VUIT Change Management Work Instructions Guide

Opening a Normal Change:

1. Click New, New Change Request.
2. Normal Change is the default for Change Type. Write down ticket #.
3. Enter Owned By Team. Select an owner if you know who it is and a Change Requestor if it's not yourself.
4. Enter Change Title.
5. Click Save button at top of page.
6. Enter the following, clicking the SAVE button periodically:
    a. Description
    b. Reason
    c. Service Affected
    d. Service Category
    e. Service Subcategory
    f. Priority
    g. Primary CI (if more than one CI, go to Configuration Items tab at bottom of page and highlight as many CIs as you need).
    h. Click Impact Analysis button if you want to view CI dependencies upstream and downstream (view with care in web client, you may get booted from your change and will have to go back into it)
    i. Scheduled Start/End Date/Times.
    j. Click View Change Calendar button and click View Collision Detection button if you'd like to.
    k. Click Next (or scroll down if in Expanded View)
    l. Number of Users Impacted
    m. Number of Teams Involved
    n. Can it be Tested/Can it be Backed Out
    o. Check the boxes if they apply for "Not During Normal Maintenance Window" and "Requires Service Outage"
    p. Click "Display Maintenance Windows" button to view normal maintenance windows
    q. Impact Assessment
    r. Risk
    s. Business Technical Justification
    t. Pre-Implementation Test Results
    u. Click Next or scroll down if in Expanded View
    v. Implementation Plan
    w. Verification Plan
    x. Back out Plan
7. Click SAVE button.
8. If your change is Low Risk, move to Scheduling status and go to Step 11. If your change is Medium/High Risk move to Change Owner Mgr Approval status.
9. Your leader or a designate will review and approve your change by moving it to Technical Review status. They may or may not enter a Journal Note in the Journal tab.

10. The Technical Review Board will review this change at its next meeting. Board members will enter comments in the Review Boards tab. If they approve, they will move the change to Scheduling status. They may or may not send your change to Architectural Review status (who would then move it to Scheduling upon approval).
11. In Scheduling status, confirm the window you plan on using is entered in Scheduled Start/End Date/Time.
12. If your change is Low Risk <u>or</u> if your change is within the normal maintenance window, move to Change Proposal Review status. If your change is Medium/High Risk <u>and</u> the box is checked for being outside of the normal maintenance window, move to Customer Approval status.
13. If a Low/Medium Risk change, your leader or designate will approve by moving it to Build status. They may or may not enter Journal Notes. If a High Risk change, it will go to CAB for the first approval and CAB will move to Build status.
14. Finish building out your change as necessary.
15. Move to CAB Approval.
16. If a Low/Medium Risk change, the Change Manager will provide online approval and move to Approved status. If a High Risk change, CAB will provide second approval and move to Approved status.
17. At the start of your change window, move change to Implementing status. Enter the Actual Start Date/Time now if you like.
18. At the end of your change window, make sure the Actual Start/End Dates/Times are filled in as well as Final Disposition. Move to Review status.
19. Once you are confident your change has been verified, you can move your change to Closed status.

Opening a Standard Change:

1. Click on New, New Change Request.
2. Select Standard under Change Type. Write down ticket #.
3. Enter Owned By Team. Select an owner if you know who it is and a Change Requestor if it's not yourself.
4. Enter Change Title.
5. Click Save button at top of page.
6. Select the Standard Change Template from the dropdown.
7. Enter the following, clicking the SAVE button periodically:
    a. Priority
    b. Change Title
    c. Service Affected
    d. Service Category
    e. Service Subcategory
    f. Primary CI (go to Configuration Items tab to add additional CIs)
    g. Scheduled Start/End Date/Time

8. At start of change window, move to Implementing status. Enter Actual Start Date/Time if you like.
9. At end of change window, make sure the Actual Start/End Date/Times and Final Disposition are entered. Post Implementation Notes are optional.
10. Move change to Review status.
11. Once you are confident your change has been verified, you can move your change to Closed status.

Opening an Emergency Change:

1. Click on New, New Change Request.
2. Select Emergency under Change Type. Write down ticket #.
3. Enter Owned By Team. Select an owner if you know who it is and a Change Requestor if it's not yourself.
4. Enter Change Title.
5. Click SAVE button at top of page.
6. Enter the following, clicking the SAVE button periodically:
    a. Description
    b. Reason
    c. Service Affected
    d. Service Category
    e. Service Subcategory
    f. Priority
    g. Primary CI (if more than one CI, go to Configuration Items tab at bottom of page and highlight as many CIs as you need).
    h. Click Impact Analysis button if you want to view CI dependencies upstream and downstream (view with care in web client, you may get booted from your change and will have to go back into it)
    i. Scheduled Start/End Date/Times (optional for Emergency changes).
    j. Enter in the date for the next scheduled CAB (Thursdays) as a reminder and for dashboards.
    k. Click Next (or scroll down if in Expanded View)
    l. Number of Users Impacted
    m. Number of Teams Involved
    n. Can it be Tested/Can it be Backed Out
    o. Check the boxes if they apply for "Not During Normal Maintenance Window" and "Requires Service Outage"
    p. Click "Display Maintenance Windows" button to view normal maintenance windows
    q. Impact Assessment
    r. Risk
    s. Business Technical Justification
    t. Pre-Implementation Test Results
    u. Click Next or scroll down if in Expanded View
    v. Implementation Plan

    w. Verification Plan
    x. Back out Plan
7. Click SAVE button.
8. Enter the Actual Start/End Date/Times (required).
9. Click Next and enter Final Disposition
10. Click on the PIR (Post Implementation Review) tab at bottom of change form and answer the questions as thoroughly as possible.
11. Move to Review status.
12. Move to Closed status once you feel it is filled out as completely as possible with no additional information pending.

Opening an Informational/Non-Prod change:

1. Click on New, New Change Request.
2. Select Informational under Change Type. Write down ticket #.
3. Enter Owned By team and Change Owner. Select an owner if you know who it is and a Change Requestor if it's not yourself.
4. Enter Title (might be helpful to add "Non-Prod" to title if this is a non-prod change, though not required).
5. Click SAVE.
6. Enter the following, clicking the SAVE button periodically:
    a. Service Affected
    b. If applicable: Not During Maintenance Window, Requires Service Outage, Non-Production Change
    c. Scheduled Start/End Date/Times
    d. Description
    e. Primary CI (optional for Informational changes). If more than one CI, go to Configuration Items tab at bottom of page and highlight as many CIs as you need.
    f. Optional: In the Technical Analysis tab enter Impact Assessment, Risk, Business/Technical Justification and Pre-Implementation Test Results. Enter in what information you have or can provide.
    g. Optional: In the Implementation Verification tab enter Implementation Plan, Verification Plan and Back out Plans. Enter in what information you have or can provide.
7. Click SAVE
8. Once change has been completed, enter Actual Start/End Date/Times.
9. Enter Final Disposition
10. Move to Closed status