REMEDY ITSM
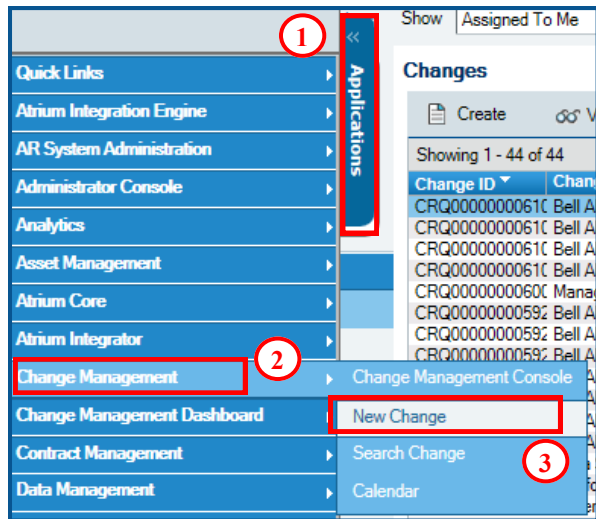## CHANGE MANAGEMENT REQUEST CREATION

CHANGE CREATION

A Change Request can be initiated from the Applications Menu or from within another form:
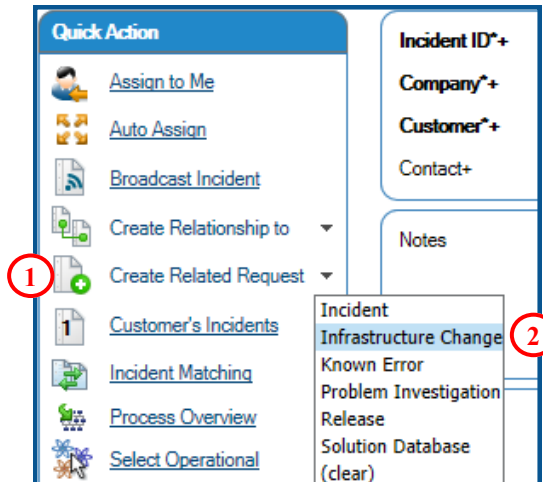
Initiating from the Application Menu:
1. Select **Application**
2. Select **Change Management**
3. Select **New Change**

Initiating from within an Incident or Problem:
1. In the Quick Action area, click the arrow by **Create Related Request**
2. Select **Infrastructure Change**

POPULATING THE FIELDS OF A CHANGE REQUEST

1. The **Change Coordinator** and **Coordinator Group** is automatically populated from your login id but can be changed if necessary.
2. **Change Location** is prepopulated but can be changed if required in order to accurately reflect the company the change is being implemented for.   You can search the site list by clicking the ✎ icon

3. Select Impacted **Service +** (Based on Customer) that relates to the Change Request you are creating
4. **Template+** allows for rapid creation of a Change Request based on predefined fields. Click to use a template 🔍 (more details below)

5.   **Summary** is a brief 100 character or less description of the Change Request. *This must be populated in order to save the Change.*

6.   **Notes** is to be populated with the detailed description of the Change Request.

Note: **Bolded** fields are Mandatory!

8. **Class** defines the timing of the Change. The Default is <u>Normal</u> but can be changed by selecting a different value from the drop down provided

9. **Change Reason** Select from the drop down

10. The **Target Date** can be added by clicking on the calendar icon, <u>this is not the Change Window</u>

11. **Impact** of the Change to the Customer/Business

12. **Urgency** of the Change to the Customer/Business

13. **Priority** is determined by Impact* & Urgency *

14. **Risk Levels** range from 1 to 5, with 5 being the highest risk and 1 being the lowest. The Risk Level is determined by the Impact and response to the Risk Assessment question.

15. **Risk Assessment Questions** are used to identify the technical risk of the change. Click [icon] to see the questions.

Field		Value
Class*	(8)	Normal
Change Reason	(9)	
Target Date	(10)	
Impact*	(11)	4-Minor/Localized
Urgency*	(12)	4-Low
Priority	(13)	Low
Risk Level*	(14)	Risk Level 1 - Minimal (15)

CLASS Values:

No Impact:
Used for Non-Managed Change Activity. Approvals are required.

Standard:
Used for Pre-Approved Change Activity. Approval by Change Management is required.

Normal: (Default Value)
Is a normal activity that meets the Change Management process requirements, including Lead-Time and approval requirements.

Expedited:
Requires accelerating the Normal Change Process and is driven by something other than an incident or problem. A **Timing Reason** must be selected and approvals are required.

CLASS Values Continued...

Emergency:
Requires acceleration the Normal Change Process and is driven by an incident or problem. It must have an incident or problem associated and requires approvals to proceed.

Latent:
An 'after the fact' Timing used for **restoration of services only**. Used when approvals are not expected because support is responding to an outage. MUST be an open Critical or High urgency incident or problem record that this change will correct. Change Request must be submitted to Change Management within 24 hours of implementing change, including notifying Submitter's Manager, Client Representative and Change Manager.

16. **Status** defaults to Draft in the Initiate stage

17. Select the **Change Manager Group** by clicking the drop down arrow and drilling down to the group required

18. Select the **Change Manager** from the drop down list

19. **Save**

Tip: To quickly select the Change Manager type in the Change Manager name only and hit enter to have the group auto-populated.

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Field		Value
Status*	(16)	Draft
Status Reason		
Manager Group*+	(17)	Change Management IT Services B
Change Manager+	(18)	Cynthia Best
Vendor Group+		
Vendor Ticket Number		
External Ref Number		

(19) Save | Next Stage | Print

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*Tip: If you don't know who the Change Manager should be you can **Auto Assign** the **Manager Group** by clicking on this icon 👤 next to the field. This will pop a new window with a list of Manager Groups that best match the information entered on the Change Request so far. The most qualified is at the top of the list provided.   Select the appropriate group and click "OK". To view further Assignment criteria **Select "View".***

ADDING WORK DETAILS TO THE CHANGE

The Work Details Tab is used to add additional information like attachments, rack or cross impact information or customer approvals

1. Select the **Work Detail** tab
2. Under the **Add Work Info** Section add details of your work information under **Notes**
3. To add an **Attachment** click the folder icon.
4. By clicking **More Details,** you can expand the section to enable adding additional details such as adding up to two more Attachments
5. Under **Work Info Type**, select the type of Work Information to add from the drop down list provided
6. If you select "Yes" for **Locked**, the Work Log cannot be modified once it has been saved
7. Under **View Access,** Selecting "Internal" will allow only users with Change Management Permissions to view the entry. Selecting "Public" will allow all those with access to Remedy to see the entry
8. Click **Add**

AD-HOC APPROVERS

The Change Coordinator or Change Manager can add Ad-Hoc approvers to the infrastructure change request.

1. Click on the "Add" button below the list of approvals.
2. Specify the group or individual approver that you want to add.
3. Select the approval phase to add the approver to.
4. Click save.

Tip: Only current approvers or ad-hoc approvers can be deleted from a change. If a future default approver needs to be deleted it can be done when the change moves to the approval phase that the approver is defaulted to.

Note: All Approvals except Change Management should be added to the **Business approval phase**. If the change is already in Implementation Approval you'll only be able to add them to that phase.

1. Select the **Categorization** tab
2. The **Change Location Company** should reflect which company the change is for.
3. Select applicable **Operational Categorization** Tiers as required
4. **Product Categorization** tiers are prepopulated based on the Service + selection on the Request Form but can be modified as required

Operational Categorization may be auto-completed when a Change template is selected. In the event it is not populated, you will need to categorize the Change Request.

⭐ **Tip:** *Type in a Product **Name+** and hit enter to populate the rest of the product categories.*

| Work Detail | Categorization | Tasks | Relationships | Date/System | Additional Details |

Change Location Company ② Bell Aliant

Operational Categorization

Tier 1+ ③

Tier 2

Tier 3

Clear

Product Categorization

Tier 1 ④

Tier 2

Tier 3

Product Name+

Model/Version

Manufacturer

5. **Install Plan** contains step by step implementation details.
6. **Test Plan** contains both pre (when applicable) and post testing information
7. **Backout Plan** contains the steps to backout the change or the contingency plan if unable to back out.
8. **Service Impact** is used to identify the services, applications and users who will be impacted by the change.
9. **Post Implementation Review** is completed when closing a change and captures the outcome, as well as an issues that were encountered during the change.

A template is used to populate these fields with mandatory questions that need to be answered.

 A. Click on the **blue arrow icon** next to each of the above fields.

 B. Click on the **text box icon** to display the text of each template in a separate window.

 C. **Answer the questions** for the templates for each of the fields: Install Plan, Test Plan, Backout Plan, Service Impact and Post Implementation Review (upon closing)

 D. Click **OK**

Install Plan ⑤

Test Plan ⑥

Backout Plan ⑦

Service Impact ⑧

Post Implementation Review ⑨

Ⓑ Ⓐ

Change – Install Plan

1. How long will the change take to implement?:
2. How many resources are required?:
3. Scheduling Requirements (Normal maintenance window or a is a negotiated maintenance window required, if so, why?):
4. Duration of Preparation Effort:
5. Is Data Centre access required? (Yes or No. If yes, please associate the applicable Data Centre CI):

Describe the detailed implementation plan below (Or if there's MOP attached to the Change, please include a high level implementation plan below):

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Ⓓ OK Cancel

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ADD TASKS TO A CHANGE

If the Change Request requires pieces to be performed by different groups or individuals tasks can be added by:

1. Select Tasks tab
2. Select the Task Type from the drop down
3. Click Relate, a new window opens
4. Select a Template from the list returned if Task Template or Task Group Template was selected and click on Relate.

Note: You can add an "individual task" or a "task group" (a set of predefined and sequenced tasks) to a Change

Tip: *Templates make it easy to add a task*

5. If Ad hoc was selected populate the Task Name, Summary, Assignment and Dates fields.
6. Click Close

RELATING A CONFIGURATION ITEM TO A CHANGE REQUEST

When relating your Change Request to a CI:

1. Select the **Relationships Tab**
2. In the **Create Relationships** section below, Click the Drop down arrow next to the **Search** field to view the request type list and select the type of request you would like to create a relationship to.

Tip: *In order to use this functionality you must have the Summary* section populated first.*

3. Select **Configuration Item**
4. At the top of the screen input the **Search +** criteria and **click the Search button**. This will generate a list of CI's. Select one from the list.
5. Select a **Relationship Type** below.
6. Click **Relate**

Note: Click the Advanced Search button to further search the request type selected. This will pop a new box.

Note: Ensure you select the correct Relationship Type ie. Pick "Removes" if the CI is being removed as part of the Change.

RELATING CI UNAVAILABILITY TO A CHANGE REQUEST

If the Change will be making the CI Unavailable the CI needs to be related with an unavailability by:

1. Follow steps above from Relating a CI
2. Click Relate with Unavailability instead of Relate.
3. A CI Unavailability Update screen will open.
4. Select the Unavailability Type
5. Select the Scheduled Start and Scheduled End Date.
6. Select Assigned for the Assignment status.
7. If the Assignment is not showing you, select manually for the Assignment is set from radio buttons. Select yourself from the Assignment section.
8. Click Save below.

Note: Ensure the Assignment is set to the Assignee individual level, if not pages may be generated to the Assigned Group.

RELATING ANOTHER TICKET TO A CHANGE REQUEST

You can also relate incidents, infrastructure changes, or other work orders to a Change Request:

1. Go to the **Relationships** tab of the Change Request.

2. At the bottom, select the type of ticket from the list.

3. Enter the ID of the ticket you wish to relate to the WO. Then click the **magnifying glass** button.

Note: You must enter the **entire ID** for the system to find your ticket. A partial ID will not return results.

4. The system will open the relationships Search screen with the matching record.

5. At the bottom of the screen, **select Relate.** Click Ok on the confirmation message. You will be returned to the request screen.

Tip: If you don't know your ticket ID, use the Advanced Search feature to find your ticket.

ADD DATES ON A CHANGE

1. Select the Date/System tab.

2. **Scheduled Start Date** and **Scheduled End Date** are used to indicate the implementation window of the Change.

3. **Timing Reason** is used to indicate things like Negotiated Maintenance Window, Non-Managed or the reason for Expediting a Change.

Note: Timing Reason is required for Expedited Changes.

SUBMITTING CHANGE FOR APPROVAL

When all information is provided the Change can be submitted for approval. **Exercise caution when submitting a Change for approval, fields such as Change Coordinator, Change Manager, Class, Risk Level all get locked down and cannot be modified without the Change being Rejected!**

1. Click the Next Status button and save.

Note: Depending on the Class it may stop at 'Request for Authorization' status or proceed to 'Request for Change' for approvals.

Approval Phase:

Initiate:
Change is in Draft status, change details can be added.

Review Approval:
Change is in Request for Authorization status. Normal changes stop here for Change Management to review the change prior to moving forward.

Business Approval:
Change is in Request for Change status. All business/customer approvals are done here.

Implementation Approval:
Change is in Scheduled for Approval status. The Change is now waiting on the final approval by Change Management to proceed.

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