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

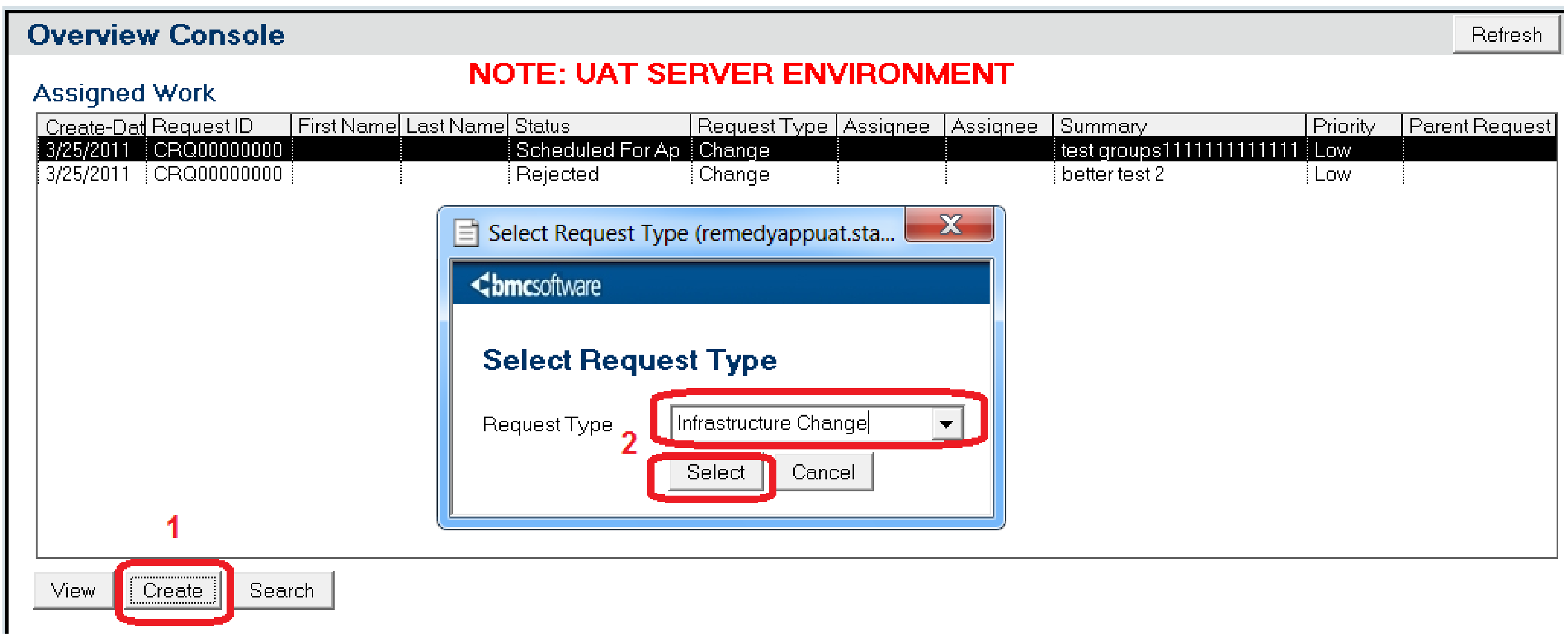
(for just the Application Support group)

- 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:

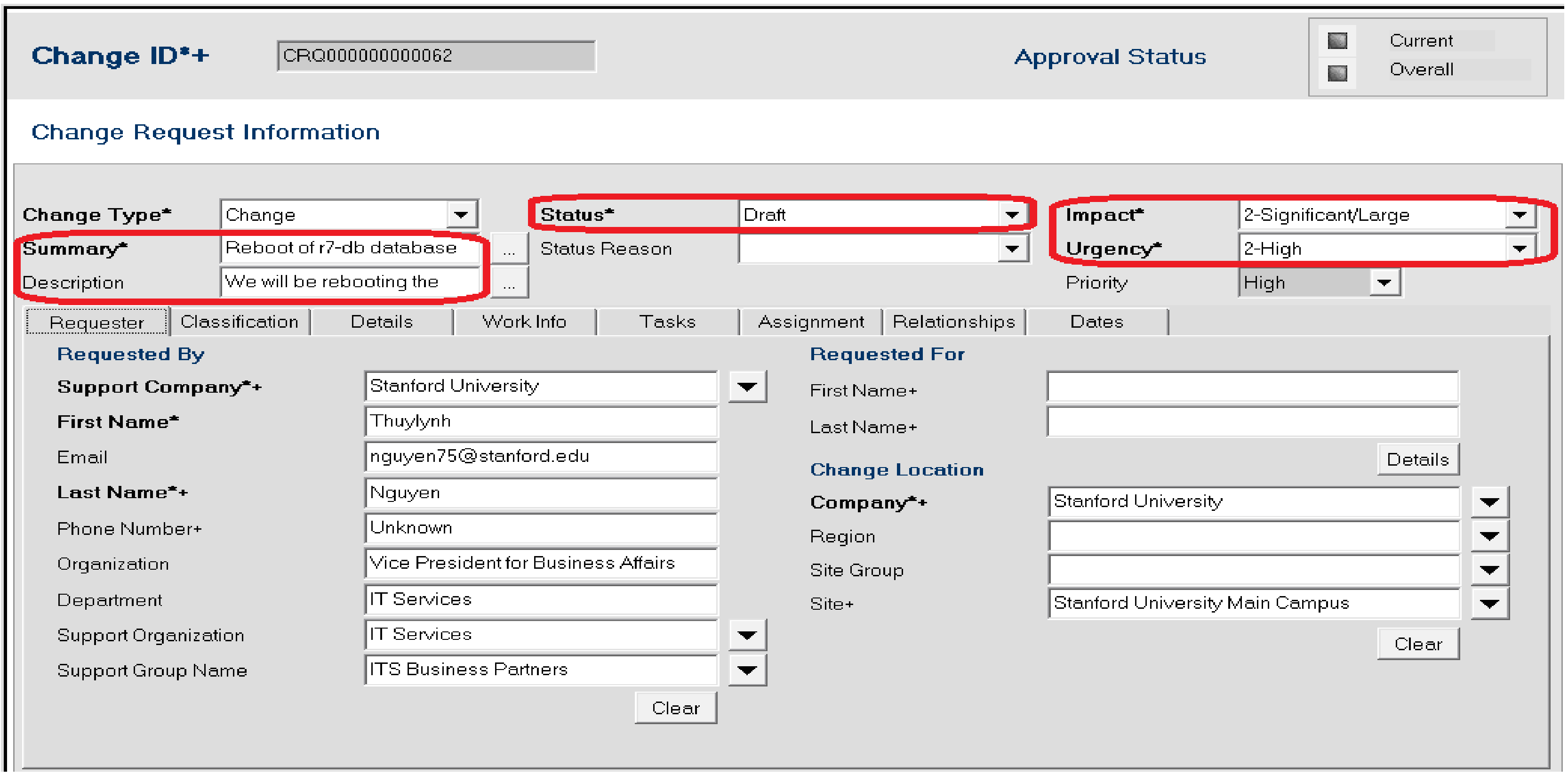
  https://cmr.stanford.edu
  OR
  https://remedyweb.stanford.edu/arsys/forms/remedyapp.stanford.edu/SHR:OverviewConsole

- 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”

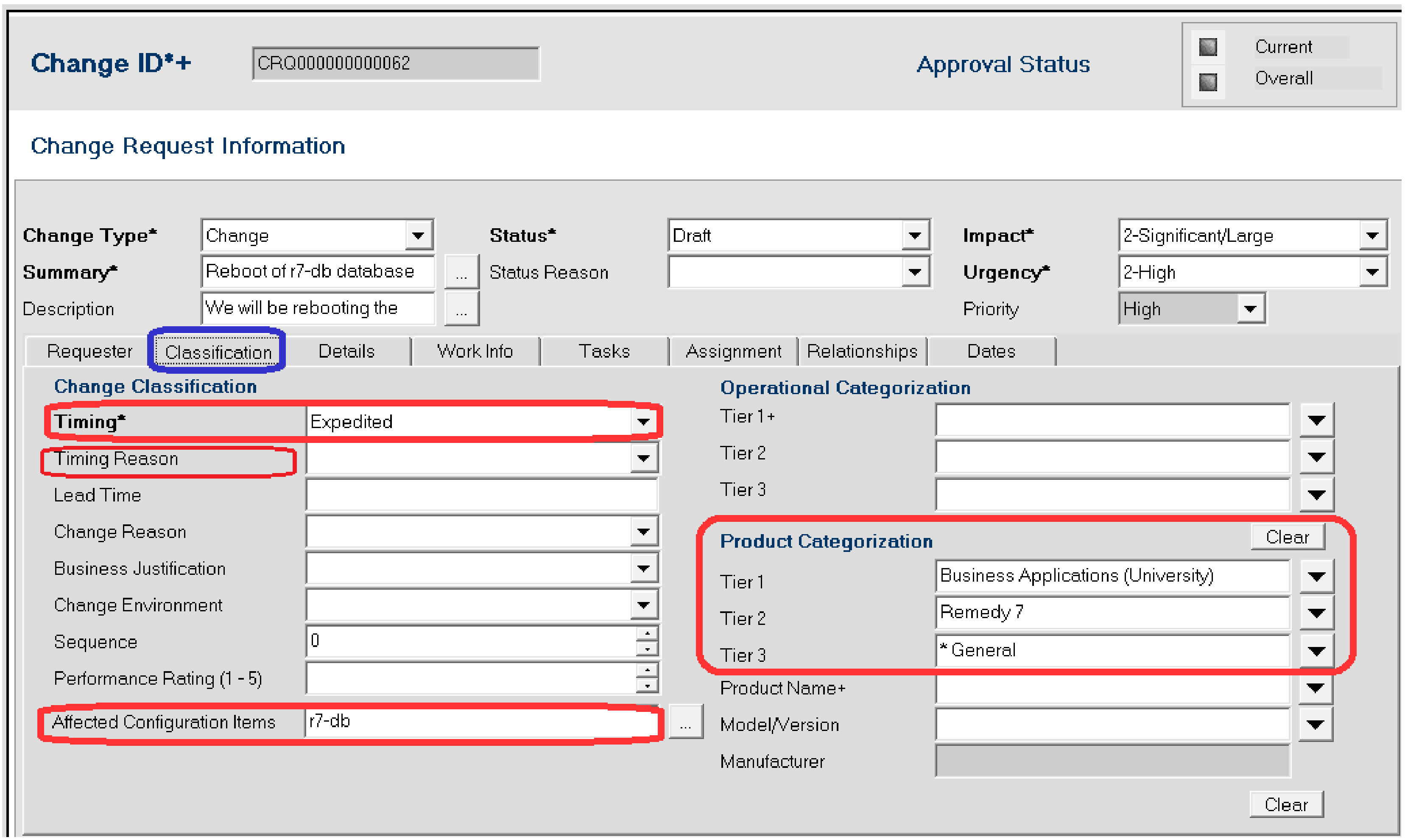


- While you’re at the Change Request Information form, make sure you specify info for the following fields.
  - Summary (limited to 100 characters)
  - Description (unlimited characters)
  - Status = Draft (default setting)
  - Impact (NOTE: Any change with an Impact of 1-Widespread or 2-Significant will require CAB Approval)
  - Urgency

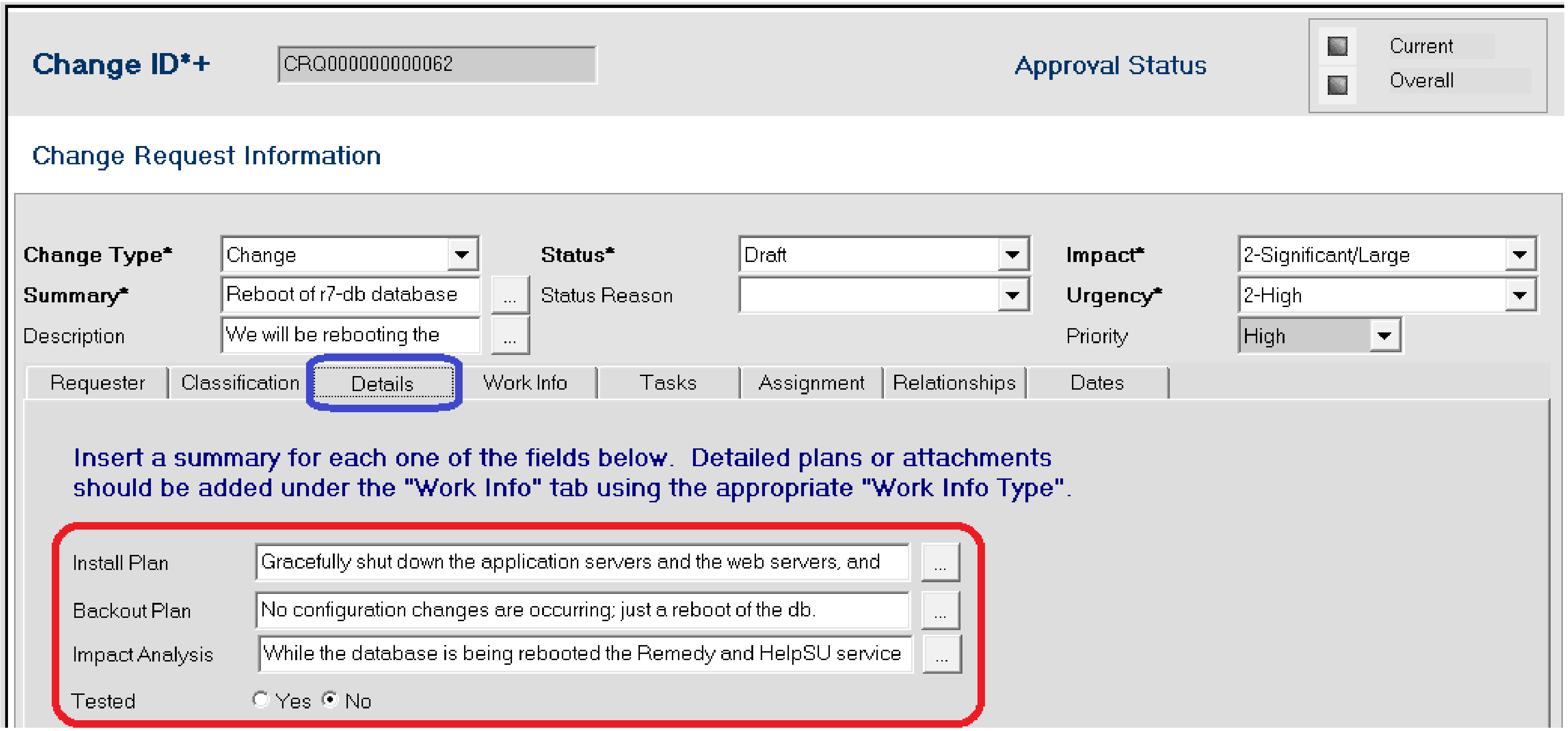
- Under “Requester” tab, all information about you as a Change Requester should be auto-populated.



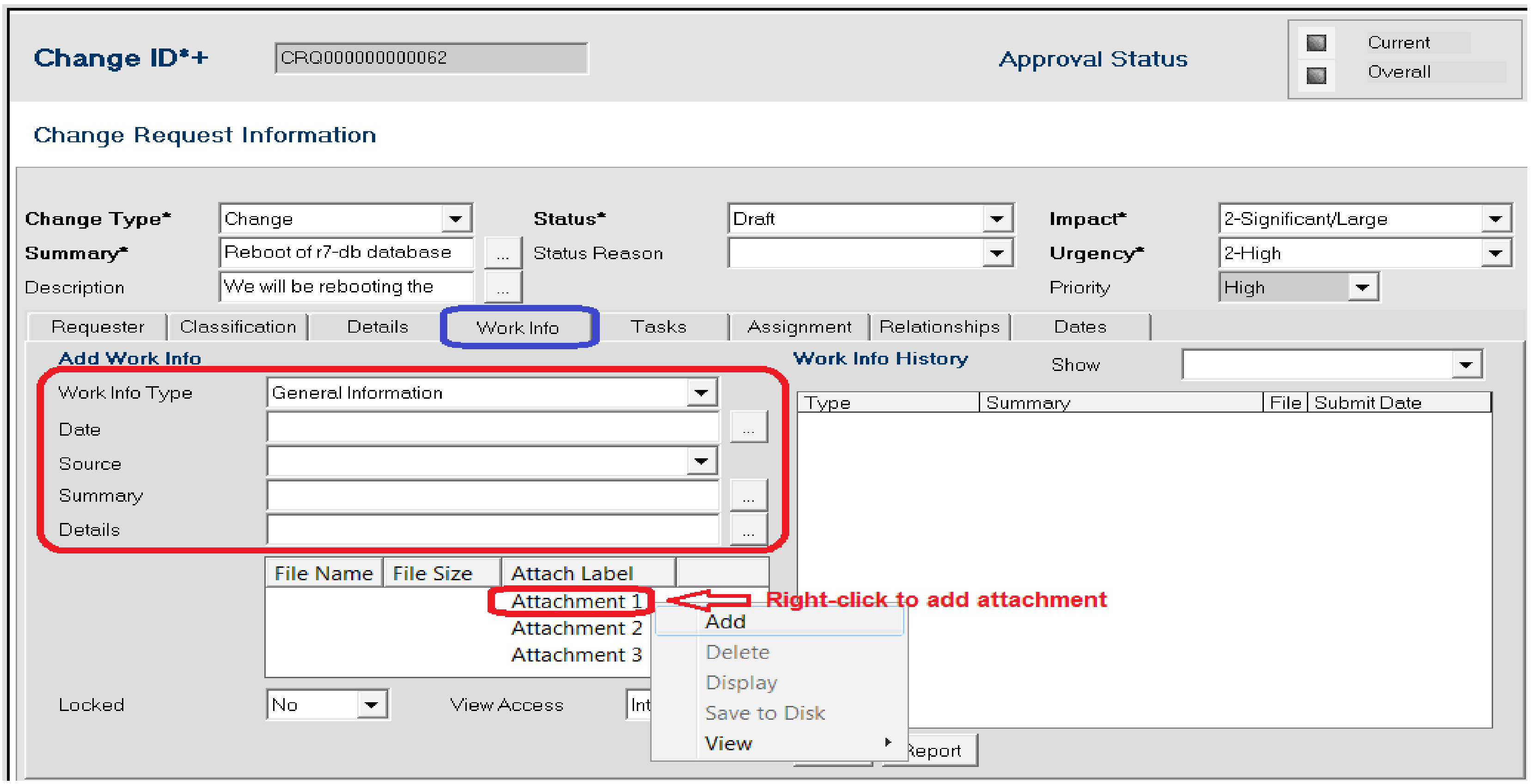
- Under “Classification” tab, enter value(s) for the following fields
  - Timing (default value = “Normal” for most changes unless Emergency/Expedited)
  - Timing Reason (required only if Timing = Expedited)
  - Affected Configuration Items. (NOTE: Multiple affected CIs should be separated by comma)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



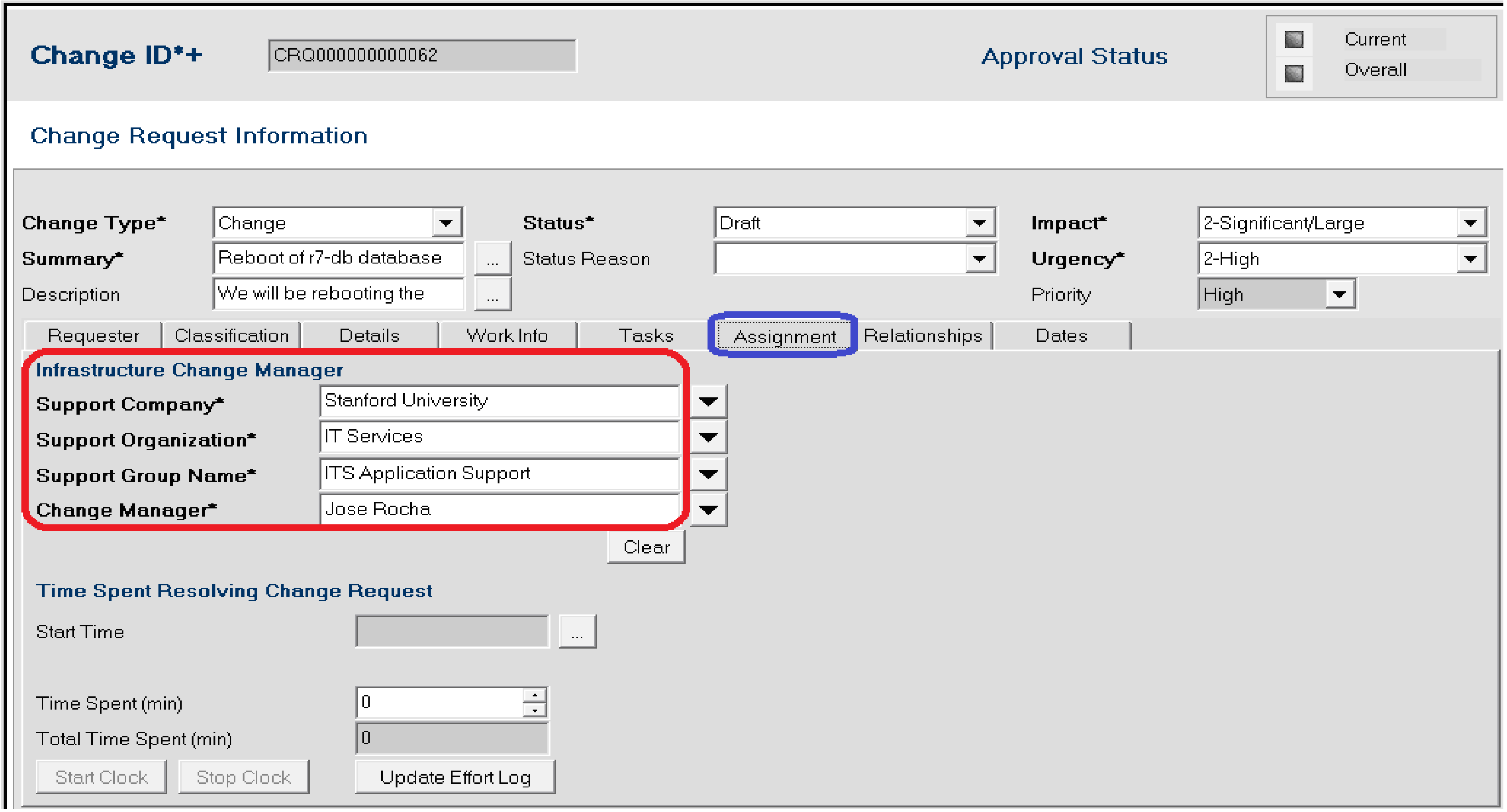
- Under “Details” tab, enter info for the following fields which are OPTIONAL but highly RECOMMENDED.
  - Install Plan
  - Backout Plan
  - Impact Analysis
  - Tested [Y/N]



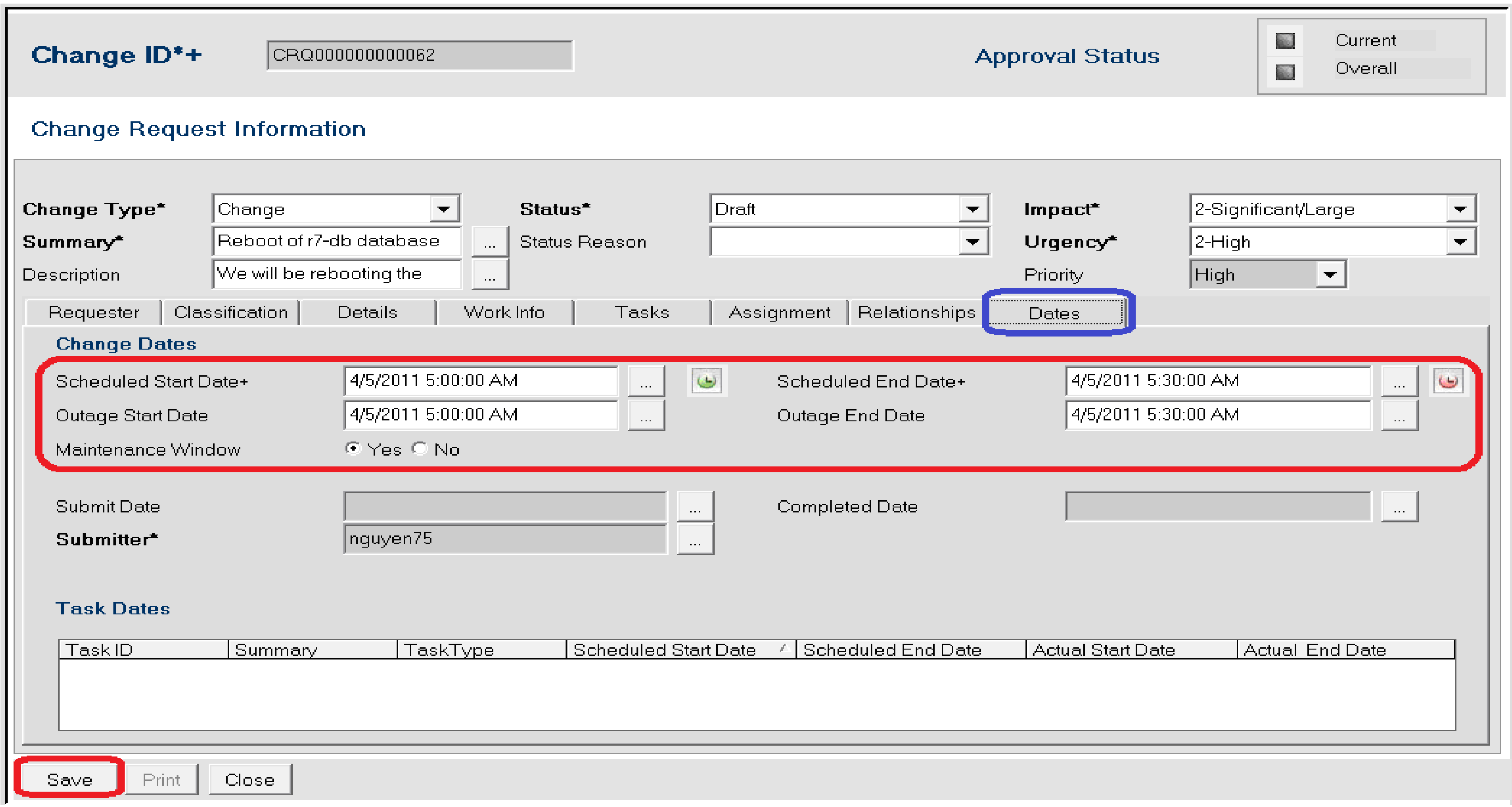
- OPTIONAL: Under “Work Info” tab, do the following if needed.
  - Work Info Type = General Information (default setting)
  - Add attachment(s) if needed.
    - To add attachments using the Remedy User tool, right-click on the first row in the attachment table and select “Add”, and then browse to the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



- 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)



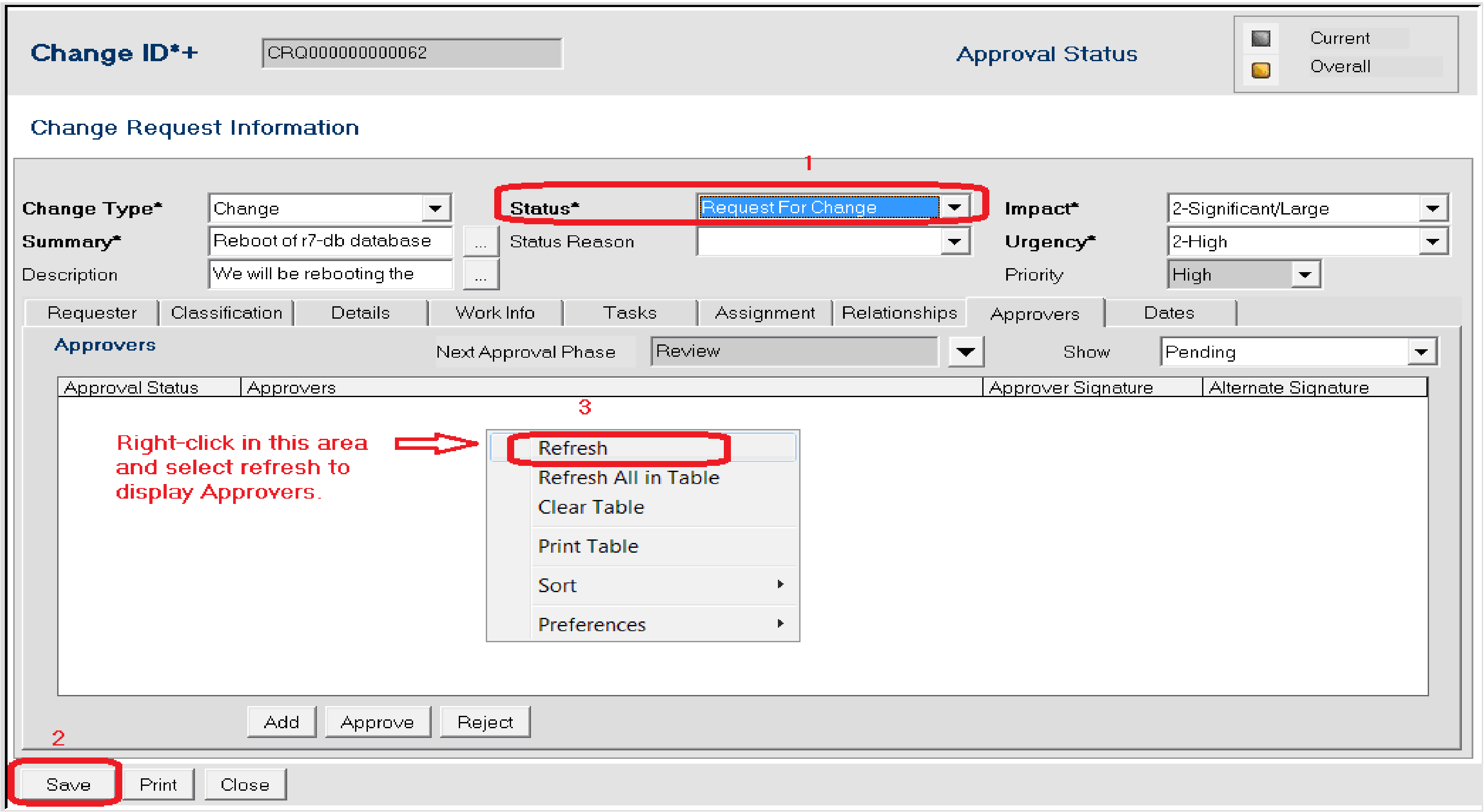
- Under “Dates” tab, specify information for the following fields and click Save.
  - Scheduled Start Date
  - Scheduled End Date
  - OPTIONAL: Outage Start Date (specify if there will be any expected outage during the change implementation)
  - OPTIONAL: Outage End Date (specify if there will be any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



- 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.



- 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.