

Normal and Expedited Change Request Definitions

A **Normal** change is one that is submitted, fully documented, and approved at the IT Director level (if required, i.e., High Risk or Limited Change Window) and below, and has an implementation date that allows discussion at the next regularly scheduled CAB meeting.

An **Expedited** Change is one that *must* be completed before next CAB and does not have a scheduled implementation date that allows discussion at the next scheduled CAB meeting. An Expedited Change will need to be reviewed and approved by Manager and IT Director electronically before proceeding.

The following steps describe how to Open a Change Request & Save in State=Draft.

1. In the Change Application Navigation Bar, click the **Create New** change option.
2. Select a **Category (22)**.
3. Enter a **Configuration Item (25)** – CI is what's being added or changed (no Generic CIs are to be used, i.e., Server).
4. Enter an **Assignment Group (29)**.
5. In **Work Info (10)** Tab, enter information in the **Short Description** and **Why is this Change Being Implemented?** fields.
6. Click the **Save (32)** button.

The following steps describe how to Request Approval.

1. Change the **State** to **Planning (16)**.
2. If you know a change will require an update to the Configuration Item (CI) record, select 'Yes' in the "Requires CI Update?" (26) field. When set to Yes, a Task is created within the Change requiring the assignee to update the CI before closing that Change.
3. Enter an **Assigned to (30)**
4. Enter a **Peer Reviewer (4)**.
5. Enter a **Group Manager Approver (5)**.

6. In the **Schedule (11)** tab, enter the **Planned Implementation Start Date** and the duration times. **All** duration fields need to be entered.
Please Note: The **Why is this Change being Expedited?** field is required only when the **Planned Start Date** is before the next CAB. This will change the **Type (19)** field value to "Expedited". If the Planned Start Date is set to occur during a Blackout Period or if the **Risk** is set to High, the **IT Director Approval (6)** field will be required.
7. In the **Change, Backout, and Validation Plan (12)** tab, complete all required fields. The step-by-step process must be entered for each of the plans. Do NOT enter statements, i.e., "install upgrade", "restore backup", "validate with user", but "how" you will carry out the change.
8. In the **Change Impact (13)** tab, complete all required fields.
9. Click the **Save (32)** button, then click **Risk Assessment** button (33). Complete risk assessment and click **Submit** button on the bottom of risk form. Risk level will automatically populate **Risk** field (28), based on responses.
10. Click **Request Peer Review (34)**.
11. After Peer reviews Change and closes their task (found at bottom of Change on **Change Tasks** tab) and the ticket has been approved (ex. Group Manager, CAB, etc.), the **State (16)** is set to Scheduled.

The following steps describe how to Implement your Change.

1. Select "Work in Progress" from the **State (16)** field.
2. And, in the **Schedule (11)** tab, enter the **Actual Implementation Start Date and Time**.
3. Click the **Save (32)** button. Now, begin your change.
4. You can optionally add Worklog entries by clicking the **Work Info (10)** tab and typing text into the **Worklog** field.
5. Click the **Save (32)** button.

The following steps describe how to Close your Change.

1. In the **Schedule (11)** tab, enter the **Actual Implementation End Date and Time**.
2. Select "Closed" from the **State (16)** field.
3. Select a **Change Result (17)**. Note: If the Actual Implementation End Date is after the Planned Implementation End Date, the **Change Result** would be 'Completed with Issues', entering Worklog notes why change ran long.
4. Click the **Save (32)** button. The Change will automatically change to 'Closed' if all open tasks are closed.
5. If the **Change Result (17)** is not "Successful", a Post Implementation Review (PIR) Task is created for Group Manager Approver. They should Click the **Change Tasks** tab (found at bottom of Change) and enter notes and complete the PIR Task. All tasks (ex. Service Desk Notification Task, CI Update Task, etc.) must be closed in order to close the main Change Ticket.
6. After all tasks are closed, the **State (16)** field will automatically change to 'Closed'.