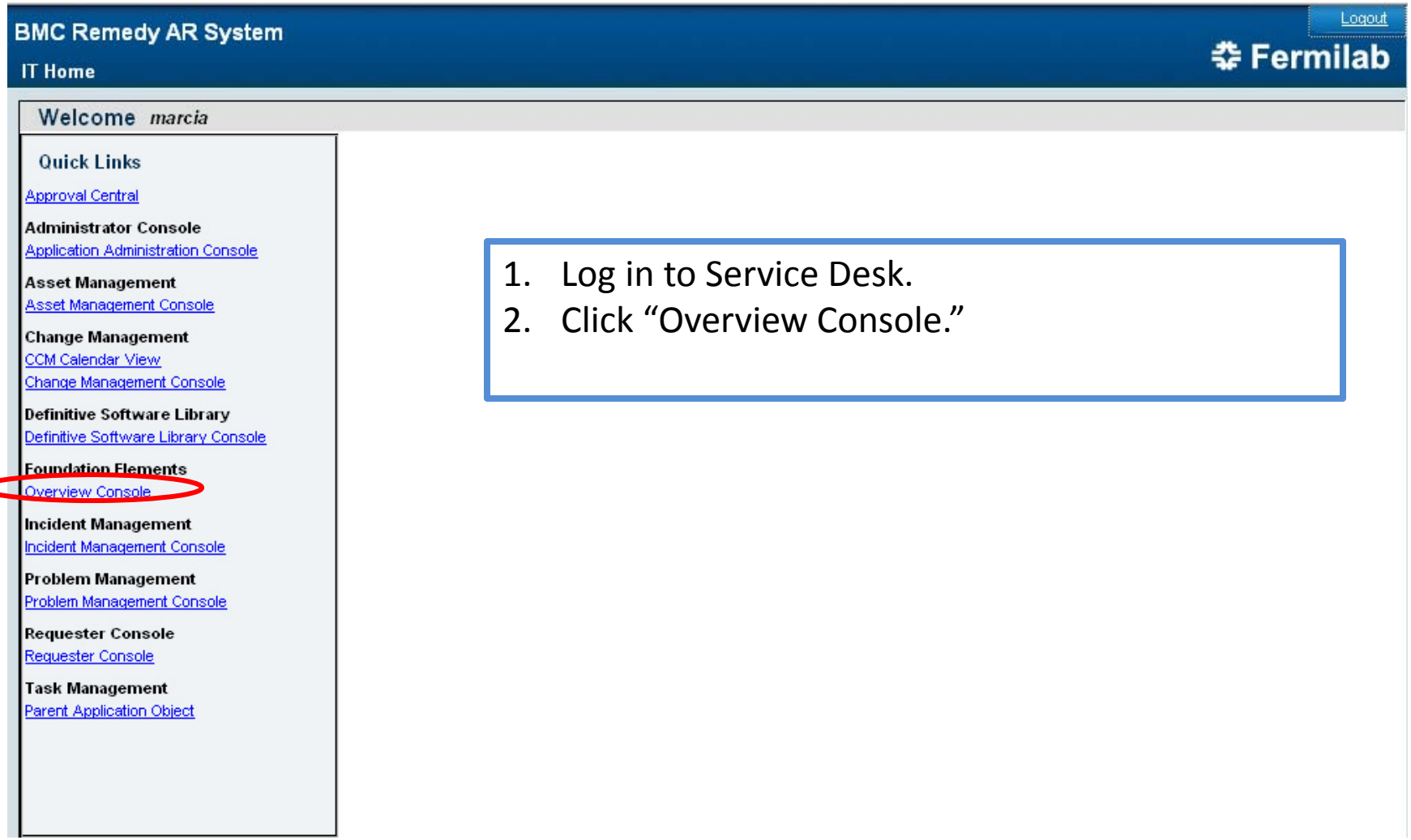
Change Management Tool Training

Setting Your Application Preferences

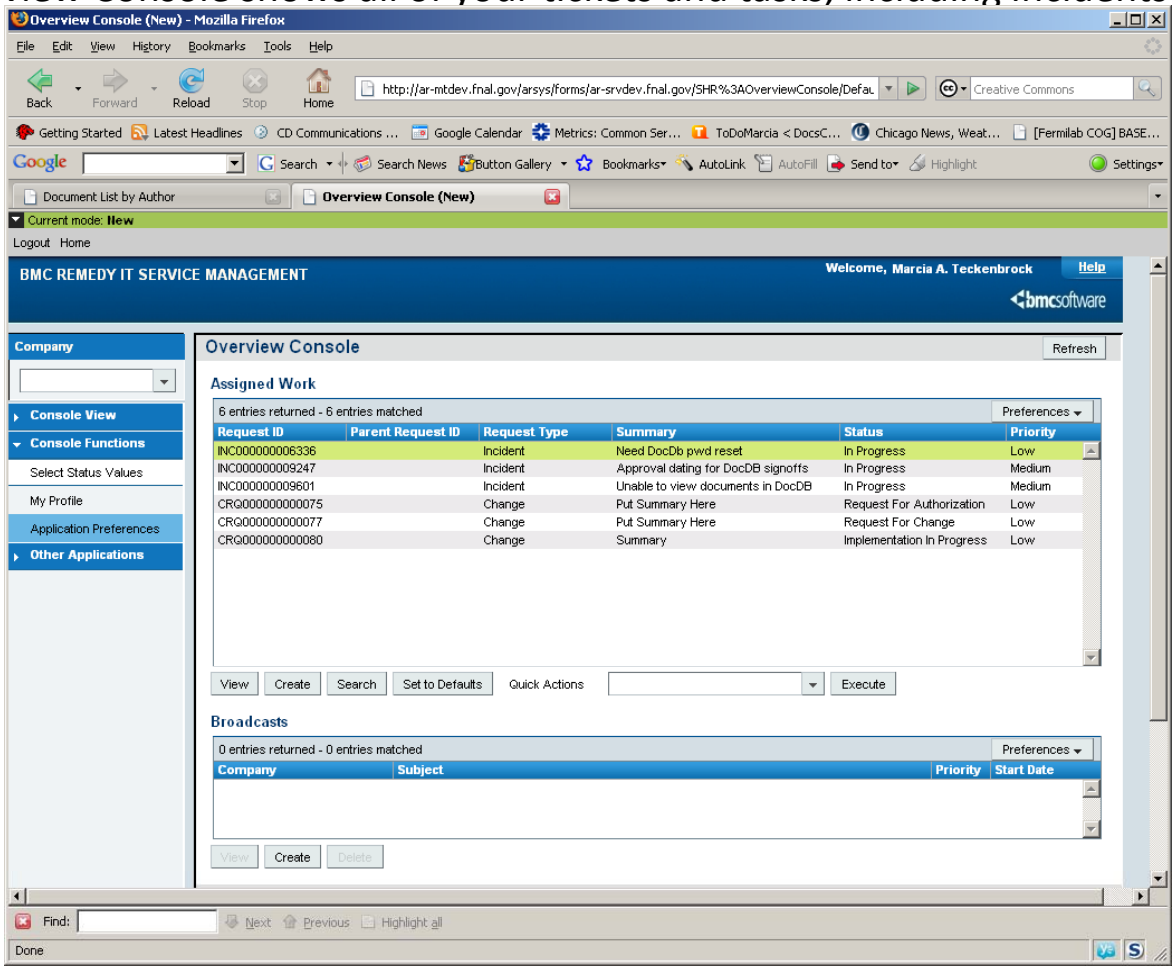


1. Log in to Service Desk.
2. Click “Overview Console.”

Setting Application Preferences

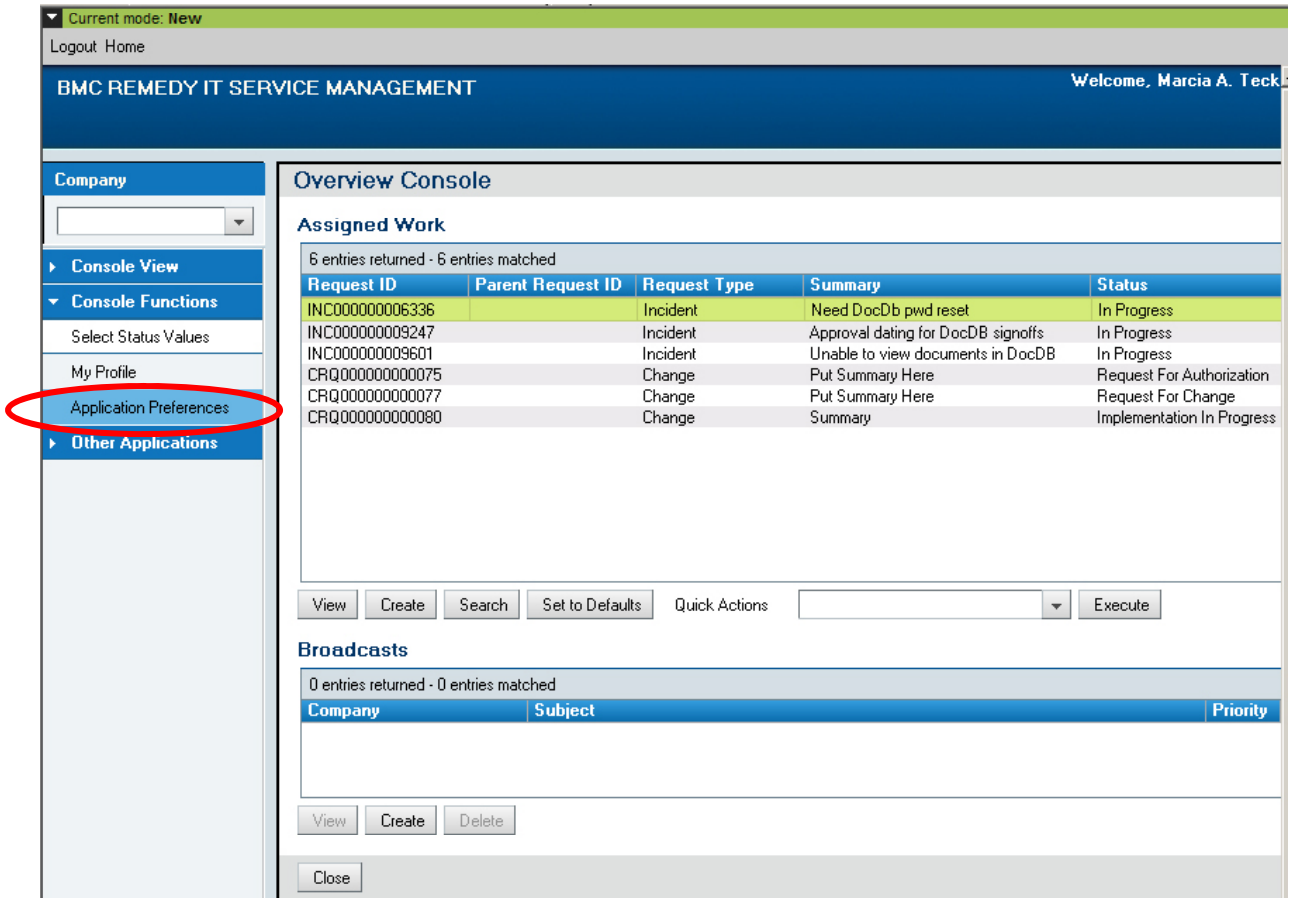
This is the Overview Console.

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



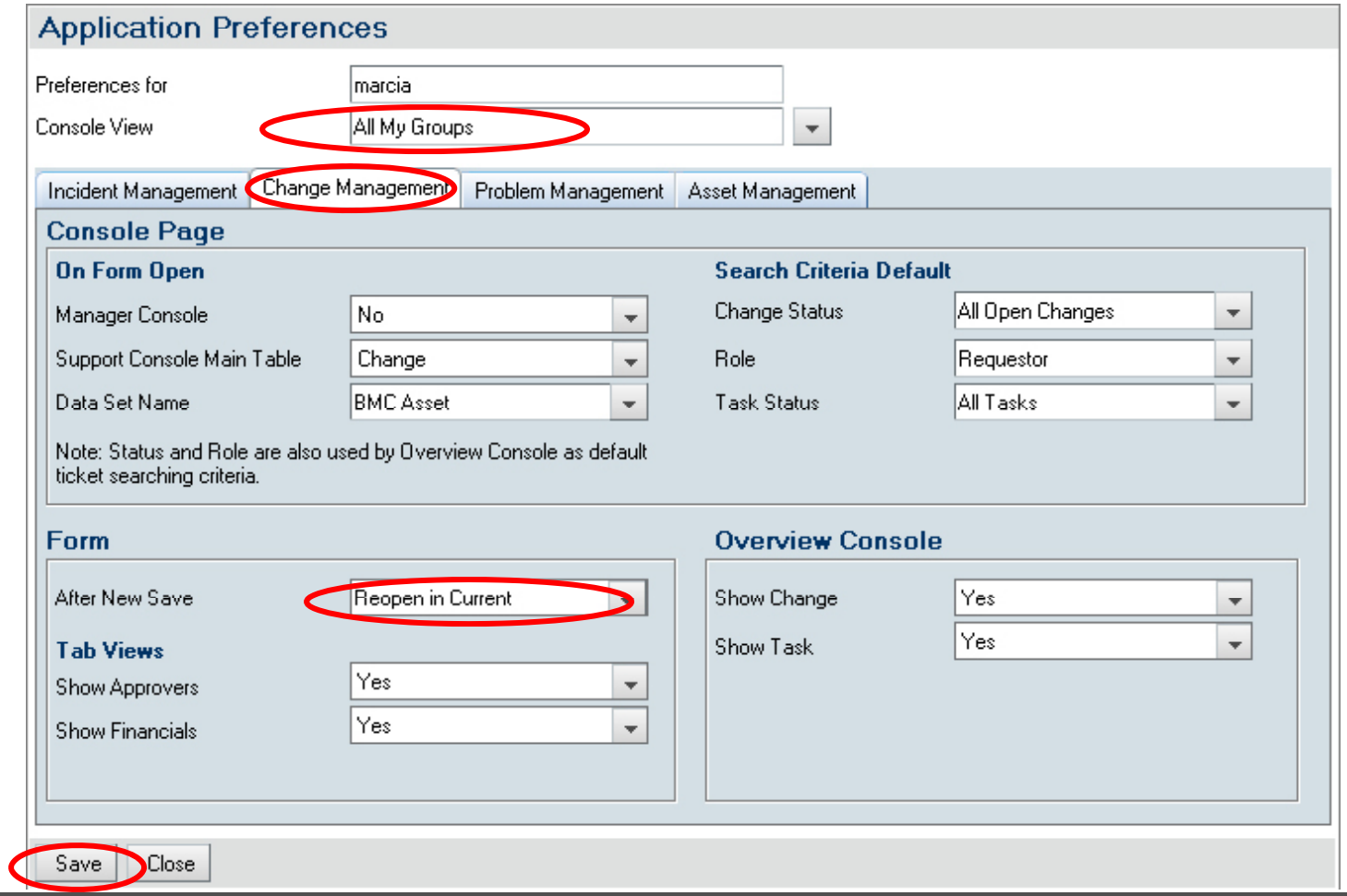
Setting Application Preferences

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

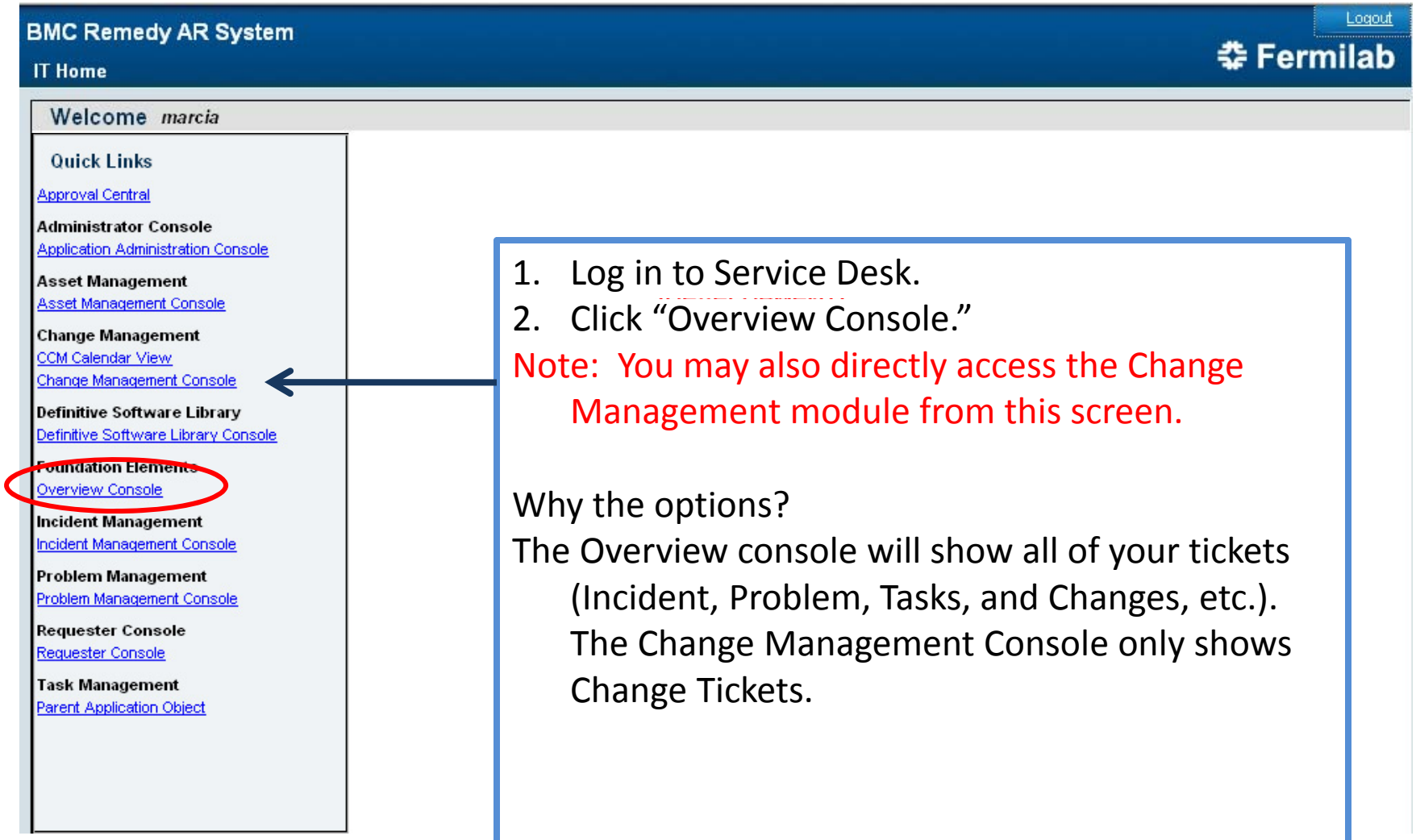


Setting Application Preferences

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.”

Current mode: **Search**

Logout Home

BMC REMEDY IT SERVICE MANAGEMENT

Welcome, Marcia A. Teckenbrock Help

bmcsoftware

Company

- **Console View**
- **Console Functions**
- **Other Applications**
  - Incident Management
  - Change Management
  - Problem Management
  - Asset Management
  - Approval Console
  - CMDB

Overview Console

Refresh

Assigned Work

6 entries returned - 6 entries matched

Preferences

Request ID	Parent Request ID	Request Type	Summary	Status	Priority
INC000000006336		Incident	Need DocDb pwd reset	In Progress	Low
INC000000009247		Incident	Approval dating for DocDB signoffs	In Progress	Medium
INC000000009601		Incident	Unable to view documents in DocDB	In Progress	Medium
CRQ000000000075		Change	Put Summary Here	Request For Authorization	Low
CRQ000000000077		Change	Put Summary Here	Request For Change	Low
CRQ000000000080		Change	Summary	Implementation In Progress	Low

View Create Search Set to Defaults Quick Actions Execute

Broadcasts

0 entries returned - 0 entries matched

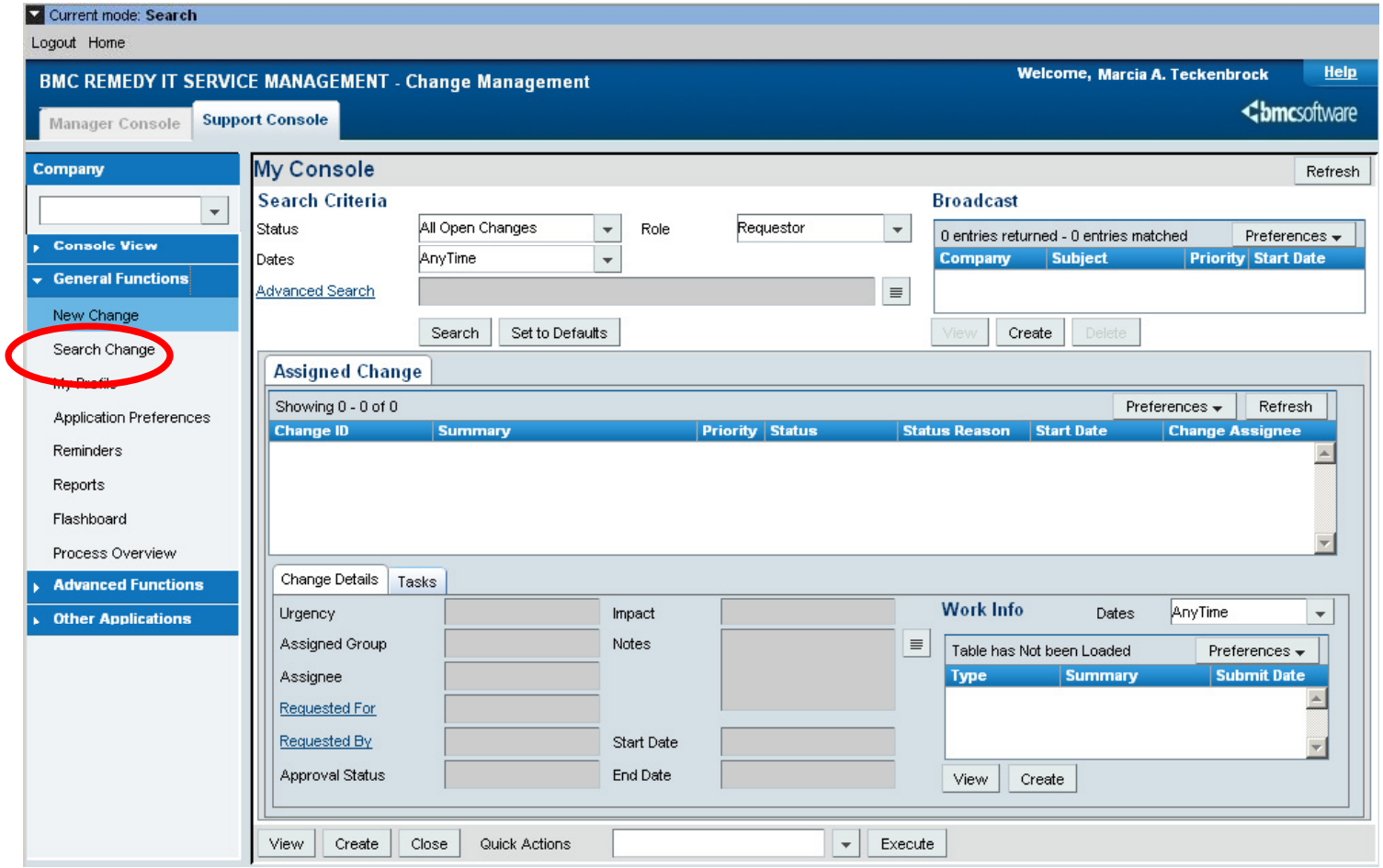
Preferences

Company	Subject	Priority	Start Date

View Create Delete

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.”

Current mode: Search

Search | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

Infrastructure Change

Help

bmcsoftware

Quick Links
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions

Advanced

Consoles

Change ID*+ 571

Process Flow Status: Initiate > Review & Authorize > Plan & Schedule > Implement > Closed

Approval Status

Approval Status

Change Request Information

Change Type* | Status* | Impact*

Summary* | Status Reason | Urgency*

Notes | Risk Level* | Priority

Requester | Classification | Work Info | Assignment | Relationships | Approvers | SLM | Dates

Requested By

Support Company*+

First Name*

Middle Name

Last Name*+

Phone Number+

Organization

Department

Support Organization

Support Group Name

Clear

Requested For

First Name+

Last Name+

Details

Change Location

Company*+

Region

Site Group

Site+

Address

Clear

Search | Print | Close

Searching For a Change

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

Current mode: Modify

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

Showing 1 - 1 of 1

Change ID*+	Company*+	Status*	Summary*	Priority	Risk Level*	Scheduled
CRQ000000000571	Fermilab	Scheduled For Approval	Turn off Exchange mailbox backup from commvault	Medium	Risk Level 4	8/23/2010 9:

Report | Select all | Deselect all

Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions
Advanced
Create Other Requests
Consoles

Change ID*+ CRQ000000000571

Process Flow Status: Initiate > Review & Authorize > Plan & Schedule Approval > Implement > Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Scheduled For Approval	Impact*	4-Minor/Localized
Summary*	Turn off Exchange mailbox b	Status Reason		Urgency*	4-Low
Notes	Request to turn off mailbox b	Risk Level*	Risk Level 4	Priority	Medium

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Joseph
Middle Name	
Last Name*+	Syu
Phone Number+	1 630 840-5718
Organization	DS - COMPUTING DIVISION
Department	LSC/CSI/BASS
Support Organization	Computing Division
Support Group Name	Storage Network Services

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

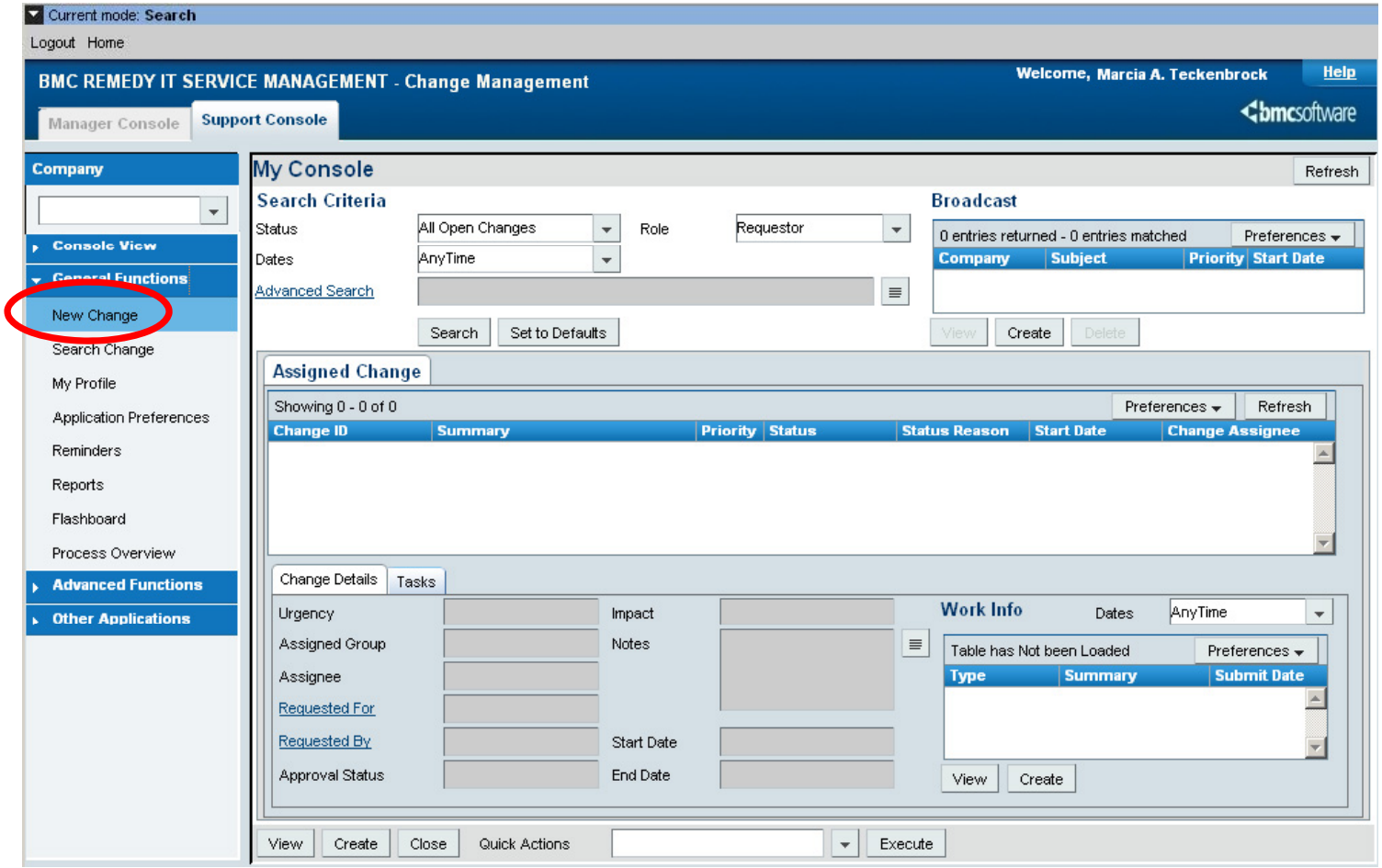
Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

Save | Print | Close

Creating a Change

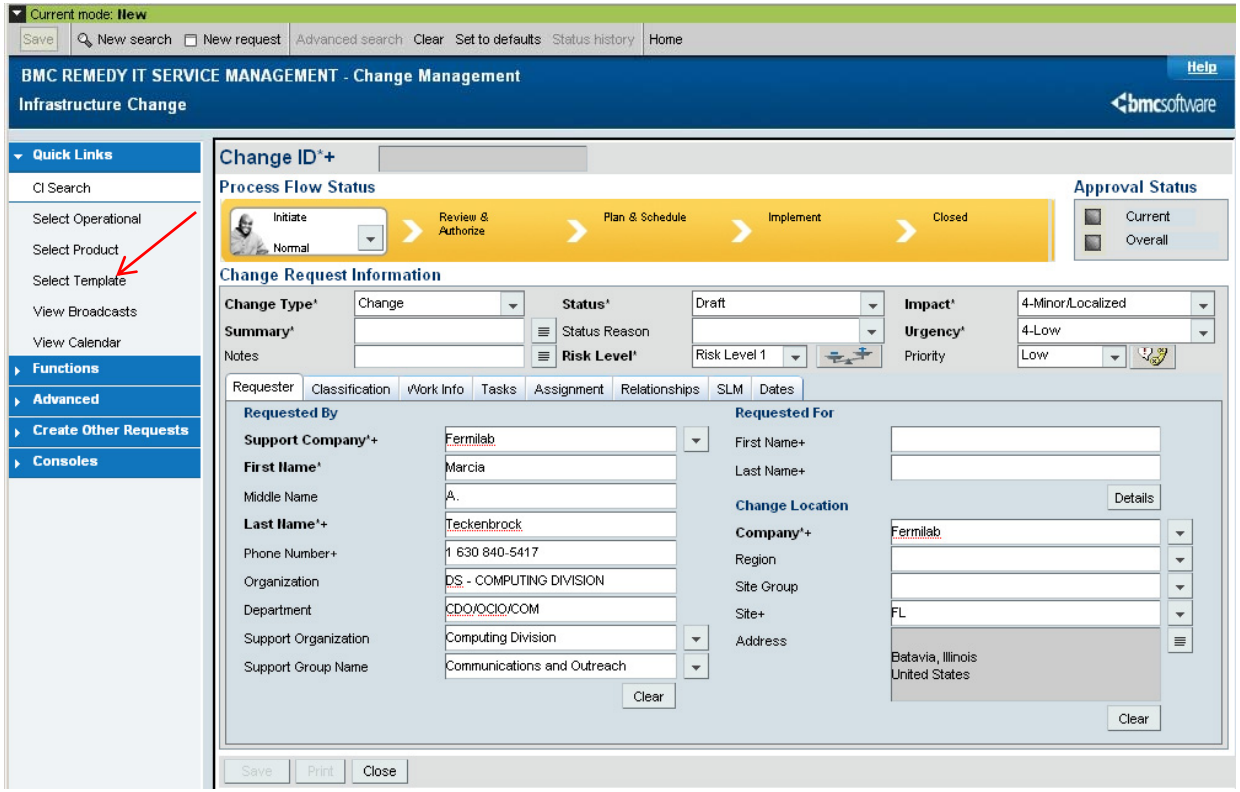
1. Click “General Functions.”
2. Click on “New Change.”



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)

Change ID*+ CRQ000000000365

Process Flow Status: Initiate > Review & Authorize > Plan & Schedule (Normal) > Implement > Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Planning In Progress	Impact*	3-Moderate/Limited
Summary*	SLF 5.5 release	Status Reason		Urgency*	4-Low
Notes	We need to build and	Risk Level*	Risk Level 4	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Change Classification

Timing*	Normal
Timing Reason	
Lead Time	
Change Reason	
Business Justification	
Change Environment	
Sequence	0
Performance Rating (1 - 5)	

Operational Categorization

Tier 1+	
Tier 2	
Tier 3	

Product Categorization

Tier 1	Operating System Software
Tier 2	LINUX
Tier 3	Server
Product Name+	
Model/Version	
Manufacturer	

Save | Print | Close

Creating a Change

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

Change ID*+ CRQ000000000365

Process Flow Status: Initiate > Review & Authorize > Plan & Schedule (Normal) > Implement > Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Planning In Progress	Impact*	3-Moderate/Limited
Summary*	SLF 5.5 release	Status Reason		Urgency*	4-Low
Notes	We need to build and	Risk Level*	Risk Level 4	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Infrastructure Change Manager

Support Company*	Fermilab
Support Organization*	Computing Division
Support Group Name*	Change Managers
Change Manager	
Set Assignment using	Set Clear

Infrastructure Change Assignee

Support Company	Fermilab
Support Organization	Computing Division
Support Group Name+	Linux Server Support
Change Assignee+	
Set Assignment using	Set Clear

Time Spent Resolving Change Request

Start Time	
Time Spent (min)	0
Total Time Spent (min)	0

Start Clock | Stop Clock | Update Effort Log

Infrastructure Change Implementer

Support Company	Fermilab
Support Organization	Computing Division
Support Group Name+	Linux Server Support
Change Implementer+	
Set Implementer using	Set Clear

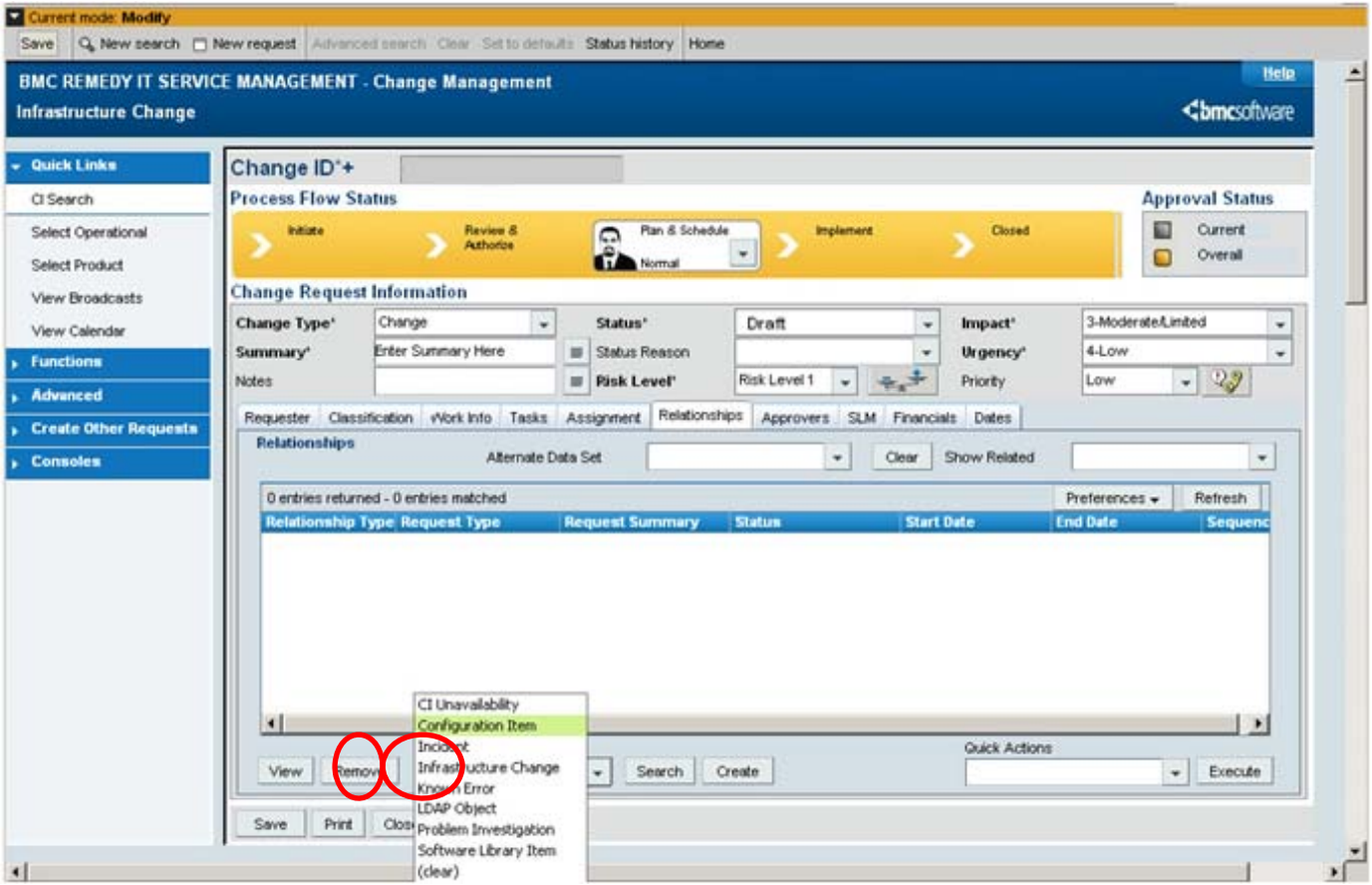
Save | Print | Close

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.

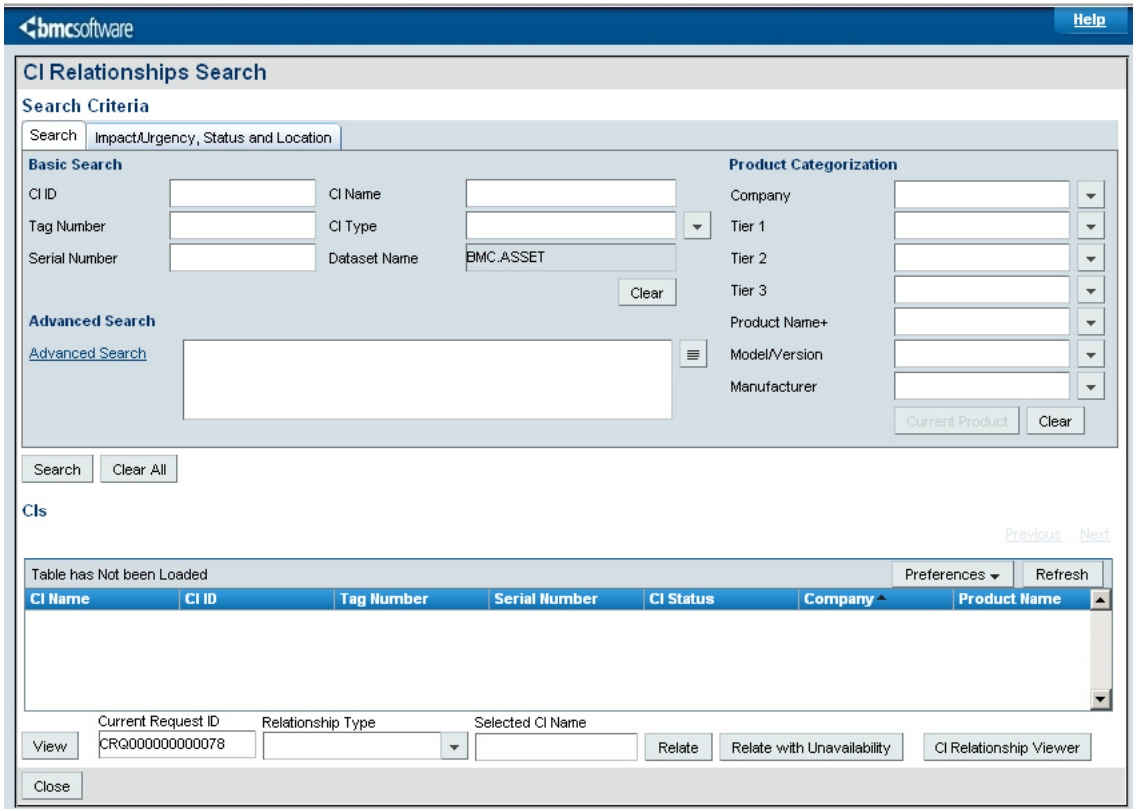


How to Search for CIs

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)



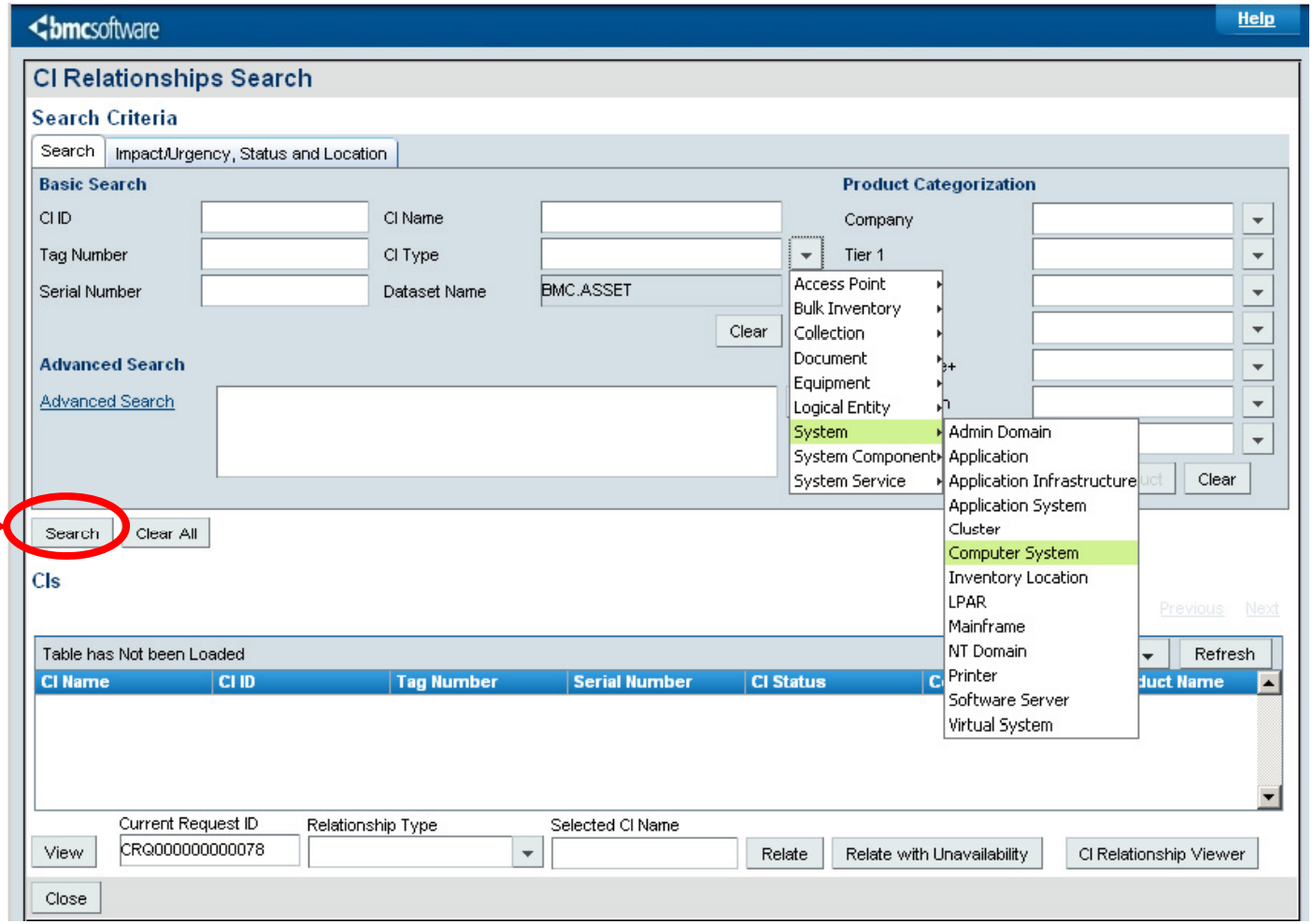
How to Search for CIs

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”



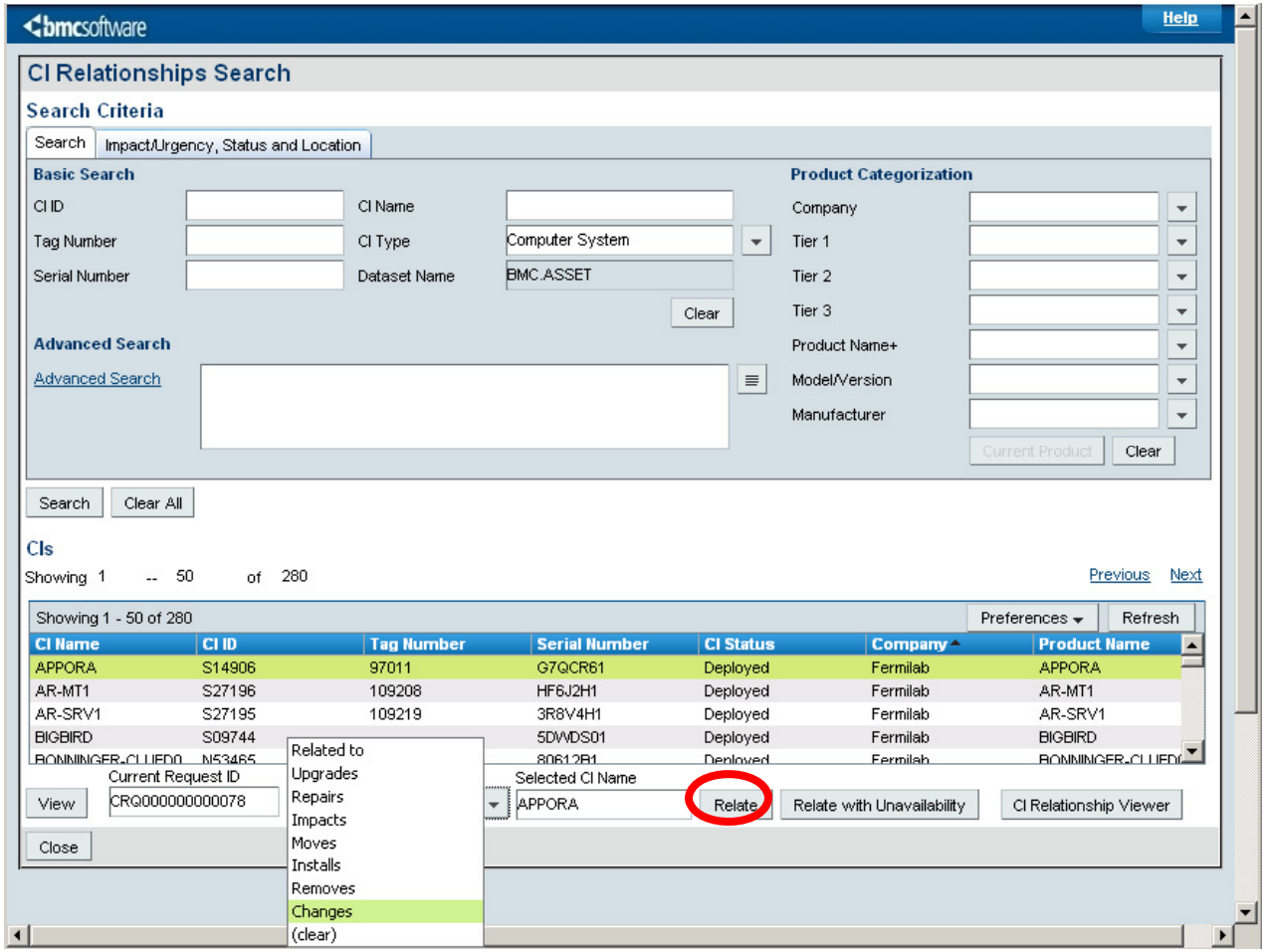
How to Search for CIs

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.

Current mode: New

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

Quick Links
- CI Search
- Select Operational
- Select Product
- Select Template
- View Broadcasts
- View Calendar

Functions
Advanced
Create Other Requests
Consoles

Change ID*+ CRQ000000000110

Process Flow Status: Initiate (Normal) > Review & Authorize > Plan & Schedule > Implement > Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Draft	Impact*	4-Minor/Localized
Summary*	Summary Here	Status Reason		Urgency*	4-Low
Notes		Risk Level*	Risk Level 2	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Marcia
Middle Name	A.
Last Name*+	Teckenbrock
Phone Number+	1 630 840-5417
Organization	DS - COMPUTING DIVISION
Department	CDO/OCIO/COM
Support Organization	Computing Division
Support Group Name	Communications and Outreach

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

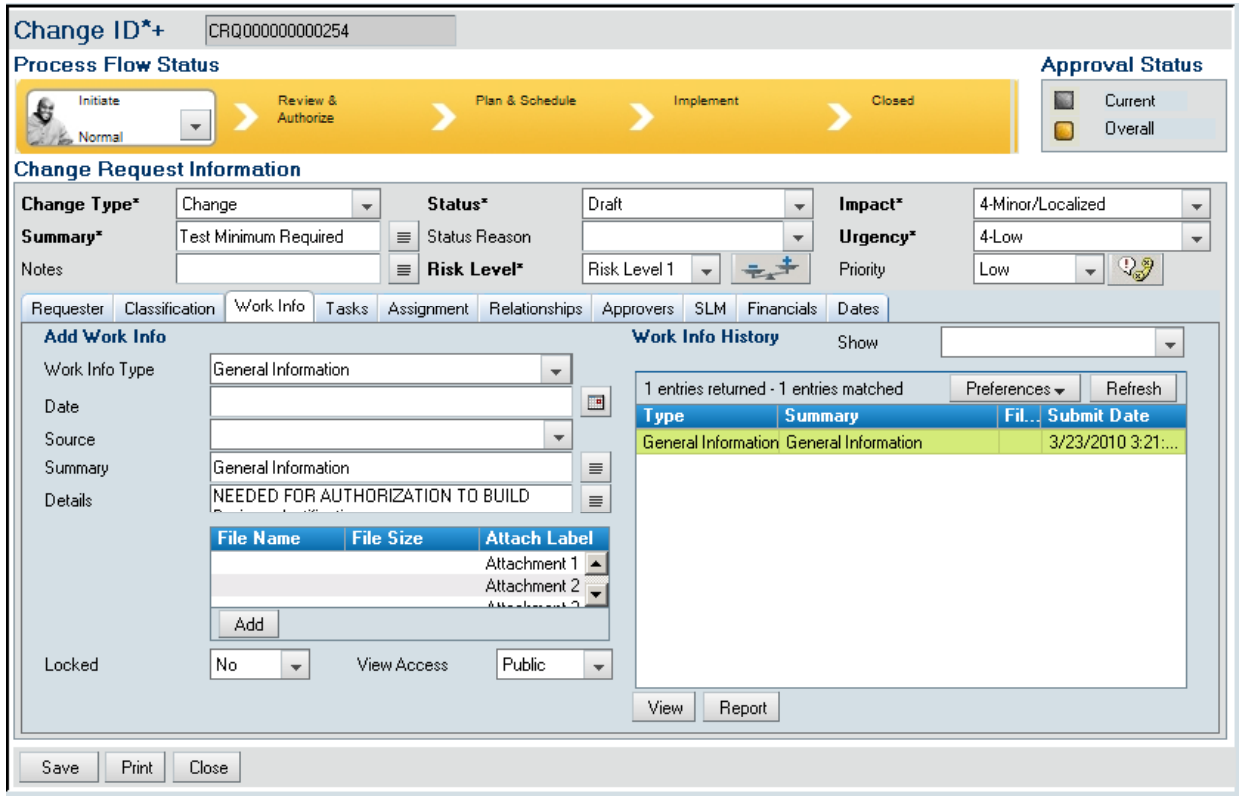
Save | Print | Close

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.

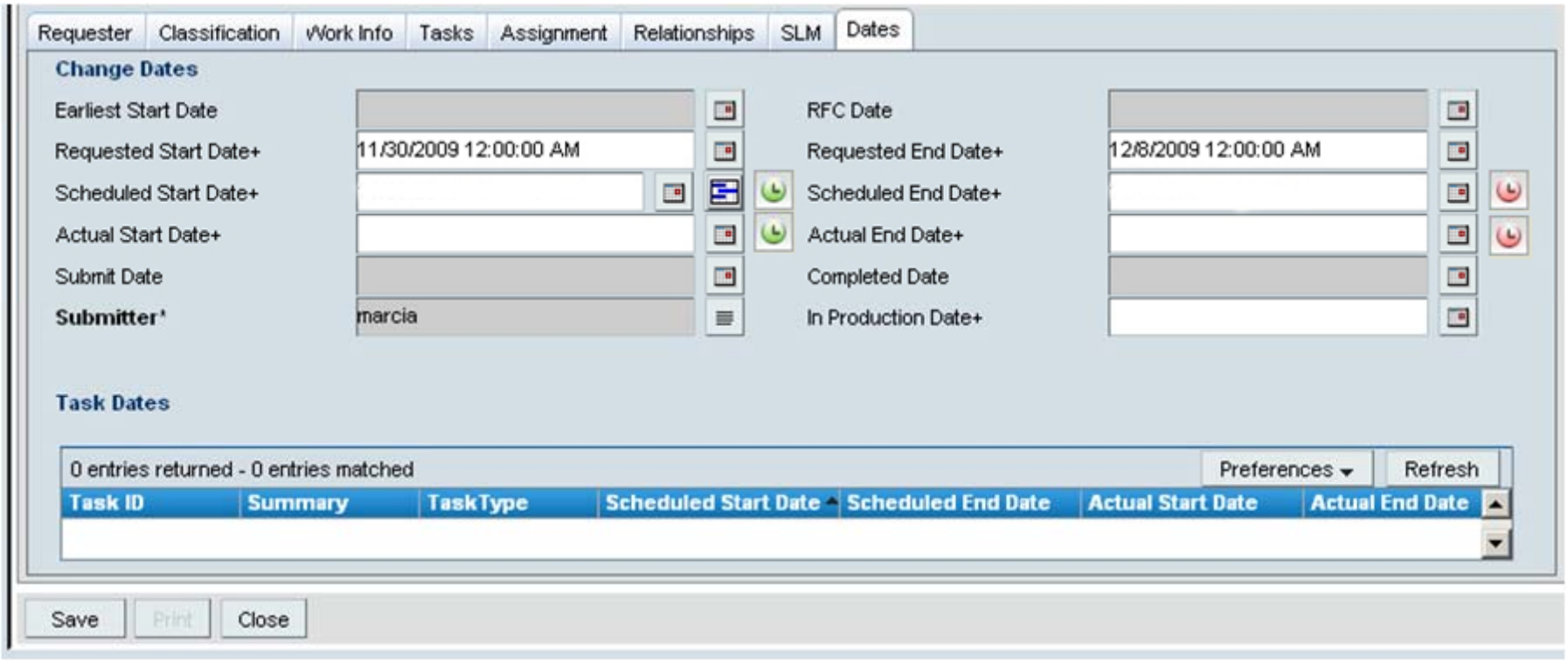
***All of this information may be put into ONE Work Info Entry

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



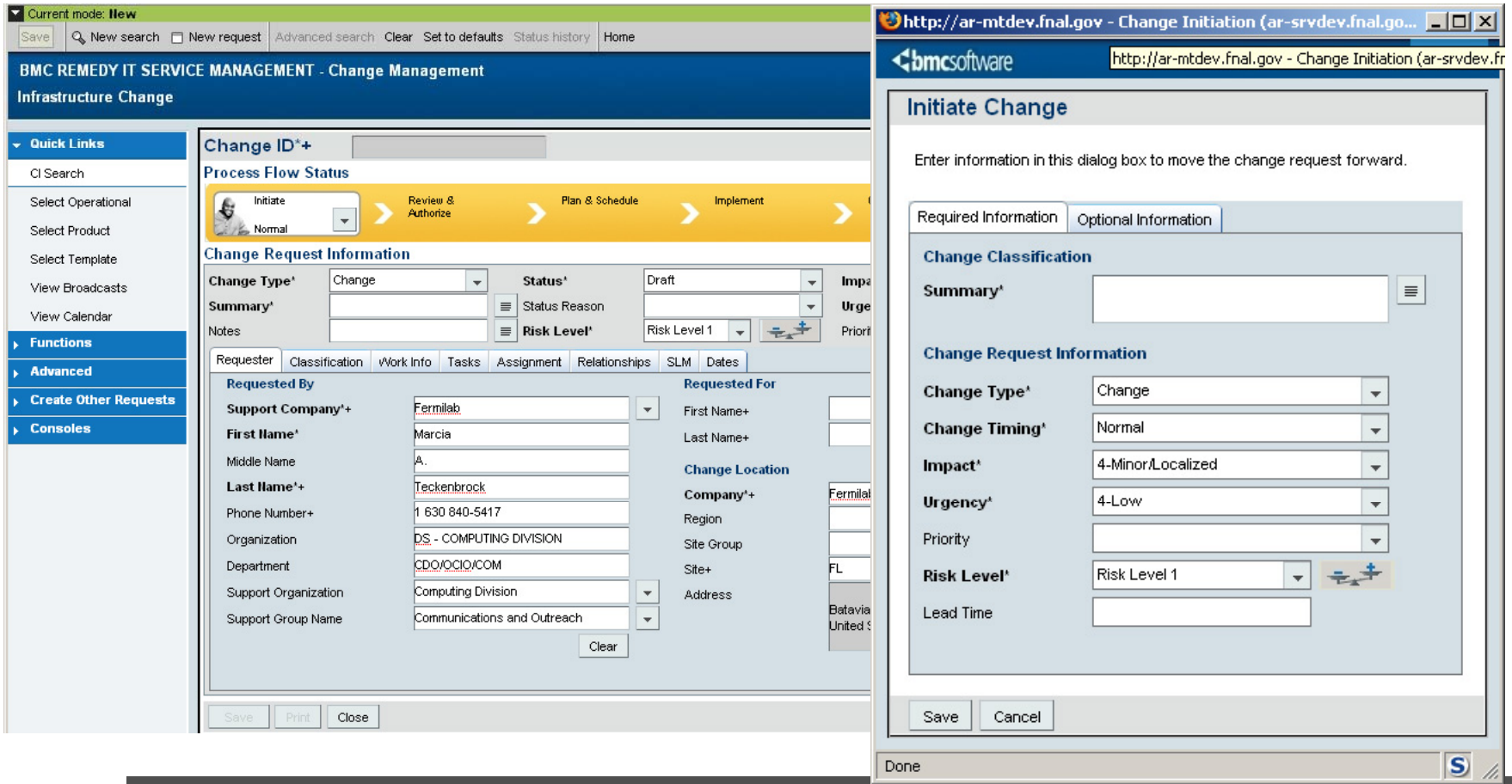
Creating a Change

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.

Current mode: **Modify**

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management Help

Infrastructure Change bmcsoftware

Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions
Advanced
Create Other Requests
Consoles

Change ID*+ CRQ000000000097

Process Flow Status: Initiate → Review & Authorize Approval → Plan & Schedule → Implement → Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Request For Change	Impact*	4-Minor/Localized
Summary*	Summary	Status Reason		Urgency*	4-Low
Notes		Risk Level*	Risk Level 2	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Marcia
Middle Name	A.
Last Name*+	Teckenbrock
Phone Number+	1 630 840-5417
Organization	DS - COMPUTING DIVISION
Department	CDO/OCIO/COM
Support Organization	Computing Division
Support Group Name	Communications and Outreach

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

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.

Quick Links
CI Search
Select Operational
Select Product
View Broadcasts
View Calendar
Functions
Broadcast Change
Copy Change
Outage List
Track Effort
Reminders
Email System
Paging System
View Audit Log
Advanced
Create Other Requests
Consoles

Change ID*+ CRQ000000000571

Process Flow Status: Initiate | Review & Authorize | Plan & Schedule (Approval) | Implement | Closed

Approval Status: Current, Overall

Approve
Reject
Cancel
Help
(clear)

Change Request Information

Change Type*	Change	Status*	For Approval	Impact*	4-Minor/Localized
Summary*	Turn off Exchange mailbox b	Status Reason		Urgency*	4-Low
Notes	Request to turn off mailbox b	Risk Level*	Risk Level 4	Priority	Medium

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Joseph
Middle Name	
Last Name*+	Syu
Phone Number+	1 630 840-5718
Organization	DS - COMPUTING DIVISION
Department	LSC/CSI/BASS
Support Organization	Computing Division
Support Group Name	Storage Network Services

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

Save | Print | Close

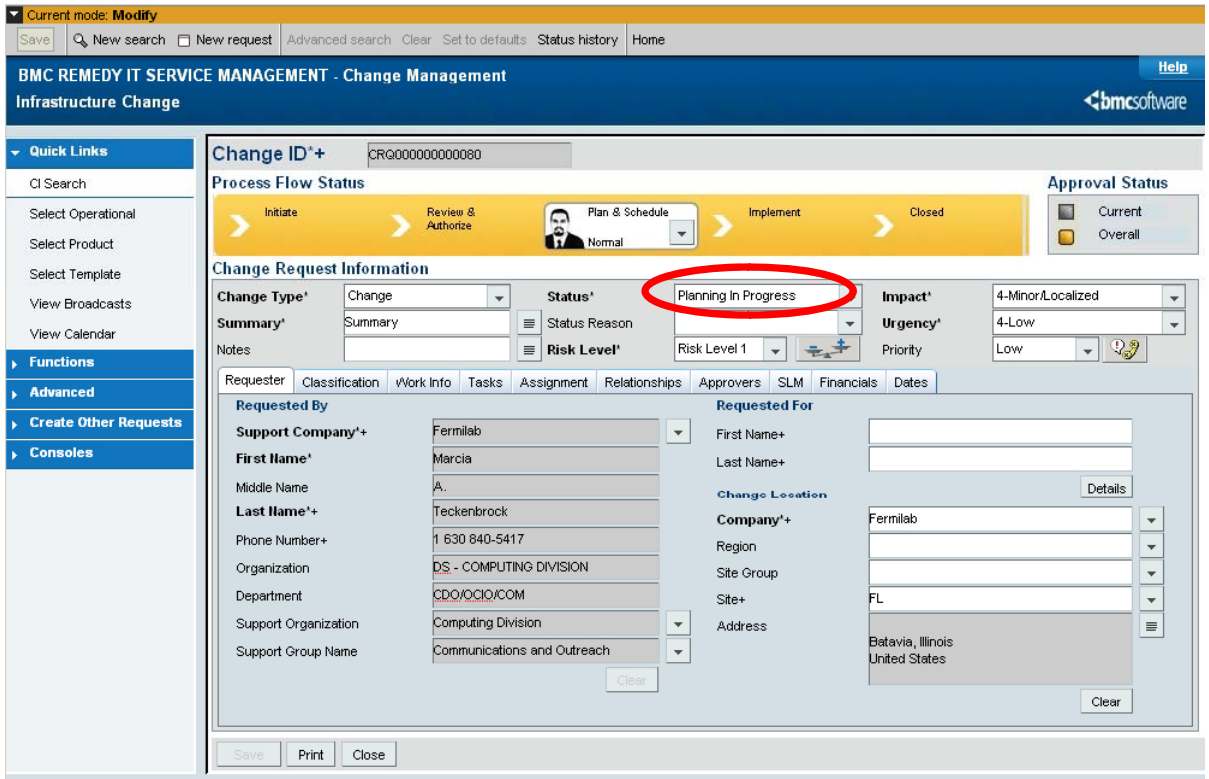
The Change Manager

- 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

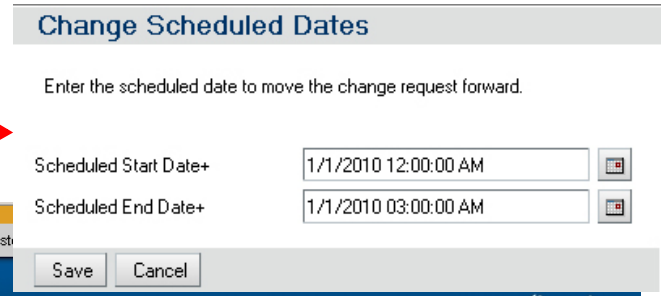
Now it's time to schedule your Change.

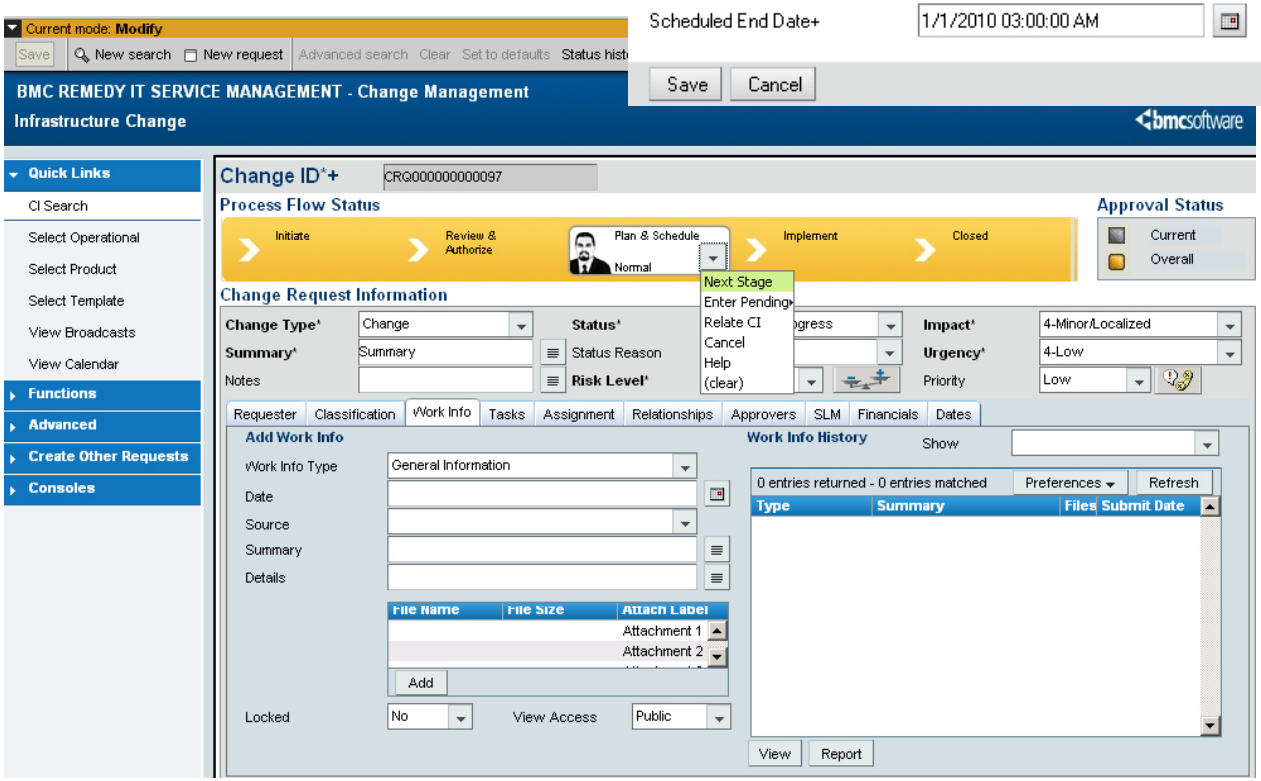
Follow the YBR by selecting "Next stage."

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.

Current mode: **Modify**

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management Help

Infrastructure Change bmcsoftware

Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions
Advanced
Create Other Requests
Consoles

Change ID*+ CRQ000000000080

Process Flow Status: Initiate → Review & Authorize → Plan & Schedule (Approval) → Implement → Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	Status*	Scheduled For Approval	Impact*	4-Minor/Localized
Summary*	Summary	Status Reason		Urgency*	4-Low
Notes		Risk Level*	Risk Level 1	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Add Work Info

Work Info Type	General Information
Date	
Source	
Summary	
Details	

File Name	File Size	Attach Label
		Attachment 1
		Attachment 2

Add

Locked: No View Access: Public

Work Info History Show

0 entries returned - 0 entries matched | Preferences | Refresh

Type	Summary	Files	Submit Date

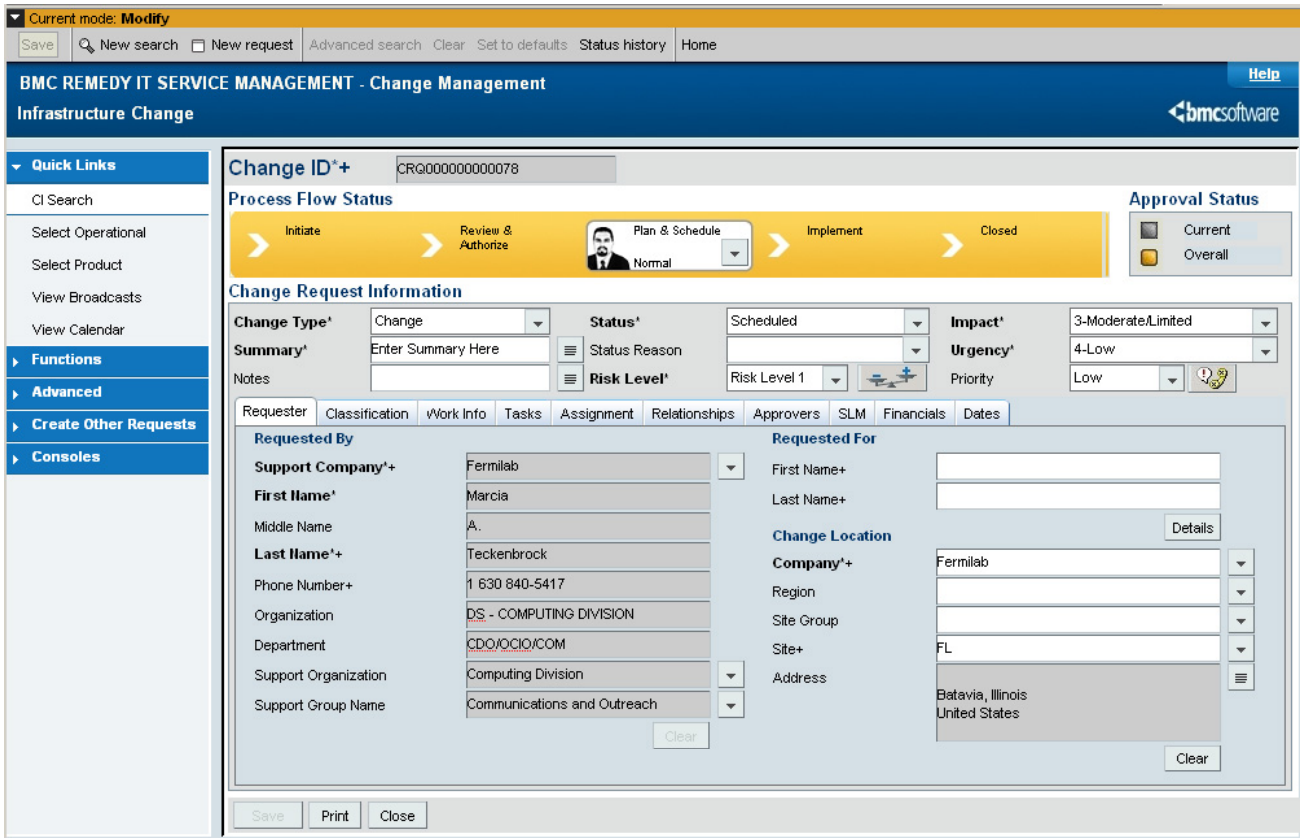
View | Report

Save | Print | Close

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.”)

Current mode: **Modify**

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

Infrastructure Change

Help

bmcsoftware

Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions

Advanced

Create Other Requests

Consoles

Change ID*+ CRQ000000000080

Process Flow Status

Initiate | Review & Authorize | Plan & Schedule | Implement (Normal) | Closed

Approval Status

Current

Overall

Change Request Information

Change Type*	Change	**Status***	Implementation In Progress	**Impact***	4-Minor/Localized
Summary*	Summary	Status Reason		**Urgency***	4-Low
Notes		**Risk Level***	Risk Level 1	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Marcia
Middle Name	A.
Last Name*+	Teckenbrock
Phone Number+	1 630 840-5417
Organization	DS - COMPUTING DIVISION
Department	CDO/OCIO/COM
Support Organization	Computing Division
Support Group Name	Communications and Outreach

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

Save | Print | Close

Completing Your Change

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

Current mode: **Modify**

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

Infrastructure Change

Help

bmcsoftware

Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions

Advanced

Create Other Requests

Consoles

Change ID*+ CRQ000000000097

Process Flow Status

Initiate → Review & Authorize → Plan & Schedule → Implement (Normal) → Closed

Next Stage
Enter Pending
Cancel
Help
(clear)

Approval Status

Current
Overall

Change Request Information

Change Type*	Change	**Status***	Implementation In Progress	**t***	4-Minor/Localized
Summary*	Summary	Status Reason		**cy***	4-Low
Notes		**Risk Level***	Risk Level 2	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

Requested By

Support Company*+	Fermilab
First Name*	Marcia
Middle Name	A.
Last Name*+	Teckenbrock
Phone Number+	1 630 840-5417
Organization	DS - COMPUTING DIVISION
Department	CDO/OCIO/COM
Support Organization	Computing Division
Support Group Name	Communications and Outreach

Clear

Requested For

First Name+	
Last Name+	

Details

Change Location

Company*+	Fermilab
Region	
Site Group	
Site+	FL
Address	Batavia, Illinois United States

Clear

Completing Your Change

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

Change Closure (ar-srvdev.fnal.gov) - Windows Internet Explorer provided by Fermilab

bmcsoftware

Help

Change Closure

Enter information in this dialog box to complete the change request.

Change Request Information

Status Reason: Final Review Complete

Change Dates

Actual Start Date*+: 1/27/2010 12:00:00 PM

Actual End Date*+: 1/27/2010 12:06:00 PM

Change Classification

Performance Rating (1 - 5)*: 1

Add Work Info

Work Info Type: Install Results - Details

Date: 1/27/2010 12:00:00 AM

Source:

Summary: Install Results - Details

Details: There were no problems with the install

Locked: No

View Access: Internal

Save | Cancel

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).

Current mode: **Modify**

Save | New search | New request | Advanced search | Clear | Set to defaults | Status history | Home

BMC REMEDY IT SERVICE MANAGEMENT - Change Management

Infrastructure Change

Help

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Quick Links
- CI Search
- Select Operational
- Select Product
- View Broadcasts
- View Calendar

Functions

Advanced

Create Other Requests

Consoles

Change ID*+ CRQ000000000080

Process Flow Status: Initiate → Review & Authorize → Plan & Schedule → Implement (Normal) → Closed

Approval Status: Current, Overall

Change Request Information

Change Type*	Change	**Status***	Completed	**Impact***	4-Minor/Localized
Summary*	Summary	Status Reason		**Urgency***	4-Low
Notes		**Risk Level***	Risk Level 1	Priority	Low

Requester | Classification | Work Info | Tasks | Assignment | Relationships | Approvers | SLM | Financials | Dates

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Save | Print | Close