



Change Management Tool Training

Setting Your Application Preferences



BMC Remedy AR System Logout

IT Home **Fermilab**

Welcome *marcia*

Quick Links

[Approval Central](#)

Administrator Console
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Asset Management
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Change Management
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[Change Management Console](#)

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Problem Management
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Requester Console
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Task Management
[Parent Application Object](#)

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.)

The screenshot shows the BMC Remedy Overview Console interface. The browser window title is "Overview Console (New) - Mozilla Firefox". The address bar shows the URL: <http://ar-mtdev.fnal.gov/arsys/forms/ar-srvdev.fnal.gov/SHR%3AOverviewConsole/Defau...>. The page header includes "BMC REMEDY IT SERVICE MANAGEMENT" and "Welcome, Marcia A. Teckenbrock". The left sidebar contains navigation options: "Company", "Console View", "Console Functions", "My Profile", "Application Preferences", and "Other Applications". The main content area is titled "Overview Console" and features a "Refresh" button. Below this, there are two sections: "Assigned Work" and "Broadcasts".

Assigned Work

Request ID	Parent Request ID	Request Type	Summary	Status	Priority
INC00000006336		Incident	Need DocDb pwd reset	In Progress	Low
INC00000009247		Incident	Approval dating for DocDB signoffs	In Progress	Medium
INC00000009601		Incident	Unable to view documents in DocDB	In Progress	Medium
CRG00000000075		Change	Put Summary Here	Request For Authorization	Low
CRG00000000077		Change	Put Summary Here	Request For Change	Low
CRG00000000080		Change	Summary	Implementation In Progress	Low

Broadcasts

Company	Subject	Priority	Start Date
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Setting Application Preferences



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

The screenshot shows the BMC Remedy IT Service Management console. The left sidebar contains a navigation menu with the following items: Company, Console View, Console Functions (with sub-items: Select Status Values, My Profile, Application Preferences, and Other Applications), and Other Applications. The 'Application Preferences' item is circled in red. The main content area displays the 'Overview Console' with an 'Assigned Work' table containing 6 entries. Below the table are buttons for View, Create, Search, Set to Defaults, Quick Actions, and Execute. Below that is a 'Broadcasts' section with 0 entries and buttons for View, Create, and Delete. A 'Close' button is located at the bottom of the console.

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

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.”

Application Preferences

Preferences for:

Console View:

Incident Management | **Change Management** | Problem Management | Asset Management

Console Page

On Form Open

Manager Console:

Support Console Main Table:

Data Set Name:

Search Criteria Default

Change Status:

Role:

Task Status:

Note: Status and Role are also used by Overview Console as default ticket searching criteria.

Form

After New Save:

Tab Views

Show Approvers:

Show Financials:

Overview Console

Show Change:

Show Task:

Opening Change Management



BMC Remedy AR System Logout

IT Home Fermilab

Welcome *marcia*

Quick Links

[Approval Central](#)

Administrator Console

[Application Administration Console](#)

Asset Management

[Asset Management Console](#)

Change Management

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Definitive Software Library

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Foundation Elements

[Overview Console](#)

Incident Management

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Problem Management

[Problem Management Console](#)

Requester Console

[Requester Console](#)

Task Management

[Parent Application Object](#)

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](#)

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
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View Create Delete

Searching For a Change



1. Click "General Functions."
2. Click on "Search Change."

The screenshot shows the BMC Remedy IT Service Management - Change Management interface. The top navigation bar includes "Logout Home", "BMC REMEDY IT SERVICE MANAGEMENT - Change Management", "Welcome, Marcia A. Teckenbrock", and "Help". Below this, there are tabs for "Manager Console" and "Support Console". The left sidebar contains a "Company" dropdown and a "Console View" menu with options: "General Functions", "New Change", "Search Change" (highlighted with a red circle), "My Profile", "Application Preferences", "Reminders", "Reports", "Flashboard", and "Process Overview". The main content area is titled "My Console" and includes a "Search Criteria" section with dropdowns for "Status" (All Open Changes), "Role" (Requestor), and "Dates" (AnyTime). There is also an "Advanced Search" field and "Search" and "Set to Defaults" buttons. To the right is a "Broadcast" section showing "0 entries returned - 0 entries matched" and a table with columns "Company", "Subject", "Priority", and "Start Date". Below this is an "Assigned Change" section with a table showing "Showing 0 - 0 of 0" entries. The table has columns: "Change ID", "Summary", "Priority", "Status", "Status Reason", "Start Date", and "Change Assignee". At the bottom, there are "Change Details" and "Tasks" tabs, and a "Work Info" section with a "Dates" dropdown set to "AnyTime" and a table with columns "Type", "Summary", and "Submit Date". The interface also includes "View", "Create", "Close", "Quick Actions", and "Execute" buttons.

Searching For a Change



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

The screenshot displays the BMC Remedy IT Service Management - Change Management interface. At the top, the current mode is set to 'Search'. The search bar contains the text '571', which is circled in red. Below the search bar, the 'Process Flow Status' is shown as a sequence of steps: Initiate, Review & Authorize, Plan & Schedule, Implement, and Closed. The 'Approval Status' is set to 'Closed'. The 'Change Request Information' section includes fields for Change Type*, Status*, Impact*, Summary*, Status Reason, Urgency*, Notes, and Risk Level*. Below this, there are tabs for Requester, Classification, Work Info, Assignment, Relationships, Approvers, SLM, and Dates. The 'Requested By' section contains fields for Support Company*+, First Name*, Middle Name, Last Name*+, Phone Number+, Organization, Department, Support Organization, and Support Group Name. The 'Requested For' section contains fields for First Name+, Last Name+, Change Location, Company*+, Region, Site Group, Site+, and Address. A red arrow points to the 'Search' button at the bottom left of the form.

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
CRQ00000000571	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*+ CRQ00000000571

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

Requested For

First Name+

Last Name+

Change Location Details

Company*+ Fermilab

Region

Site Group

Site+ FL

Address Batavia, Illinois United States

Save Print Close

Creating a Change



1. Click "General Functions."
2. Click on "New Change."

The screenshot displays the BMC Remedy IT Service Management - Change Management interface. The top navigation bar includes "Logout Home", "BMC REMEDY IT SERVICE MANAGEMENT - Change Management", "Welcome, Marcia A. Teckenbrock", and "Help". Below this, there are tabs for "Manager Console" and "Support Console". The left sidebar contains a "Company" dropdown and a "Console View" section with "General Functions" expanded. The "New Change" option is highlighted with a red circle. Other options in the sidebar include "Search Change", "My Profile", "Application Preferences", "Reminders", "Reports", "Flashboard", "Process Overview", "Advanced Functions", and "Other Applications". The main content area is titled "My Console" and includes a "Search Criteria" section with dropdowns for "Status" (All Open Changes), "Role" (Requestor), and "Dates" (AnyTime). There is also an "Advanced Search" field and "Search" and "Set to Defaults" buttons. To the right is a "Broadcast" section showing "0 entries returned - 0 entries matched" and a table with columns "Company", "Subject", "Priority", and "Start Date". Below this is an "Assigned Change" section with a table showing "Showing 0 - 0 of 0" entries. The bottom section is titled "Change Details" and "Tasks", with fields for "Urgency", "Assigned Group", "Assignee", "Requested For", "Requested By", "Approval Status", "Impact", "Notes", "Start Date", and "End Date". There is also a "Work Info" section with a "Dates" dropdown set to "AnyTime" and a table with columns "Type", "Summary", and "Submit Date". The interface includes various buttons like "View", "Create", "Delete", "Refresh", and "Execute".

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*+

Process Flow Status

Initiate > Review & Authorize > **Plan & Schedule** (Normal) > Implement > Closed

Approval Status

Current Overall

Change Request Information

Change Type* Status* Impact*
Summary* Status Reason Urgency*
Notes Risk Level* Priority

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

Change Classification

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

Operational Categorization

Tier 1+
Tier 2
Tier 3

Product Categorization

Tier 1
Tier 2
Tier 3
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*+

Process Flow Status

Initiate > Review & Authorize > **Plan & Schedule** (Normal) > Implement > Closed

Approval Status

Current Overall

Change Request Information

Change Type* Status* Impact*
Summary* Status Reason Urgency*
Notes Risk Level* Priority

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

Infrastructure Change Manager

Support Company* Support Organization*
Support Group Name*
Change Manager
Set Assignment using Set Clear

Infrastructure Change Assignee

Support Company Support Organization
Support Group Name+
Change Assignee+
Set Assignment using Set Clear

Infrastructure Change Implementer

Support Company Support Organization
Support Group Name+
Change Implementer+
Set Implementer using Set Clear

Time Spent Resolving Change Request

Start Time ...
Time Spent (min)
Total Time Spent (min)
Start Clock Stop Clock Update Effort Log

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.

The screenshot shows the BMC Remedy IT Service Management - Change Management interface. The main area is titled "Change ID#+" and displays a process flow status bar with steps: Initiate, Review & Authorize, Plan & Schedule (with a user icon and "Normal" status), Implement, and Closed. Below this is the "Change Request Information" section with fields for Change Type (Change), Status (Draft), Impact (3-Moderate/Limited), Summary (Enter Summary Here), Notes, Status Reason, Risk Level (Risk Level 1), Urgency (4-Low), and Priority (Low). The "Relationships" tab is active, showing a table with columns: Relationship Type, Request Type, Request Summary, Status, Start Date, End Date, and Sequence. The table currently shows "0 entries returned - 0 entries matched". A dropdown menu is open over the "Request Type" field, listing options: CI Unavailability, Configuration Item (highlighted), Incident, Infrastructure Change, Known Error, LDAP Object, Problem Investigation, Software Library Item, and (clear). The "Remove" button in the dropdown is circled in red.

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)

CI Relationships Search

Search Criteria

Search

Basic Search

CI ID CI Name

Tag Number CI Type

Serial Number Dataset Name

Product Categorization

Company

Tier 1

Tier 2

Tier 3

Product Name+

Model/Version

Manufacturer

[Advanced Search](#)

CIs

Table has Not been Loaded

CI Name	CI ID	Tag Number	Serial Number	CI Status	Company	Product Name
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Current Request ID Relationship Type Selected CI Name

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”

The screenshot shows the BMC CI Relationships Search interface. The search criteria are set to 'Impact/Urgency, Status and Location'. The 'Basic Search' section includes fields for CI ID, Tag Number, Serial Number, CI Name, CI Type, and Dataset Name (BMC.ASSET). The 'Product Categorization' section includes a 'Tier 1' dropdown menu, which is currently open, showing a list of categories including 'System', 'System Component', and 'System Service'. The 'System' category is selected, and its sub-menu is open, showing 'Computer System' as the selected option. The 'Search' button is circled in red, and a red arrow points to it from the text 'Click "Search"'. The 'Advanced Search' section is also visible, along with a table for 'CIs' which currently shows 'Table has Not been Loaded'. At the bottom, there are fields for 'Current Request ID' (CRQ000000000078), 'Relationship Type', and 'Selected CI Name', along with buttons for 'View', 'Relate', 'Relate with Unavailability', and 'Close'.

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.

The screenshot displays the BMC Software CI Relationships Search interface. The top section is titled "CI Relationships Search" and includes a "Search Criteria" section with a search box containing "Impact/Urgency, Status and Location". Below this are "Basic Search" and "Advanced Search" sections. The "Basic Search" section includes fields for CI ID, Tag Number, Serial Number, CI Name, CI Type (set to "Computer System"), Dataset Name (set to "BMC.ASSET"), and Product Categorization (Company, Tier 1, Tier 2, Tier 3, Product Name+, Model/Version, Manufacturer). A "Search" button and a "Clear All" button are located below the search criteria. The "CIs" section shows a table of results with columns for CI Name, CI ID, Tag Number, Serial Number, CI Status, Company, and Product Name. The table lists several CIs, including APPORA, AR-MT1, AR-SRV1, BIGBIRD, and ROMMINGER_CI_LIEDD. A context menu is open over the "APPORA" row, showing options: "View", "Close", "Related to", "Upgrades", "Repairs", "Impacts", "Moves", "Installs", "Removes", "Changes", and "(clear)". The "Relate" option is highlighted with a red circle. Below the context menu, there is a "Selected CI Name" field containing "APPORA" and buttons for "Relate", "Relate with Unavailability", and "CI Relationship Viewer".

CI Name	CI ID	Tag Number	Serial Number	CI Status	Company	Product Name
APPORA	S14906	97011	G7QCR61	Deployed	Fermilab	APPORA
AR-MT1	S27196	109208	HF6J2H1	Deployed	Fermilab	AR-MT1
AR-SRV1	S27195	109219	3R8V4H1	Deployed	Fermilab	AR-SRV1
BIGBIRD	S09744		5DWDS01	Deployed	Fermilab	BIGBIRD
ROMMINGER_CI_LIEDD	M53465		80612B1	Deployed	Fermilab	ROMMINGER_CI_LIEDD

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

Change ID*+ **CRG00000000110**

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

Requested For

First Name+

Last Name+

Change Location Details

Company*+ Fermilab

Region

Site Group

Site+ FL

Address Batavia, Illinois United States

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!

Change ID*+ CRQ00000000254

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* Test Minimum Required 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: General Information

Details: NEEDED FOR AUTHORIZATION TO BUILD

Work Info History

Type	Summary	File...	Submit Date
General Information	General Information		3/23/2010 3:21:...

File Name File Size Attach Label

Attachment 1

Attachment 2

Attachment 3

Add

Locked: No View Access: Public

Save Print Close

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* IMPLEMENTATION dates and times).
2. Click “Save.”

The screenshot shows a software interface with a tabbed menu at the top: Requester, Classification, Work Info, Tasks, Assignment, Relationships, SLM, and Dates. The 'Dates' tab is active, displaying a 'Change Dates' section with the following fields:

Earliest Start Date			RFC Date	
Requested Start Date+	11/30/2009 12:00:00 AM		Requested End Date+	12/8/2009 12:00:00 AM
Scheduled Start Date+			Scheduled End Date+	
Actual Start Date+			Actual End Date+	
Submit Date			Completed Date	
Submitter*	marcia		In Production Date+	

Below the 'Change Dates' section is a 'Task Dates' section with a table showing 0 entries returned. The table has the following columns: Task ID, Summary, TaskType, Scheduled Start Date, Scheduled End Date, Actual Start Date, and Actual End Date. At the bottom of the interface are buttons for Save, Print, and Close.

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.

The screenshot displays the BMC Remedy IT Service Management Change Management interface. The main window shows the 'Change ID' and 'Process Flow Status' (Initiate, Review & Authorize, Plan & Schedule, Implement). The 'Change Request Information' section includes fields for Change Type (Change), Status (Draft), Summary, Notes, Risk Level (Risk Level 1), and Requester details (Marcia A. Teckenbrock, DS - COMPUTING DIVISION). A 'Change Location' section is also visible.

The 'Initiate Change' dialog box is open, showing the following fields:

- Required Information: Change Classification, Summary, Change Request Information, Change Type (Change), Change Timing (Normal), Impact (4-Minor/Localized), Urgency (4-Low), Priority, Risk Level (Risk Level 1), Lead Time.
- Optional Information: (Empty)

Buttons for 'Save' and 'Cancel' are visible at the bottom of the dialog box.

Creating a Change



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

The screenshot displays the BMC Remedy IT Service Management Change Management interface. At the top, the current mode is 'Modify'. The page title is 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management Infrastructure Change'. The Change ID is CRQ000000000097. The Process Flow Status shows a sequence: Initiate (with a user icon and 'Review & Authorize Approval' button), Plan & Schedule, Implement, and Closed. The Approval Status shows 'Current' and 'Overall' checkboxes. The Change Request Information section includes fields for Change Type (Change), Status (Request For Change), Impact (4-Minor/Localized), Summary (Summary), Status Reason, Risk Level (Risk Level 2), Urgency (4-Low), and Priority (Low). Below this, there are tabs for Requester, Classification, Work Info, Tasks, Assignment, Relationships, Approvers, SLM, Financials, and Dates. The Requester section is expanded, showing '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) and 'Requested For' (First Name, Last Name, Change Location: Company: Fermilab, Region, Site Group, Site: FL, Address: Batavia, Illinois, United States). There are 'Clear' buttons for both sections.

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 then use the Yellow Brick Road to approve or reject the change. An email should be sent explaining the reason for the rejection.

The screenshot displays the Change Request Management System interface. On the left is a navigation sidebar with sections: 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, and Consoles. A red arrow points to 'Email System' in the Functions section.

The main content area shows details for Change ID*+ CRQ000000000571. The Process Flow Status bar includes steps: Initiate, Review & Authorize, Plan & Schedule (with an 'Approval' button), Implement, and Closed. A red arrow points to the 'Approval' button, which has a dropdown menu open with options: Approve, Reject, Cancel, Help, and (clear). The Approval Status section shows 'Current' and 'Overall' indicators.

Change Request Information includes:

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

Below this is a tabbed interface with tabs: Requester, Classification, Work Info, Tasks, Assignment, Relationships, Approvers, SLM, Financials, Dates. The 'Requester' tab is active, showing:

- 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.
- Requested For:** First Name+, Last Name+, Change Location (Company*+ Fermilab, Region, Site Group, Site+ FL, Address Batavia, Illinois, United States).

At the bottom are buttons for Save, Print, and 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.)

The screenshot displays the BMC Remedy IT Service Management - Change Management interface. The top navigation bar includes 'Save', 'New search', 'New request', 'Advanced search', 'Clear', 'Set to defaults', 'Status history', and 'Home'. The main header shows 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management' and 'Infrastructure Change'. The left sidebar contains 'Quick Links' (CI Search, Select Operational, Select Product, Select Template, View Broadcasts, View Calendar) and 'Functions' (Advanced, Create Other Requests, Consoles). The main content area shows a change request with ID 'CRG000000000080'. The 'Process Flow Status' bar indicates the current stage is 'Plan & Schedule' (Normal). The 'Approval Status' shows 'Current' and 'Overall'. The 'Change Request Information' section includes fields for 'Change Type' (Change), 'Status' (Planning In Progress, circled in red), 'Impact' (4-Minor/Localized), 'Summary' (Summary), 'Urgency' (4-Low), 'Risk Level' (Risk Level 1), and 'Priority' (Low). Below this, the 'Requester' tab is active, showing details for '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/OICIO/COM, Support Organization: Computing Division, Support Group Name: Communications and Outreach) and 'Requested For' (First Name, Last Name, Change Location: Company: Fermilab, Region, Site Group, Site: FL, Address: Batavia, Illinois, United States). The bottom of the form has 'Save', 'Print', and 'Close' buttons.

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."

Change Scheduled Dates

Enter the scheduled date to move the change request forward.

Scheduled Start Date+

Scheduled End Date+

The screenshot shows the BMC Remedy IT Service Management interface. At the top, a blue banner reads "BMC REMEDY IT SERVICE MANAGEMENT - Change Management Infrastructure Change". Below this is a navigation menu with "Quick Links" (CI Search, Select Operational, Select Product, Select Template, View Broadcasts, View Calendar) and "Functions" (Advanced, Create Other Requests, Consoles). The main content area displays "Change ID*+ CRQ000000000097" and "Process Flow Status" with a progress bar showing stages: Initiate, Review & Authorize, Plan & Schedule (current), Implement, and Closed. A "Change Request Information" section includes fields for Change Type (Change), Status (Normal), Summary, and various dropdowns for Status Reason, Risk Level, Impact (4-Minor/Localized), Urgency (4-Low), and Priority (Low). A "Change Scheduled Dates" window is overlaid on top, showing input fields for Scheduled Start Date (1/1/2010 12:00:00 AM) and Scheduled End Date (1/1/2010 03:00:00 AM) with Save and Cancel buttons. Below the main form, there are sections for "Add Work Info" and "Work Info History".

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.

The screenshot displays the BMC Remedy IT Service Management - Change Management interface. The top navigation bar includes 'Current mode: Modify', 'Save', 'New search', 'New request', 'Advanced search', 'Clear', 'Set to defaults', 'Status history', and 'Home'. The main header shows 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management' and 'Infrastructure Change'. The left sidebar contains 'Quick Links' (CI Search, Select Operational, Select Product, View Broadcasts, View Calendar) and 'Functions' (Advanced, Create Other Requests, Consoles). The main content area shows a 'Change ID' of CRQ000000000080. The 'Process Flow Status' bar indicates the current step is 'Plan & Schedule' (Approval), with previous steps 'Initiate' and 'Review & Authorize', and subsequent steps 'Implement' and 'Closed'. The 'Approval Status' section shows 'Current' and 'Overall' status indicators. The 'Change Request Information' section includes fields for 'Change Type' (Change), 'Status' (Scheduled For Approval), 'Impact' (4-Minor/Localized), 'Summary' (Summary), 'Urgency' (4-Low), 'Notes', 'Risk Level' (Risk Level 1), and 'Priority' (Low). Below this is a tabbed interface with 'Work Info' selected, showing 'Add Work Info' and 'Work Info History' sections. The 'Add Work Info' section includes fields for 'Work Info Type' (General Information), 'Date', 'Source', 'Summary', and 'Details', along with an attachment table with columns 'File Name', 'File Size', and 'Attach Label'. The 'Work Info History' section shows '0 entries returned - 0 entries matched' and a table with columns 'Type', 'Summary', 'Files', and 'Submit Date'. The bottom of the form has 'Save', 'Print', and 'Close' buttons.

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).

The screenshot displays the BMC Remedy IT Service Management Change Management interface. The current mode is 'Modify'. The page title is 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management' with a sub-header 'Infrastructure Change'. The Change ID is CR0000000000078. The Process Flow Status is 'Plan & Schedule' (Normal), with other stages being 'Initiate', 'Review & Authorize', 'Implement', and 'Closed'. The Change Request Information section shows: Change Type: Change; Status: Scheduled; Impact: 3-Moderate/Limited; Urgency: 4-Low; Priority: Low; Risk Level: Risk Level 1. The Requester information includes: 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. The Requested For information includes: Company: Fermilab; Region: ; Site Group: ; Site: FL; Address: Batavia, Illinois, United States. The interface includes a navigation menu on the left with sections for Quick Links, Functions, Advanced, Create Other Requests, and Consoles. At the bottom, there are 'Save', 'Print', and 'Close' buttons.

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 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 > **Implement** > Closed

Approval Status: Current, Overall

Change Request Information

Change Type* Change | **Status*** Implementation In Progress | **Impact*** 4-Minor/Localized | **Urgency*** 4-Low

Summary* Summary | **Status Reason** | **Risk Level*** Risk Level 1 | **Priority** Low

Notes

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

Requested For

First Name+ | Last Name+ | **Change Location** Details

Company*+ Fermilab

Region | Site Group | Site+ FL | Address Batavia, Illinois United States

Save | Print | Close

Completing Your Change



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

The screenshot displays the BMC Remedy IT Service Management Change Management interface. At the top, the current mode is set to 'Modify'. The page title is 'BMC REMEDY IT SERVICE MANAGEMENT - Change Management' with a 'Help' link. The breadcrumb trail shows 'Infrastructure Change'. On the left, there are 'Quick Links' and 'Functions' sections. The main content area shows a 'Change ID' of CRQ000000000097. The 'Process Flow Status' bar indicates the current stage is 'Implement' (Normal), with a dropdown menu open showing 'Next Stage' options: 'Enter Pending', 'Cancel', 'Help', and '(clear)'. The 'Change Request Information' section includes fields for 'Change Type' (Change), 'Status' (Implementation In Progress), 'Summary', 'Notes', 'Status Reason', 'Risk Level' (Risk Level 2), and 'Priority' (Low). Below this, there are tabs for 'Requester', 'Classification', 'Work Info', 'Tasks', 'Assignment', 'Relationships', 'Approvers', 'SLM', 'Financials', and 'Dates'. The 'Requested By' section shows details for Marcia A. Teckenbrock at Fermilab. The 'Requested For' section shows details for the change location at Fermilab, Batavia, Illinois, United States.

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		Add Work Info	
Status Reason	Final Review Complete	Work Info Type	Install Results - Details
Change Dates		Date	1/27/2010 12:00:00 AM
Actual Start Date*+	1/27/2010 12:00:00 PM	Source	
Actual End Date*+	1/27/2010 12:06:00 PM	Summary	Install Results - Details
Change Classification		Details	There were no problems with the install
Performance Noting (1 - 5)*	1	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 “Advisory” 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).

The screenshot displays the BMC Remedy IT Service Management Change Management interface. The current mode is 'Modify'. The change ID is CRG000000000080. The process flow status is 'Implement' (Normal). The change request information includes:

- Change Type: Change
- Status: Completed
- Impact: 4-Minor/Localized
- Summary: Summary
- Status Reason: [Empty]
- Urgency: 4-Low
- Risk Level: Risk Level 1
- Priority: Low

The 'Requested By' section shows:

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

The 'Requested For' section shows:

- Company: Fermilab
- Region: [Empty]
- Site Group: [Empty]
- Site: FL
- Address: Batavia, Illinois, United States

Buttons at the bottom include Save, Print, and Close.