

NAB Endevor Change Request

The purpose of this document is to explain the steps to create and update an Endevor Change Request. These are the high level steps and important information which must be included in your Endevor Change Requests.

For further details on the Technology Change Management process – please refer to the Enterprise Service Management Process Portal -

<http://teams.national.com.au/apps/smpp/Pages/Home.aspx>

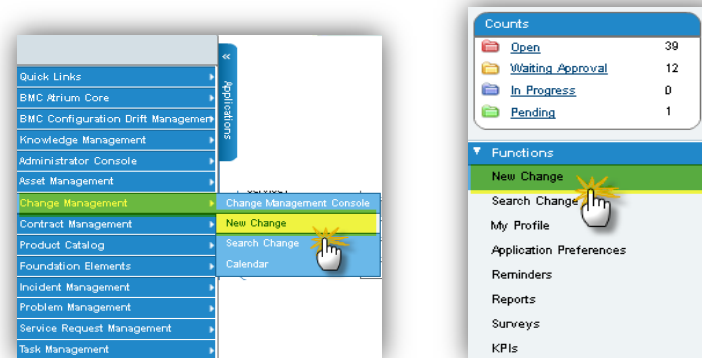
The Change Coordinator must ensure the following:

- ✓ Select the **Endevor Change template** (Refer to section 1.2)
- ✓ Select the relevant **Endevor Task Templates** based on the packages required for your change. (Refer to section 2)
- ✓ **Endevor Task** must have the same **sequence** number if they are to be moved to the staging libraries on the same implementation date (Refer to section 2.4)
- ✓ The Endevor Task Templates must have the correct **Reference ID** recorded. (Refer to section 3.3)
- ✓ The Endevor Task Templates must have the **Task Scheduled Start and End Dates** recorded. (Refer to section 3.4)
- ✓ The Change request must progress through the relevant **Approval gates** before it will integrate with Endevor. (Refer to section 4)
- ✓ When the change is ready for implementation, the Status of the record must be progressed from 'Scheduled' to '**Implementation in Progress**'. (Refer to section 5.1)

If any of the above items are not completed correctly, the Endevor integration with Remedy will not work.

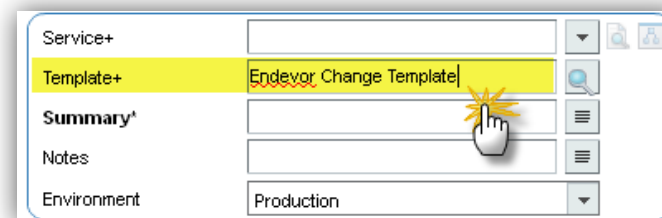
Section 1: Create a new Endevor Change Request

- 1.1 Go to the Applications tab and select **Change Management > New Change**, or click on the **New Change** option in the Functions section on the left hand side of the Change Console.

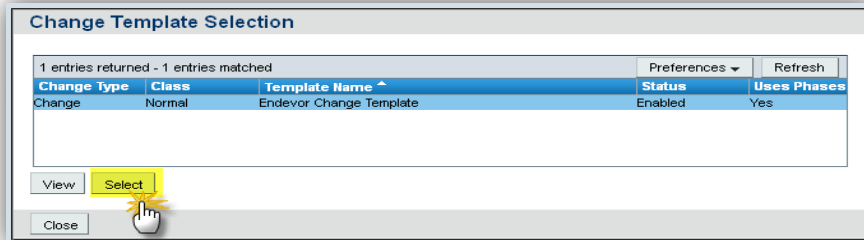


- 1.2 Select the **Endevor Change Template** by clicking in the Template field and type in the word 'endevor'. Click on the template called '**Endevor Change Template**'.

Note: Do not select any items from the Service+ field until after the Template has been selected. The Template will clear out any Service selected. You can select a Service after the template has been selected.



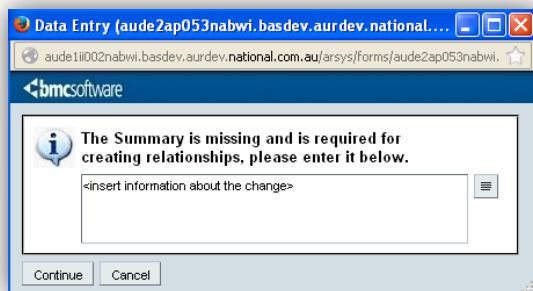
- 1.3 The **Change Template Selection** pop up box appears. Highlight the template again and click Select.



The dialog box titled "Change Template Selection" shows a table with one entry. The "Select" button is highlighted with a mouse cursor.

Change Type	Class	Template Name	Status	Uses Phases
Change	Normal	Endevor Change Template	Enabled	Yes

- 1.4 A window will pop up asking for **Summary** information. This is the Summary information for the Change request.



The dialog box titled "Data Entry (aude2ap053nabwi.basdev.aurdev.national....)" shows a message: "The Summary is missing and is required for creating relationships, please enter it below." with a text area for input.

- 1.5 **Update the mandatory fields** in accordance to the Enterprise Change Management Process – Summary, Notes, Environment, Class, Change Reason, Impact, Urgency, Risk Level, Categorizations, and Manager Group.

- 1.6 Click **Save**.

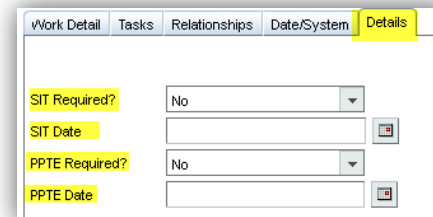


The "Save" button is highlighted with a mouse cursor.



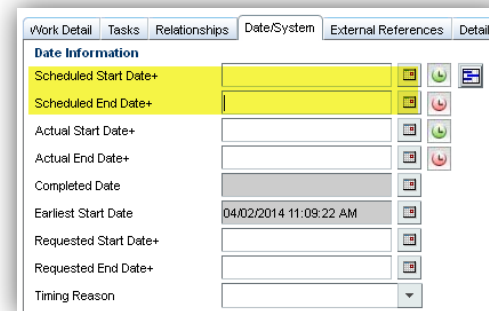
Please refer to the Change Management User Guide or suite of QRGs on the go/smpp site for instructions to complete these fields.
<http://teams.national.com.au/apps/smpp/Pages/Home.aspx>

- 1.7 Go to the **Details** tab and select the relevant yes/no options for the SIT and PPTE environments and dates for your change, if required.



The "Details" tab shows fields for "SIT Required?", "SIT Date", "PPTE Required?", and "PPTE Date".

- 1.8 Go to the **Date/System** tab and insert the **Scheduled Start Date** and **Scheduled End Date**. This is the date for your change 'window' to implement into the production environment.



The "Date/System" tab shows fields for "Scheduled Start Date+", "Scheduled End Date+", "Actual Start Date+", "Actual End Date+", "Completed Date", "Earliest Start Date", "Requested Start Date+", "Requested End Date+", and "Timing Reason".

- 1.9 Click **Save**



The "Save" button is highlighted with a mouse cursor.

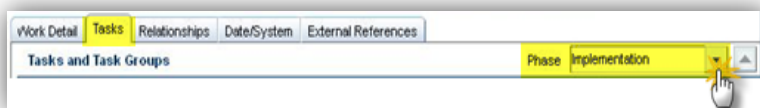
Section 2: Adding Endevor Package Tasks



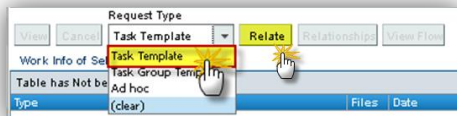
You **must** use the Endevor Package task templates otherwise the auto-integration between Remedy & Endevor will not work.

Tasks must be created for the Implementation Phase only. Endevor Tasks created for the Review Phase (i.e. pre-implementation tasks) will not be picked up by Endevor.

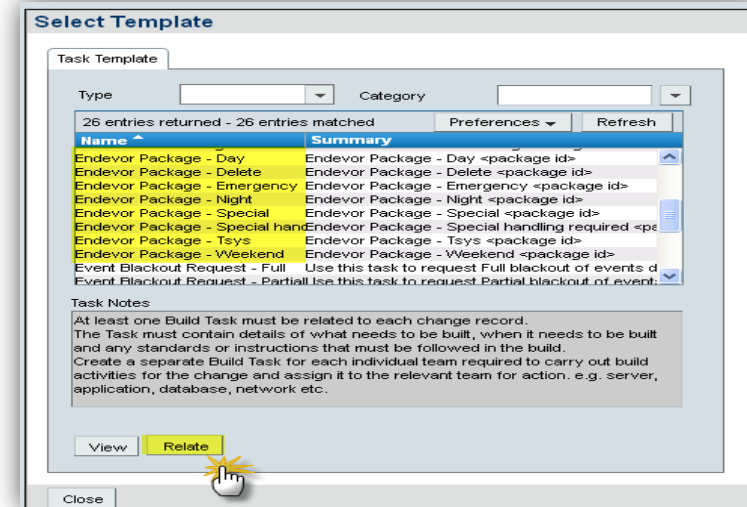
- 2.1 Go to the **Task** tab and select the **Implementation** phase from the drop down menu.



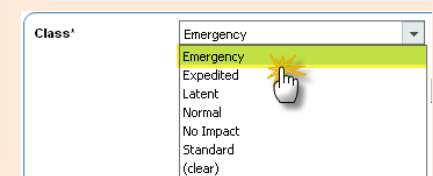
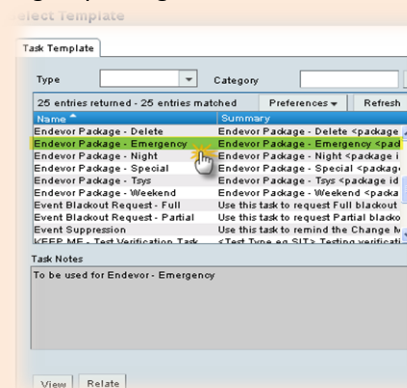
- 2.2 Go to the **Request Type** drop down menu, select **Task Template** then click on **Relate**.



- 2.3 Select the **Endevor Package Task Templates** relevant for your change request then click on **Relate**.



Note: If you need to select the **Endevor Package – Emergency**, the Class of the Change Request must be changed to Emergency Class. This is only relevant for an Emergency Change.



2.4 Endevor tasks must have the same **sequence** number if they are to be moved to the staging libraries on the same implementation date, otherwise the tasks will be executed in the sequence number order.

To modify the sequence number, highlight the Task and click on the black triangles to sequence Tasks Up or Down.

If Endevor Tasks are to be moved to the staging library on a different date, the sequence numbering must reflect this order.

Type	Name	ID	Instance	Sequence	Status
Task	Endevor Package - Day	TAS000000006567	1	1	1 Staged
Task	Endevor Package - Delete	TAS000000006568	1	1	1 Staged

The following table provides an example of Task sequence and dates.

Change Tasks	Task Scheduled Start Date	Sequence
Endevor Task 1	14/01/2014	1
Endevor Task 2	14/01/2014	1
Ad-hoc Task 1	15/01/2014	2
Endevor Task 3	16/01/2014	3
Endevor Task 4	16/01/2014	3
Ad-hoc Task 2	16/01/2014	4
Endevor Task 5	17/01/2014	5

Tasks Implemented on 14/01/2014
Endevor Task 1
Endevor Task 2

Tasks Implemented on 15/01/2014
Ad-hoc Task 1

Tasks Implemented on 16/01/2014
Endevor Task 3
Endevor Task 4

Tasks Implemented on 16/01/2014
Ad-hoc Task 2

Tasks Implemented on 17/01/2014
Endevor Task 5

2.5 Other tasks can also be added to the Change request, as required. Select the relevant **Task Template** or **Ad Hoc Task** option to relate other tasks.

Section 3: Updating Endevor Package Tasks

3.1 Open the **Task form** by double clicking on the relevant Task in the table.

Type	Name	ID	Instance	Sequence	Status
Task	Endevor Package - Day	TAS000000005778	1	1	1 Staged
Task	Endevor Package - Delete	TAS000000005779	1	1	1 Staged
Task	Endevor Package - Special	TAS000000005780	1	1	2 Staged

3.2 Fill out the **Summary** field with the relevant Package ID. Also fill in any relevant information into the **Notes** field, as required. In particular, please ensure any specific scheduling instructions for **Special Package** tasks are included in the Notes.

3.3 To add the Task Reference ID, go to the **Classification** tab and type in the Base/Production Package ID in the **Reference ID** field. This is the last 6 digits of the Change record number (e.g. CRQ00000**123456**) plus a suffix as per the Endevor Package Name standards. Refer to TSYS > GIF



The package Reference ID is critical to the Endevor integration. Please ensure this field is completed correctly.

Note: The Package Reference ID must be unique for each Task otherwise the integration will fail.

3.4 Go to the **Dates** tab and record the **Scheduled Start and End Dates** for the task.

The Scheduled Start date must be a business day because Endevor packages are only executed on business days.



The scheduled Start and End Dates are required for the package to be approved and implemented in Endevor. Without this information, the Endevor build activities cannot commence.

3.5 Go to the **Work Info** tab and select '**Change**' from the drop down menu in the **Work Info Type** field.

3.6 Record implementation information (Endevor component details) relevant for the task in the **Work Info Notes** field.



There is a limit of 20 Move Packages, 4 Delete Packages and 20 Adhoc Tasks per Change record. The Tasks created beyond this limit will not be integrated with Endevor and will also result in failure of the Auto Approval process. If there is a need to create beyond the limitation, then you must create a new Change record.

3.7 Click **Save** to ensure your task is saved.

3.8 To go back to the main Change request, click on the CRQ ID in the breadcrumb at

the top of the Task form.

IT Home > CRQ000000009340 > TAS000000005773



Section 4: Progressing the Change Request for Approval

- 4.1 Once all the required fields and information are recorded in the Change request, click on **Next Stage** to move the record through for **Review Approval**.

The Status of the Change record moves to 'Request for Authorisation'.

This record must be approved by the Change Manager.

Save Next Stage Print

Status* Request For Authorization



- 4.2 To progress the record to **Implementation Approval**, click on **Next Stage** to move the Status to 'Scheduled for Review'.

Save Next Stage Print

Status* Scheduled For Review



- 4.3 Click on **Next Stage** again to move the Status to 'Scheduled for Approval'. This record must be approved by the respective Change Approvers based on the Risk Level and Class of the Change. A new automated Approver called "Orchestration" will get added to the Change Approver list. The Change Manager approves the Change only after "Orchestration" approval which is performed by the tool.

Save Next Stage Print

Status* Scheduled For Approval



Additional Approvers can be added, as required by the Change Coordinator. Please ensure you **select 'Show: All Approvers'** in the Approvals table to view all approvers before adding extra approvers to the Change request.



If the Change record moves to the "Scheduled for Approval" Status without having the correct details, then none of the Tasks will get approved and the Change Coordinator will receive an email notification every 15 minutes until the Tasks are updated with the correct information.



The Change Coordinator will also receive an email every 15 minutes if there is a package mismatch if the number of Packages in Remedy does not match the number of packages approved by Endevor.

Note: If all the required information is correct in the task, it will be Auto Approved by the system and the **Package Approved** status will change to "Yes". Please note this is only for the Change request. Packages still need to be manually approved in Endevor as relevant at different stages.

Package Details

Reference ID 009321W

Package Approved? Yes

- 4.4 Once the record is approved by all the required Change Approvers, the Status of the Change request is automatically updated to 'Scheduled' by the system.

Status* Scheduled


Section 5: Implementation of the Change Request

- 5.1 On the day of Implementation, the Change Coordinator must click on **Next Stage** to move the Status of the Change record to '**Implementation in Progress**'. This will activate the Tasks according to the sequencing that has been set up. Failing to do this, will result in Tasks not being implemented by Endevor as the Tasks will remain in a 'Staged' Status in Remedy.



The next task in the sequence will only move to a Status of 'Pending' or 'Assigned' once the preceding Tasks in the sequence are closed. This includes the closure of Ad Hoc Tasks.

- 5.4 Once all the Tasks are executed, the Change Coordinator must update the Change request and refer to the Enterprise Change Management Process to complete the Change request.



Packages which are approved will be implemented automatically using automated jobs.

Endevor Tasks are extracted and implemented by Endevor only on business days.

Auto Implementation is not scheduled to run on Weekends. Hence, Change Coordinator should ensure the Task Scheduled Date and the Sequence correctly entered, so that the tasks are activated and executed as per the date.

- 5.2 The Status of the Endevor Tasks will move to 'Closed' automatically in the Change request when the package is successfully executed by Endevor.

Task Note: Task(s) must not be set to Closed -> Failed without first contacting the parent record coordinator.

Name*	Endevor Package - Night	Task ID	TAS000000005749
Summary*	Endevor Package - Night P123456	Type*	Manual
Notes	To be used for Endevor - Night Migrate JCL and Code to Production	Status*	Closed
Priority	Medium	Status Reason	Success
		Request ID	CRO000000009321

Open

- 5.3 Only the Endevor Packages which were executed will be auto closed.

Additional Information:

The following table provides a correlation between the Remedy Change request status and Endevor Package Levels.

Status	Scheduled start date	Endevor Packages	Endevor Corresponding Status	Comments
Draft	NA	NA	NA	User neither can add elements nor can create packages.
Request for authorisation	NA	NA	NA	User neither can add elements nor can create packages.
Planning in Progress	No Date	No Packages	NA	User neither can add elements nor can create packages.
Planning in Progress	with date	No Packages	NA	User neither can add elements nor can create packages.
Planning in Progress	no date	with Packages	NA	User neither can add elements nor can create packages.
Planning in Progress	with date	with Packages	OPEN	User can add elements and create packages.
Scheduled for review	date is mandated	No Packages	NA	User neither can add elements nor can create packages.
Scheduled for review	date is mandated	with Packages	OPEN	User can add elements and create packages.
Scheduled for Approval	NA	NA	Requested	1. User cant add new packages as CR is requested for approval. User cant reset his casted packages in Endevor 2. User packages will be executed if all the move packages approved in Endevor. 3. User will get email notification if All P packages are not in 'In-Approval' status and if any delete packages present prod packages should be created and casted for the same.
Rejected	with date	with Packages	OPEN	To reset packages in Endevor for any reason or if user wants to add any extra packages user should get CR rejected from any one of the Approver group.
Scheduled	NA	NA	Scheduled	1. User can reset his Prod packages by resetting CR by going to back stage 'Planning in Progress' or 'Scheduled for review'. 2. Scheduled is the last stage for user to stop implementing or updating package elements by Resetting
Implementation in Progress	NA	NA	Scheduled	1. The Endevor packages scheduled for that day based on the Endevor task scheduled start date and sequence packages will be executed. 2. Once CR is in Implementation in Progress status user cant reset his any of Prod packages as Cr cant be reset from Implementation in Progress.
Completed	NA	NA	Implemented	CR deployment completed to Production.
Cancel	NA	NA	NA	At any point of time user cancels the Change same packages needs to created again to continue with same CR and Cr should be in 'Planning in progress' or 'Scheduled for review'