

Remedy Change Management

Student Guide

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INTRODUCTION

Purpose

The purpose of this guide is to provide users with the necessary procedures to execute the activities and tasks within the Remedy Change Management process.

Scope

The target audience for this document is second level support staff but the information may also benefit Manitoba eHealth management and Service Desk staff.

Manitoba eHealth Change Management

The Manitoba eHealth Change Management process strives to provide controlled, efficient and prompt management of changes to Manitoba eHealth production environments and to minimize the risk of negatively impacting availability when introducing changes into the production environment.

Requests for Change (RFC) are raised in Remedy to capture, manage, and report on Changes during the Manitoba eHealth Change Management process.



More details on policies, principles, and standards are in the Manitoba eHealth **Change Management Process Guide** and the **Change Management Process Principle Guide** located on SharePoint.
(See "References" on page 29.)

Icons



This icon will point to reference sources that contain more information on the topic.



This icon indicates that the information is an important business rule, principle or standard in the Change Management process.



This icon warns of the consequences of doing or not doing a certain action.




This icon identifies a tip or a shortcut.

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RFC PROCEDURES

Process Flow Wizard

The **Process Flow Status/Wizard** guides you through the Change process from start to finish. It provides a visual mechanism to track the state of a Change. The Process Flow Status area displays the sequence of the Change Management Lifecycle stages from the initial Initiate stage to the Closed state. The current stage of the Change is highlighted in green.

To move a Change to the next stage, click the drop down arrow  or click [Next Stage](#) at the bottom of the form.



Stages of RFC

Some state transitions in the RFC lifecycle can only be performed by users who have been assigned a specific role.

The various stages (states) in the lifecycle of an RFC are:

Change Status	Description
Draft	Initial details are entered; RFC is not yet submitted to the Change Management process
Request For Authorization	RFC is in Review Approval phase for Resource Group Manager / Change Manager approval*
Request For Change	RFC is in Business Approval phase for Business / Technical Resource approval*
Planning In Progress	Tasks are created and assigned for planning activities
Scheduled for Approval	RFC is in Implementation Approval phase for Resource Group Manager / Change Manager / Change Advisory Board (CAB) / Senior Management approval*
Scheduled	RFC has been assigned for completion
Implementation In Progress	RFC is being implemented
Pending	Work on the RFC has been temporarily suspended
Rejected	RFC has been rejected by an Approver
Completed	RFC has been implemented
Closed	RFC can no longer be modified
Cancelled	RFC is no longer required

* The specific approval(s) that will be required depend on the Class and Risk Level of the RFC.



For further details refer to ***Change request lifecycle*** in the BMC Remedy Change Management Help.

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Change Initiate and Record



An RFC should be raised as soon as the need for a change is known to ensure proper planning for change implementation.

Review policies and collect all required information.

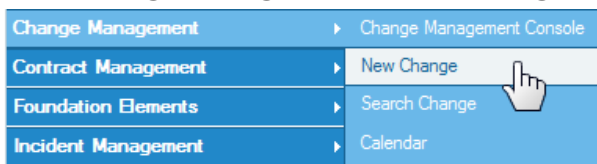


Refer to the Manitoba eHealth **Change Management Process Guide** and the **Change Management Process Principle Guide** for more information regarding lead times. (See "References" on page 29.)

CREATE AN RFC

To create a new RFC:

1. Display the **Applications** menu on the left side of the screen.
2. Select **Change Management > New Change**.



The new Infrastructure Change form is displayed. A Change ID is automatically assigned.

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Fields highlighted in black with an asterisk are mandatory.
Mandatory fields must be filled in for the RFC to be saved in Remedy.

CHANGE REQUEST INFORMATION



Change ID*+	CRQ000000100501	
Coordinator Group*+	Application-Mgmt	▼
Change Coordinator+	Support Staff 15	▼
Change Location	Air Canada	

Field	Description
Change ID	A unique value assigned automatically by Remedy.
Coordinator Group	This field is auto-filled based on your login.
Change Coordinator	This field is auto-filled based on your login.
Change Location	The site at which the change will be implemented. This field is auto-filled based on your login but you can click to modify the location.

Service+		▼
Template+		
Summary*		≡
Notes		≡

Field	Description
Service	Leave this field blank.
Template	If applicable, select a template on which to base the RFC.
Summary	Enter a brief description of the RFC. (This description will be included for paging.)
Notes	Enter additional information about the RFC.

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Class*	Normal	▼
Change Reason		▼
Environment	Production	▼
Impact*	4-Minor/Localized	▼
Urgency*	4-Low	▼
Priority	Low	▼
Risk Level*	Risk Level 1	▼  



Refer to the **Manitoba eHealth Change Management Principle Guide** for further details regarding Class and Risk Level. (See "References" on page 29.)

Field	Description
Class	<p>Class specifies the relative urgency of the RFC, so that approvers can assess its magnitude.</p> <ul style="list-style-type: none"> ➤ Emergency - Emergency RFCs are changes that must be implemented immediately due to system or service failure and must have a corresponding Priority 1 or Priority 2 Incident ticket raised in Remedy. They can be raised after the change is made to avoid holding up a restored service. All Emergency RFCs are to be reviewed with CAB after implementation. ➤ Expedited - Expedited RFCs require immediate action but do not meet the conditions defined in an Emergency RFC (e.g. proactive incident avoidance) and cannot be accomplished within the normal change cycle. They can be raised with less lead time prior to implementation. ➤ Latent - Latent Change activities occur when no notification or request for approval is applied for prior to implementing the change. The change activity is done without CAB or Business approval and the recording of the activity is done after the fact. As a result, Latent timing automatically sets the request status to Completed after you save the change request. ➤ Normal - A normal RFC goes through predefined steps that are documented in the Change Management process with sufficient lead times for review, communication, and approvals. A person that initiates an RFC is known as the Change Requester. RFCs may be initiated as soon as the need for a change is known to ensure proper planning for change implementation. ➤ No Impact – This option is for "information only" purposes as well as Configuration Item (CI) document changes; where the process dictates that the change must be logged in a Change Request. Review approvals will be required and the ticket must be closed by the implementer. ➤ Standard – A Standard RFC is an RFC that has been defined and accepted (first time) via CAB approval to a common set of requirements where authority is effectively given in advance. Any normal, successful RFC may become a candidate for Standard RFC status. A Standard RFC is repeatable and occurs frequently with an acceptable level of risk.
Change Reason	Optional; select the reason that best reflects why the change is being made.

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Field	Description
Environment	Select the environment in which the change will be made. Production environments MUST have an RFC raised for all identified in scope work identified in the Change Management Principle Guide.
Impact	Select the option that best reflects the extent to which the change affects the business.
Urgency	Select the option that best reflects the importance the Change Requester assigns to the RFC.
Priority	Display only; Priority is set by Remedy when a combination of Impact and Urgency are selected. This priority will be used by Change Management to prioritize approvals and review of RFCs that appear in their queue. (This is not related to Incident Management Priority.)
Risk Assessment Questions	Answer the Risk Assessment Questions to ensure that the risk to the business is assessed appropriately to reduce business impact. 
Risk Level	Display only; answer the Risk Questions for the Risk Level field to be updated. Risk Questions are identified in the Change Management Principle Guide. The highest Risk Level is 5.

Status*

Draft


Status Reason

Manager Group*+

Change Manager+

Vendor Group+

Vendor Ticket Number

 For further details on Status Reason refer to **Requirements for status reasons** in the BMC Remedy Change Management Help.


Field	Description
Status	Display only; this reflects the lifecycle stage of the RFC. (In Draft state, the RFC has not yet been submitted to the Change Management process.)
Status Reason	Some RFC Status codes require a Status Reason to be selected (E.g. Pending). (Draft state does not require a Status Reason.)
Manager Group	Select Change-Mgmt.
Change Manager	Select any value in the list
Vendor Group	Leave blank
Vendor Ticket Number	Leave blank


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REQUESTED FOR


The Requested For option may be used if you (the Change Coordinator) are submitting the RFC on behalf of someone else. In the Quick Action section, select **Requested For**.


Quick Action


 [Auto Assign](#)


 [Broadcast Change](#)


 [Impact Simulator](#)


 [Create Relationship to](#) ▼


 [Create Related Request](#) ▼


 [Process Overview](#)

 [Select Operational](#)

 [Select Product](#)

 [Requested For](#)

 [View Calendar](#)



Requested For

Customer Company+

First Name+

Middle Name

Last Name+

Phone Number+ ...

Email

Organization

Department

[Clear](#)

OK

Cancel

Field	Description
Customer Company	This field will be populated based on the Last Name information.
First Name	This field will be populated based on the Last Name information.
Last Name	Type the last name of the person for whom the request was created and press Enter . This will either fill in the rest of the Customer information or it will bring up the People Search utility with all of the people matching the last name entered.
Phone Number	This field will be populated based on the Last Name information. If the Phone Number is incorrect, the information can be edited by selecting the <input type="text"/> ... button.
Email	This field will be populated based on the Last Name information.



The Customer (Requested For) is notified when the Status is changed from Draft to an open Status.

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CATEGORIZATION TAB

The categorizations are used to describe the change and show which products and services are affected by the RFC.

Work Detail **Categorization** Tasks Relationships Date/System Additional Details

Change Location Company ▼

Operational Categorization

Tier 1+ ▼ 🔍

Tier 2 ▼

Tier 3 ▼

Product Categorization

Tier 1 ▼

Tier 2 ▼

Tier 3 ▼

Product Name+ ▼

Model/Version ▼

Manufacturer

Section	Description
Operational Categorization	Tier 1 - What can be changed? Tier 2 - Components to be changed? Tier 3 - Action (What are you doing?)
Product Categorization	Tier 1 – Product Category (e.g. Hardware/ Software) Tier 2 – Product Group (e.g. Print Device, Facilities, Network) Tier 3 – Product Type (e.g. Printer, Scanner) Product Name - If you select a Product Name first, Tiers 1-3 will be populated with the correct detail supporting the Product Name. Model /Version Manufacturer



Categorizations may also be set by clicking **Select Operational** or **Select Product** in the Quick Action section.

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WORK DETAIL TAB

The Work Detail tab allows you to add notes and attachments into the RFC as well as view approval information. Use this tab to add a note that indicates which areas will be impacted (if any) and to attach Implementation, Test, Backout, and Release Plans.

Work Detail
Categorization
Tasks
Relationships
Date/System
Additional Details

Table has Not been Loaded
Preferences
Refresh

Type	Notes	Files	Submit Date	Submitter

Add Work Info

Notes:

Attachment:

<File Name>

Work Info Type

General Information

More Details

Attachment #2

<File Name>

Attachment #3

<File Name>

Locked

☐ Yes
☒ No

View Access

☒ Internal
☐ Public

Add

Approval Phase

Show

Pending

Table has Not been Loaded
Preferences
Refresh


Approval...	Approvers	Date ^	Approve...	Alternate...

View Notifications
 Add
 Approve
 Reject

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Adding a Work Detail

To add a work detail, populate the following fields and click the  button.





Field	Description
Notes	Enter a detailed summary of the Work Detail.
Attachment	Optional; Click the Browse Attachment button  to select a file to be attached. Two additional attachments maybe added in the More Details section. The maximum size for each file is 10 MB.
Work Info Type	Select a value that best corresponds with the type of note you are adding.
Locked	Determine if you want to lock this record. Locking a record prevents anyone from editing the record at a future time.



An email may be sent from within an RFC by selecting the **Email System** link under Functions. Remedy will automatically append the email to the Work Detail section of the RFC. It is necessary to include your name and contact information at the end of the email as the tool doesn't add these details to it.

Managing Work Details

Each Work Detail record will be displayed as a separate line in the list at the top of the Work Detail tab. The number in the Files column indicates how many files have been attached in the Work Detail.

Button	Description
	Allows you to edit the selected Work Detail; click  when you are done revising the record
	Opens a printable summary report of the selected Work Detail record(s)
	Opens the Work Info History window and displays a summary of all Work Detail records

Viewing Approvals

The bottom section of the Work Details tab shows information related to the current approval phase. By default, Pending approvals will be displayed but you may select a different option in the **Show** menu.

TASKS TAB



For information on working with Tasks refer to the **Manitoba eHealth Remedy Tasks Student Guide** or the **Task implementer role** section in the BMC Remedy Change Management Help. (See "References" on page 29.)

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RELATIONSHIPS TAB

Use the Relationships tab to view relationships that have been created between the current RFC and other Remedy items or to create new relationships.

Viewing Relationships

Any item(s) that the current RFC has been related to will be displayed in the table at the top of the Relationships tab. You may filter the type of item(s) you see by selecting an option in the **Show Related** menu (Incident, Known Error, etc.).

Creating a Relationship

To relate the current RFC to another Remedy item:

1. Click the drop down arrow next to the **Search** field at the bottom of the tab and select the type of item to be related (E.g. Incident).
2. Click in the next field and type a key word(s) for the item. An example is shown below.

Create Relationships

Search

Note: You may also enter the ID number of the item if you know it. E.g. %200300

3. Click .

A Search window opens and displays a list of matching items.

Note: If you need to further refine your search, click **Use Advanced Search** in the top right of the window.
4. Select the item you want to relate.
5. Optional: Change the value in the **Select a Relationship Type** drop down menu. (The default is Related To.)

Note: The options will vary depending on the type of item you have searched for.
6. Click .



- Relationships may also be created by selecting **Create Relationship to** in the Quick Action section.
- To delete a relationship: select the record on the Relationships tab and click .

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DATE/SYSTEM TAB

When planning an RFC, utilize the Date/System tab to track the scheduled, and actual start and end dates of the RFC.

Date Information

Scheduled Start Date+

Scheduled End Date+

Outage Start Date+

Outage End Date+

Actual Start Date+

Actual End Date+

Completed Date

Timing Reason

RFC Resolution

Time Spent Resolving Change Request

Start Time

Time Spent (min)

Total Time Spent (min)

System Information

Submitter*

Submit Date

Scheduled Start/End Dates and, if applicable, Outage Start/End Dates MUST be filled in before submitting the RFC for Review approval.

Item	Description
Scheduled Start Date	Date RFC is scheduled to start. Required to advance RFC to Planning in Progress.
Scheduled End Date	Date RFC is scheduled to end and is required.
Outage Start Date	Date outage is scheduled to start (if applicable).
Outage End Date	Date outage is scheduled to end (if applicable).
Actual Start Date	Actual start date of the RFC.
Actual End Date	Actual end date of the RFC.
Completed Date	Date RFC is completed.
Timing Reason	Required when Class is set to Expedited.

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Item	Description
RFC Resolution	Code that summarizes what happened during implementation.
Time Spent (min)	Time Change Implementer spent (in minutes) resolving the RFC.
Submitter	Person responsible for submitting the RFC.
Submit Date	Date the RFC was submitted.

Click [View Task Date](#) to display a list of task dates and times that you can use to populate the start and end dates of the RFC. The dates and times for tasks are populated within the tasks themselves.



Once the RFC has gone through Implementation approval, you will not be able to modify the Scheduled Start/End Dates.

SAVE AN RFC

To save the RFC in Draft status:

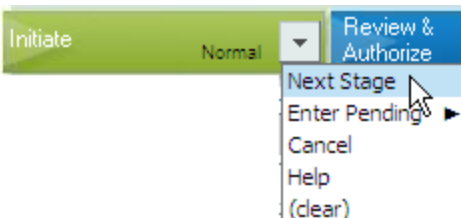
1. Fill in all the mandatory fields in the Change form.
2. Click the [Save](#) button at the bottom of the form.
The RFC will remain in Draft status and will not be advanced through approvals.

SUBMIT AN RFC FOR REVIEW APPROVAL



The Scheduled Start and End Dates MUST be in the RFC at this point. Risk 2/3 Changes should also have ALL other details finalized in the RFC before submitting for Review approval. Risk 4/5 Changes must also have a completed Technical Review Questionnaire attached.

In the Process Flow Status area select *Initiate* > *Next Stage*.



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The RFC moves to the Initiate – Approval stage and the Status changes to Request for Authorization. The RFC is in the Review Approval Phase.

Initiate

Approval

Review & Authorize

Plan & Schedule

Implement

Closed

Change ID*+

CRQ000000100502

Coordinator Group*+

Application-Mgmt

Change Coordinator+

Support Staff15

Change Location

Air Canada

Service+

Template+

Summary*

Test

Notes

Test RFC for training

Class*

Normal

Change Reason

Other

Environment

Production

Impact*

4-Minor/Localized

Urgency*

4-Low

Priority

Low

Risk Level*

Risk Level 2

Status*

Request For Authorization

Status Reason

Manager Group*+

Change-Mgmt

Change Manager+

Vendor Group+

Vendor Ticket Number

Work Detail

Categorization

Tasks

Relationships

Date/System

Additional Details

2 entries returned - 2 entries matched

Preferences

Refresh

Type	Notes	Files	Submit Date	Submitter
General Information	Status Transition: Draft > Request f		7/13/2015 1:29:30 PM	support15
General Information	See attached implementation plan	1	7/13/2015 1:27:52 PM	support15

Add Work Info

Notes:

Attachment:

<File Name>

Work Info Type

General Information

More Details

Add

Current Approval Phase

Review

Show

Pending

1 entries returned - 1 entries matched

Preferences

Refresh

Approval...	Approvers	Date	Approve...	Alternate...
Pending	manager.trainer.jbyers2			

View Notifications

Add

Approve

Reject

Save

Next Stage

Print

Process Wizard

Process Tracker

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Review and Authorize



During the Review & Authorize stage, the Resource Group Manager and the Change Manager (depending on Risk Level) will review the RFC for estimation of Risk Level, Impact and details.

RFC's with Risk Level 4/5 will also require a Business/Technical approval at this stage.

When all details are verified, the required approvers will authorize the RFC. The Change Coordinator will receive an email notification of each approval.

When all required approvals have been granted, the RFC will automatically progress to the Plan & Schedule stage with a Status of Planning in Progress.

Initiate
Review & Authorize
Plan & Schedule
Implement
Closed

Change ID*+
CRQ000000100502

Coordinator Group*+
Application-Mgmt

Change Coordinator+
Support Staff15

Change Location
Air Canada

Service+

Template+

Summary*
Test

Notes
Test RFC for training

Class*
Normal

Change Reason
Other

Environment
Production

Impact*
4-Minor/Localized

Urgency*
4-Low

Priority
Low

Risk Level*
Risk Level 2

Status*
Planning In Progress

Status Reason

Manager Group*+
Change-Mgmt

Change Manager+

Vendor Group+

Vendor Ticket Number

Work Detail
Categorization
Tasks
Relationships
Date/System
Additional Details

2 entries returned - 2 entries matched
Preferences
Refresh

Type	Notes	Files	Submit Date	Submitter
General Information	Status Transition: Draft > Request f		7/13/2015 1:29:30 PM	support15
General Information	See attached implementation plan	1	7/13/2015 1:27:52 PM	support15

Add Work Info

Notes:

Attachment:
<File Name>

Work Info Type
General Information

More Details

Add

Next Approval Phase
Implementation Approva
Show
Pending

0 entries returned - 0 entries matched
Preferences
Refresh

Approval...	Approvers	Date	Approve...	Alternate...
-------------	-----------	------	------------	--------------

View Notifications
Add
Approve
Reject

Save
Next Stage
Print

Process Wizard
Process Tracker

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Plan and Schedule



During the Plan & Schedule stage, the Change Coordinator creates plans and updates the build details of the RFC. He/she will also review the Change Calendar and resolve all schedule conflicts.

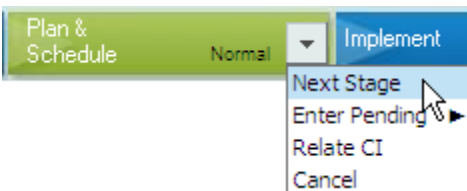


To view the Change Calendar, open the Change Console and select **View Calendar** in the Functions section on the left side of the screen.

SUBMIT AN RFC FOR IMPLEMENTATION APPROVAL

Once the Change Coordinator validates the plans and finalizes the build of the RFC, the RFC is submitted for Implementation Approval.

In the Process Flow Status area select *Plan & Schedule > Next Stage*.



The RFC moves to the Plan & Schedule – Approval stage and the Status changes to Scheduled For Approval. The RFC is in the Implementation Approval phase.

The screenshot shows the Remedy Change Management interface. The top navigation bar includes 'Initiate', 'Review & Authorize', 'Plan & Schedule' (selected), 'Approval', 'Implement', and 'Closed'. The left sidebar contains various fields for the RFC, including 'Change ID*', 'Coordinator Group*', 'Change Coordinator+', 'Change Location', 'Service+', 'Template+', 'Summary*', 'Notes', 'Class*', 'Change Reason', 'Environment', 'Impact*', 'Urgency*', 'Priority', 'Risk Level*', 'Status*', 'Manager Group+', 'Change Manager+', 'Vendor Group+', and 'Vendor Ticket Number'. The 'Status*' field is highlighted with a red box and shows 'Scheduled For Approval'. The main content area displays the 'Work Detail' tab, showing a table of RFCs with columns for 'Type', 'Notes', 'Files', 'Submit Date', and 'Submitter'. The 'Current Approval Phase' is set to 'Implementation Approv'.

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Plan and Schedule Approval



All RFCs will require Change Manager approval at this point.

Depending on its Risk Level, the RFC may also require approval from CAB and Senior Management.

When all required approvals have been granted, the RFC will automatically progress to the Plan & Schedule – Normal stage with a Status of Scheduled.

Initiate Review & Authorize Plan & Schedule Normal Implement Closed

Change ID*+ CRQ000000100502

Coordinator Group*+ Application-Mgmt
Change Coordinator+ Support Staff15
Change Location Air Canada

Service+
Template+
Summary* Test
Notes Test RFC for training

Class* Normal
Change Reason Other
Environment Production
Impact* 4-Minor/Localized
Urgency* 4-Low
Priority Low
Risk Level* Risk Level 2

Status* Scheduled
Manager Group*+ Change-Mgmt
Change Manager+ Change Mgmt1
Vendor Group+
Vendor Ticket Number

Work Detail Categorization Tasks Relationships Date/System Additional Details

2 entries returned - 2 entries matched

Type	Notes	Files	Submit Date	Submitter
General Information	Status Transition: Draft > Request f		7/13/2015 1:29:30 PM	support15
General Information	See attached implementation plan	1	7/13/2015 1:27:52 PM	support15

Add Work Info
Notes:
Attachment: <File Name>
Work Info Type General Information

More Details

Add

Next Approval Phase
Close Down Approval
Show
Pending

0 entries returned - 0 entries matched

Approval...	Approvers	Date	Approver...	Alternate...
-------------	-----------	------	-------------	--------------

[View Notifications](#) [Add](#) [Approve](#) [Reject](#)

Save Next Stage Print

Process Wizard Process Tracker

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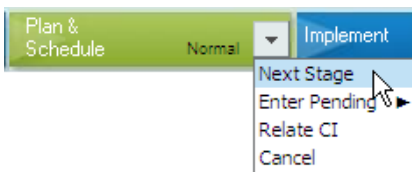
Implementation



When it is time to implement the Change, the Change Coordinator moves the RFC to the Implement stage.

To move an RFC to the Implement stage:

In the Process Flow Status area select *Plan & Schedule > Next Stage*.



The RFC moves to the Implement – Normal stage and the Status changes to Implementation in Progress.

Initiate | Review & Authorize | Plan & Schedule | **Implement** Normal | Closed

Change ID* CRQ00000100502

Coordinator Group* Application-Mgmt

Change Coordinator* Support Staff15

Change Location Air Canada

Service+

Template+

Summary* Test

Notes Test RFC for training

Class* Normal

Change Reason Other

Environment Production

Impact* 4-Minor/Localized

Urgency* 4-Low

Priority Low

Risk Level* Risk Level 2

Status* Implementation In Progress

Status Reason

Manager Group* Change-Mgmt

Change Manager+ Change Mgmt1

Vendor Group+

Vendor Ticket Number

Save | Next Stage | Print

Work Detail | Categorization | Tasks | Relationships | Date/System | Additional Details

2 entries returned - 2 entries matched

Type	Notes	Files	Submit Date	Submitter
General Information	Status Transition: Draft > Request f		7/13/2015 1:29:30 PM	support15
General Information	See attached implementation plan	1	7/13/2015 1:27:52 PM	support15

Add Work Info

Notes:

Attachment: <File Name>

Work Info Type General Information

More Details

Add

Next Approval Phase Close Down Approval

Show Pending

0 entries returned - 0 entries matched

Approval...	Approvers	Date	Approver...	Alternate...
-------------	-----------	------	-------------	--------------

View Notifications | Add | Approve | Reject

Process Wizard | Process Tracker



It is the Change Implementer's responsibility to implement the approved RFC.

Change Coordinators and Change Implementers are responsible for coordinating any action required if the implementation of an RFC is backed out or fails.

The Implementer(s) should perform the following steps when implementing an approved Change:

1. Accept Scheduled RFC/Tasks.
2. Implement the RFC.
3. Perform Post Implementation Test.
4. Back out RFC if required.
5. Update RFC with Implementation and Test Results.
6. Confirm all Tasks completed.

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Completion and Closure



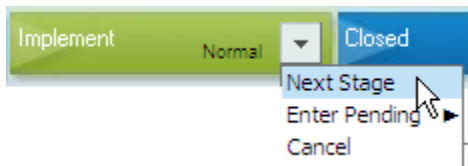
Once the implementation/back out is finished, the Change Coordinator is responsible for completing the RFC with the correct completion code (see below).

Relate Incident tickets that were raised during the implementation of the RFC.

If an RFC is unsuccessful and the back out is unsuccessful the Change Manager and Stakeholders must be notified and a PIR (Post Implementation Review) conducted.

To complete an RFC:

In the Process Flow Status area select *Implement > Next Stage*.



The Change Closure window appears.

Enter the following information and click .

Field	Description
RFC Resolution	Select an appropriate completion code.
Actual Start Date	Enter the implementation start date and time.
Actual End Date	Enter the implementation end date and time.
Notes	Add a note to explain whether the change was successful, backed out, etc. If the change was backed out, provide an explanation as to why.
Work Info Type	Select the value that best corresponds with the note you added.

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The RFC remains in the Implement stage but the Status of the RFC is now Completed.

Initiate
Review & Authorize
Plan & Schedule
Implement Normal
Closed

Change ID* CRQ000000100502
Coordinator Group* Application-Mgmt
Change Coordinator+ Support Staff15
Change Location Air Canada

Service+
Template+
Summary* Test
Notes Test RFC for training

Class* Normal
Change Reason Other
Environment Production
Impact* 4-Minor/Localized
Urgency* 4-Low
Priority Low
Risk Level* Risk Level 2

Status* Completed
Status Reason Final Review Complete
Manager Group*+ Change-Mgmt
Change Manager+ Change Mgmt1
Vendor Group+
Vendor Ticket Number

Work Detail
Categorization
Tasks
Relationships
Date/System
Additional Details

3 entries returned - 3 entries matched
Preferences
Refresh

Type	Notes	Files	Submit Date	Submitter
General Information	Implemented as planned		7/13/2015 2:31:42 P	support15
General Information	Status Transition: Draft > Request		7/13/2015 1:29:30 P	support15
General Information	See attached implementation plan	1	7/13/2015 1:27:52 P	support15

Add Work Info
Notes:
Attachment: <File Name>
Work Info Type General Information

More Details
Add

Show Pending

0 entries returned - 0 entries matched
Preferences
Refresh

Approval...	Approvers	Date	Approve...	Alternat...
-------------	-----------	------	------------	-------------

View Notifications
Add
Approve
Reject

Save
Next Stage
Print
Process Wizard
Process Tracker

Student Guide

Risk Level 2 and 3 Change tickets will automatically move to the Closed stage after 7 days provided that the following criteria are met:

- Status = Completed
- All Tasks have been completed
- Actual Start and End Dates have been entered



The Change Manager MUST approve the close down of all Risk Level 4 and 5 RFCs and conduct PIRs when required.



An RFC cannot be reopened once it has been closed.

Initiate

Review & Authorize

Plan & Schedule

Implement

Closed

Normal

Change ID*+

CRQ000000100502

Coordinator Group*+

Application-Mgmt

Change Coordinator+

Support Staff15

Change Location

Air Canada

Service+

Template+

Summary*

Test

Notes

Test RFC for training

Class*

Normal

Change Reason

Other

Environment

Production

Impact*

4-Minor/Localized

Urgency*

4-Low

Priority

Low

Risk Level*

Risk Level 2

Status*

Closed

Status Reason

Successful

Manager Group*+

Change-Mgmt

Change Manager+

Change Mgmt1

Vendor Group+

Vendor Ticket Number

Work Detail

Categorization

Tasks

Relationships

Date/System

Additional Details

3 entries returned - 3 entries matched

Preferences

Refresh

Type	Notes	Files	Submit Date	Submitter
General Information	Implemented as planned		7/13/2015 2:31:42 P1 support15	
General Information	Status Transition: Draft > Request		7/13/2015 1:29:30 P1 support15	
General Information	See attached implementation plan	1	7/13/2015 1:27:52 P1 support15	

Add Work Info

Notes:

Attachment:

<File Name>

Work Info Type

General Information

More Details

Add

Show

Pending

0 entries returned - 0 entries matched

Preferences

Refresh

Approval...	Approvers	Date	Approve...	Alternat...
-------------	-----------	------	------------	-------------

View Notifications

Add

Approve

Reject

Save

Next Stage

Print

Process Wizard

Process Tracker

RFC TICKET MANAGEMENT

Notifications

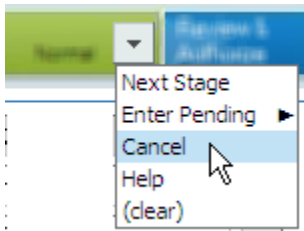
When an RFC moves into a new state, Remedy triggers notifications for the assigned Change Management groups. Change Coordinators are notified of new RFCs based on their notification preferences defined in their Profile settings.

Cancel an RFC

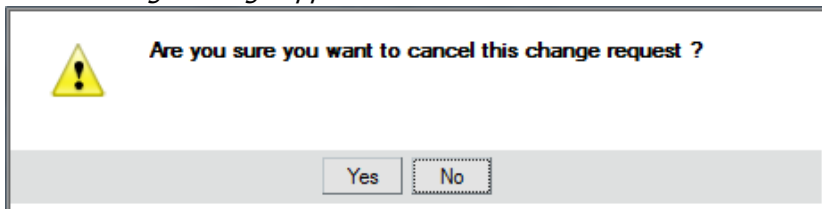
An RFC can be cancelled at any time during the RFC lifecycle, up until Implementation commences.

To cancel an RFC :

1. Click the drop down arrow in the Process Flow Status Area and select **Cancel**.



The following message appears.



2. Select Yes.
The Status changes to Cancelled and the RFC moves to the Closed stage.
3. Select a **Status Reason** that reflects why you are cancelling the RFC.

A screenshot of a web form for managing an RFC. The 'Status*' field is set to 'Cancelled'. Below it, the 'Status Reason' field is open, showing a list of options: 'Funding Not Available', 'No Longer Required', 'Resources Not Available', 'To Be Re-Scheduled', and '(clear)'. A red circle highlights the dropdown arrow on the right side of the 'Status Reason' field. To the right of the dropdown, there are icons for a person and a magnifying glass. Other fields like 'Manager Group*', 'Change Manager+', and 'Vendor Group+' are visible on the left.

4. Click **Save** at the bottom of the Change form.

Student Guide

Receive an Approved RFC

On receipt of an Approved RFC, the Change Coordinator has authorization to implement the RFC in accordance with the approved times/dates in the RFC.

Receive a Rejected RFC

RFCs may be rejected at any level of review during the Approval workflow. If an approver rejects a proposed RFC, the approval process is stopped. The Status field is set to Rejected.

Status*

When an RFC is rejected:

- The reasons are entered in the Work Details tab of the RFC.
- An email notification is generated to the Change Coordinator and the Change Manager.

Resubmit a Rejected RFC

To re-submit an RFC:

1. Make the amendments to the RFC; provide details in the Notes field on the Work Detail tab.
2. Select **Initiate > Restart** in the Process Flow Status Area.



Back Out an RFC



It is the Change Coordinator's responsibility to back out an RFC when they note that the RFC has not completed successfully.


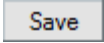
When backing out an RFC:

- Back out the Change activity.
- If the back out is successful and an Incident has been raised, relate the RFC to the Incident Ticket.
- If the back out is unsuccessful, relate the RFC to the Incident Ticket.
- Notify the Change Manager/ Stakeholders.
- Conduct a PIR and document results. (Change Manager)

Student Guide

Reassign an RFC

A Change Coordinator or Change Manager can reassign the RFC. To reassign an RFC:

1. Select the Change Coordinator to whom you want to reassign the RFC. Change Coordinator+ 
2. Click  at the bottom of the Change form.

Only individuals who have a Remedy account can be designated as the Change Coordinator. He/she will then be notified of the reassigned RFC.

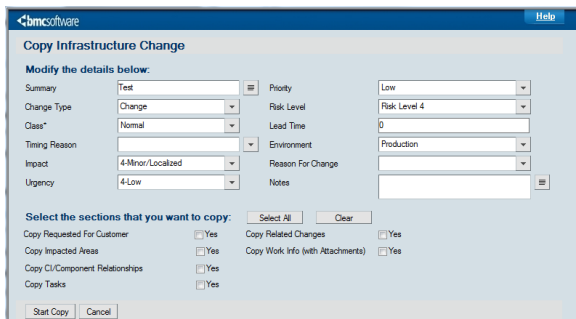
Copy an RFC

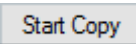
The Copy Change function allows you to copy an existing request into a new RFC. To copy an RFC:

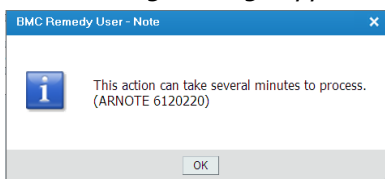
1. Open the RFC that you would like to copy.
2. On the left side of the screen, select **Functions > Copy Change**.

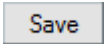


The Copy Infrastructure Change window appears.



3. Select the options that you want and click . *The following message appears.*

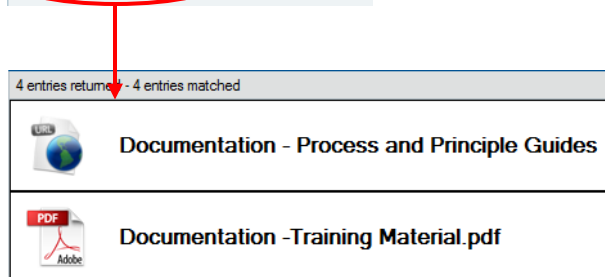
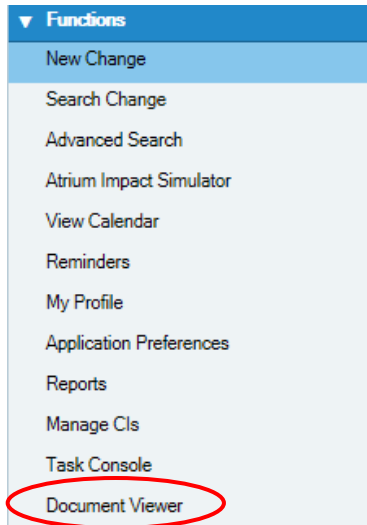


4. Click **OK**. *The new RFC appears and is in Draft status.*
5. Click  at the bottom of the Change form. *The RFC is saved and the Risk Level is calculated.*

REFERENCES

Manitoba eHealth Documents

To view the Manitoba eHealth Process Documents or Remedy Training Material, log into Remedy, open the Change Console, and select the **Document Viewer**.



RELATED PROCESS DOCUMENTS

- Change_Mgmt Process Guide
- Change _Mgmt Process Principle Guide
- Change_Mgmt Technical Review Questionnaire Template

RELATED TRAINING MATERIAL

- Remedy Basic Features Student Guide
- Change Management Student Guide
- Change Management Quick Reference Guide
- Change Management Lab Exercises
- Change Management Training Presentation Slides
- Tasks Student Guide

BMC Remedy Change Management Help

