WELCOME

UVAHS REMEDY
CHANGE MANAGEMENT
Alternate INTRODUCTION: Felicia Mendygral, Education Consultant with over 20+ years training experience, the past 5 working with the BMC Remedy products.
We’ll start by logging into the system and then create a Change from an Incident and work it through to completion.
Change Management v9.0
User Training Class

Module 1: Change Management: Review of Concepts and Terms
We just covered Incident Management. Change is about tracking defects, enhancement requests, and any other type of request that changes a product, process or service. Change Management is a means to ensure standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the number and impact of issues/problems occurring when a service is performed. **Previously known as a Design Request.**

Change can be confusing to End Users. They don’t always know when a Change Request should be submitted instead of an Incident. To help determine if a Change is needed, think about whether the request is adding, removing, modifying, or obtaining approval for a change within a current setting of a process, or a resource owned by the company.
When do you create an Incident? Answer: For interruption in service. A change is required for application modification, decommissioning or commissioning a server, upgrading network switches, router configuration changes, voice/data sites, etc.
What is Change Management? Change Management is a means to ensure standardized methods and procedures are used for efficient and prompt handling of all UVAHS changes, in order to minimize the number and impact of issues/problems occurring when a service is performed.

Components of Change Management include:
1. The categorization of the change, from identifying the importance of the change to identifying the type of service being requested;
2. The risk assessment, through a list of pre-defined set of weighted questions;
3. The impact assessment is based on the location, organization or departments being affected by the change;
4. Schedule management is to determine conflicts and personnel/resource availability;
5. Four phase approval process to ensure necessary parties are aware of the change; and
6. Implementation, Back-out and Test plan management.
Here are some things that constitute a Change Request in the system.
Let's quickly talk about roles or assignments.

**Change Manager** – Oversees the implementation and approval process of the Change. Typically oversees many Changes. The Coordinator does the actual work, the Change Manager is oversight. To be a Change Manager you must be given the Functional Role of Change Manager within your UVAHS Support Group in Remedy.
Change Coordinator – Defines the implementation plans, request scheduling, request assessment, and request classification. In addition, overall responsible for implementing the UVAHS Change Request.

**Change Coordinator** – Defines the implementation plans, request scheduling, request assessment, and request classification. In addition, overall responsible for implementing the change. The Coordinator does the actual work on this particular Change Request. To be a Change Coordinator you must be given the Functional Role of Change Coordinator within your UVAHS Support Group in Remedy.
Change Requester – Requester of the change. This person is the one who recognizes a change is needed to improve a business service, process, or operation. If the Change Coordinator is the Change Requester, then this role can be left blank.

The system will automatically notify the requested/customer by generating a SR and notify on creation and completion.
Task Implementer – Implements one or more tasks associated to the change. Tasks are mini-service requirements to fulfill the implementation of a change. For example: To install a patch to a production environment requires installing, testing and documentation to take place. These steps can be performed by the same UVAHS Support Group or by different ones through the utilization of tasks.
Change Approver – Reviews and approves (or denies) requests for change for the UVAHS Group. We’ll talk more about this later.

Which role are you? Answer: Change Coordinator
A major consideration with Change Requests is the “classification” process. Changes are primarily controlled through the different classification features within Change Management.

Classification settings used by UVAHS include:
- Change Class
- Change Type
- Impact and Urgency (determines Priority)
- Product Categorizations

The classification of a change determines support group settings, approvers, importance of the change, effected areas, etc.
There are eight Change Type options available within Change Management. *UVAHS will just be using the first one -- Change. The full list of change types are:

1. **Change* – Generally a stand-alone change activity and most widely used.
2. **Project – A group of changes that are part of a larger scale change. Similar to a new Step by Step process to implement a change is being introduced to the environment, followed by additional changes that will utilize the pre-approved step by step process.
3. **Release – Previous setting used to represent a Release request prior to Release Management association. Not used if Release Management is being utilized.
4. **Asset Configuration – Changes to a Configuration Item. Associated to a change in the Configuration Item by the Configuration Item’s business service owner.
5. **Asset Management – Changes to the method of managing assets or Configuration Items. Associated to ownership and processing changes to one or more Configuration Items.
6. **Asset Lease – Changes related to lease requests.
7. **Purchase Requisition – Purchase requests association requiring an approval.
8. **Asset Maintenance – Scheduled maintenance changes.
Change Class defines the “urgency” of the request through one of the following six options: (The one with an * is the main one used by UVAHS, however all the bolded ones might be needed from time to time.)

1. Normal – Not Used.
2. Standard* – A common change that has low risk and low impact, which follows an established process. A manager will change the class to one of the others if needed. For the EPIC Team - Only a manager is authorized to use another class.
3. Emergency – Indicates a change that resolves an incident or problem that is deemed critical to the business community. It is typically needed within 24 hrs.
4. Latent – Indicates a change that has already been performed, setting the Change to Completed once it has been saved. Other groups may use this. Not the EPIC Team.
5. Expedited – Not Used
6. No Impact – Not Used

Which class will you be using? Answer: Standard
Impact represents the change assessment by the UVAHS Change Coordinator.

Urgency represents the change assessment by the Change Requester.

The results of the responses provided from Impact and Urgency determine the Priority of the Change.

Priority classification is primarily used in Service Level Agreements, on-call notifications, reporting, and Change Advisory Board approval.

- **Impact** represents the assessment of impact by the Change Coordinator.

- **Urgency** represents the importance to the Change Requester.

- The results of the responses provided from Impact and Urgency determine the **Priority** of the Change. These are usually already filled in by a template.

- Priority classification is primarily used in Service Level Agreements, on-call notifications, reporting, and Change Advisory Board approval.
Product Categorizations are a part of the UVAHS Change Process. You are not required to fill in the Prod Cat however we strongly recommend using the Product Categorizations.

**Product Categorization** – Identifies the product or asset the service is being performed against. For example: Since John Customer needs an application product installed, we need to let the technician know what specific application they are supposed to install.

Product categorization settings are used to:
- Assign the request to specific support groups such as UVAHS;
- Metric analysis;
- Service Level Agreement processing;
- Quick reference guide; and
- Quick search options.
The different change assessments are based on the importance of the change. This includes:

A. **Risk Assessment** – Combines qualitative and quantitative criteria for assessing the risk level associated with a change.

B. **Impact Assessment** – Defines the areas that would be affected by the change. For example: Updating the company’s Anti-Virus Software would affect the entire company, where a request to shut down an email server for maintenance may only affect two or three locations. So some might only impact UVAHS where others would impact all of CMS.

C. **Resource Assessment** – Defines the amount of money, manpower and equipment will be needed to implement the change.
An implementation plan is a detailed listing of activities, costs, expected difficulties, and schedules that are required to achieve the objectives of a strategic plan. With any plan, there should be a back-out plan in case the implementation fails and a test plan to ensure the implementation was completed as expected.

On top of the implementation plan is the various tasks that can be incorporated to support the plan, ensuring the implementation is performed according to the plan.
Approvals – there are typically 1 to 2 levels of approvals for UVAHS, depending on which type of Change Request is submitted. For the vast majority of you, you will ONLY submit Standard Change Requests. For Standard Changes (the ones the majority of you will use), there is only 1 approval – the Change Manager (typically your manager) approval.

For Managers, they might use Emergency or Expedited Change Requests that have 2 levels of approvals. The assigned Change Manager is the first level approval. The CAB approval is the 2nd level of approval. For Emergency Change Requests this is just done faster. In other cases, a Latent Change Request may take place which has no approvals. However, unless your Manager tells you otherwise, you will all ONLY do Standard Change Requests at UVAHS. Managers will be the ONLY ones to handle the other types of Change Requests.

We will go over these approvals again in the demonstrations.

Keep in mind that when working with Change Requests, the Status of the change may become locked down, preventing any assigned group from advancing the change to the next stage. This lock down would be the result of an approval requirement needed.
UVAHS has four (4) Change template to use currently. You have zero (0) services, and the typical class used is Standard.

The typical Impact and urgency is Low. Prod category to use. You will fill in.
That was lots of info in a short time. Let’s go now into the system and create a Change from an Incident.
Change Management v9.0 User Training Class

Module 2: Creating a Change from an Incident
Please login to Remedy ITSM.
Logging into Action Request System

- From the UVAHS homepage, type http://servicetst press Enter
- Enter Network ID User Name and Password
- Leave Authentication field blank
- Press the Enter key or click the Log In button.
Navigate to the Incident Management console and quickly create an incident for user WDS, **Summary**: “Error printer bar code not working”, **Get SN**, **Impact**: “2”, **Urgency**: “4”, **Reported**: “Phone”, Assign it to self, **Op Cat**: **Tier 1**: “Failure hardware”, **Tier 2**: “Printing – Bar Code”, **Tier 3**: “Not Working”, **Prod Cats Product Name**: “Remedy ITSM” and “SAVE”.

We are now going to relate/create a infrastructure change to this incident because we are replacing the faulty email server with a new one.
But before creating the change request from the incident, you will need to resolve the incident and save it.
Under **Quick Actions** on the left side menu with **Create Relationships To** and select Infrastructure Change.
Notice fields are filled in with information from the incident. For example, the brief description of the change in the Summary field. You are the Change Coordinator. Now we’ll select a template to help fill in other required fields.
This displays the change to the Support Organization / Support Group menu hierarchy. Currently in production 95% of the groups are squeezed into a single Support Organization called “HSTS”, which produces a very long list (99 groups) to scroll through.
Under Quick Actions, click Requestor For. Search by last name of “smith” and select Alexandria for this example. You will be asked if it is ok to change the location. Click on yes. Notice your location has changed.

When will the Requester be notified by an SR? Answer: creation and completion
In the template field and begin typing the name of the template. All your templates start with the name of your group. For training we used TRNG.

From the drop down, select the appropriate template. You will select the Standard template. Remember: For the EPIC Team - **Only a manager is authorized to use another class.**

Or

Click on the magnifying glass icon for a table view.

Click on the template name then, click the Select button.
Class – You are not authorized to change the class.
Risk Level – A work info is required for all risk level of 2.
Status – Notice the status changes and we more through the stages.
Manager Group/Change Manager – It is assigned to your manager.
Categorizations are entered by the template. Although not required, we recommend using product categorizations.

Tasks – task work just like Incident.
Relationship Tab – Under Quick Action select Configuration Item to relate a Configuration Item (CI) to the Change Request. This is similar to what you did in Incident Management, you’re just using a different method to associate the Configuration Item to the Change Request. Click on the Relationship tab to see the relationship to CIs. The relationship to the Change Request (CR) will display here after the CR is saved.
Here’s a tip. If you save now, the system will let you know which required fields you failed to fill in.

Notice system put a red rectangle around the Change Reason field. This is a required field. From the Change Reason dropdown, select Upgrade. Then Save again.

Now the system displays a message at the top of the screen to notify you to complete a work info entry.
There are two ways you can communicate with the customer through the system. One is to create a work info entry and select Public view access. This will notify the customer in My IT that something needs attention. And you can track the communication in Work Details tab.
Another way to communicate with a customer is to use the Email System function. The email and subject auto-fills. Click the Summary button to add the text from the summary into the body of the email. When complete click the Send Email Now. You will receive a pop up box verifying that the email has been sent. Click the Email Log tab to see a record of the email and view the Work Detail tab to view a record of the email. You may need to refresh. Notice that it is set to internal because it sent an email directly to the customer.
When you save you are taken back to the incident. A notification is automatically sent by the system to the requester informing them of the CR creation. Click on the relationships tab and select the CR. Once back in the CR notice you have a req # and under the relationships tab you can now see the relationship to the incident.

The Status bar at the top and the Status field, indicate you are now in the planning stage.
During the planning stage you can continue to record work details. One example, may be a backup plan. It is always good to have a backup plan right? So let’s create a work info entry where we attach a the backup plan document.
To move the Change forward to Implementation Approval – First click the Date System tab then enter the Scheduled Start and End Dates. Click Next Stage twice. The Status of the Change moves to Implementation Approval, pending approval by your manager.
Note that the Status of the Change is now in Scheduled for Approval and it is pending Implementation Approval. The list approvers is located in the Current Approval Phase area. Once approved you can work on this change.

For managers that want to change to a new class, change it to a status of Cancel and then click next stage, next stage and start over and select the new class.
The change has been approved and this change is not scheduled. The Scheduled Status is based on the Scheduled start and end dates entered at Plan and Schedule. Click on the View Calendar and view the Change on the Change Calendar.

Be sure to check the Change Management Console to see if you can proceed with the change. The Change Management Console work similarly to Incident so we won’t take the time to review it here.
Click the Next Stage button. This is the Stage where the Change is Implemented. At the start of the Scheduled Dates (the Implementation Stage) – any Tasks configured to trigger at the Implementation Phase will move to Pending. **NOTE: All Tasks scheduled during the Implementation Phase MUST be completed before the Change can be marked “Completed”**

Assign any tasks at this phase to be worked during Implementation Stage.

**Step 1:** When you start working on the Change implementation, Click on Date/System Tab and record the Actual Start Date. Save an continue to work and save. Be sure all tasks are complete.

**Step 2:** Perform a post information verification and record your findings in a work info entry

**Step 3:** When all work is complete – click on the Date/System Tab and record the Actual End Date
Once the Change is completely implemented, move the Change to “Completed” Status by clicking the Next Stage button.

NOTE: If the Actual Start and End Dates have not been entered, you will be prompted to enter them before the Change can be moved to “Completed Status”. A Change Closure dialog box appears to enter the Actual Start and End Dates. Enter these dates, select a Status reason, and click “Save”

The system will auto close this change in two days. A notification is automatically sent to the requester regarding the change completion.

IF the Change failed, move the Change to Closed and select Unsuccessful Status Reason
From the flyout applications menu, scroll to Change Management and select the Change Mgmt Console. Or you can select New Change right from this menu.
To create a new change, navigate to the Change Management console. It looks and feels similar to Incident. Click on New Change.

Remember to use templates to help you to fill out the fields.
As a habit and security reasons, you should always log out of the BMC Remedy system when you are no longer using it.

Please get in the habit of logging out of Remedy once you are no longer using the system. This is also a good security practice. To logout simply use the Logout button/link on the top right corner of the Remedy screen.
This concludes the introduction to Change Management Application. You are now aware of the specific features available within a Change Request. In addition, it is important to remember how to access Change Management Application.

You’ve learned how to create a Change Request from an Incident and work the CR through to completion including verification.

This concludes the introduction to Change Management Application. You are now aware of the specific features available within a Change Request. In addition, it is important to remember how to create a change request from an incident.
Module Summary

This concludes the Change Management course.

Good Luck!
QUESTIONS & ANSWERS