Change Management Quick Flow Demo Card

SMA-X 2017.11

**Background**

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| Key Messages | * Track the status of planned and ongoing changes and manage approvals * Schedule changes in compliance with blackout and maintenance windows * Standardize and automate change implementation to reduce risk |
| Customer Challenge | * End-to-End change tracking for compliance and regulation * Expediting approvals * Change scheduling: avoiding schedule conflicts, complying with blackout periods and agreed maintenance windows * Decreasing risk as the volume of changes increases |
| Engage Them | * How do you track changes through the change lifecycle from planning to completion? * Are your changes delayed by approvals that are ignored? * Do you need a visual representation of the forward schedule of change? * Are you able to keep up with increased volumes of change while decreasing the risk of change? |
| Differentiators | * Change Analytics suggest process improvements to standardize and automate changes. * Immersive change analytics improve the risk analysis process by providing history of similar changes. * Change models allow you to standardize change implementation activities to increase productivity and decrease risk. The graphical task plan editor allows you to configure both manual and automated tasks in powerful sequential or parallel workflows. * The Change Calendar provides a graphical forward schedule of change that highlights maintenance window conflicts. The calendar will suggest the next available time to correct non-compliant changes. * Users can paste a list of CI’s in the change description to expedite data entry when creating a change affecting many CI’s. * Impact analysis is improved as the Affected Services are automatically calculated and the list of impacted subscribers is also visible and exportable. * Strong Identity Validation is an extra security measure to ensure that the approver(s) of this Critical and Very High risk change are actually who they say they are as required by SOX compliance. |

**Quick Flow**

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

For a **Quick flow** for Change Management focus on the Change Evaluation and Change Planning phases to highlight “Immersive” Change Analytics, Service Impact and subscribers, and the Change Calendar time period and suggest next available window features. The value of Change Models to standardize task plans is also important to highlight.

Features demonstrated:

* Create Change (from Incident)
* Change Evaluation Phase
* Immersive Analytics
* Affected Services and their Subscribers
* Change Planning (Scheduling) Phase
* Change Collision Detection
* Change Approval Phase (with optional Strong Identity Validation)
* Change Execution, Review, and Closure Phases
* Change Analytics

| **Do** | **Say** | Cheat Sheet |
| --- | --- | --- |
| **Create Change (from Incident)**   * Logged in as Jennifer falconmf. * If you did not close your incident created in the Incident demo card, go to Incident home, Incidents owned by me * Open Incident ‘Exchange response times are degrading’. If your incident was closed, create/save a new Incident using the Incident model “Unacceptable response time on Exchange”. * Choose ‘Create change from record’ (in the More menu) * Several fields including the Service ‘(DEMO) Exchange Service’ will have been filled in from the Incident * Change Title to : “Fix Exchange response times are degrading with windows patch” * Change Model: ‘(DEM0) Windows patch update’ * Check the box ‘Emergency change’ * Fill in: * Reason for Change: Incident/Problem resolution * Justification: Incident resolution * Click Save (which also opens the full view) * Under Classification subtab, set Owning group field to: “Change Coordinators” * Owner: falconmf, jennifer | * In our demo scenario, I own an Incident regarding Exchange response times are degrading that is in the Review phase. (If you have shown Problem Mgmt, then you could create the change from the Problem record rather than the Incident). * It has been determined that a windows patch is required to resolve and prevent this issue from happening again. We’ll start with the servers in our NY office where our executives reside. I will create an emergency change that will patch the windows servers used for the primary mail server in the NY office. * Creating a Change from the Incident copies over the relevant data, included the server. When creating a Change, the agent can select from pre-defined re-usable change models which contain default values and task plans that are put into the change to ensure the appropriate actions are completed. * *Later, we’ll see how Change Analytics can report back on the effectiveness of such task plans.* | * Incident Home, Incidents owned by me * Open Incident: ‘‘Exchange response times are degrading’ * More> Create Change from Record * Title: “Fix Exchange response times are degrading with windows patch” * Change Model:‘(DEM0) Windows patch update’ * Emergency box * Reason for change: Incident resolution * Justification: Incident resolution * Save * Owning group: “Change Coordinators” * Owner: yourself |
| * In the Description field, paste the servers that support the ‘Mail Server NY – Primary’ system element * SER123MS002, SER123MS003, (DEMO) SER123MS001 * Save * Show Involved Cis tab to see that these 3 Cis were added | * Now we need to identify which servers are included in this change. Adding the related CI is important to data quality but often missing from the actual record and instead shared separately in an email or spreadsheet. * SMA-X recognizes the critical nature of the information and instead of requiring the users to manually enter the CI names, we leverage that same interaction of pasting the CI in the description and automatically detect a known CI, and add as a related record. **This little innovation goes a long way to ensuring traceability of the change, and that the correct CI has been selected.** | * Description, paste Cis: (DEMO) SER123MS001, SER123MS002, SER123MS003 * Save * Involved CIs |
| **Change Evaluation Phase**   * Workflow tab shows we are in the Evaluation phase   **Immersive analytics**   * Ensure right side bar (Additional Information) on the change is expanded or expand it now and review the analytics provided. * Plan and Execute Tab ->   + Review the Implementation plan and Back-out plan text (copied from the model) * Plan and Execute Tab -> Task Plan   + Review the task plan for the Execute phase (also copied from the model)   **Affected Services and their Subscribers**   * Involved CIs tab -> Affected Services   + Select ‘(DEMO) SharePoint – Sales’ row (not link) so that it’s highlighted   + Click on Affecting CIs   + Select any of the Devices row (not link)   + Click on Show impact map   + Close impact map   + Back on the change in the Affected Services list, Click the link to the (DEMO) Sharepoint - Sales Service and go to Subscriber tab   + Optional, export Group subscribers and explain that you can copy the group email address PDLs to your email client to send a notification to them about this upcoming change.   + Back to Change record * General Tab -> Classification section   + Set Risk to ‘High’ risk (Note: if you are doing the optional subflow for strong identify validation, set risk to “Very High”.   + Save | * SMA-X provides out-of-the-box ITIL-based change workflows for Standard, Normal, and Emergency changes. This is an Emergency change and we are in the Evaluation phase. * As the change coordinator responsible for *evaluating* the change I need to determine the risk value that I will set for this change based on the Immersive Analytics and my experiences and on aspects of this particular change, including the: * Complexity of the Implementation and Back-out Task plans: The automation Task plans can include workflows for pre-assigned activities as well as automation tasks to kick off business rules to perform automated actions on our on-premise systems. * Impacted Services and their Subscribers: The Affected Services for the Change are automatically calculated and shows us that in addition to the Exchange Service, this change could have an impact on two SharePoint services as well. One of these ‘SharePoint – Sales’ has High business criticality. Understanding why this service could be affected is important to evaluating this change. Using the Impact Visualization feature makes this easy (follow steps to the left to show). * On the Service record, we can see the Subscribers and optionally, we can export their email address to send a notification using an email client. This will help keep the subscribers informed about planned changes. * Based on the information we have learned from both the past history of changes of this type, and the particular CIs involved here, and the Service criticality and subscriber importance, we will now set the risk for Change to ‘High’ risk.   *Notes for optional Strong Identity Validation subflow:*   * Strong Identity Validation or 2 factor authorization is an extra security measure to ensure that the approver(s) of this Critical and Very High risk change are actually who they say they are. The conditions for requiring 2 factor authorization are configurable. * *We will see this in action in a little bit when we perform the ECAB approval. The member of the ECAB group approving this change will need to provide a pre-defined passcode and also a dynamically-generated verification code that is sent to them via email at the time of the approval* | * Workflow tab * Immersive Analytics (More Information) on the right side bar * Review Back-out plan text (copied from the model) * Select (DEMO)‘SharePoint – Sales’ row (not link) * Click on Affecting CIs * Select any of the Devices * Click on Show impact map * Close impact map * Back to Change * Click link to (DEMO) Sharepoint-Sales, go to Subscriber tab * Export group subscribers * Back to Change record * Set Risk to ‘High Risk’ (or ‘Very High” for optional subflow for 2 factor authorization) |
| * Lifecycle Bar -> Manual workflow transition to Plan phase, Save | * Move change forward in the workflow to the Plan phase | * Lifecycle Bar -> Manual workflow transition to Plan phase |
| **Change Planning (Scheduling) Phase**  *(Note: The steps below show scheduling within the global Change calendar, but you can also show scheduling within the Change/Schedule tab)*  Go to Change management 🡪 Calendar tab   * Filter: Add filter: Service=(DEMO) Exchange Service * Filter: Remove filter: Scheduled Start: Next Month (if it hasn’t already been removed) * Hover over the Clock icon of our change to “Fix Exchange performance issue with windows patch “to show the hover help, and then click on it.   + In the dialog select a change duration of 1 hour   + Suggest next available window   + Show the stakeholder image & hover   + Drag the change to be earlier – the lightning bolt icon will display   + Click on the lightning bolt and ask to move to next available window to fix the scheduling issue   + Review any other changes scheduled in the same timeframe to determine if the suggested time is acceptable.   + Press disk icon for our change to Save * Open the preview pane   + In you are in the global calendar, click the link to the change “Fix Exchange response times” Lifecycle: Build and Test, Save   + Lifecycle: ECAB, Save | * To plan and schedule this change we will switch to the easy to use Change Calendar, which provides full visibility into the details of each change – allowing you to visualize the information and effectively manage and modify change schedules –aligning with agreed maintenance windows, and avoiding blackout periods. * I am most interested in the changes for the Exchange Service, so I will filter the Calendar to show those changes only. And because I want to schedule this change as soon as possible (emergency change) I will position the calendar to show the current time. * In the list we see the other changes that are scheduled for the service and the ones that are not yet scheduled – like the change we just evaluated. And we can see the upcoming maintenance windows and blackout periods. Now let’s schedule this change. The system will find the next available maintenance window and place the change in it. You can then further refine the change schedule. If you try to move the change outside of a maintenance window the system will alert you with the lightning bolt icon. * If it suggests a schedule that conflicts with an existing change for this same Service, I can hover over each change to get additional information, view the change in the preview pane, or go to the full details for the change to resolve the change conflict. * Now that the change has been evaluated and scheduled, I can move it forward in the workflow through the Build and Test phase and then onto the Emergency CAB (ECAB) approval phase | * Change Calendar * Filter service =(DEMO) Exchange Service * Delete filter for scheduled next month to see current time * Hover over clock icon on our new change * duration of 4 hours * Suggest next available window * stakeholder image & hover * Drag the change to be earlier * Click lightning bolt to fix the scheduling back to suggested ‘next available window’ * Note time that change is scheduled for collision detection use case. * Disk icon to save dates on our change * Open the preview window on the right side, edit * Lifecycle: Build and Test, Save * Lifecycle: ECAB, Save |
| **Change Collision Detection**  Go to Changes queue   * New   + Title: Add 1GB memory to (DEMO) SER123MS001 server   + Desc: Add 1GB memory to (DEMO) SER123MS001 server (Note: CI should be detected and added.)   + Reason for change: Proposed Upgrade   + Service: (DEMO) Exchange Service   + Model: Increase memory on server   + Emergency change   + Justification: upgrade * Save * Classification section:   + Impact: Site or department   + Category: Hardware\Memory   + Owning group: Hardware Services * Manual Advance to Plan phase * Save * Schedule tab, click clock to schedule   + 1 hr duration, suggest next available window. (Note: should schedule as same time as previous change) * You will see a red error (light bulb). Click on light bulb to see message with the number of the change that your change is colliding with.   Open Calendar in a new tab to see colliding change   * filter the view for changes with Scheduled start on this date. * Mouse over the colliding changes in the window to see the end time.   Back on our new change to install memory on the server on the Schedule tab, drag the change green box to four hours later or to the next change window to eliminate red light bulb collision warning.   * Save | * Before we show the approval of this change, let’s look at Change Collision detection in the planning phase. We will create a second change affecting the same CI and use Change Collision detection validation rules to ensure it is not scheduled at the same time. * We use our calendar to schedule the change into the next available window. * When we save the change, we will be notified if there is a change collision and which change numbers are colliding. | * Change > New * Title/Desc: Add 1GB memory to (DEMO SER123MS001 server * Model: Increase memory on server * Save * Classification * Manual advance to plan phase * Save * Schedule with conflict * Calendar in new tab to see conflicting change end time * Move change to eliminate collision * Save |
| **Change Approval Phase (with optional Strong Identity Validation)**   * Back on our change to “Fix Exchange response times”, View the workflow tab to see that we are now in the ECAB phase. * Bring up the Approvals from the mega menu (green field on the right) in a new tab for Jennifer as the Service owner in the Agent UI   + Select Service Owner approval in the list (select row, not link)   + Approve, Save in the Preview window * In a separate browser window, logged in as joe.managermf, bring up the Service Portal   + See your TODO list for a pending ECAB approval, and Approve   + *Optional if Strong Identity Validation is enabled and you set this as a Very High risk, then perform the ECAB approval with your passcode, if prompted for it (Password\_123), and the authorization code that will be sent to Joe’s gmail account.* * Go back to the change calendar (refresh) The change now shows the thumbs up icon indicating it has been approved. | * This change requires two approvals – first by the Service Owner (me) and second by one member of the ECAB group (we’ll show Joe.managermf in ESS). * I can approve the change either through the Agent interface which I’ll do first or through the Service Portal. * If Strong Identity Validation is required, you will be prompted for a verification code that is sent to you in email after you provide your passcode. This is an extra security measure to ensure the person is really them. * Once the change is approved this is indicated in the Change Calendar with the ‘Thumbs Up’ icon. | * Approval Queue agent interface (Service Owner) approval * Approval queue in Service Portal (ECAB) approval) * *Optional: 2 factor authentication, if configured: (passcode (HPspm4$demos) and dynamic authorization code sent to your email in real time)* * Go back to the change calendar (refresh if needed) |
| **Change Execution, Review, and Closure Phases**   * Back as Jennifer in the other browser window, * Go to the Full view of the change * To see the task plan, go to Plan and execute tab -> Task plan section -> Execute * To simulate task fulfillment across multiple individuals, go to:   + Megamenu> Tasks (on the green field) > ‘My Group Task’ view.   + Select the ‘Switch to Fail Over servers’ task row (not link) and expand the preview window on the right   + Lifecycle: Validate, Save   + Repeat for the remaining tasks (that appear as you validate and save the previous one. There will be 5 of them in total at the bottom of the task list. * Back on the change, refresh the task plan to see that all are completed. * Switch to the Change schedule section   + Fill in the Actual Start and Actual End   + Save * Lifecycle: CMDB Update, Save * Lifecycle: Review, Save * Switch to the General Tab > Review section at top:   + Fill in Review results, completion code * Lifecycle: Close, Save * Switch back to the calendar and refresh | * Now that the change is approved it automatically advances to the Execute phase. For this phase we had defined a task plan and now that task plan will be activated. * We can see that the first task is now ‘In progress’. I can see tasks that are either assigned to me or assigned to one of my groups on the Task page. From here I can make my task as completed. The next task immediately shows up for me and I can mark that completed too. Once the tasks are complete and the change has been implemented I will set the actual start and end times and then finish the change process flow. * Now that the change is completed, it no longer appears in the Calendar. | * ‘My Group Task’ view. * ‘Switch to Fail Over servers * Complete and Repeat for all tasks * Change schedule section- Actual Start and Actual End * Fill in Review results, completion code * Close, Save the change * Switch back to the calendar and refresh |
| **Change Analytics**   * Switch to the Change Analytics page * On the Success Rate KPI click on the ‘view suggested action points’ under HOW CAN YOU IMPROVE? * Close the suggested action points panel * Click on the trend line icon in the upper left of the Success Rate KPI * Close the KPI history trend view | * Change Analytics provides the change process owners with the ability to view key Change Management KPIs and set goals for each KPI. * For each KPI you can see the current value for the KPI and you have the ability to see the historical values of the KPI for the last 6 months. Both the current KPI value and the historical trend view show the values for the changes that are included in the current filter. * The INSIGHTS section of the KPI panel shows information related to the KPI from your system. Similarly the HOW CAN YOU IMPROVE section’s suggestions are based on the data in your system and are not generic suggestions. This allows you to target your change improvement efforts toward the areas that can result in the largest improvements of the KPI. | * Change Analytics * ‘view suggested action points’ * Click on the trend line icon in the upper left of the KPI page * Close the KPI history trend view |
| **After your demo is complete:**   * Fill in Jennifer as the owner and abandon your change to “Add 1GB memory to (DEMO) SER123MS001 server” so it won’t be there the next time a demo is performed. |  |  |

**Optional Sub Flows**

Customer intrigued after seeing this overview? Want to show more of the solution? Ideas for possible sub-flows/drill-downs:

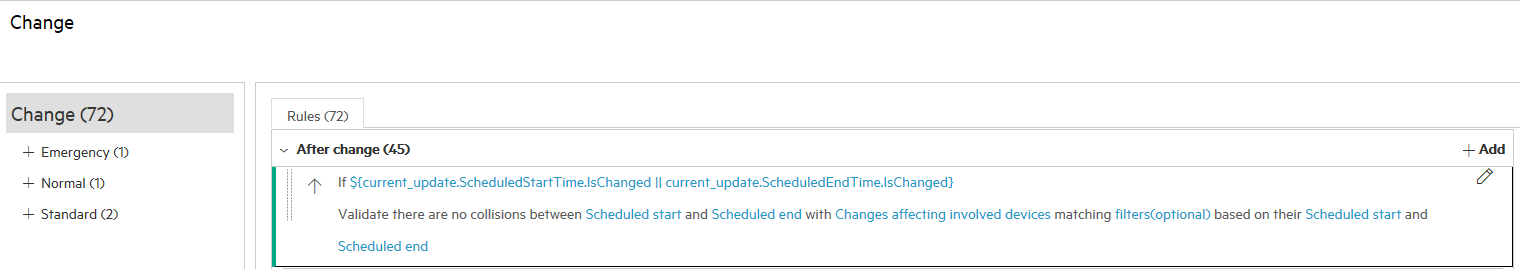
| **Do** | **Say** |
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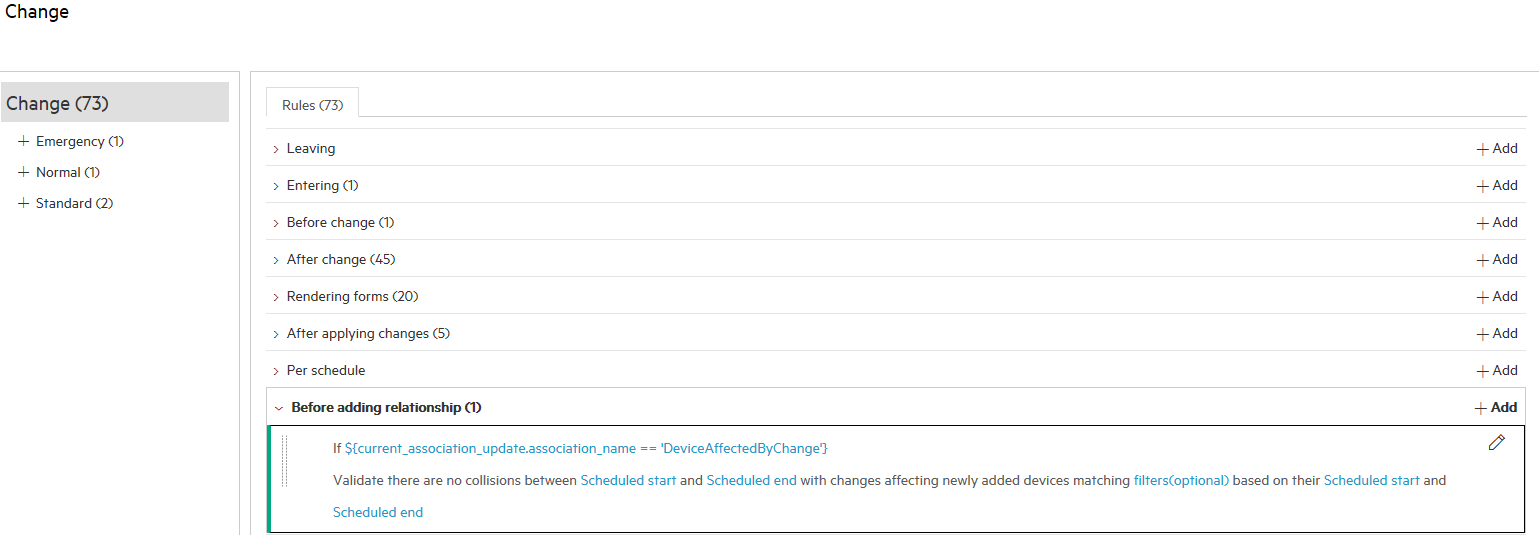
**Demo Preparation**

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

Initial Set-up

* Add pictures to profile for user’s: amy.lopezmf@gmail.com, [joe.managermf@gmail.com](mailto:joe.managerhpe@gmail.com), [Kimberly.quanhpe@gmail.com](mailto:Kimberly.quanhpe@gmail.com), [Jennifer.falconmf@gmail.com](mailto:Jennifer.falconhpe@gmail.com) so they will be visible on the Change Calendar.
* Add organizational group, IT, with email [IT.group@advantage.com](mailto:IT.group@advantage.com) and configure Kimberly and Jennifer to be in this group.
* Configure Amy and Joe as members of the Marketing organizational group and add an email address for this group to [Marketing.group@advantage.com](mailto:Marketing.group@advantage.com)
* On the “(DEMO) Exchange Service” (Actual Service in SACM), configure [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) as the Service owner.
* Make sure Jennifer is a member of the ECAB group and the Change Coordinators Group
* Make sure the CAB and ECAB Approval definitions (in Admin > Records > Change) are set to ‘One must approve’
* Remove name from the Change inbox filter (to show all changes)
* To demo subscribers impacted by a change: Add the IT and Marketing groups as group subscribers to the (DEMO) Exchange Service and the (DEMO) Sharepoint-Sales Service
* Configure two Change Collision Validation rules:





* Optional Demo flow: To demo strong identity validation:
* Enable “Strong Identity Validation” in the Application Settings. Also “Enable strong identity validation bypass for admin”.
* To require strong identity validation only for ECAB approvals with “Very high” risk: In the Admin>Records>Task>Authorization: Choose “Enabled for records based on condition” with this condition (required for critical ECAB approvals on changes): ${entity.ParentEntityType == 'Change' && entity.AssignmentGroup.Name == 'ECAB Group' && entity.RiskAssessment == 'VeryHighRisk'}
* On the Jennifer.falconmf Profile and prefererences, check the box “May generate password verification code”
* Now we need to generate the password and verification codes:
* As Jennifer, create a change with Very High risk as described in the use case.
* Jennifer does the Service owner approval normally.
* For the ECAB approval, login as [joe.managermf@](mailto:joe.managerhpe@gmail.com), go to approval, approve, submit and you will be prompted for a verification code (one time only). This is the one that Jennifer needs to generate and share with Joe.
* Jennifer Falconmf has been configured to generate verification codes. On her Profile and Preferences page, select the Manage passcode verifications link in the list on the left side. Generate the passcode for Joe.
* Joe enters the verification code. Next Joe is prompted for an authorization code that is sent to his gmail account.
* Joe enters the authorization code.

Per-demo Checklist (in addition to above)

* Abandon your change to “Add 1GB memory to (DEMO) SER123MS001 server” so it won’t be there the next time a demo is performed.