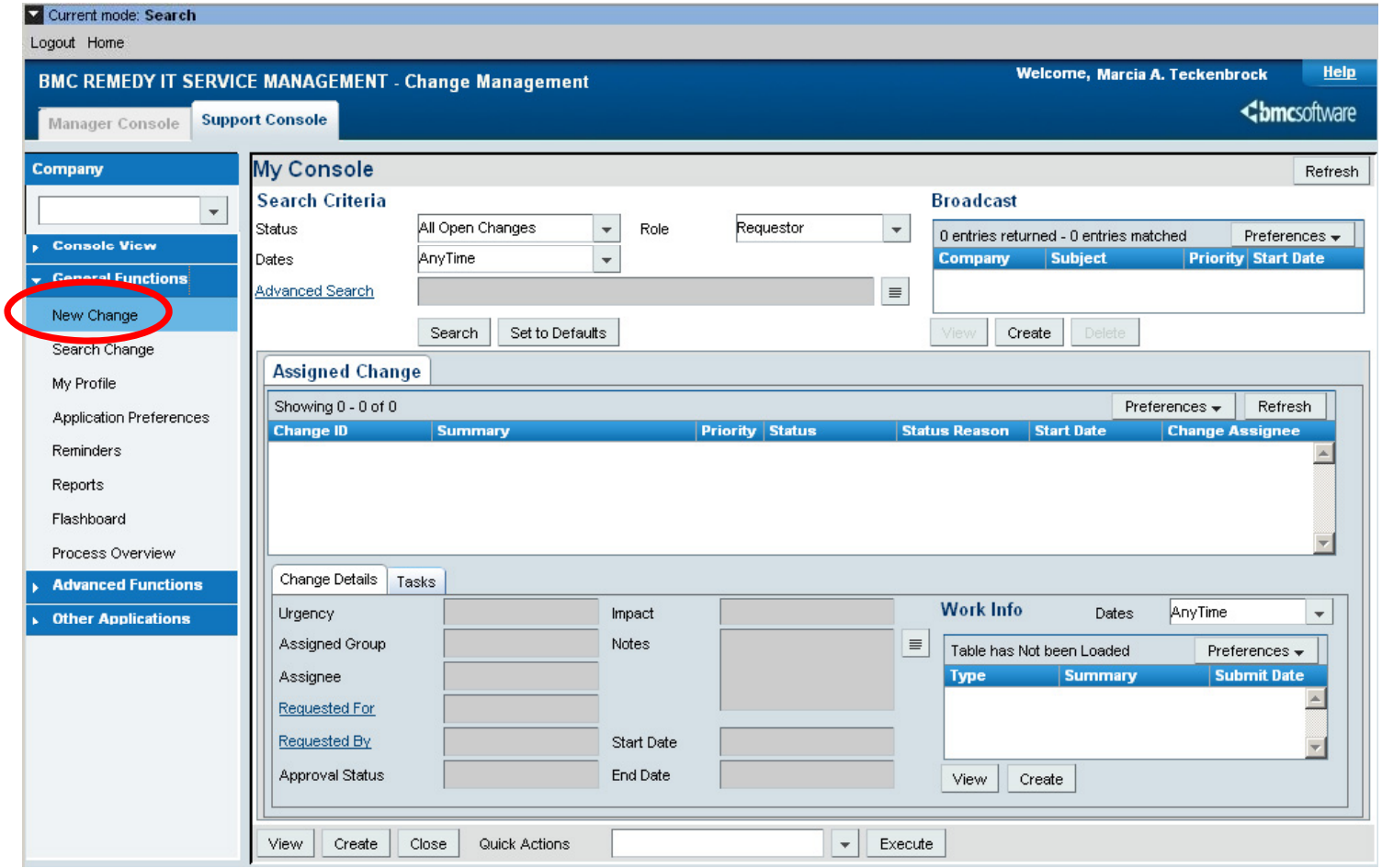
Searching For a Change

The change(s) that match your search criteria are returned and you are able to update the change.



Creating a Change

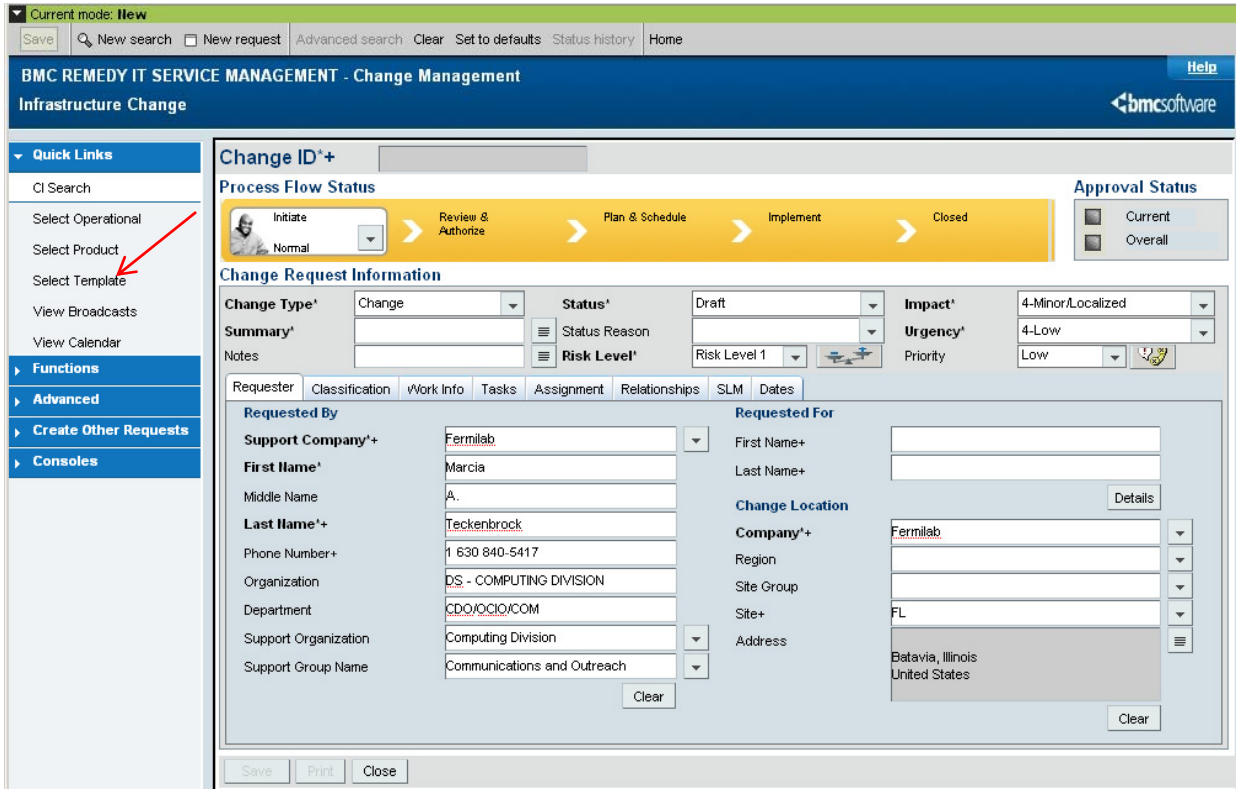
1. Click “General Functions.”
2. Click on “New Change.”



Creating a Change

Most items are auto-populated. You can select a template (once standard changes are made available or fill out the following:

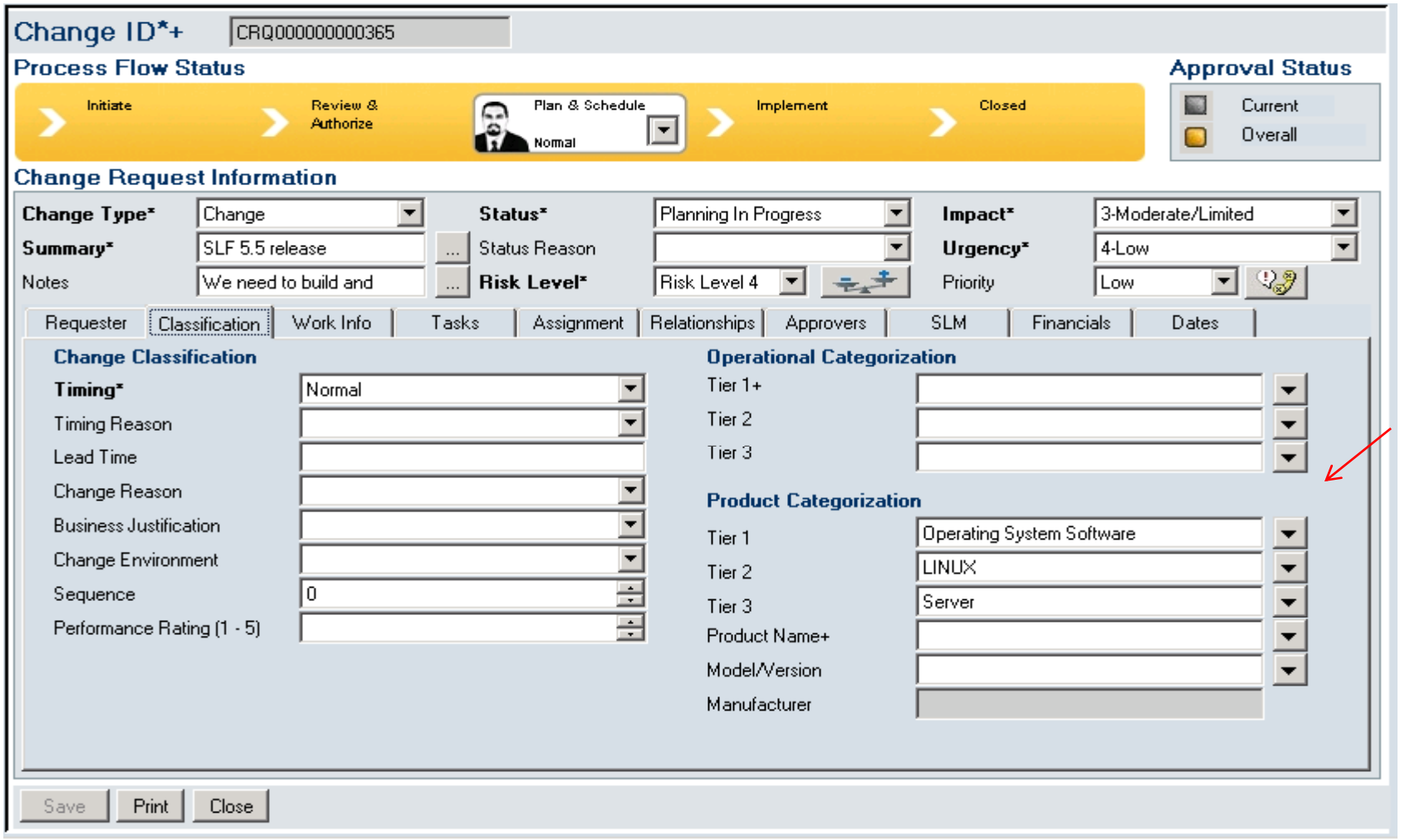
1. Summary (type in form)
2. Impact (dropdown)
3. Urgency (dropdown)
4. Risk Level (consult your team's negotiated risk classification document)



Note: The Risk Assessment Questions Button to the immediate right of the Risk Level should NOT be used and the Risk Assessment Questions should NOT be answered.

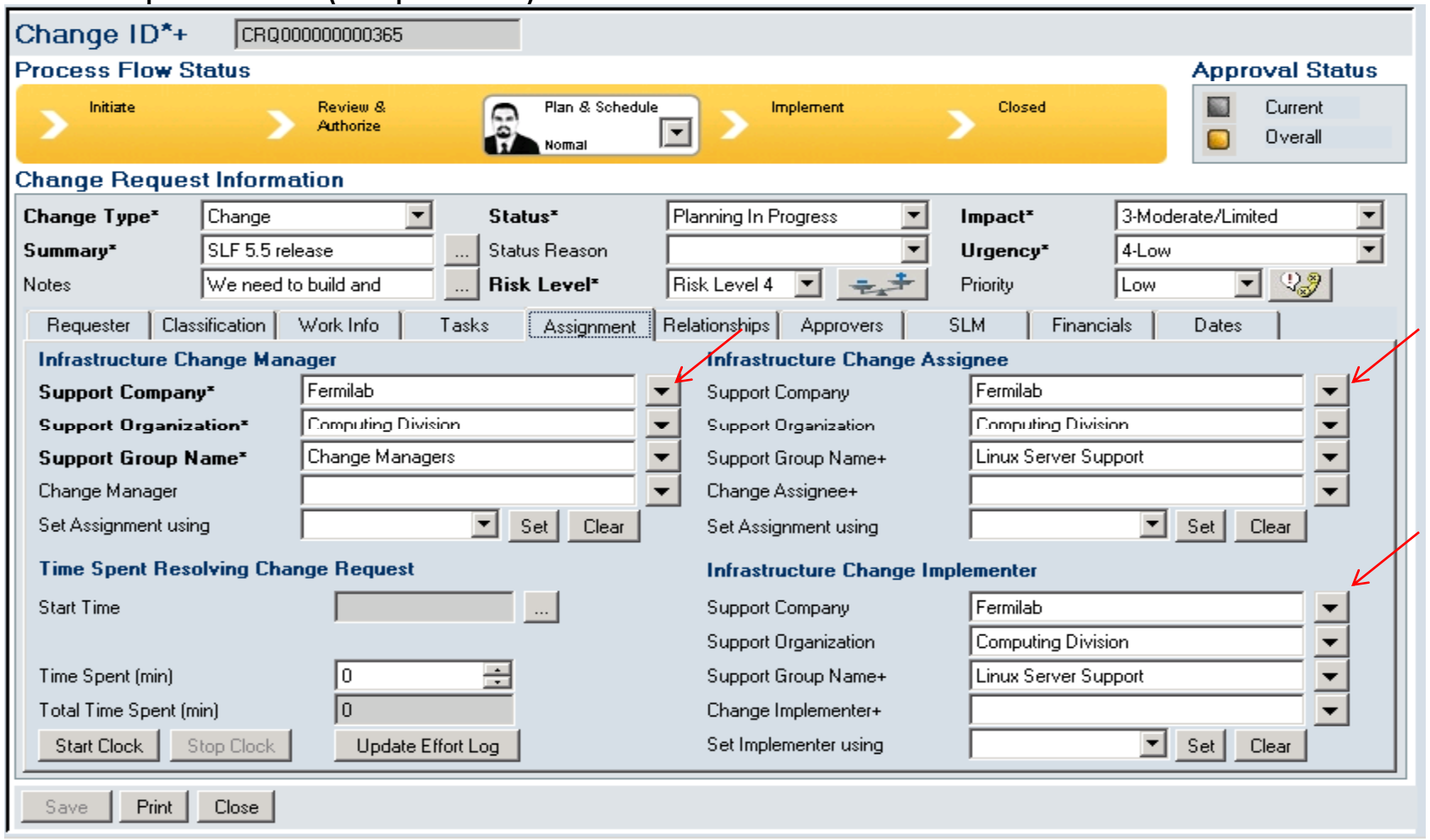
Creating a Change

5. Click the “Classification” tab, Select a Product Categorization (dropdowns)



Creating a Change

6. Click the “Assignment” tab, Select a Change Manager, Assignee, and Implementer (dropdowns)

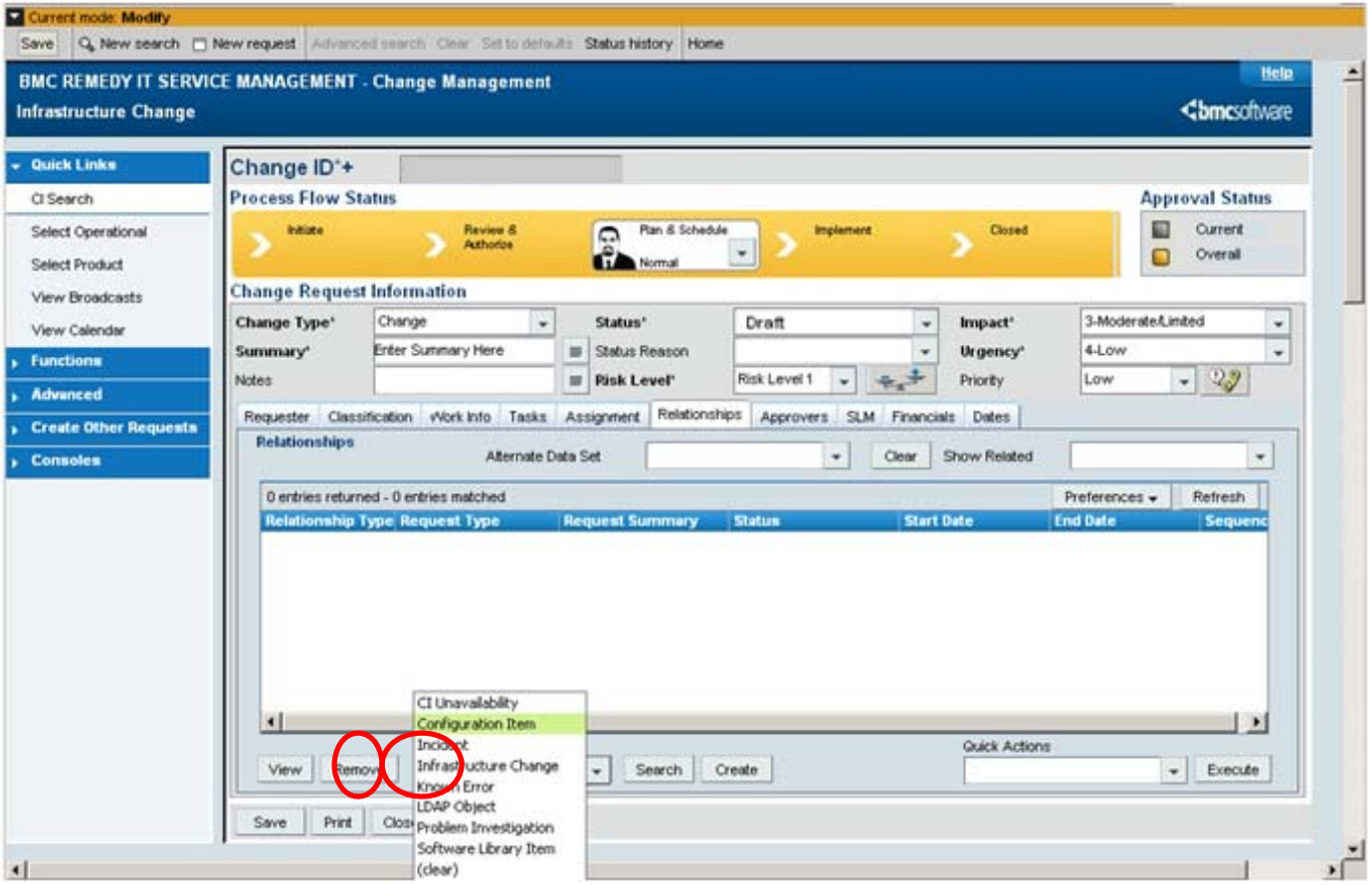


How to Search for CIs

In the “Relationships” tab:

1. Click Down Arrow in the “Request Type” field at bottom of screen
2. Select “Configuration Item.”
3. Click “Search.”

Note: Configuration Management is not “live” yet. Until it is rolled out, configuration items should be described in verbiage along with the other info that is required for Approval to Go Live.

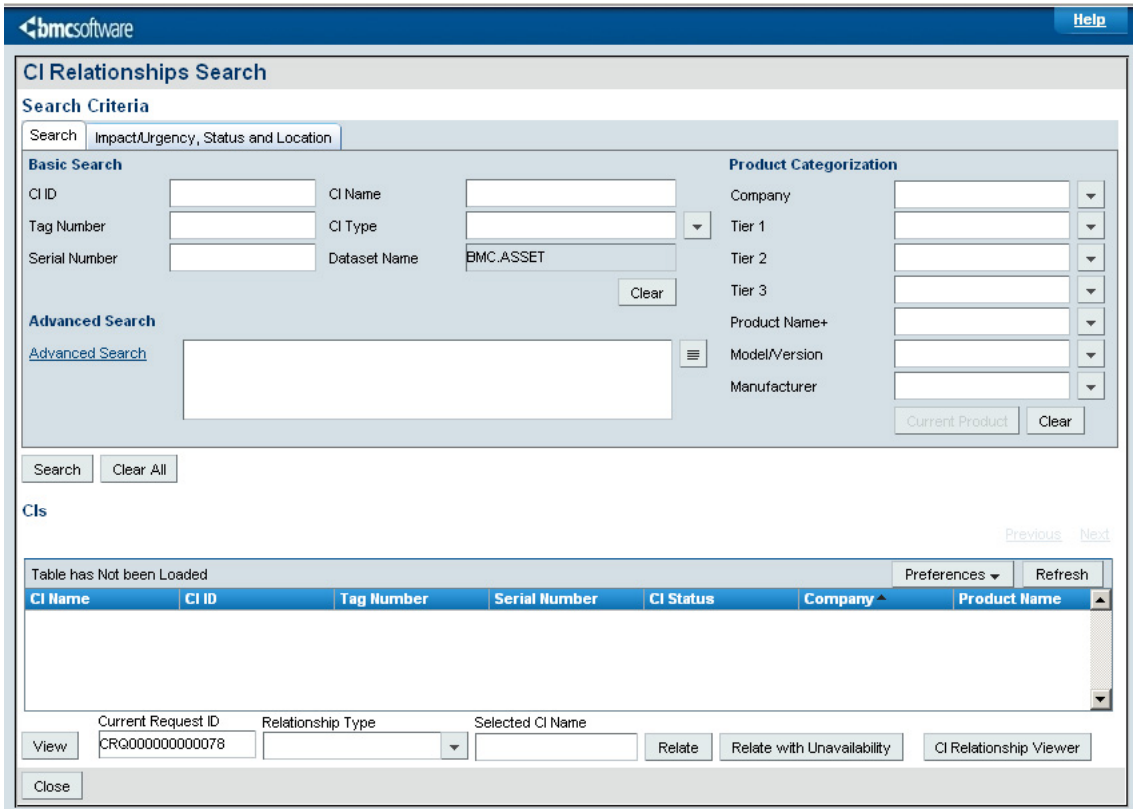


How to Search for CIs

Search for your configuration item based on your source information (EQUIP-DB, SMS, etc...)

If you cannot find your configuration item, continue your change leaving the “CI Type” field blank and contact the Configuration Manager (Brad Trygar) to have the CI added.

Note: These search fields are case-sensitive (i.e. Ghost vs. ghost vs. GHOST)



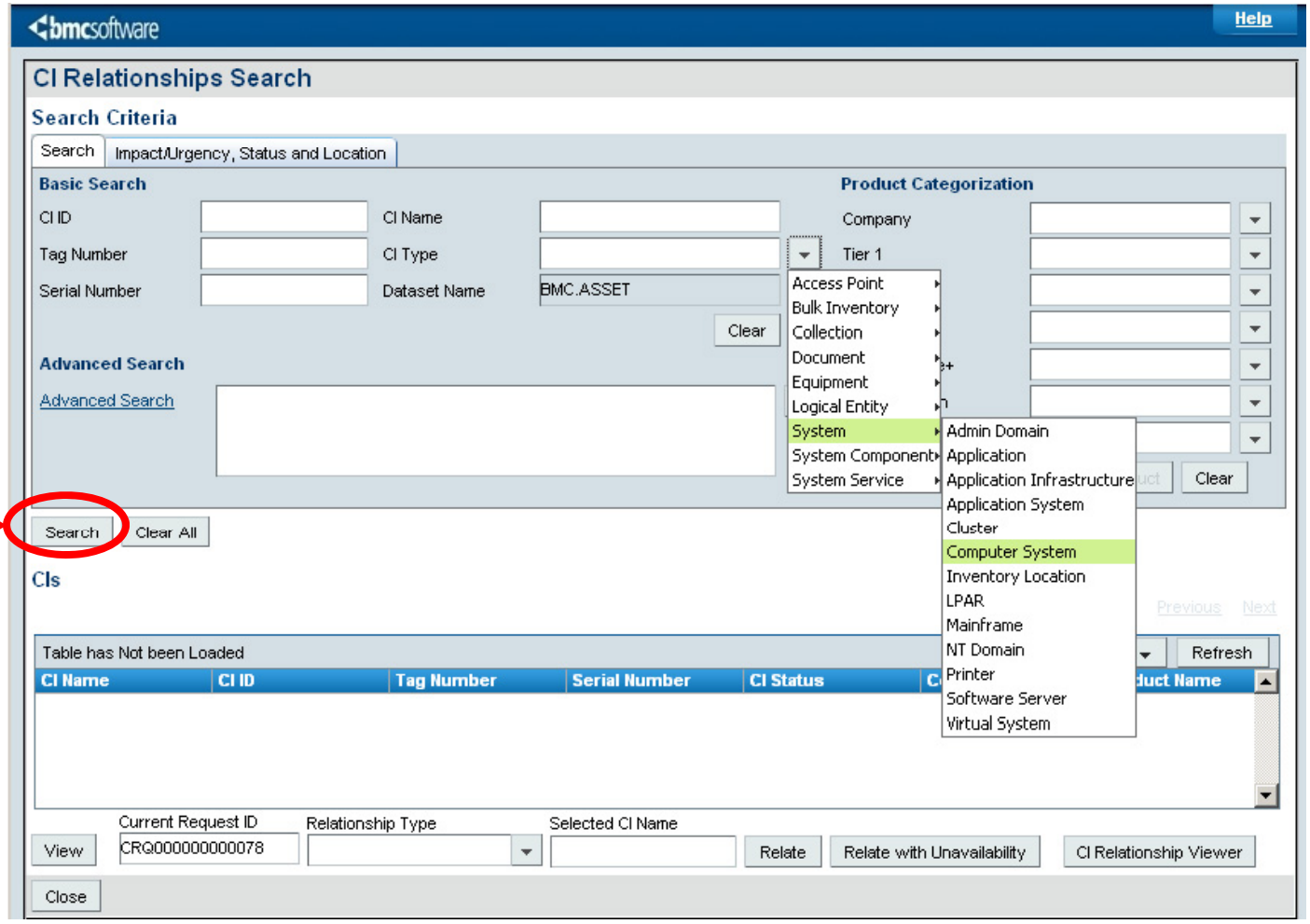
How to Search for CIs

The dropdown menus are one way to locate your CI.

In the “CI Type” field, click the down arrow.

(In our example, we chose System > Computer System.)

Click “Search”



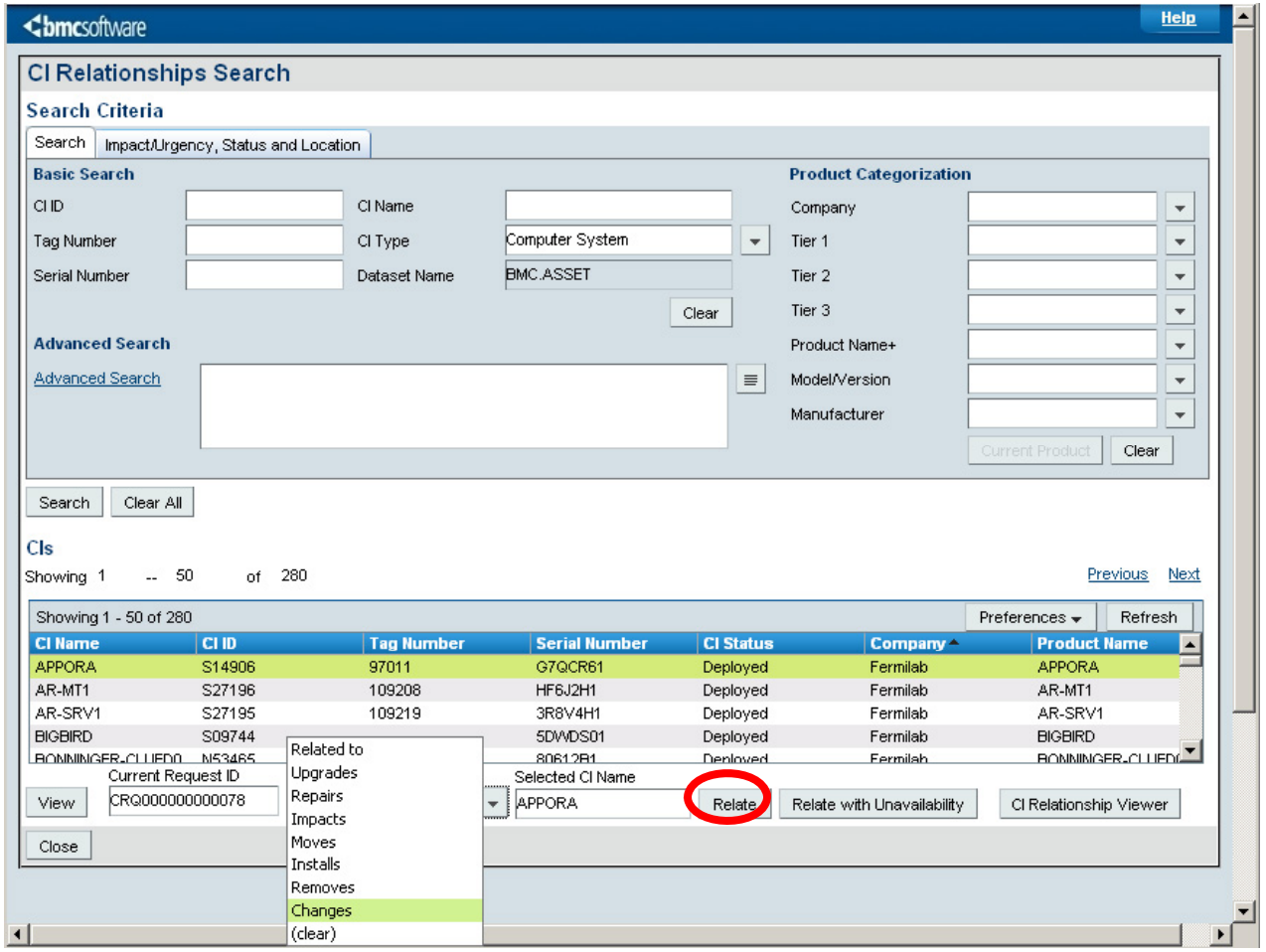
How to Search for CIs

Once you locate your CI(s), you must relate it to the Change Record

1. Highlight the appropriate CI.
2. Click the down arrow to Select the “Relationship Type” from the dropdown menu.
3. Select the most appropriate choice for your activity.
4. Click “Relate.”

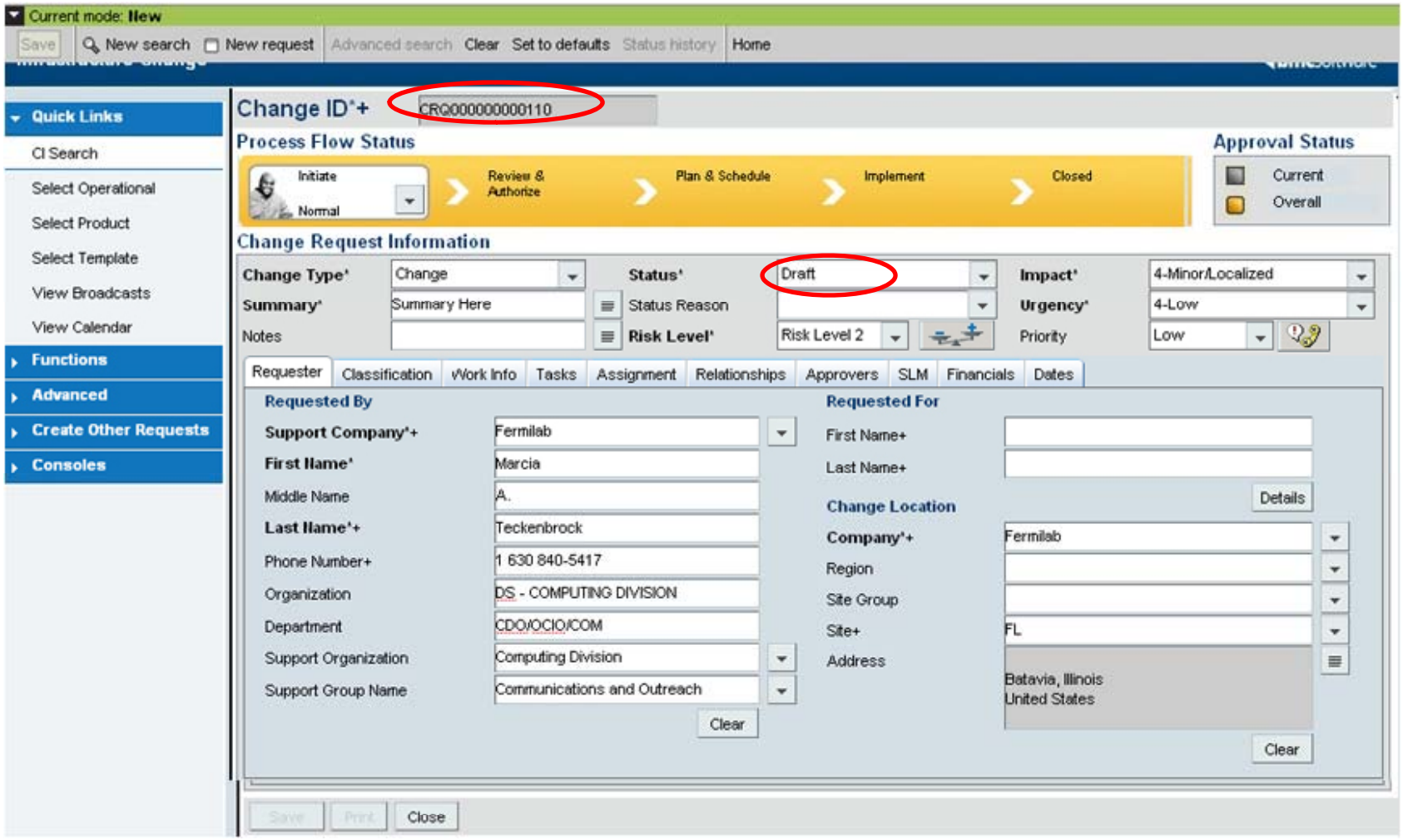
A pop-up window will tell you it worked.

5. Save your Ticket.



Creating a Change

Note that your Status is still “Draft” and that you now have a Change ID number.

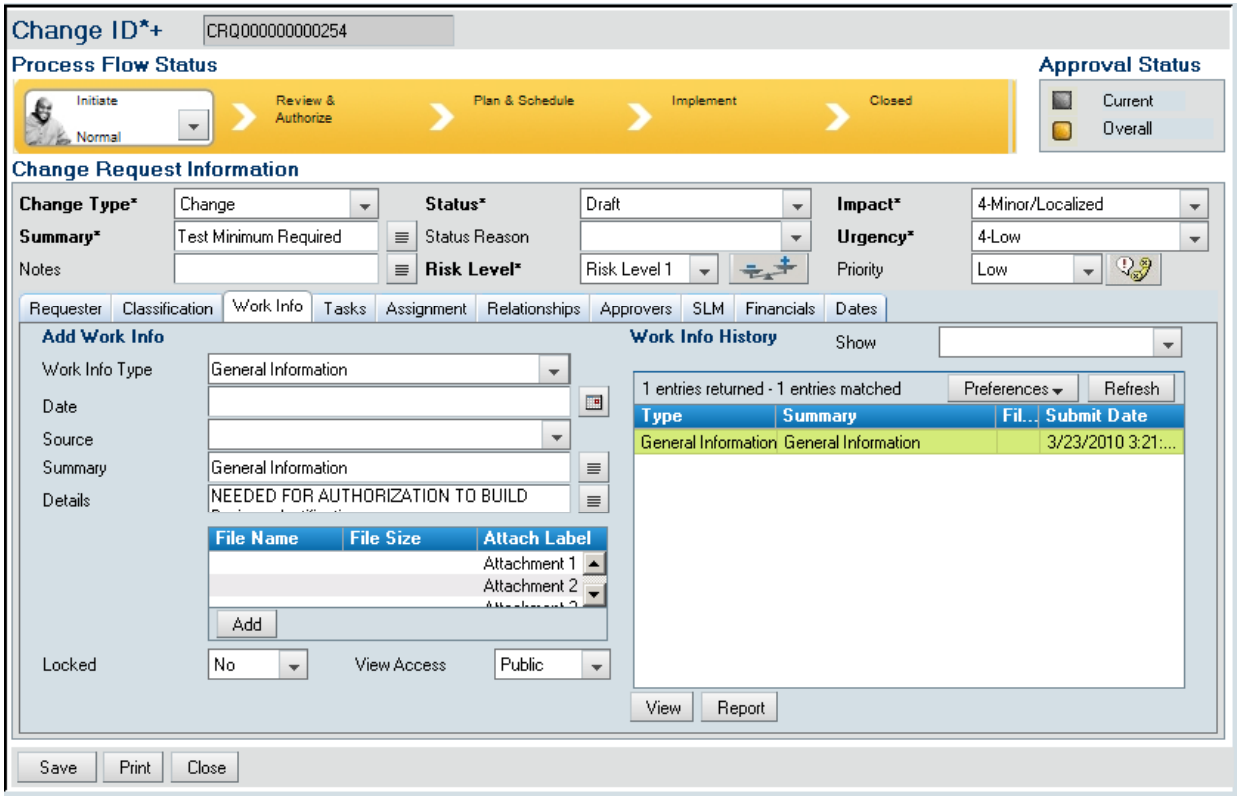


Creating a Change

On the “Work Info” tab, Select a Work Info Type, Enter a Summary and in the details section, enter all the information needed for Authorization to Build and later all the information needed for Approval to Go Live.

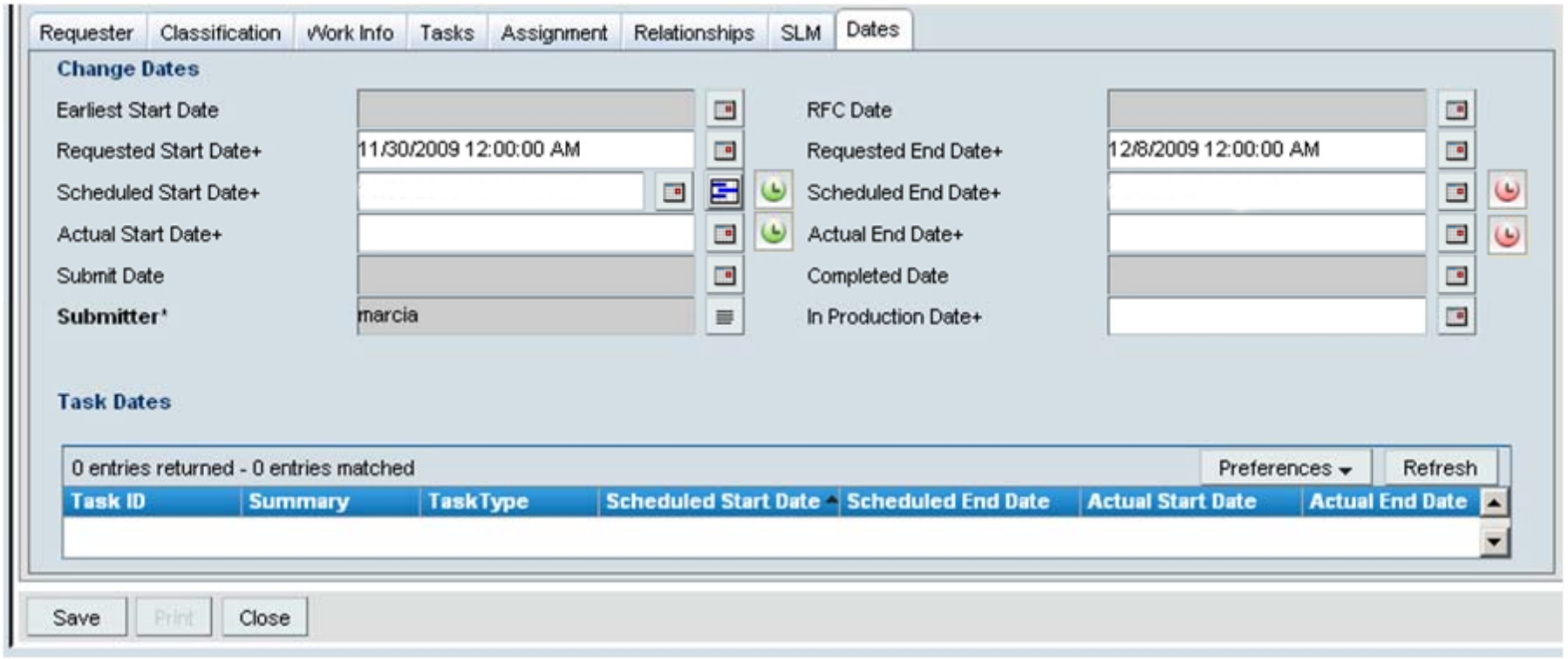
***All of this information may be put into ONE Work Info Entry

Note: You must SAVE your record after you update each Work Info entry, otherwise you will only change the last entry you updated!



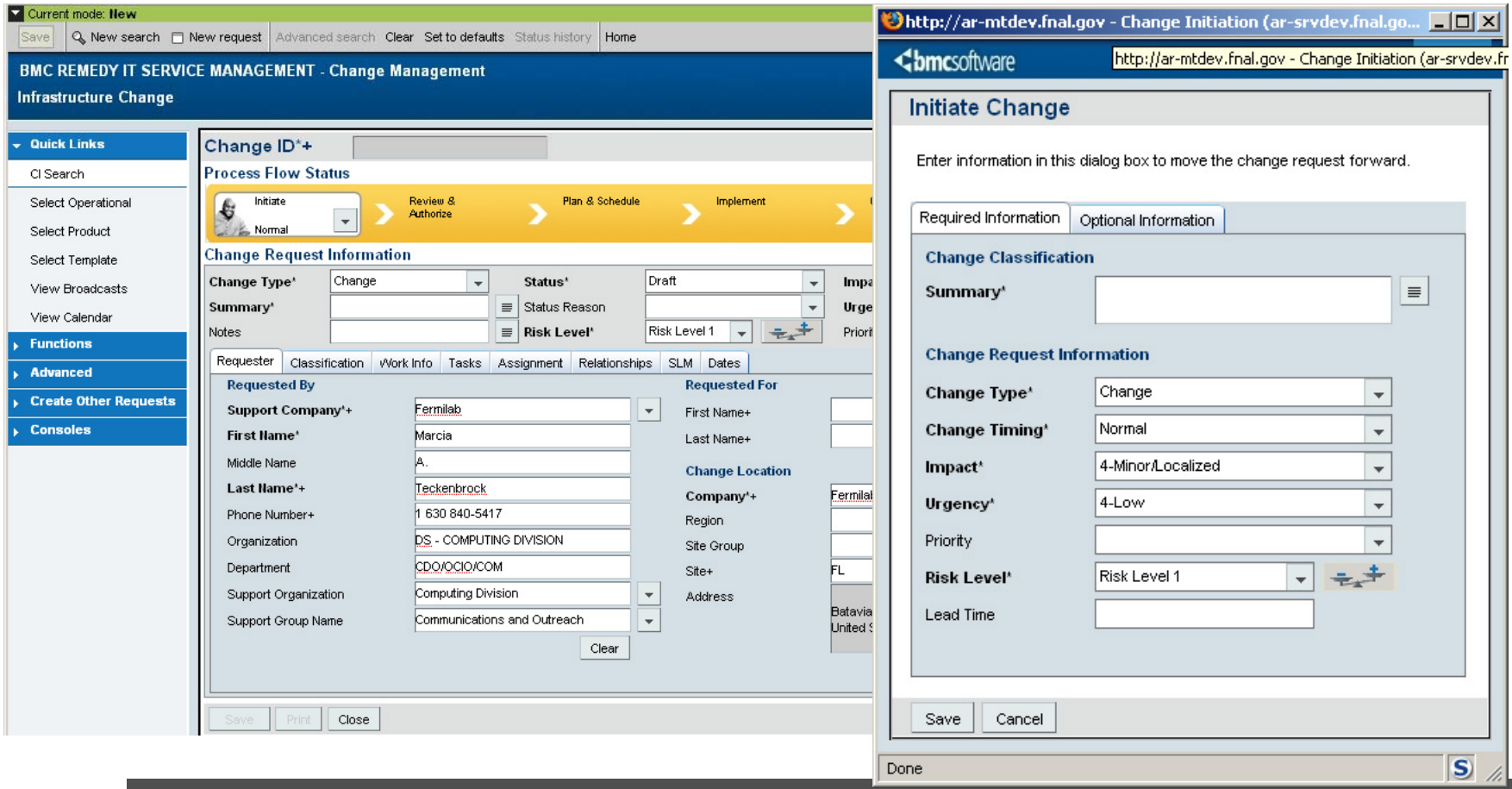
Creating a Change

1. Go to the “Dates” tab and enter your dates and times in the “Requested Start Date” and “Requested End Date” fields (These are your *proposed* IMPLEMENATION dates and times.
2. Click “Save.”



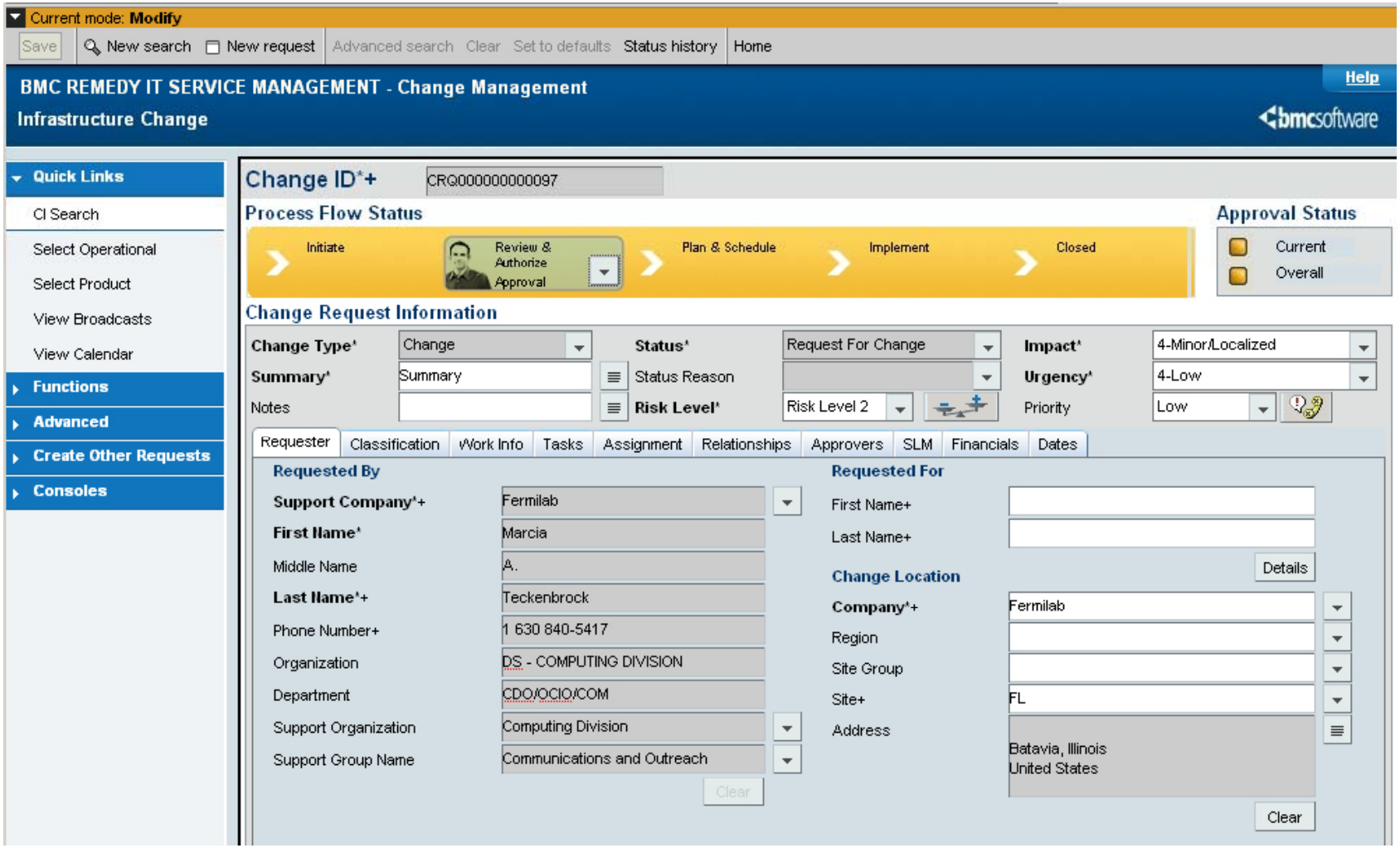
Creating a Change

1. From the main screen, select the dropdown in Yellow Brick Road (YBR) next to “Initiate”
2. Select “Next stage.”
3. “Initiate Change” box will pop up if you forgot to fill out a required field. Verify information and populate any field you haven’t already populated.



Creating a Change

At this point, you are done with the Change. It is now ready for Change Management authorization.

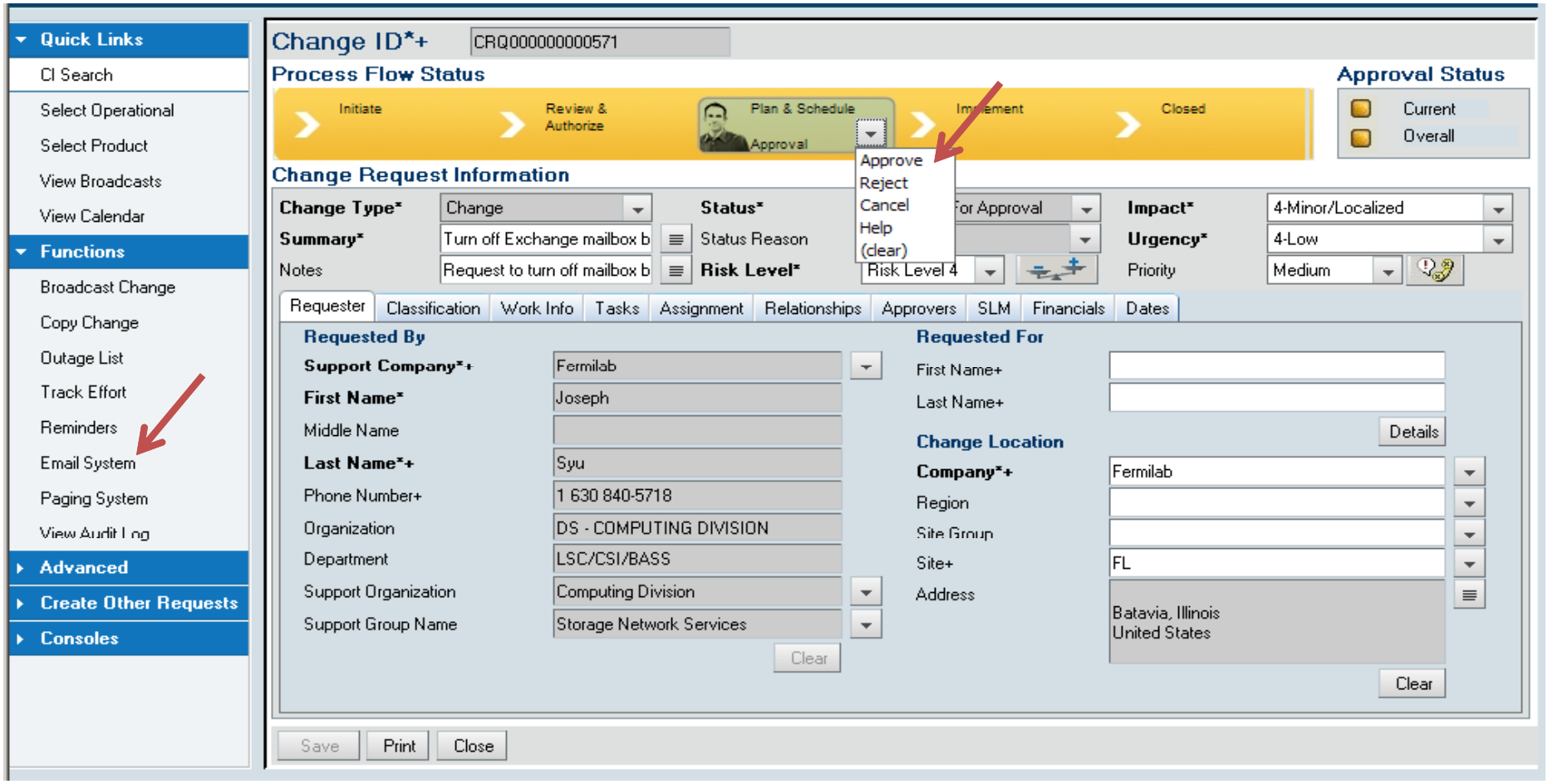


Creating a Change

- What happens next?
  - Your change will go to your manager and then to Change Management for review.
    - They may reject the change, asking you for more information.
    - They may approve it as-is.
    - They will require someone to represent the change at a Change Advisory Board (CAB) meeting if it is a Major Change (Risk Level 5).

Approving the Change

The group leader will Approve/Reject your change by Searching on the Change (see previous Searching For a Change slides) and the use the Yellow Brick Road to approve or reject the change. An email should be sent explaining the reason for the rejection.



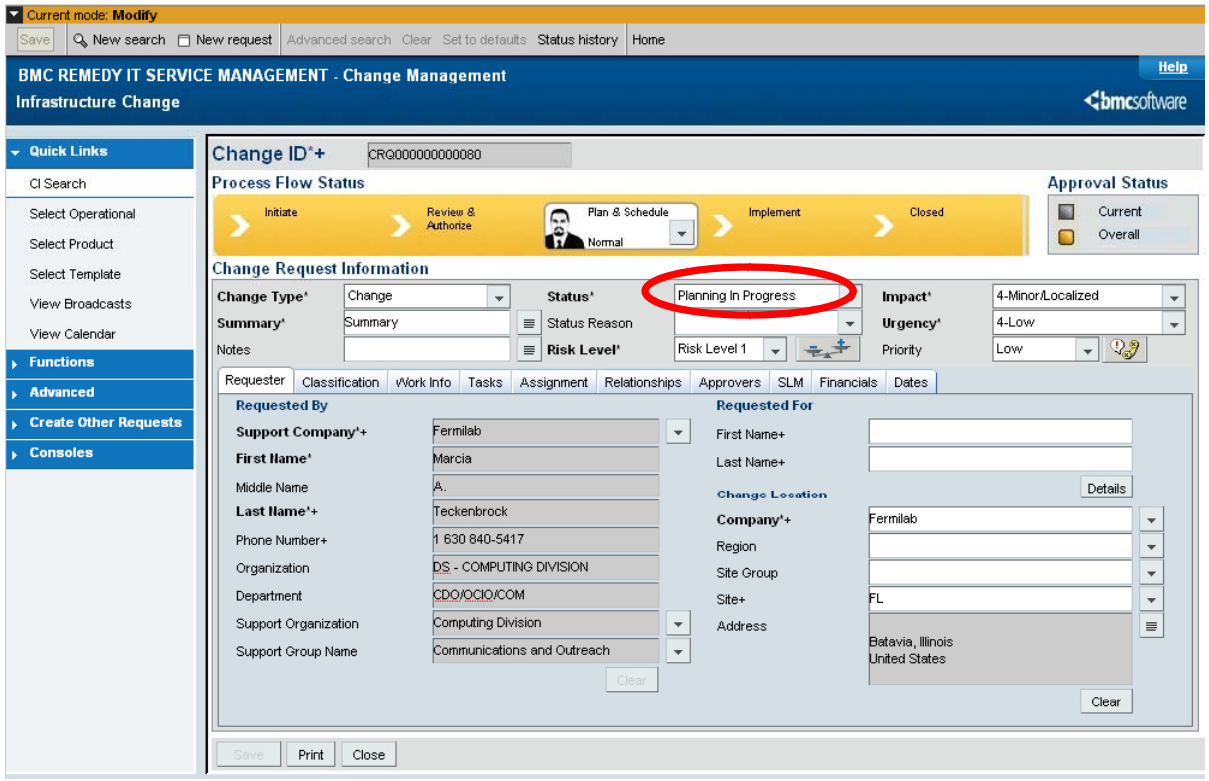
The Change Manager

- Your requested change is being considered by the Change Manager.

For the purposes of this training, we'll assume that the Change Manager approved your Change Request.

Working Your Change

Following Change Manager authorization, the status will change to “Planning in Progress.” (You should get notified by email.)



Working Your Change

- Now you may begin working on your change (ordering service, writing code, testing, etc.).

- Before you can schedule this Change, you need to update your Change Record with all the information needed for Approval to Go Live (Test Results, Install Plan, Backout Plan etc…)

Working Your Change

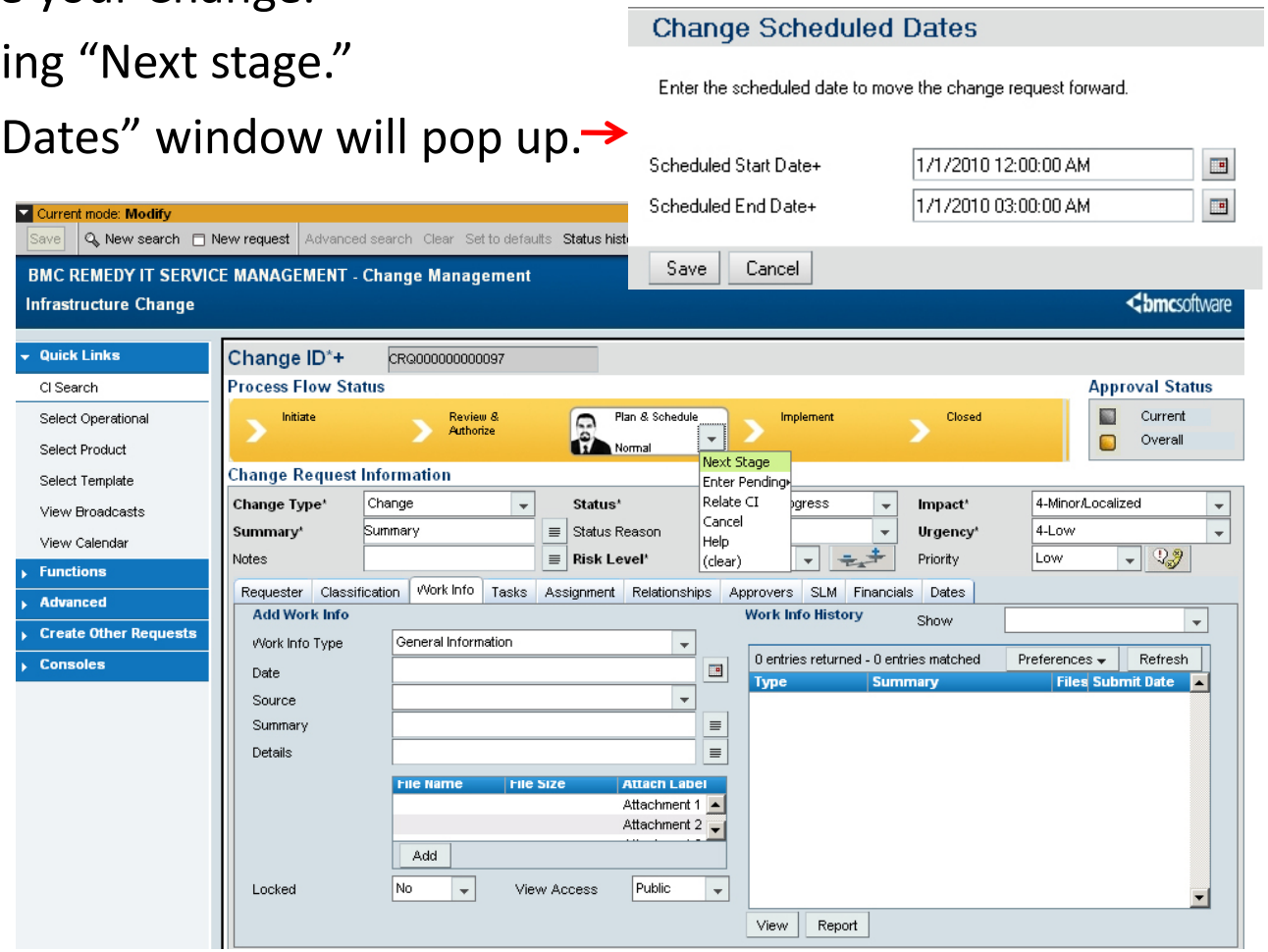
Now it's time to schedule your Change.

Follow the YBR by selecting "Next stage."

The "Change Scheduled Dates" window will pop up.

Enter your proposed implementation dates/times and Click "Save."

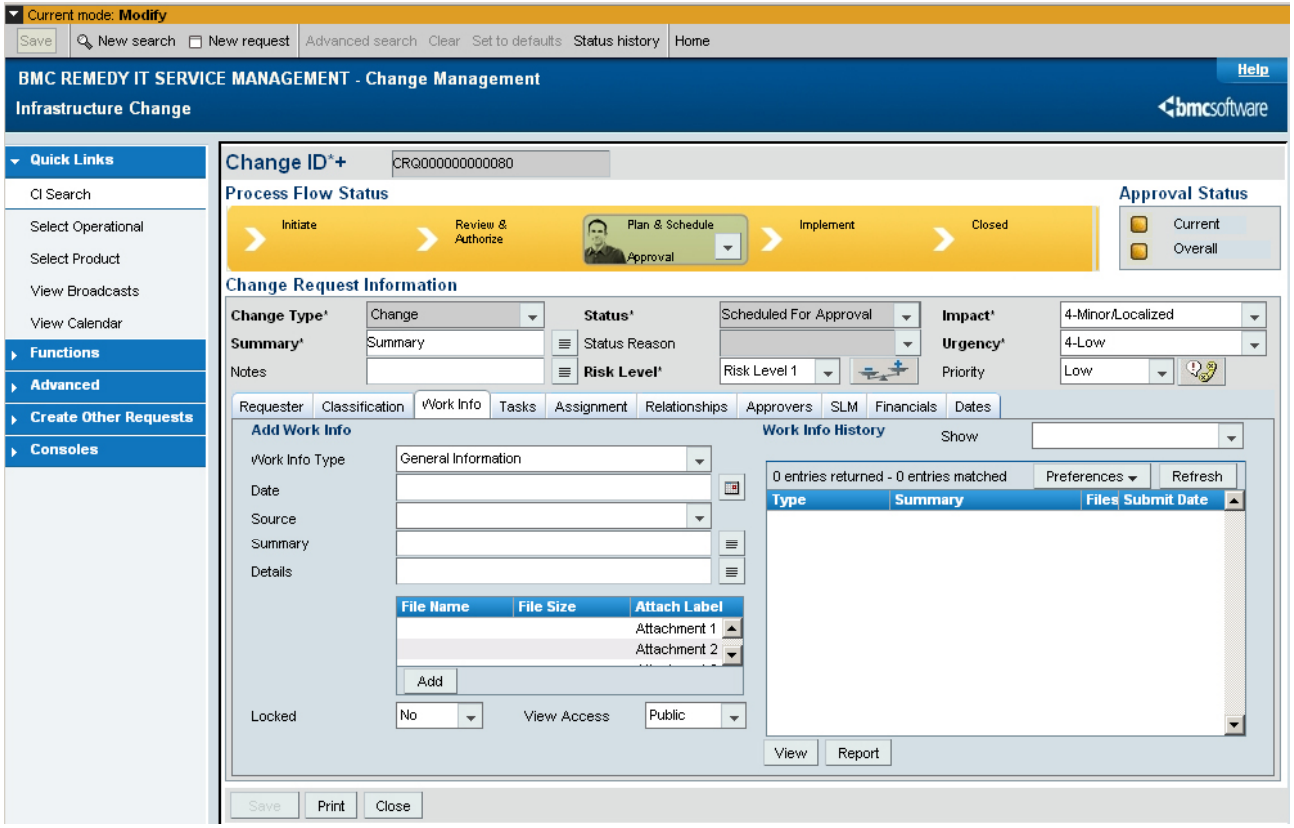
The Status will change from "Planning in Progress" to "Scheduled For Approval."



Note: The status "Scheduled For Review" may show up temporarily, after refreshing your change record, it will be on "Scheduled for Approval."

Working Your Change

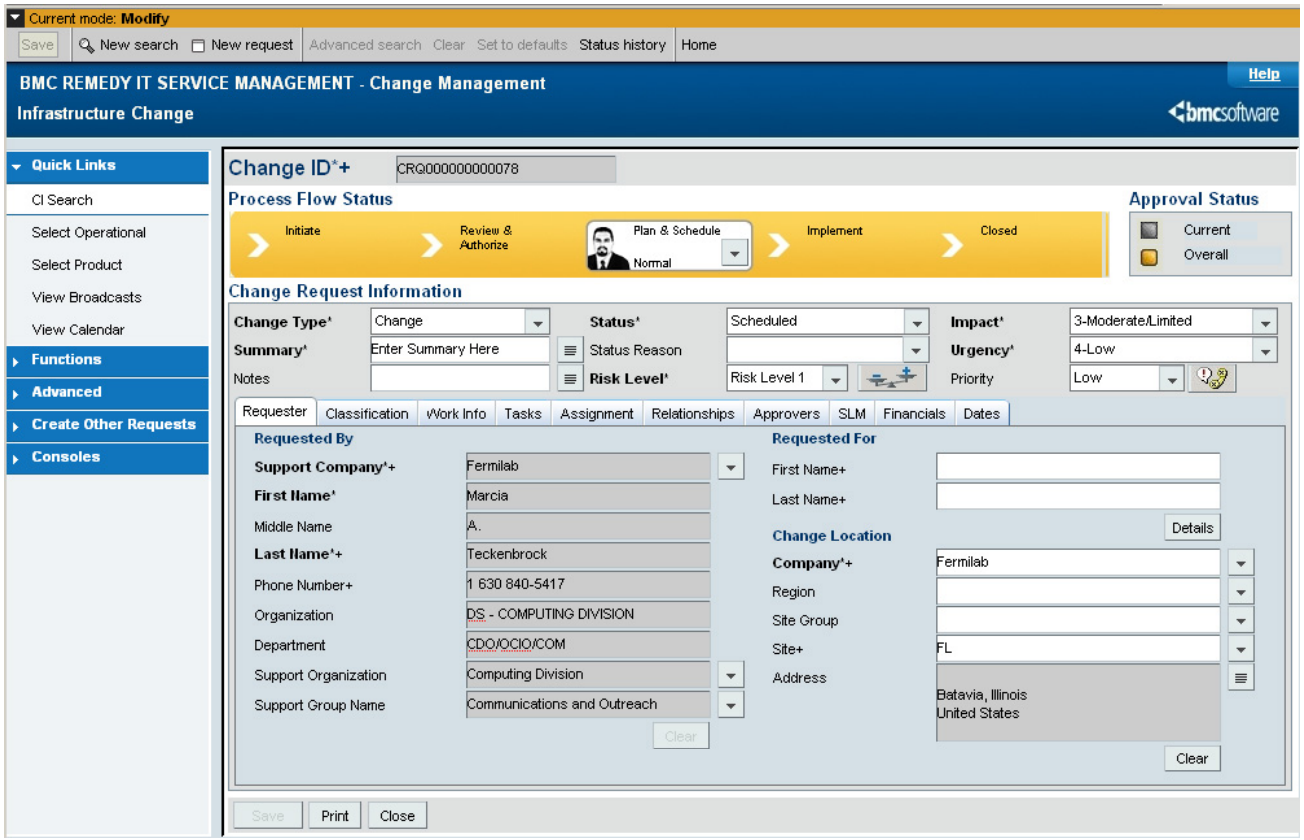
- Your Change Request will go to your manager for approval and then to the Change Manager for approval.
- The Change Manager will either approve your request, reject your request, ask for more information, or ask you to go to the CAB for a Major Change.



Working Your Change

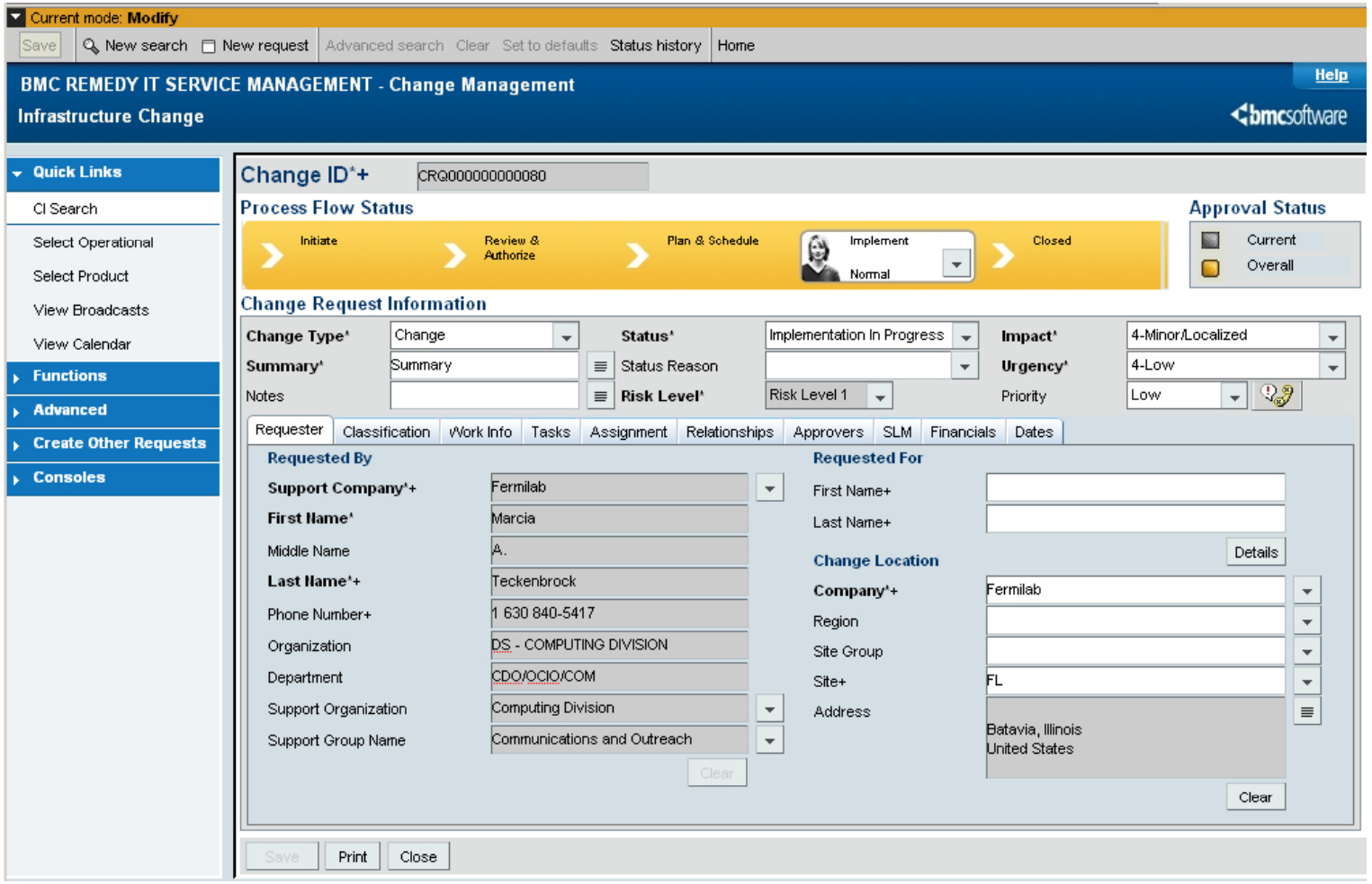
After the Change Manager has approved your request, your ticket will change to the status of “Scheduled.”

Your work is now scheduled (either for the implementation date/time you provided or the date/time provided by the Change Manager if there was a conflict).



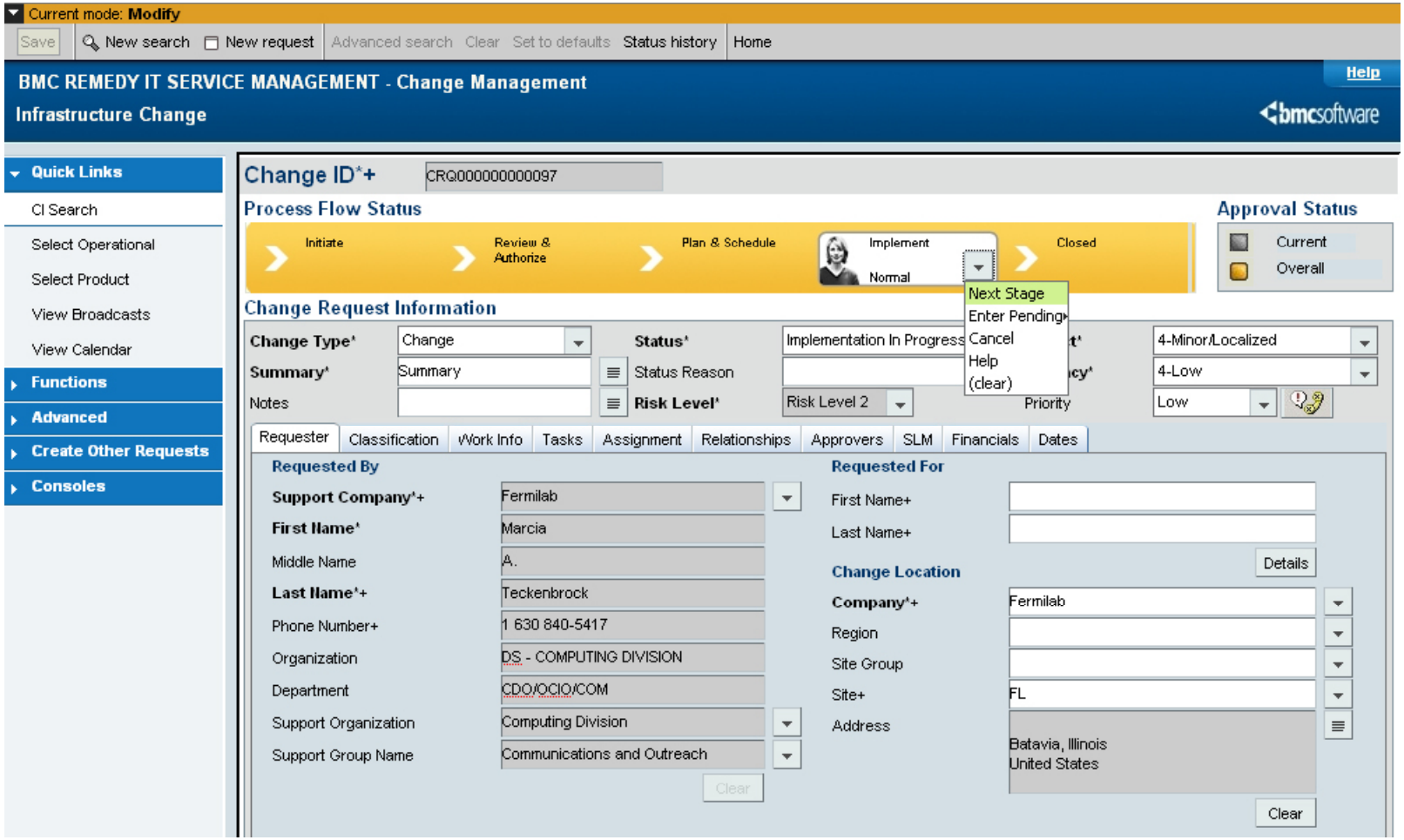
Completing Your Change

When you begin your Change, open your Change Record, and click “Next stage.” (This is the only time you will see the Status, “Implementation in Progress.”)



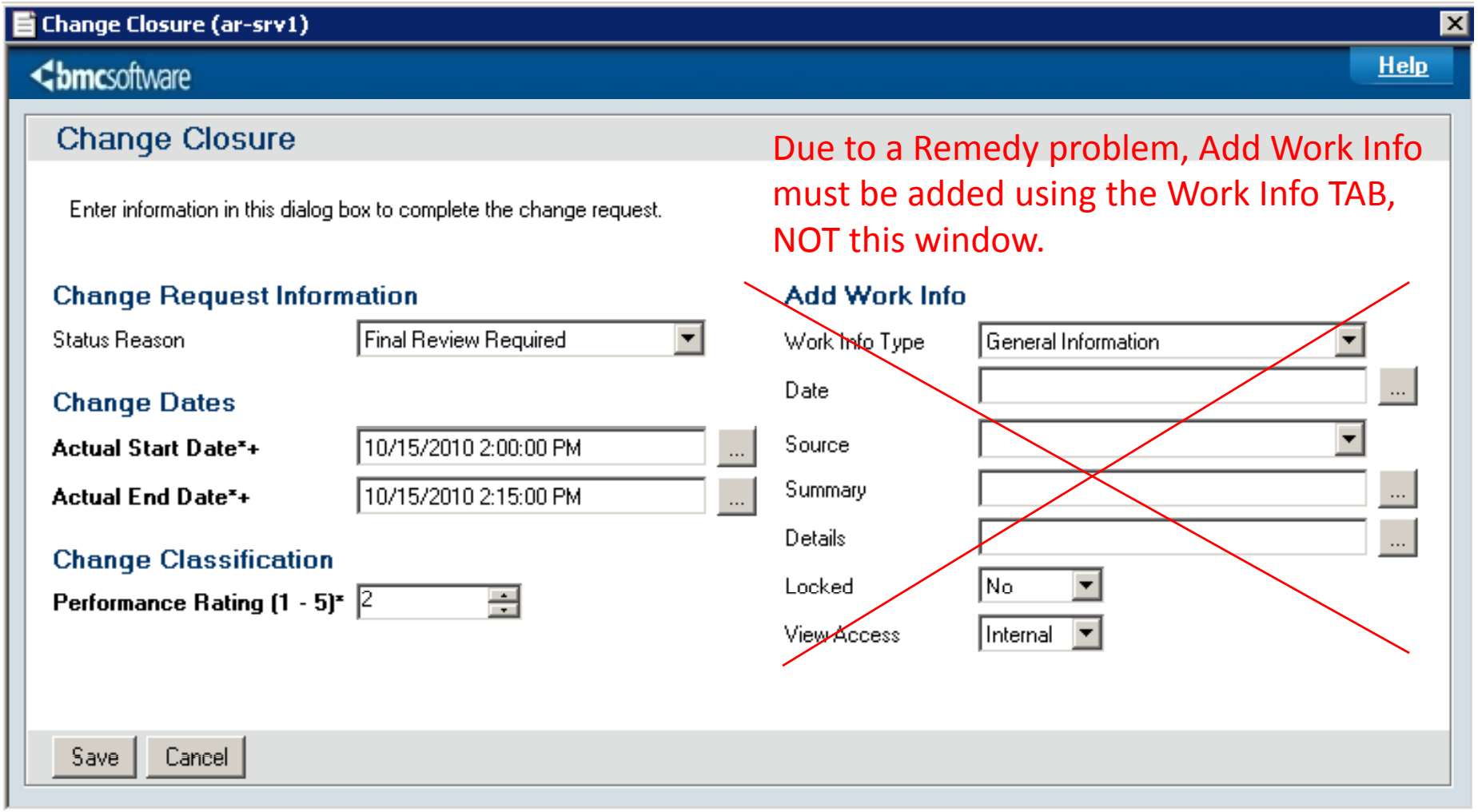
Completing Your Change

When you finish your Change, open your Change Record and click “Next stage.”



Completing Your Change

Please fill out the fields using the guidance on the following 3 slides:



Completing Your Change

Status Reason Field

Select "Final Review Required"	If this is NOT a standard change
Select "Final Review Complete"	If this is a standard change
Select "Additional Coding Required"	If there are known issues that will need to be resolved with a subsequent change request (this selection overrides the two previous selections, e.g. does not matter if this is a standard change or not) Note: There is a request to change this poorly worded dropdown field to "Additional Changes Required" or "Additional Action Required"

Actual Start Date

Fill in actual start date and time

Actual End Date

Fill in actual end date and time

Completing Your Change

Performance Rating

Select "1"	If Successful - No known problems at time of implementation
Select "2"	If Successful with issues. Successful with issues means that the change was installed, issues were detected, and the change was left in place.
Select "3"	If Unsuccessful. Unsuccessful means the change did not resolve the main purpose of the change. The change was left in place because backing out the change was not desirable.
Select "4"	If Backed Out – Backed out means that the change was removed after its installation.

If the change was "Successful with issues", "Unsuccessful", or "Backed Out", you must fill out the Add Work Info fields.

Work Info Type
Select "Install Results – Details"

Date
Select today's date

Summary
Use default (Install Results – Details)

Completing Your Change

Details

Describe the issues, the reason the change was considered unsuccessful, or the reason it was backed out.

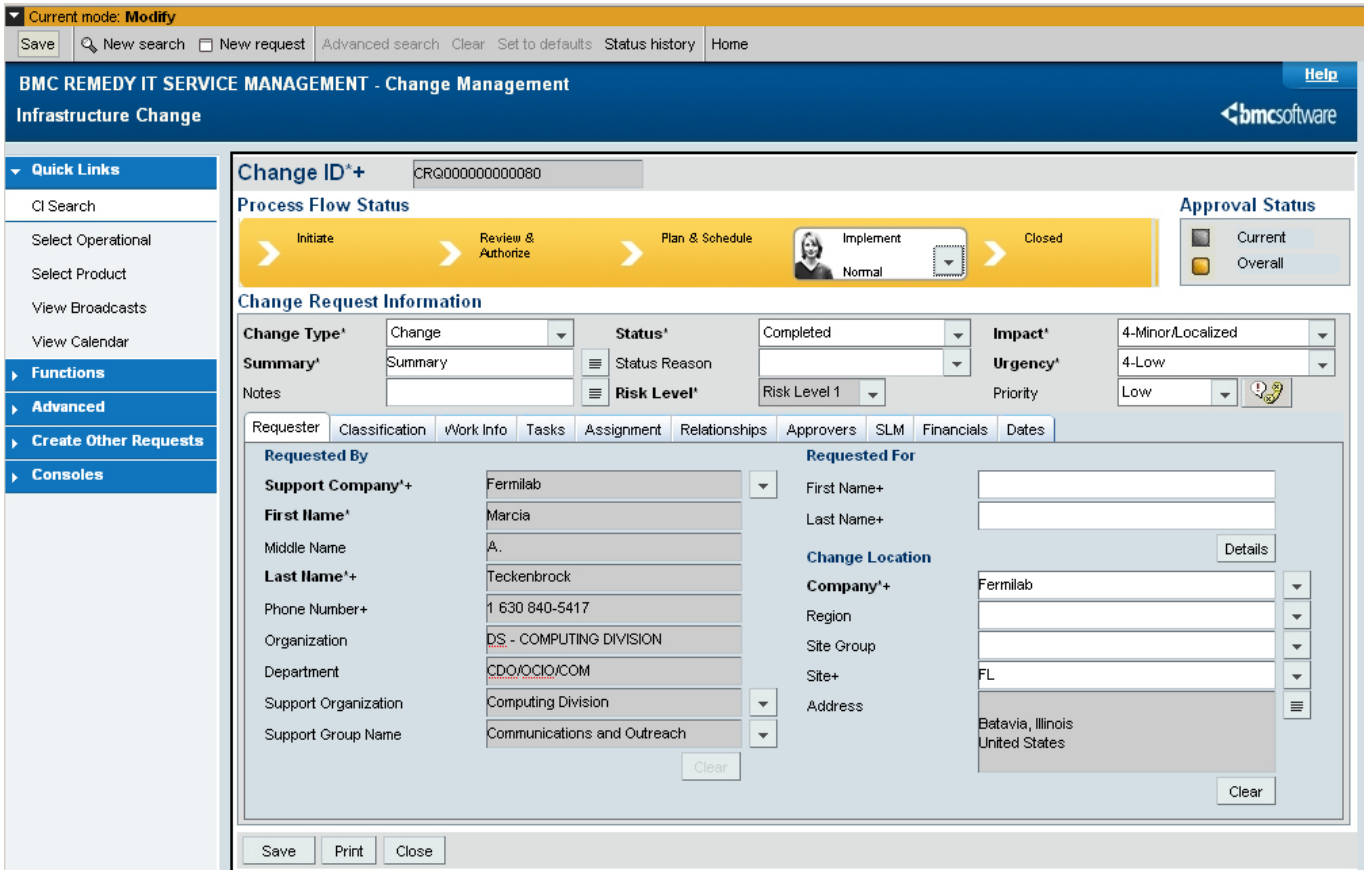
Example 1: The change was successful with issues. The new web screen works as designed, however it was noted that the word "Advisery" was spelled wrong. A new RFC will be entered to correct the spelling of the word "Advisory".

Example 2 : The change was unsuccessful. The updated form from Oracle did not resolve the problem with not being able to approve John Smith's timecard from three months ago. The change will remain in production because any further patches from Oracle will require us to be on the latest revision of the form and the change did not cause any new problems.

Example 3: The change was backed out. We were unable to boot up the server with the upgraded OS. The old OS was put back in place per our backout plan.

Completing Your Change

You're almost done.

Now your change needs a Post Implementation Review (PIR).

Only the Change Manager can close the Request for Change (RFC).