

The Quick n' Dirty 1-Page How To Create Remedy Change Request (for just the Application Support group)

1. Launch Remedy Web Client (cmr.stanford.edu or remedyweb.stanford.edu)
2. Click Create button and select Infrastructure Change
3. Enter a Summary (100 characters) and Description (unlimited characters)
4. Select Impact: (Note: 1-Widespread or 2-Significant will require CAB approval)
5. Select Urgency; Leave Status as "Draft" for now.
6. Under "Classification" tab, enter value(s) for the following fields
 - a. Timing (default value = "Normal" for most changes unless Emergency/Expedited)
 - b. Affected Configuration Items (these are server names, host names, system names, etc)
 - c. Product or Operational Categorization (Tier 1, 2, & 3)
7. Under "Details" tab, enter info for the following fields which are OPTIONAL but highly RECOMMENDED
 - a. Install Plan
 - b. Backout Plan
 - c. Impact Analysis
 - d. Tested [Y/N]
8. Under "Assignment" tab, select from the drop-down menu for the following fields
 - a. Support Organization (This is YOUR Support Organization – i.e. IT Services)
 - b. Support Group Name (This is YOUR Support Group – i.e. ITS Application Support)
 - c. Change Manager (This is YOUR Name as change implementer, **NOT** your manager's name)
9. Under "Dates" tab, specify information for the following fields and click Save.
 - a. Scheduled Start Date
 - b. Scheduled End Date
10. **SAVE (you can save a CRQ as a DRAFT anytime, but you MUST save before adding secondary/additional approvers.)**
11. If you want to add additional approvers other than approvers of your group which is automatically added by Remedy, you can add them under the Approvers Tab as "Individual" or as "Support Group"
12. Finally, set CRQ Status to **"Request for Change"** and SAVE. The Business Approval process will then be triggered.

HOW THE FIELDS MAP FROM TOOL TO TOOL (Infra to Remedy)

Infra Change Management	Remedy Tab	Remedy Field
Change Title		Summary
Description		Description
Stencil		Impact & Urgency
Scheduled Date/Time	DATES	Scheduled Start Date & Scheduled End Date
Outage Start Date/Time	DATES	Outage Start Date & Outage End Date
Maintenance Window	DATES	Maintenance Window
Tested	DETAILS	Tested
Impact Analysis	DETAILS	Impact Analysis
Install Plan	DETAILS	Install Plan
Class/Type/Activity	CLASSIFICATION	Product Catalog Tier1/Tier2/Tier3
Items	CLASSIFICATION	Affected Configuration Items*
Backout Plan	DETAILS	Backout Plan
PRIMARY DOMAIN	ASSIGNMENT	Support Group Name
SECONDARY DOMAIN	APPROVERS	Add Approvers as Individuals or Groups
Notes	WORK INFO	Summary/Details
Attachments	WORK INFO	Attachments

*Alternatively, you can relate your CRs to CIs on the Relationships Tab.

How To Create a Change Request (CRQ) Using BMC Remedy Change Management System (for just the Application Support group)

- Launch BMC Remedy Client Tool (if you have it installed) and log into the system using your SUNetID and password.
Start → All Programs → Action Request System → BMC Remedy User

- Alternatively, launch Remedy Change Management from a Web Browser:

<https://cmr.stanford.edu>

OR

<https://remedyweb.stanford.edu/arsys/forms/remedyapp.stanford.edu/SHR:OverviewConsole>

- At the Overview Console, do the following:
 1. Click “Create” button to create a CRQ
 2. Click the drop down menu to select Request Type, select “Infrastructure Change” and click “Select”

Overview Console Refresh

NOTE: UAT SERVER ENVIRONMENT

Assigned Work

Create-Date	Request ID	First Name	Last Name	Status	Request Type	Assignee	Assignee	Summary	Priority	Parent Request
3/25/2011	CRQ000000000			Scheduled For Ap	Change			test groups111111111111111	Low	
3/25/2011	CRQ000000000			Rejected	Change			better test 2	Low	

Select Request Type (remedyappuat.sta...)

bmcsoftware

Select Request Type

Request Type Infrastructure Change

Select **Cancel**

1 **Create** **Search**

- While you're at the Change Request Information form, make sure you specify info for the following fields.
 - Summary (limited to 100 characters)
 - Description (unlimited characters)
 - Status = Draft (default setting)
 - Impact (NOTE: Any change with an Impact of 1-Widespread or 2-Significant will require CAB Approval)
 - Urgency
- Under "Requester" tab, all information about you as a Change Requester should be auto-populated.

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Description

Status Reason

Urgency*

Priority

Requester

Classification

Details

Work Info

Tasks

Assignment

Relationships

Dates

Requested By

Support Company*+

First Name*

Email

Last Name*+

Phone Number+

Organization

Department

Support Organization

Support Group Name

Requested For

First Name+

Last Name+

Change Location

Company*+

Region

Site Group

Site+

- Under “Classification” tab, enter value(s) for the following fields
 - Timing (default value = “Normal” for most changes unless Emergency/Expedited)
 - Timing Reason (required only if Timing = Expedited)
 - Affected Configuration Items. (NOTE: Multiple affected CIs should be separated by comma)
 - Product or Operational Categorization (Tier 1, 2, & 3).

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Status Reason

Description

Priority

Requester
 Classification
 Details
 Work Info
 Tasks
 Assignment
 Relationships
 Dates

Change Classification

Timing*

Timing Reason

Lead Time

Change Reason

Business Justification

Change Environment

Sequence

Performance Rating (1 - 5)

Affected Configuration Items

Operational Categorization

Tier 1+

Tier 2

Tier 3

Product Categorization

Tier 1

Tier 2

Tier 3

Product Name+

Model/Version

Manufacturer

- Under “Details” tab, enter info for the following fields which are OPTIONAL but highly RECOMMENDED.
 - Install Plan
 - Backout Plan
 - Impact Analysis
 - Tested [Y/N]

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Status Reason

Urgency*

Description

Priority

Requester
Classification
Details
Work Info
Tasks
Assignment
Relationships
Dates

Insert a summary for each one of the fields below. Detailed plans or attachments should be added under the "Work Info" tab using the appropriate "Work Info Type".

Install Plan

Backout Plan

Impact Analysis

Tested
☐ Yes ☒ No

- OPTIONAL: Under “Work Info” tab, do the following if needed.
 - Work Info Type = General Information (default setting)
 - Add attachment(s) if needed.
 - To add attachments using the Remedy User tool, right-click on the first row in the attachment table and select “Add”, and then browse to the appropriate attachment and click “Open”.
 - To add attachments using the Mid-Tier web tool, click on the Add button to the left of the attachment table. Browse to the appropriate attachment and click “Open”.

Change ID*+ CRQ0000000000062 **Approval Status** ☐ Current ☐ Overall

Change Request Information

Change Type* Change **Status*** Draft **Impact*** 2-Significant/Large
Summary* Reboot of r7-db database **Status Reason** **Urgency*** 2-High
 Description We will be rebooting the **Priority** High

Requester Classification Details **Work Info** Tasks Assignment Relationships Dates

Add Work Info **Work Info History** Show

Work Info Type General Information
 Date
 Source
 Summary
 Details

File Name	File Size	Attach Label
		Attachment 1
		Attachment 2
		Attachment 3

Locked No View Access Int

Right-click to add attachment

- Under "Assignment" tab, select from the drop-down menu for the following fields
 - Support Company = Stanford University (default value)
 - Support Organization (This is YOUR Support Organization – i.e. IT Services)
 - Support Group Name (This is YOUR Support Group – i.e. ITS Application Support)
 - Change Manager (This is YOUR Name as a Change Implementer, **NOT** your manager's name)

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Status Reason

Urgency*

Description

Priority

Requester
Classification
Details
Work Info
Tasks
Assignment
Relationships
Dates

Infrastructure Change Manager

Support Company*

Support Organization*

Support Group Name*

Change Manager*

Clear

Time Spent Resolving Change Request

Start Time

Time Spent (min)

Total Time Spent (min)

Start Clock

Stop Clock

Update Effort Log

- Under “Dates” tab, specify information for the following fields and click Save.
 - Scheduled Start Date
 - Scheduled End Date
 - OPTIONAL: Outage Start Date (specify if there will be any expected outage during the change implementation)
 - OPTIONAL: Outage End Date (specify if there will be any expected outage during the change implementation)
 - OPTIONAL: Maintenance Window [Y/N]

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Status Reason

Urgency*

Description

Priority

Requester
 Classification
 Details
 Work Info
 Tasks
 Assignment
 Relationships
 Dates

Change Dates

Scheduled Start Date+

Scheduled End Date+

Outage Start Date

Outage End Date

Maintenance Window
☒ Yes ☐ No

Submit Date

Completed Date

Submitter*

Task Dates

Task ID	Summary	TaskType	Scheduled Start Date	Scheduled End Date	Actual Start Date	Actual End Date

Save
Print
 Close

- Once “Draft” CRQ has been saved, the “Approvers” tab will appear on form. This is where you add as many secondary/additional approvers as needed.
- Next, set “Status” = “Request For Change” and Save again. (NOTE: you can save a CRQ as a “DRAFT” anytime, but you MUST set the CRQ status to **“REQUEST FOR CHANGE”** in order to start the Business Approval process).
- Once your CRQ Status has been set to “Request For Change” and saved, you now can see the pending Business Approver info. Sometimes you might need to click “Refresh” for the form to display the updated info.

Change ID*+ **Approval Status**

Change Request Information

Change Type* **Status*** **Impact***

Summary* **Status Reason** **Urgency***

Description **Priority**

Requester **Classification** **Details** **Work Info** **Tasks** **Assignment** **Relationships** **Approvers** **Dates**

Approvers **Next Approval Phase** **Show**

Approval Status	Approvers	Approver Signature	Alternate Signature
<div> <div>Right-click in this area and select refresh to display Approvers.</div> <div> <input type="button" value="Refresh"/> <input type="button" value="Refresh All in Table"/> <input type="button" value="Clear Table"/> <input type="button" value="Print Table"/> <input type="button" value="Sort"/> <input type="button" value="Preferences"/> </div> </div>			

2

3

- By saving your CRQ with status “Request For Change”, the CRQ would be submitted for Business Approval (pending application business owner’s signature). You’ll be receiving a confirmation email for your recent CRQ submission.

Change ID*+

Approval Status

☐ Current
 ☐ Overall

Change Request Information

Change Type*

Status*

Impact*

Summary*

Status Reason

Urgency*

Description

Priority

Requester
 Classification
 Details
 Work Info
 Tasks
 Assignment
 Relationships
 Approvers
 Dates

Approvers

Current Approval Phase

Show

Approval Status	Approvers	Approver Signature	Alternate Signature
Pending	nguyen75		

Add
 Approve
 Reject

The approver info is determined by your selection of Product Categorization (Tier 1, 2, & 3) under Classification tab.