

REMEDY ITSM CHANGE CALENDAR

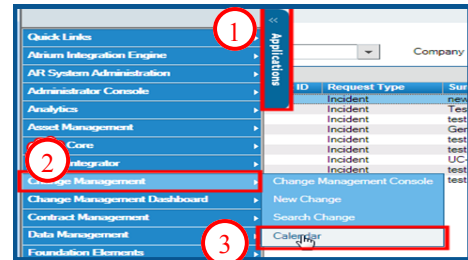
CHANGE CALENDAR

WHAT IS THE CHANGE CALENDAR?

The Calendar is a dynamic console for scheduling, managing, and monitoring incidents, problems, changes, releases, and secondary data sources like the related activities and manifests. It is used to view incidents, problems, changes, releases, planned and unplanned CI outages, and business events occurring in the organization for a given duration

OPENING THE CALENDAR

1. Expand the **Applications Menu**
2. Select **Change Management**
3. Select **Calendar**



CALENDAR VIEWS

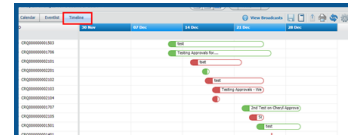
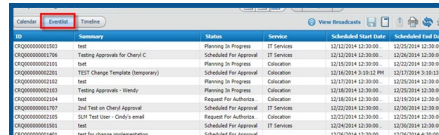
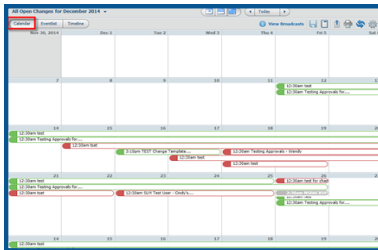
This will open the Calendar in the default view - Monthly.

Multiple Calendar viewing durations are available—Day, Week, or Month. The icons are located at the top of the Calendar. Formats available are:

Calendar

Event

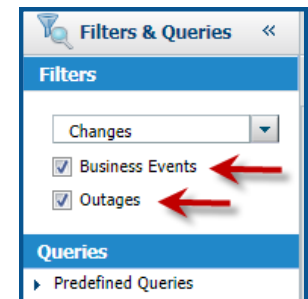
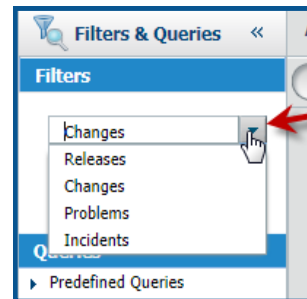
Timeline



FILTERING THE CALENDAR

The Calendar can be filtered to display:

- ▶ **Problems or incidents** with their reported dates and target dates
- ▶ **Changes or Releases** with their scheduled start and end dates
- ▶ **Business events and Activities**
- ▶ **Outages** (CI unavailability) - planned and unplanned.



Other information, such as tasks or manifests, related to the Problems, Incidents, Changes, or Releases can be viewed in the Timeline view of the Calendar.



CHANGE CALENDAR

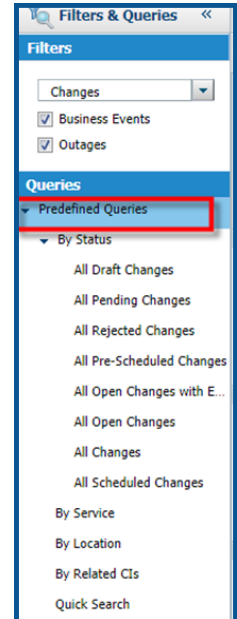
QUERIES

There are two types of Queries:

1. Predefined

The following Predefined Queries are available for Changes:

- ▶ By Status:
 - ▶ All Draft Changes — All changes that are in the Draft status
 - ▶ All Pending Changes — All changes that are in the Pending status
 - ▶ All Pre-Scheduled Changes — All changes with a status earlier than Scheduled
 - ▶ All Open Changes with Extensive Impact — All changes in the Open status and with the Impact defined as Extensive
 - ▶ All Open Changes — All changes in the Open status
- ▶ By Service
- ▶ By Location
- ▶ By Related CI
- ▶ By Quick Search

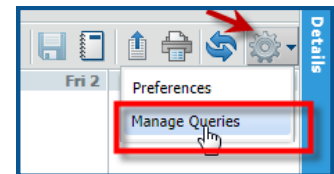


2. User-defined

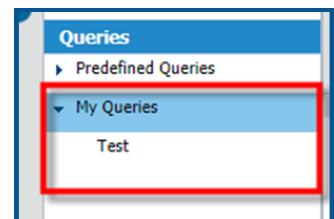
Queries that you can create by selecting the Settings Icon -> Manage Queries in the top right corner of the calendar.

Fill in the fields as required:

- ▶ **Query Name:** Define the name of the query by selecting or entering up to three levels of categorization for the query. The **Query Tier** fields allow three levels of categorization for your search queries.
- ▶ **Data Source:** Select from list provided
- ▶ **Form:** The Form list displayed depends on the data source selected.
- ▶ **Build Qualifications:**
- ▶ **Enable**



New queries that you create are listed under the query tiers that you defined when creating the query in the **Query selection** list of the Manage Queries dialog box. Log off and log on again to view the new queries in the **Queries > My Queries** list in the **Filters & Queries** pane.



NOTES:

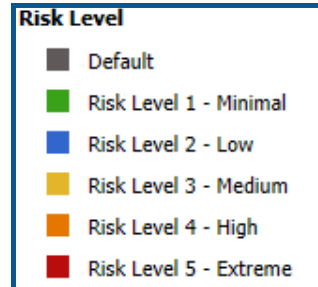
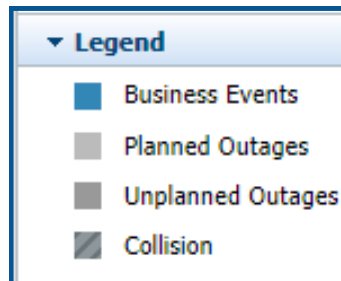
The list of queries that is displayed depends on the value selected in the **Filters** menu. For example, if you select **Change Request**, all queries related to change requests are displayed.

Any saved queries migrated from an earlier version of the Calendar are displayed under **Queries > Predefined Queries**.

CHANGE CALENDAR

LEGEND AND RISK LEVEL INDICATORS

These are located below Filters and Queries



RIGHT CLICK MENU COMMANDS

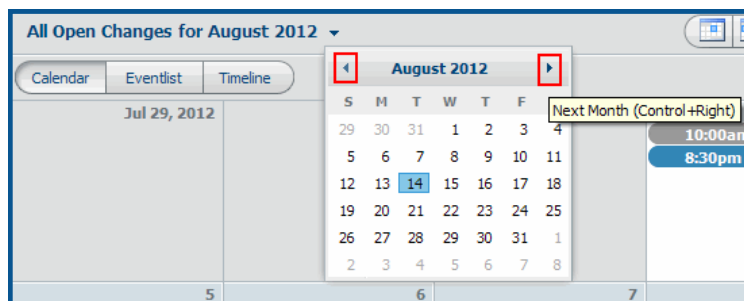
When you right-click on a change or release in a view, or their related tasks or manifest in the Eventlist view, all available commands for the selected record are displayed:

- ▶ Open Request
- ▶ Edit Event
- ▶ Show Approval (if applicable)
- ▶ Service Context

USING THE DATE CHANGER

The Calendar header provides information about the data filters applied and the duration of the calendar data. For example, if the data filter applied is for all open changes and the duration selected is Month, the header is **All Open Changes for August 2012**.

The down arrow next to the header displays the date picker for the calendar



You can perform the following functions on the date picker: Click < and > to move the calendar to the previous or next month. Click on a day in that month to have the Calendar change.

Press **Ctrl+Up Arrow** or **Ctrl+Down Arrow** to move the calendar to the same month in the previous or next year.

CHANGE CALENDAR

BUSINESS BENEFITS

- ▶ Better understand the risk and impact of changes and releases.
- ▶ Because of better planning, you can make more productive decisions about the forward schedule of changes (FSC).
- ▶ Helps you consider potential conflicts by displaying both events and outages for the selected duration.
- ▶ Provides investigative links that help determine whether multiple incidents were created as the result of an outage, enabling you to determine whether the incidents could have been prevented.

MANAGING ADMINSTRATOR PREFERENCES

An administrator can make the following changes:

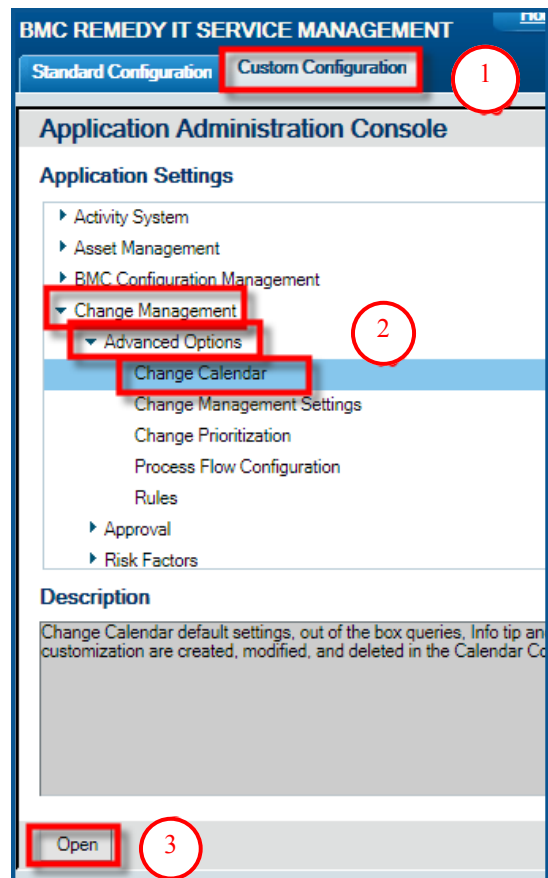
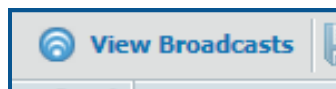
- ▶ Customize the display preferences like the default filter, view, and duration
- ▶ Add or remove fields to be displayed on InfoTips
- ▶ Select the color scheme field and customize the colors
- ▶ Manage custom queries
- ▶ Manage data source status settings
- ▶ Set auto-collision

TO ACCESS MANAGE ADMISTRATOR PREFERENCES

1. From the **Application Administration Console**, click the **Custom Configuration** tab.
2. From the **Application Settings** list, select one of the following options
 - ▶ **Foundation > Advanced Options > Calendar Configuration**
 - ▶ **Change Management > Advanced Options > Calendar** (example on side)
 - ▶ **Release Management > Advanced Options > Calendar Configuration**
3. Click **Open**

BROADCASTING

Broadcasts can be made or updated by clicking on the **View Broadcasts** Button on the top right side of the Calendar.



CHANGE CALENDAR

SETTING ADMINISTRATOR PREFERENCES

Select your preferences under the following tabs:

- ▶ **Preferences**—Query, View, Timespan In, Status, and Auto Collision
- ▶ **InfoTip Template**—All Fields, Info Tips Fields, InfoTip Template
- ▶ **Colors**—Change Request, Release Request, Incident Record, Problem Record
- ▶ **Manage Queries**—Query Tier, Data Source, Form, Build Qualification, Enable Status

mcssoftware

Data source: Changes Default

Company: - Global -

Primary form: CHG:Infrastructure Change

Preferences InfoTip Template Colors Manage Queries

Query: By Status>>All Open Changes


View: Calendar

Timespan in: Months

Status: Enabled

Auto Collision Yes

COLLISION DETECTION

- ▶ This collision indicator is displayed on the Calendar in the Calendar and Timeline views. When you click on the event, all events that collide with the selected one are highlighted in solid shaded blocks 
- ▶ You can view the colliding changes and make a decision about rescheduling any of the colliding events.
- ▶ You can resolve the collision by rescheduling the events from within the Calendar in either of the following ways:
 - ▶ Using the drag-and-drop feature (For changes and releases, in the Calendar and Timeline views, you can drag changes and releases to another date and time and drop them there.)
 - ▶ Selecting the **Edit Event** option from the right-click menu options (Displays a dialog box in which you can update the summary or the start and end date of the request.)

INTEGRATION WITH EXTERNAL CALENDARS

You can export the calendar schedule for the selected period to a file, which you can then import into an external calendar, like the Outlook Calendar, to add the exported events to that calendar. You can view the schedule for changes, releases, incidents, problems, and outages within the personal calendar you use on a day-to-day basis. These entries are not dynamic, but you can add these events for a selected time period within your existing calendar.

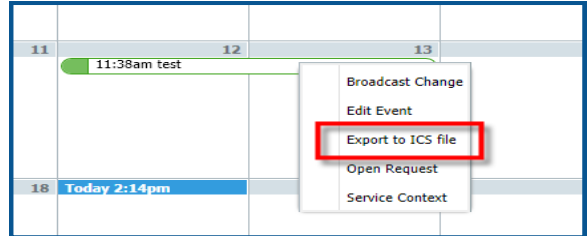
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HOW TO EXPORT CALENDAR EVENTS

- ▶ To export a selected event, in the Calendar view, right-click the event that you want to export and select the **Export to ICS** option.
- ▶ To export all events seen on the Calendar, in the Calendar view, click the **Export all Events to ICS** file icon at the top right corner above your Calendar.
- ▶ The data is exported to an ICS file, which is downloaded to your computer. For information about how to import this ICS file in your personal calendar, see your application documentation



GLOSSARY

- ▶ **Planned outage** is the planned, scheduled downtime of a CI. Typically, a planned outage occurs during a scheduled change.
- ▶ **Unplanned outage** occurs when the CI experiences a sudden, unpredictable service downtime. Typically, an unplanned outage is caused by an incident.