APPENDIX X

CHANGE MANAGEMENT PROCESS DOCUMENT

Process Document

Change Management

Published:	5/16/2016
Document Location:	P:\penndot shared\ITSM\ProcessDocuments\Change_Management.pdf
Summary:	This document outlines the Change Management process, procedures and work instructions

Associated Documents

Title of Document	File Location
Change Management Policy	P:\penndot shared\ITSM\Policy\Change_Management_Policy.pdf
IT Service Management	P:\penndot shared\ITSM\ProcessDocuments\IT_Service_Management.pdf
ITSM Glossary	P:\penndot shared\ITSM\Support\ITSM_Glossary.pdf
ITSM Document Downloads (HTML)	http://pdremedy7.penndot.lcl/arsys/shared/SMPM/download.htm

Document History

Below is a document history log which includes the last ten changes that were made to this document, which team member made the change, and the date of the change. The first final version of the document is version 1.0. Subsequent updates to the document will be numbered v1.1, v1.2, v1.3, etc. Any significant changes (i.e. the addition of a new section or the removal of an existing section) will be numbered v2.0, v3.0, etc.

Version	Comments/Changes	Authored By	Revision Date
0.1	Initial draft		
0.1	Updated process & procedure flow diagrams		11/12/2015

Table of Contents

1. Mission

The purpose of the change management process is to control the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services.

1.1 Objectives

The objectives of change management are to:
• Respond to the customer's changing business requirements while maximizing value and reducing incidents, disruption and re-work.
• Respond to the business and IT requests for change that will align the services with the business needs.
• Ensure that changes are recorded and evaluated, and that authorized changes are prioritized, planned, tested, implemented, documented and reviewed in a controlled manner.
• Ensure that all changes to configuration items are recorded in the configuration management system.
• Optimize overall business risk – it is often correct to minimize business risk, but sometimes it is appropriate to knowingly accept a risk because of the potential benefit.

2. Scope

A change is defined as 'the addition, modification or removal of anything that could have an effect on IT services'. The scope should include changes to all architectures, processes, tools, metrics and documentation, as well as changes to IT services and other configuration items.

All changes must be recorded and managed in a controlled way. The scope of change management covers changes to all configuration items across the whole service lifecycle, whether these CIs are physical assets such as servers or networks, virtual assets such as virtual servers or virtual storage, or other types of asset such as agreements or contracts.

At the highest level, the scope of the Change Management process is limited to change implementations that will cause:

1) a service to become unavailable or degraded,
2) the functionality of a service to become different, or
3) the CMDB to require an update.

2.1 In Scope

The intended scope of the Change Management Process is to cover all of PennDOT's computing systems and platforms. The primary functional components covered in the Change Management process include:

• **SDLC** – Changes handled through the formal software development life cycle will be included within PennDOT's change management process.
• **IT Infrastructure** – Installation, modification, removal or relocation of hardware, software, networks, facilities etc. that are required to develop, test, deliver, monitor, control and/or support applications and IT services.

- **Software** – Installation, patching, upgrade or removal of software products including operating systems, access methods, commercial off-the-shelf (COTS) packages, internally developed packages and utilities.
- **Database** – Changes to databases, files or structures such as additions, reorganizations or major maintenance that affect all records.
- **Application** – Application changes being promoted to production as well as the integration of new application systems and the removal of obsolete elements.
- **System Configurations** – Any moves, adds, changes and deletes to system configuration files.
- **Automation Changes** - Requests for creation, deletion, or revision to job schedules, back-up schedules or other regularly scheduled jobs managed by ISTO.
- **Telephony** – Installation, modification, removal, or relocation of automatic call distributor (ACD), audio/video conference and switching (PBX, Centrex, Key) systems and services.
- **Generic and Miscellaneous Changes** – Any changes that may [*positively or negatively*] impact a significant number of users or pose any significant risk to the business.

2.2   Out of Scope

There are many IT activities performed at PennDOT, either by ISTO or by the end users that do not fall under the policies and procedures of Change Management. Activities that require an operational process (ex: incident or request mgmt.), but are outside the initial scope of the PennDOT's Change Management process includes:

- Contingency/Disaster Recovery
- Changes to non-production elements or resources
- Any modification or relocation of individual desktop equipment and/or services.
- Changes made within the daily administrative process, assuming a service will not become unavailable or degraded, the functionality of a service will not become different, and the CMDB does not require an update.

    o   Examples of daily administrative tasks include:
    - Password resets
    - User adds/deletes
    - User modifications
    - Data corrections
    - Adding, deleting or revising security groups
    - Rebooting machines when there is no change to the configuration of the system
   - File permission changes

The Service Management Change Advisory Board (CAB) may modify the scope periodically to include items in the scope of the ISTO's overall Change Management process.

3. KPI's

The table below lists the critical success factors and associated key performance indicators (KPIs) that have been selected for tracking the success of the Change Management process.

Critical Success Factors	Key Performance Indicators
Optimizing overall business risk	• Number and percentage of changes that are categorized as emergency changes • Number and percentage of incidents attributed to changes • Number and percentage of failed changes
Responding to business and IT requests for change	• Number and percentage of changes with the Change Type× field set to "Change" that do not yet have their Status× field set to "Completed", broken down by urgency, priority and change type • The average time it takes, from the moment a change has been registered, until its Status× field is set to "Scheduled for Review". • The average time it takes for the Status× field of a change to get from "Scheduled for Approval" to "Scheduled".
Ensuring that all changes to configuration items are well managed	• [Click **here** and type text]

Change Management interfaces with the following ITSM modules:
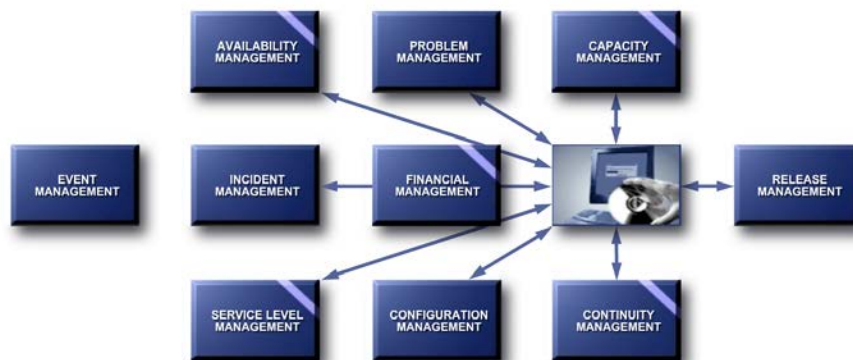
4. Owner

The owner of the Change Management process is the Service Management CAB

The Service Delivery Manager chairs the Service Management CAB and the CAB is responsible for reviewing, and subsequently approving or rejecting, requests for improvement of the Incident Management process and its supporting functionality in the service management application.

The Service Management CAB is comprised of a representative from each of the following areas:

- Technical management
- Application management
- IT Service Desk
- IT Service Management (ITSM) tool administrator

5. Roles & Responsibilities

The table below lists the different roles that are involved in the Change Management process, along with their respective responsibilities.

Role	Responsibility
Approver	• Reviews the available information to understand the change and the associated risks • Decides whether to approve or reject changes.
Change Coordinator	• Continually assess requested activities against the documented change scope and registers changes as needed, regardless of source of the request for change (RFC) • Ensures that the change risk & impact are investigated and documented. • Accountable for the creation of the Change Plan, documenting the stakeholders and the install, test, back-out & communication procedures. • Chairs (or co-chairs) the change advisory board (CAB), responsible for the creation and distribution of the CAB agenda, inviting appropriate stakeholders and conducting the CAB meeting to accomplish the objective(s) of the meeting's agenda. • Obtains approval(s) for changes. • Provides assignments to Support Technician to implement a change, offering guidance on the change management process where necessary. • Monitors the progress of changes through all phases of the lifecycle, ensuring the change is accurately controlled and documented. • Provides status updates concerning changes to the Change Manager. • Recommends revisions to scope documentation, including the nomination of standard changes • Develops change and task templates

Role	Responsibility
Change Manager	• Reviews the risk & impact analysis to ensure that this has been performed thoroughly. • Ensures that appropriate actions have been planned to minimize both the risk of failure and the impact on users during change implementations. • Ensures that the timing of planned implementations does not conflict with other planned changes or events. • Provides status updates for changes to ISTO Management
Support Technician	• Completes change assignments/tasks and updates the change work notes and/or task records with relevant information. • Provides status updates for a change to the Change Coordinator.

6. Description

The Change Management process consists of eight procedures; six for implementing planned changes, and two for implementing emergency changes.

The first procedure is called "Initiate Change". This procedure is used by change coordinators when they are dealing with requests for change.

The second procedure is called "Change Evaluation". It is used by change coordinators and support technicians to evaluate the risk of the change and to obtain business approval.

The third procedure is called "Change Planning". It is used by change coordinators and support technicians to prepare the implementation plans for changes.

The forth procedure is called "Change Scheduling". It is used by the change manager and approvers (i.e. customer representatives and service owners) to approve planned changes.

The fifth procedure is called "Infrastructure Change Implementation". It is used by support technicians to implement infrastructure changes.

The sixth procedure is called "Application Change Implementation". It is used by support technicians and change coordinators to implement application changes.

The seventh procedure is called "Planned Change Closure". It is used by support technicians when they perform production tests after changes have been implemented and by change coordinators when they close out changes.

The eighth procedure is called "Emergency Change Implementation". This procedure is used by support technicians and release administrators to implement changes to resolve incidents.

The ninth and last procedure is called "Emergency Change Closure". This procedure is used by support technicians and change coordinators to complete and close out emergency changes.
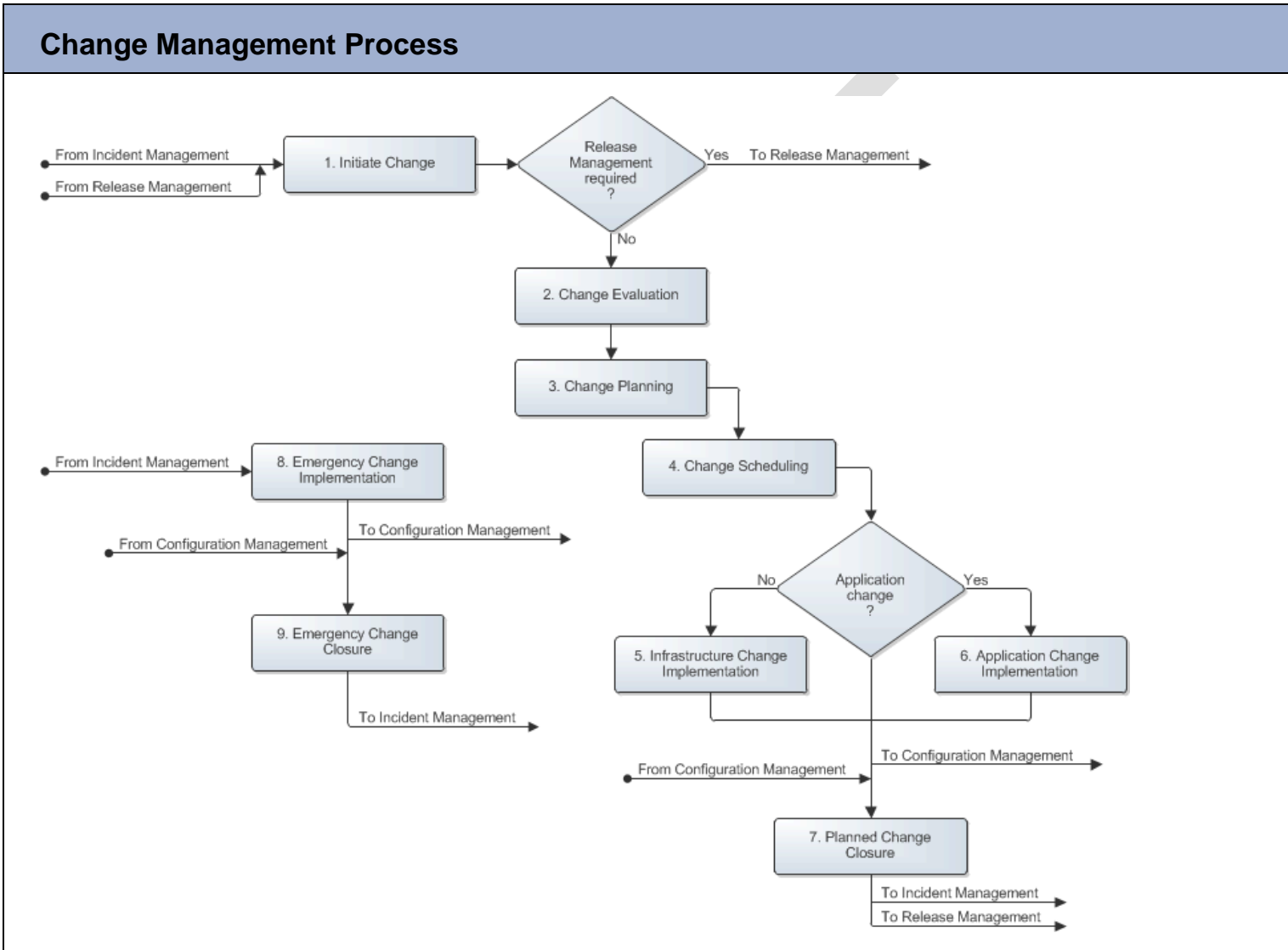
Additional details about these procedures and graphical representation of the process is provided in the Process Flow section.

7. Process Flow

The Change Management process includes the following procedures:

Change Management Process

7.1   Initiate Change

The change coordinator receives the requests for change for the service(s) that he/she coordinates the change for. The requests for change can originate from the following five sources:
- Incident Management, in the form of incident requests which resolutions need to be implemented by Change Management,
- Incident Management, in the form of changes that were generated upon the submission of the Request form,
- Problem Management, in the form of known errors,
- Release Management, in the form of documents that detail the change requirements, and
- Continuity Management, in the form of return-to-production requests from service owners following the recovery of service infrastructures at their continuity sites.

Upon receiving a request for change from Problem Management, the change coordinator determines if it can be added to a change that was already prepared earlier. If this is the case, the change coordinator links the new request for change to the existing change to optimize efficiency.

If the request for change asks for the implementation of a standard change, the change coordinator uses the appropriate change template to prepare the change.

If the request for change is not a request for a standard change, the change coordinator checks the request to ensure that it does not conflict with internal standards or policies. If it does conflict, the request for change is rejected and the requester is informed of the internal standard or policy that the request for change conflicts with.

If there is no conflict, the change coordinator determines whether the change implementation really needs to be coordinated by Change Management. This is only necessary when the implementation will cause:
- a service to become unavailable or degraded,
- the functionality of a service to become different, or
- the CMDB to require an update.

If the change can be implemented without the involvement of Change Management, the change coordinator rejects the request for change and informs the requester that Change Management is not required.
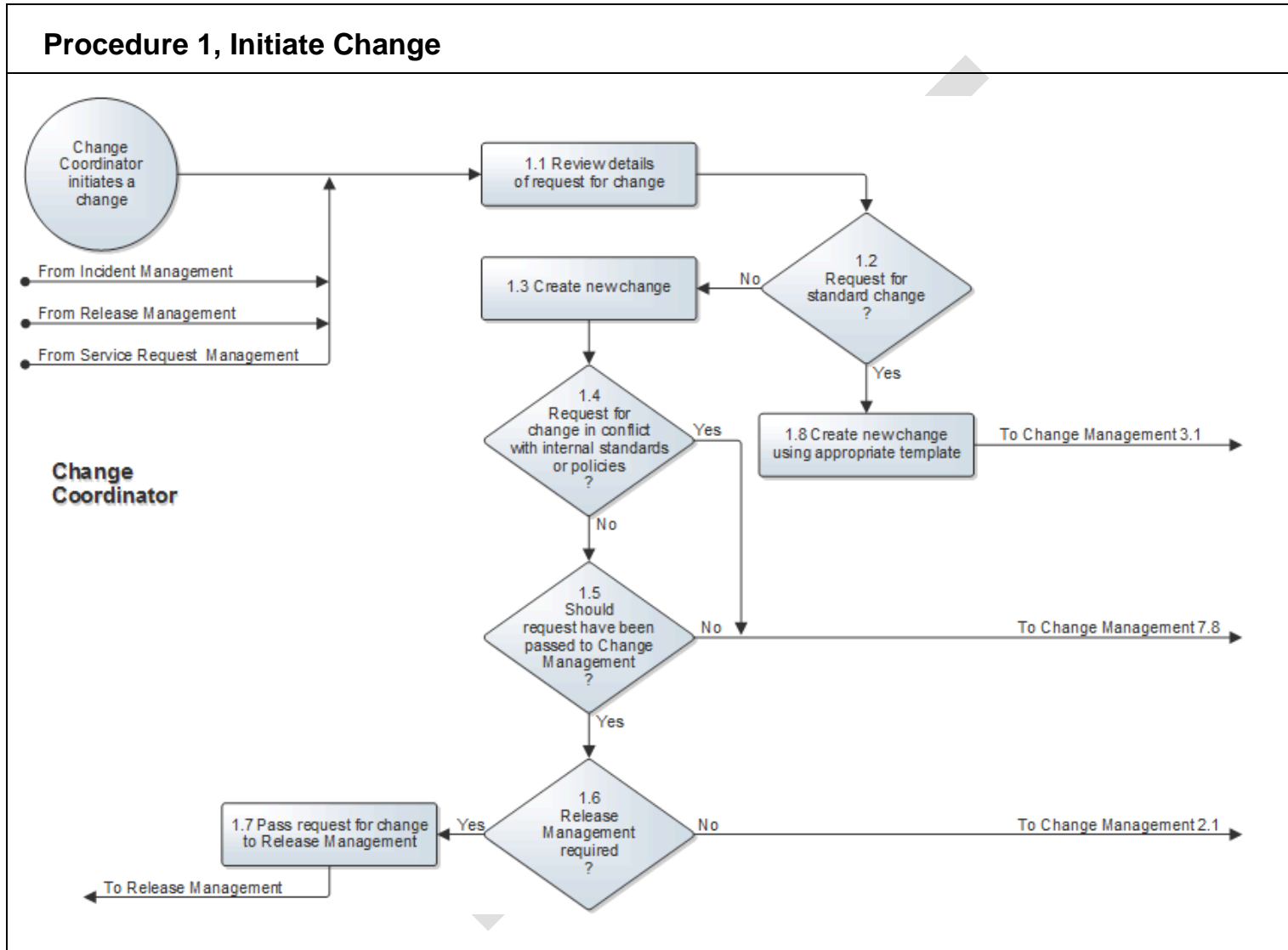
If it has been determined that Change Management is required for the implementation of the requested change, the change coordinator determines whether the request for change should be passed on to Release Management. Release Management is not required if the request for change asks for the prevention or fix of a problem, provided that:
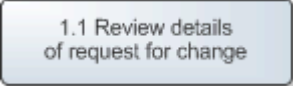- the change implementation can be coordinated by a single change coordinator,
- the implementation will not cause the functionality of the service to become different, and
- no additional funding is required to complete the implementation.

If Release Management is not required, or if the request for change originated from Release or Continuity Management, the change coordinator selects the most appropriate change template and/or task (group) template(s) to register the change. All other requests for change are assigned to Release Management.

The *Request for Change Review* procedure is presented on the next page.

Procedure 1, Initiate Change

Change Coordinator initiates a change

From Incident Management

From Release Management
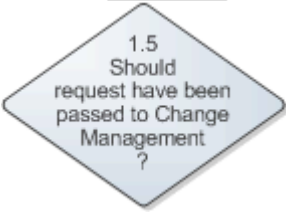
From Service Request Management

Change Coordinator

1.1 Review details of request for change

1.2 Request for standard change ?

No → 1.3 Create new change

Yes → 1.8 Create new change using appropriate template → To Change Management 3.1

1.4 Request for change in conflict with internal standards or policies ?

Yes

No

1.5 Should request have been passed to Change Management ?

No → To Change Management 7.8

Yes

1.6 Release Management required ?

Yes → 1.7 Pass request for change to Release Management → To Release Management

No → To Change Management 2.1

Procedure 1 Steps	Work Instructions
Change Coordinator initiates a change	Note: A Change Coordinator can initiate a change based on information gathered via means external to the ITSM tool (ex: conversations, investigations, institutional knowledge, management direction, etc.) that are detailed enough that a formal proposal for a change can be created, or "Request for Change" (RFC)
1.1 Review details of request for change Change Coordinator	1.1.1 Examine the information in the RFC, incident ticket, RFS request or from Release Management to obtain an understanding of the requirements of the request for change. Note: Combining requests for change from Incident Management can save time, for example, when multiple tickets have been passed to Change Management for getting bugs fixed in an application. By linking the incident tickets to a single change ensures that only one change needs to be approved and only one new release of the application will need to be tested and transferred.
1.2 Request for standard change ?	1.2.1 If the requested change can be implemented by following the workflow defined in a change template that has been approved by the service owner of the service that will be affected (i.e. if the request for change asks for the implementation of a standard change), go to 1.8.1. Otherwise continue with 1.3.1.
1.3 Create new change Change Coordinator	1.3.1 Register a new change in the ITSM tool by following the field utilization guidelines for the Change form. Ensure that a concise description is entered in the Summary× field and the change requirements are entered in the Notes× field of the change. 1.3.2 If the request for change was received in the form of an incident request, ensure that the unique identifier of the incident request is included in the Summary× field of the change. Go to the Relationships tab and link the incident request to the change. Open the incident request and add a work info entry to its Work Info History table. Use it to indicate that the "Responsibility for the incident request has been accepted by Change Management" and include the unique identifier of the change.

		Set the Status× field of the incident request to "Pending", and set its Status Reason field to "Infrastructure Change".
	1.3.3	Set the Class× field set to "Normal"
	2.6.1	Make sure that the Target Date is set correctly.
	Note:	If this is an Emergency Change, go to 8.1.1.
		If this is a latent change, meaning the change has already be introduce into the production environment, you may set the Class× field set to "Latent" and continue with the rest of the Change Management process to capture the details of the change.
	1.3.3	Fill out the Target Date and verify that you are selected in the Change Coordinator+ field.
	1.3.4	Select the appropriate change template and/or task (group) template(s) to link the necessary tasks to the change in the Template field.
	1.3.5	Update each task where CIs are affected by establishing the relationships with these CIs on the Relationships tab.
1.4 Request for change in conflict with internal standards or policies ?	1.4.1	Go to 7.8.1 if the requirements of the request for change conflict with an internal standard or policy. Otherwise continue to 1.5.1.
1.5 Should request have been passed to Change Management ?	1.5.1	If the requested change can be implemented without the involvement of Change Management, go to 7.8.1. Otherwise continue to 1.6.1.
	Note:	A change must be coordinated by Change Management if its implementation will cause: • a service to become unavailable or degraded, • the functionality of a service to become different, or • the CMDB to require an update.
1.6 Release Management required ?	1.6.1	Go to 2.1.1 if the request for change asks for the prevention or fix of a problem, provided that: • the change implementation can be coordinated by a single change coordinator, • the implementation will not cause the functionality of the service to become different, and

	• no additional funding is required to complete the implementation. Continue with 1.7.1 for any other kind of request for change.
1.7 Pass request for change to Release Management Change Coordinator	**1.7.1** If the request for change was received from Incident Management in the form of an incident request, select the release coordinator of the service for which the change is requested in the Assignee+ field of the incident request. Leave the Status× field of the incident request set to "Assigned". **1.7.2** If the request for change was received from Problem Management in the form of a known error, select the release coordinator of the service for which the change is requested in the Assignee field of the known error. Leave the Status× field of the known error set to "Assigned".
1.8 Create new change using appropriate template Change Coordinator	**1.8.1** If the request for change was received by an RFC or in the form of an incident request, register a new change for it by following the field utilization guidelines for the Change form. Ensure that a summary of the change requirements, as well as the unique identifier of the incident request, are entered in the Summary× field of the change. Go to the Relationships tab and link the incident request to the change. Open the incident request and add a work info entry to its Work Info History table. Use it to indicate that the "Responsibility for the incident request has been accepted by Change Management". Set the Status× field of the incident request to "Pending", and set its Status Reason field to "Infrastructure Change". **1.8.2** If the request for change was received in the form of a known error, register a new change for it by following the field utilization guidelines for the Change form. Ensure that a summary of the change requirements, as well as the unique identifier of the known error, are entered in the Summary× field of the change. Go to the Relationships tab and link the known error to the change. Open the known error, indicate on its Work Info History table that the "Responsibility for the known error has been accepted by Change Management", set its Status× field to "Scheduled for Correction", and set its Status Reason field to "Pending Infrastructure Change". **1.8.3** Ensure that you have linked the Service field (i.e. the business service records) that will be affected by the implementation of the standard change, Fill out the Target Date and ensure that you are selected in the Change Coordinator+ field. **1.8.4** Select the appropriate change template for the requested standard change in the Template field.

	1.8.5	Update each task where CIs are affected by establishing the relationships with these CIs on the Relationships tab.

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7.2 Change Evaluation

After having registered a new change, the change coordinator starts the risk & impact analysis phase by gathering the necessary information so that a change implementation plan can be created that minimizes both the risk of failure and the impact on user(s).

The change coordinator consults support technicians as needed to obtain this information. If a new service infrastructure is to be built, or if an existing service infrastructure is likely to require a modification in order to satisfy the change requirements, the change coordinator also requests the assistance from the Infrastructure Architect for the creation of a new, or the modification of an existing, service infrastructure design.
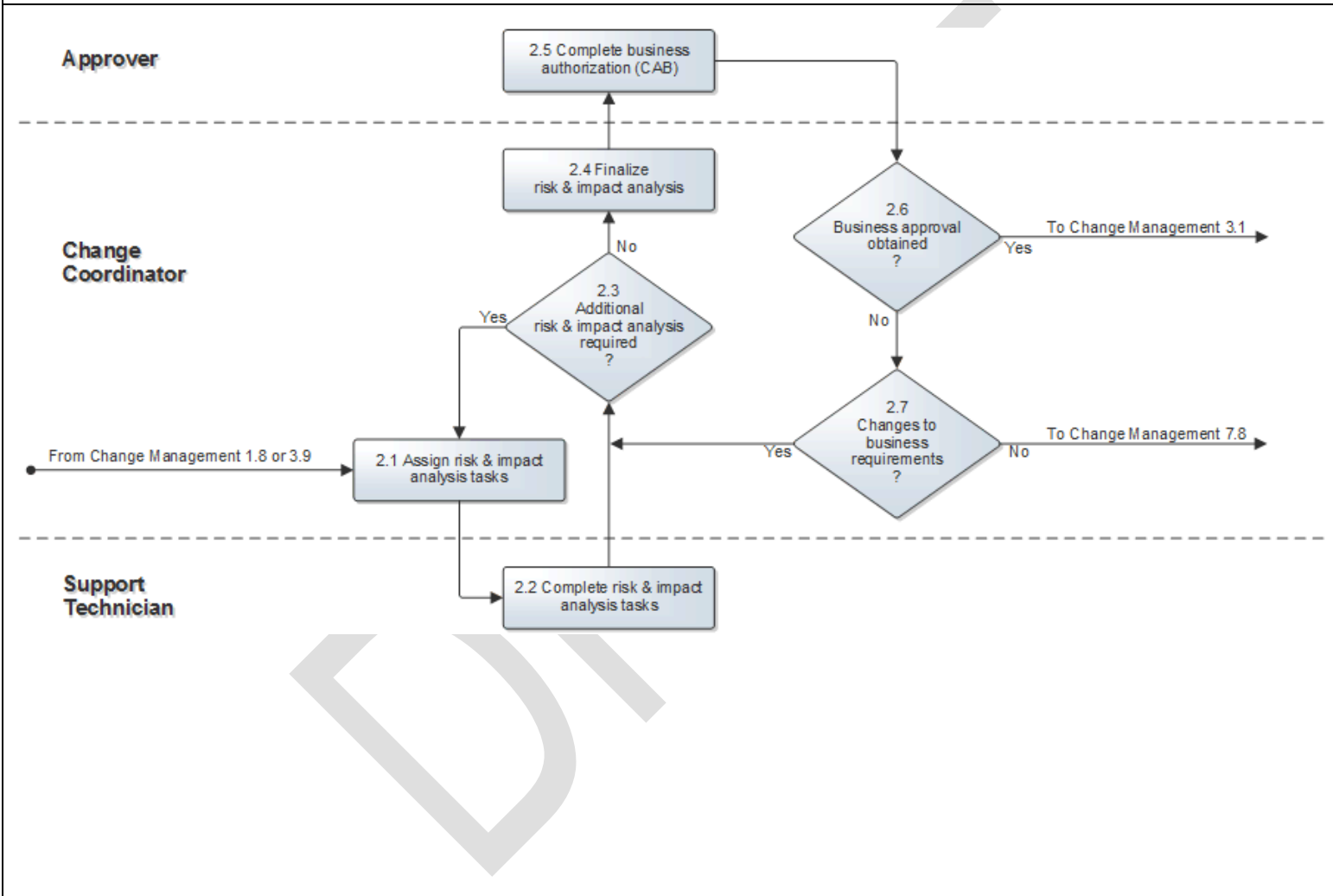
Having gathered all the risk & impact information, the change coordinator finalizes the planning for the change implementation ensuring that the risk of failure and the impact on the user(s) is minimized.

If the change is a standard change for which the approval phase can be skipped, the change coordinator initiates the implementation of the change. On the other hand, if approval is required, the change coordinator asks the change manager to initiate the collection of the necessary approvals.
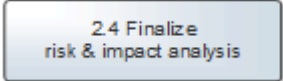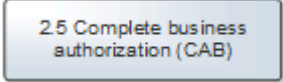
The *Change Planning* procedure is presented on the next page.
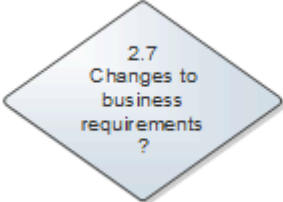
Procedure 2, Change Evaluation

Approver

2.5 Complete business authorization (CAB)

Change Coordinator

2.4 Finalize risk & impact analysis

2.6 Business approval obtained ? — Yes → To Change Management 3.1

No

2.3 Additional risk & impact analysis required ?

Yes

No

From Change Management 1.8 or 3.9 → 2.1 Assign risk & impact analysis tasks

2.7 Changes to business requirements ? — No → To Change Management 7.8

Yes

Support Technician

2.2 Complete risk & impact analysis tasks

Procedure 2 Steps	Work Instructions
2.1 Assign risk & impact analysis tasks Change Coordinator	**2.1.1** Ensure that a risk & impact analysis task is linked to the change for each question that is to be answered in order to: • identify, and determine how to minimize, each risk that could cause the implementation of the change to fail, and to • identify, and determine how to minimize, the impact of the change implementation on the customer(s). **2.1.2** Make sure that you entered the risk & impact analysis question(s) in the Notes field of each risk & impact task. **2.1.3** Determine for each risk & impact task who the most appropriate member of your group is (in terms of skills, availability and access rights) to answer it. Select this person in the Assignee+ field of the task. Select yourself in this field whenever you can provide the answer yourself. If a risk & impact task needs to be answered by another group, discuss it with the coordinator of this group. Work with this person to determine who the most appropriate member is (in terms of skills, availability and access rights) to provide the answer and agree on a realistic completion target. Select this person in the Assignee+ field of the task. **2.1.4** Also assign a risk & impact task to the availability manager for service infrastructure design if the change could require a new service infrastructure to be built, or if it could require an existing service infrastructure to be adjusted. **2.1.5** Fill out the Scheduled Start Date+ and Scheduled End Date+ fields of each risk & impact task that is linked to the change. Make sure that the scheduled end date is easily achievable. **2.1.6** Ensure that the Status× field of these risk & impact tasks is set to "Assigned". **2.1.7** Set the Status× field of the change to "Planning In Progress".
2.2 Complete risk & impact analysis tasks Support Technician	**2.2.1** After the Status× field of your risk & impact task has been set to "Assigned", open it and read the risk & impact analysis question(s) in the Notes field. **Note:** If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment.

	2.2.2	As soon as you are ready to work on the risk & impact task, set its Status✗ field to "Work in Progress" and try to find the answer to its question(s).
	Note:	If for any reason you cannot continue your work on the task (e.g. because you are waiting for information from a supplier), set its Status✗ field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the answer can be expected.
	2.2.3	As soon as you know the answer(s) to the risk & impact analysis question(s), enter them on the Work Info tab. If you were unable to find the answer(s) to the risk & impact analysis question(s), specify on the Work Info tab why the question(s) could not be answered.
	2.2.4	Set the Status✗ field of the risk & impact task to "Closed" and select the most appropriate option in the Status Reason field.
2.3 Additional risk & impact analysis required ?	2.3.1	Review the risk & impact analysis answers by opening each completed risk & impact task and clicking on its Work Info tab.
	2.3.2	If sufficient information has been provided to create a change plan that minimizes the risk of failure and the impact on customers, continue with 2.4.1. Otherwise return to 2.1.1 to request additional information.
2.4 Finalize risk & impact analysis Change Coordinator	2.4.1	Validate that the appropriate values are entered in the Impact✗, Urgency✗ and Risk Level✗ fields.
	2.4.2	Initiate the Business Approval of the change by setting its Status✗ field to "Request for Change". This will prompt the system to automatically email the business approver(s) and the workflow will stop until the predefined approvals have been received.
2.5 Complete business authorization (CAB) Approver	2.5.1	More…
	2.5.2	More...
	Note:	More… A CAB may or may not be used at this point…

2.6 Business approval obtained ?	**2.6.1** If business approval is obtained, continue with 3.1.1. Otherwise go to 2.7.1.
2.7 Changes to business requirements ?	**2.6.1** If the business area(s) did not approve the change due to additions or alterations of one or more requirement(s), return to 2.3.1. Otherwise go to 7.8.1.
2.8 Update change to notify change manager Change Coordinator	**2.8.1** Move to 3.6 Select the change manager in the Change Manager field of the change. **2.8.2** Set the Status× field of the change to "Scheduled for Review". This ensures that the change manager knows that the change is waiting for approval.
2.9 Update change to initiate implementation Change Coordinator	**2.9.1** Move to 4.7 Initiate the implementation of the standard change by setting its Status× field to "Scheduled for Approval". This will automatically cause the Status× field of the change to be set to "Scheduled" when it is saved. This, in turn, will cause the Status× field of the task(s) in the first sequence to be set to "Assigned" when their scheduled start date is reached.

7.3 Change Planning

After a change coordinator has informed the change manager that a change is ready for approval, the change manager reviews the change. If the change manager finds the change to be in conflict with internal standards or policies, he/she informs the change coordinator that the change cannot be implemented.

If the change is not in conflict with any internal standards or policies, the change manager reviews the risk assessment and the implementation plan. The change manager checks the plan to ensure that appropriate precautions have been planned to minimize both the risk of failure and the impact on the user(s), and that the timing of the implementation does not conflict with other planned changes or planned events.

If the risk & impact analysis is found to be insufficient, the change manager requests additional analysis from the change coordinator. Similarly, if the planning does not adequately address the risk of failure or the impact on the user(s), or if the planning conflicts with other planned changes or events, the change manager requests an adjustment of the implementation plan from the change coordinator.

On the other hand, if the risk & impact analysis and the planning of the implementation appear to be in order, the change manager ensures that the necessary approvals will be collected for the change.

Approval is required from the representatives of customers who will be affected by the change implementation, if it will cause:

- a service to become unavailable or degraded, or

- the functionality of a service to become different.

Approval from the service owner is sufficient if these conditions do not apply to the planned implementation.

If the change is rejected by an approver, the change manager finds out why. The change manager asks the change coordinator to perform additional risk & impact analysis or to adjust the planning if that was the reason why the change was rejected.

If the change was rejected for any other reason, the change manager informs the change coordinator that the change cannot be implemented.

The *Change Approval* procedure is presented on the next page.

Procedure 3, Change Planning
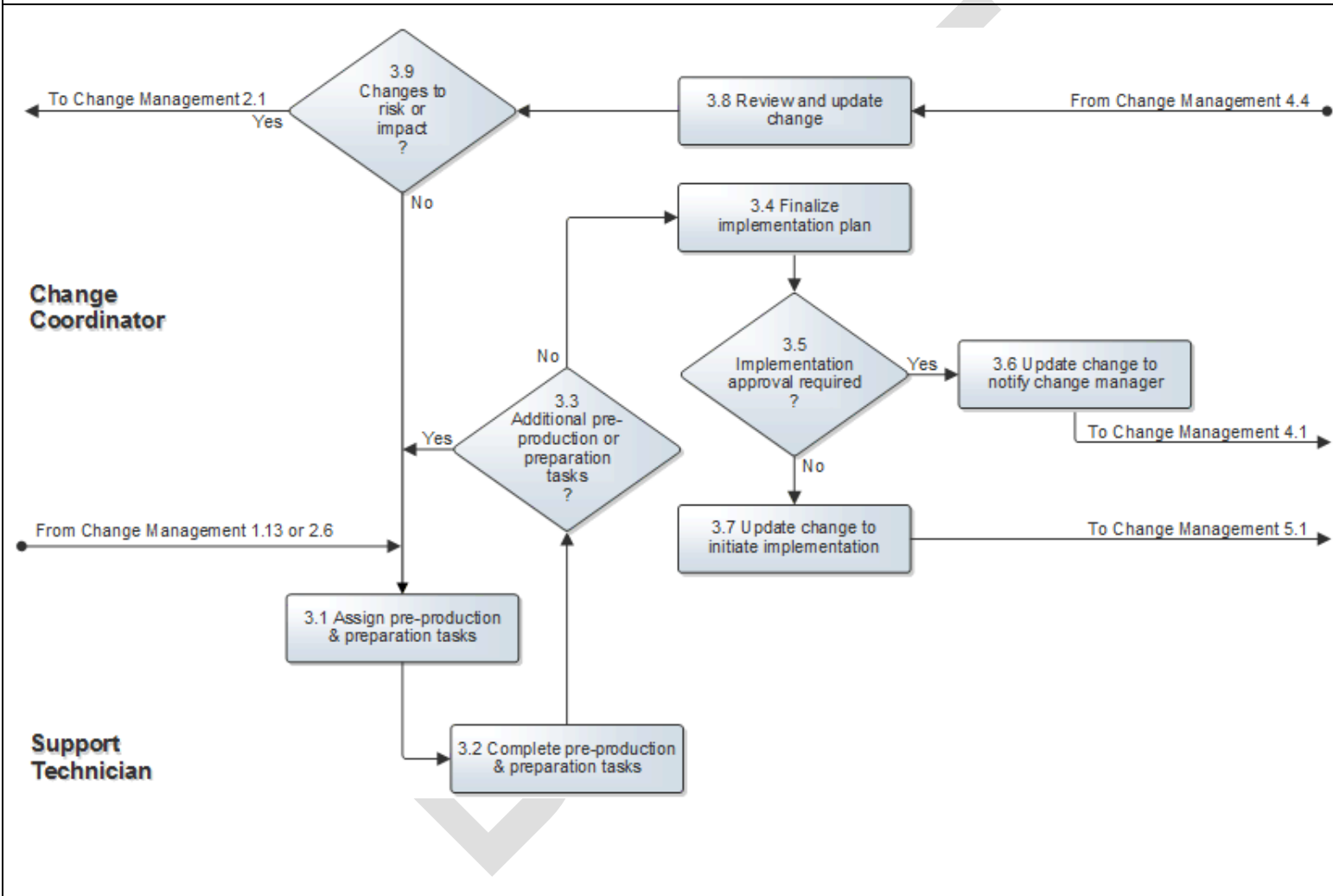
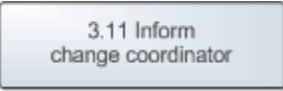| Procedure 3 Steps	Work Instructions
3.1 Review change details Change Manager	3.1.1 Review the requirements of the change to ensure that they do not conflict with an internal standard or policy. 3.1.2 Check the results from the risk & impact analysis to ensure that appropriate actions will be taken to minimize both the risk of failure and the impact on the user(s). 3.1.3 Review the planning of the change implementation to ensure that its timing does not conflict with other planned changes or planned events.
3.2 Change in conflict with internal standards or policies ?	3.2.1 Go to 3.11.1 if the requested change is in conflict with an internal standard or policy. Otherwise continue with 3.3.1.
3.3 Risk & impact analysis satisfactory ?	3.3.1 If the change does not accurately reflect the risk and/or impact because certain factors have not been considered, continue with 3.4.1. Otherwise go to 3.5.1.
2.6 Finalize implementation plan Change Coordinator	2.4.2 Prepare a detailed test plan, implementation plan and/or back out plan if this could help reduce the risk of failure. Use the Work Info tab to attach a copy of such plans to the change. 2.4.3 Add or cancel implementation tasks as needed based on the outcome of the risk & impact analysis and the instructions of the availability manager (if applicable), or based on the feedback from the change manager if he/she requested an adjustment of the implementation plan. Note: When multiple tasks need to be assigned to the same person, and if these tasks are to be completed in sequence without interruption, a single task can be created to cover all these tasks. Note: To cancel an implementation task, set its Statusx field to "Bypassed". 2.4.4 Use the Sequence column in the Tasks and Task Groups table of the change to place the tasks in the correct

		sequence. This ensures that they will be assigned in the right order.
	2.6.2	Make sure that the Notes field of each implementation task provides the necessary instructions for the person to whom the task will be assigned.
	2.6.3	Determine for each implementation task who the appropriate person is to execute it and select this person in the Assignee+ field.
	Note:	If a task needs to be completed by another group, discuss it with the group coordinator of this group. Work with this person to determine who the most appropriate person is (in terms of skills, availability and access rights) to do the work and agree on a realistic completion target. Select this person in the Assignee+ field of the task. However, select only the group in the Assignee Group+ field, if the group coordinator indicated that it is not yet known who should be asked to complete the task. In that case the group coordinator can select the most appropriate person in the Assignee+ field after the task's Status**x** field has been set to "Assigned".
	2.6.4	Fill out the Scheduled Start Date+ and Scheduled End Date+ fields of each task that is linked to the change. Establish a relationship with affected CIs using the Relationships tab for the relevant tasks. Fill out the Scheduled Start Date+ and Scheduled End Date+ fields of each task that is linked to the change.
	2.6.5	Ensure that the Status**x** field of each task is set to "Staged".
3.4 Request further analysis Change Manager	3.4.1	Specify on the Work Info tab of the change which factors still need to be considered in order to complete the risk & impact analysis.
	3.4.2	Set the Status**x** field of the change back to "Planning In Progress". This ensures that the change coordinator knows that the change requires further work before it can be approved.
3.5 Change plan satisfactory ?	3.5.1	If the planning does not adequately address the risk of failure or the impact on the user(s), or if the planning conflicts with other planned changes or planned events, continue with 3.6.1. Otherwise go to 3.7.1.

3.6 Request adjustment of change plan Change Manager	3.6.1	Specify on the Work Info tab of the change why the planning of its implementation needs to be adjusted.
	3.6.2	Set the Status× field of the change back to "Planning In Progress". This ensures that the change coordinator knows that the change requires further work before it can be approved.
3.7 Request required approval(s) Change Manager	3.7.1	Ensure that the necessary change signatures are assigned to the approvers and set the Status× field of the change to "Scheduled for Approval".
3.8 Complete change signature Approver	3.8.1	After having received the notification that your approval has been requested for a change, go to the approval console and open the change signature. Review the details of the related change on the Infrastructure Change tab.
	Note:	Click on the More Information button of the change signature if you require more information to be able to decide whether or not to approve the change.
	3.8.2	Back in the approval console, ensure that the change signature is selected (i.e. highlighted) and click on the Approve button to approve the implementation of the requested change, or on the Reject button to reject the change.
3.9 Approval for change obtained ?	3.9.1	When the Approval Status field of all change signatures that are related to the change have been set to "Approved", go to 4.1.1. The Status× field of the change has automatically been set to "Scheduled" and the Status× field of the task(s) in the first sequence will automatically be set to "Assigned" when their scheduled start date is reached. If the approved change does not contain any tasks, because it was used to request approval for an adjusted implementation plan, set the Status× field of this change to "Cancelled" and set its Status Reason field to "No Longer Required". It should be changed to say that the Status× field should be set to "Closed" and the Status Reason should be set to "Successful". On the other hand, continue with 3.10.1 if the Approval Status field of one of the change signatures that are related to the change has been set to "Rejected".
	3.10.1	Determine why the change was rejected by contacting the approver(s) who rejected it.

	3.10.2	Return to 3.3.1 if the change was rejected because one or more approvers considered the risk & impact analysis inadequate, or if one or more approvers identified a timing conflict. If the change was rejected for any other reason, continue with 3.11.1.
3.10 Risk & impact or timing issue ?		
3.11 Inform change coordinator Change Manager	3.11.1	Contact the change coordinator and explain why the change was rejected.
	3.11.2	Ask the change coordinator to cancel the change and to inform its requester(s) and approver(s).

7.4 Infrastructure Change Implementation

If the change concerns an application change, the implementation continues in Procedure 5, Application Change Implementation. The first task(s) of an infrastructure change, however, are assigned to the specialist(s) for the preparation of the implementation (i.e. to ensure operational readiness). This can involve ordering hardware, configuring a test environment, performing tests, etc.

When everything is ready, the specialist(s) receive and complete the task(s) for the actual implementation of the change.

The *Infrastructure Change Implementation* procedure is presented on the next page.

Procedure 4, Infrastructure Change Implementation
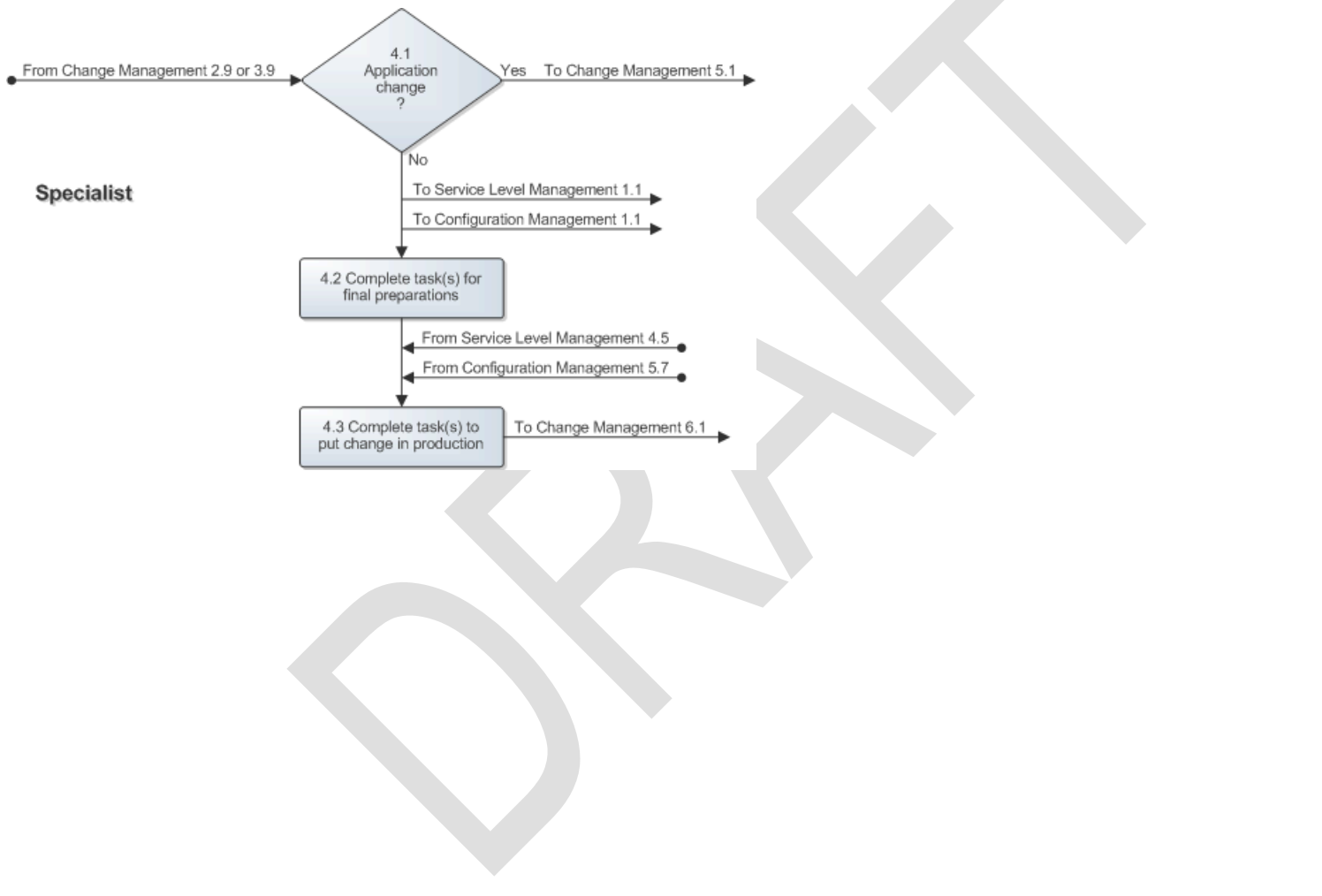
Procedure 4 Steps	Work Instructions
4.1 Application change ?	4.1.1 Continue with 4.2.1 if the change is an infrastructure change. Go to 5.1.1 if it concerns an application change.
4.2 Complete task(s) for final preparations Support Technician	4.2.1 The tasks for completing the final preparations can include tasks to provide training for operators, test new equipment in a lab environment, etc. This means everything to ensure operational readiness. When the Status× field of your task has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field. Note: If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment. 4.2.2 As soon as you are ready to work on the task, set its Status× field to "Work in Progress" and make the final preparations before the change is implemented. Note: If for any reason you cannot continue your work on the task (e.g. because you are waiting for equipment to be delivered), set its Status× field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed. 4.2.3 As soon as you have completed the work, set the Status× field of the task to "Closed". If the work was completed as requested, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. On the other hand, if the desired result could not be achieved, set the Status Reason field to "Failed". If you selected the option "Failed", or if you achieved the desired result in a different manner, explain the reason why on the Work Info tab.
4.3 Complete task(s) to put change in production Support Technician	4.3.1 When the Status× field of your task has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.

	Note:	If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment.
	4.3.2	As soon as you are ready to work on the task, set its Status✗ field to "Work in Progress" and implement the change.
	Note:	If for any reason you cannot continue your work on the task (e.g. because you are waiting for equipment to be delivered), set its Status✗ field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	4.3.3	As soon as you have completed the work, set the Status✗ field of the task to "Closed". If the work was completed as requested, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. On the other hand, if the desired result could not be achieved, set the Status Reason field to "Failed". If you selected the option "Failed", or if you achieved the desired result in a different manner, explain the reason why on the Work Info tab.

7.5   Application Change Implementation

After the first implementation task(s) of the application change have been assigned, one or more support technicians develop the new release in the development environment. The new release is tested by the specialist(s) to ensure that the change requirements have been met. This is done in a separate test environment if one has been made available for this purpose. Otherwise, the tests are performed in the development environment. The (automated) scripts for regression testing are also updated and run by the specialist(s) if such scripts are available for the application. The specialist(s) fix any errors that were encountered during the tests in the development environment.

Once the specialist(s) have confirmed that the change requirements have been met and that no new bugs have been introduced, the release administrator transfers the new release to the test environment where the customer representative(s) ensure that it gets tested.

The change coordinator creates and assigns additional tasks if the new release did not pass customer testing, so that the new release can be corrected. If these additional tasks caused the transfer to production to be rescheduled, the change will need to be approved again.

Once the new release has passed customer testing, the specialist(s) ensure that everything is ready to take the new release into production (i.e. ensure operational readiness). This could involve user training, the addition of storage capacity to the production and continuity environments, ordering additional software licenses, etc.

Finally, the release administrator transfers the new release into production.
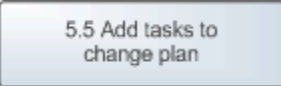
The *Application Change Implementation* procedure is presented on the next page.

Procedure 5, Application Change Implementation

From Change Management 4.1

To Service Level Management 1.1

To Configuration Management 1.1

Specialist

5.1 Complete task(s) for building new release

5.8 Complete task(s) for final preparations

From Service Level Management 4.5

From Configuration Management 5.7

Release Administrator

5.2 Complete task for transfer to test

5.9 Complete task for transfer to production

To Change Management 6.1

Customer Representative

5.3 Complete task for testing new release

Change Coordinator

5.5 Add tasks to change plan

No

5.4 New release passed test ?

Yes

5.6 Has transfer to production been rescheduled ?

No

Yes

To Change Management 3.1

5.7 Ask change manager to start collection of approvals

Procedure 5 Steps	Work Instructions	
5.1 Complete task(s) for building new release Support Technician	5.1.1	When the Status✗ field of your task for the development of the new release has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.
	Note:	If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment.
	5.1.2	As soon as you are ready to start the development of the new release, set the Status✗ field of the task to "Work in Progress".
	Note:	If for any reason you cannot continue your work on the task (e.g. the development turns out to be more difficult than anticipated and you are waiting for help from a colleague), set its Status✗ field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	5.1.3	As soon as you have completed the development of the new release, test it to ensure that the change requirements have been met. Do this in a separate test environment if one has been made available to you for this purpose. Otherwise, perform your tests in the development environment. Also ensure that the (automated) scripts for regression testing are updated and run if such scripts are available for the application. Use the development environment to fix any errors that you encounter during your tests. Once you have confirmed that the change requirements have been met and no new bugs have been introduced, specify which tests you have performed on the Work Info tab of the task, set its Status✗ field to "Closed", and set its Status Reason field to "Success". On the other hand, if it was not possible to meet the requirements of the change, specify why it was not possible to develop the required functionality on the Work Info tab of the task, set its Status✗ field to "Closed", and set its Status Reason field to "Failed".
5.2 Complete task for transfer to test Release Administrator	5.2.1	When the Status✗ field of your task for the transfer of the new release has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.
	Note:	If the task had better be assigned to another release administrator, contact the change coordinator and ask him/her to change its assignment.
	5.2.2	As soon as you are ready to start the transfer of the new release to the test environment, set its Status✗ field to "Work in Progress".
	Note:	If for any reason you cannot continue your work on the task (e.g. because you have not been provided with the

		required access rights), set its Status× field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	5.2.3	As soon as you have completed the transfer of the new release to the test environment, set the Status× field of the task to "Closed".
		If the work was completed as requested, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. On the other hand, if the desired result could not be achieved, set the Status Reason field to "Failed". If you selected the option "Failed", or if you achieved the desired result in a different manner, explain the reason why on the Work Info tab.
5.3 Complete task for testing new release Customer Representative	5.3.1	When the Status× field of your task for testing the new release has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.
	Note:	If the task had better be assigned to another person, contact the change coordinator and ask him/her to change its assignment.
	5.3.2	As soon as you are ready to start testing the new release, set the Status× field of the task to "Work in Progress".
	Note:	If for any reason you cannot continue your work on the task (e.g. it is temporarily not possible to access the test environment), set its Status× field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	5.3.3	As soon as you have finished testing the new release, set the Status× field of the task to "Closed" and the Status Reason field to "Success".
		Any deviations from the instructions provided should be documented in a Work Info entry.
		If the new release passed all tests, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. If you achieved the desired result in a different manner, explain the reason why on the Work Info tab.
	5.4.1	Go to 5.8.1 if the new release passed customer testing. Otherwise, if the new release failed the test, continue with 5.5.1.

5.4 New release passed test ?	**Note:** If one or more bugs were found during the test, but the customer representative(s) still decided to approve the transfer of the new release to production, ensure that a problem is registered for each bug. Having a problem registered in the service management application for each bug makes the bug information available to the people who will be involved in the support of the new release. It also ensures that work on these problems will start as soon as possible.

5.5 Add tasks to change plan	5.5.1	Review the test result documentation from the customer representative(s) who discovered the malfunctioning of the new release.
Change Coordinator	5.5.2	Insert the necessary additional tasks for correcting the new release and for getting it tested again. Do this by following the field utilization guidelines for the Task form.
	Note:	When multiple tasks need to be assigned to the same person, and if these tasks are to be completed in sequence without interruption, a single task can be created to cover all these tasks.
	5.5.3	Make sure that the Notes field of each new task provides the necessary instructions for the person to whom the task will be assigned.
	5.5.4	Determine for each of the new tasks who the appropriate person is to execute it and select this person in the Assignee+ field.
	5.5.4	If a task needs to be completed by another group, discuss it with the group coordinator of this group. Work with this person to determine who the most appropriate person is (in terms of skills, availability and access rights) to do the work and agree on a realistic completion target. Select this person in the Assignee+ field of the task. However, select only the group in the Assignee Group+ field, if the group coordinator indicated that it is not yet known who should be asked to complete the task. In that case the group coordinator can select the most appropriate person in the Assignee+ field after the task's Status× field has been set to "Assigned".
	5.5.5	Fill out the Scheduled Start Date+ and Scheduled End Date+ fields of each new task that is linked to the change. If necessary, also update the scheduled dates of the tasks that were planned earlier and that need to be completed after the new tasks have been executed.
	5.5.6	Ensure that the Status× field of each task is set to "Staged".
	5.5.7	Use the Sequence column in the Tasks and Task Groups table of the change to place the tasks in the correct sequence. This ensures that they will be assigned in the right order.

	5.5.8	If it was not necessary to adjust the scheduled start date of the task for the transfer to production, restart the implementation of the change by setting the Status✗ field of the task(s) of the first new sequence to "Assigned".
5.6 Has transfer to production been rescheduled?	5.6.1	Continue with 5.7.1 if the transfer of the new release to production was rescheduled in 5.5.5. Otherwise, if the scheduled start date of the transfer to production task was left unchanged, return to 5.1.1.
5.7 Ask change manager to start collection of approvals Change Coordinator	5.7.1	Specify on the Work Info tab of the change that the new release did not pass customer testing, that additional work needs to be done to ensure that the release is going to pass the tests and that the change needs to be approved again because the timing of the transfer to production had to be adjusted.
	5.7.2	Set the Status✗ field of the change to "Pending" and set its Status Reason field to "Task Review".
	5.7.3	Go to the Relationships tab and create a new change for the approval of the adjusted implementation plan. Specify in the Summary✗ field of this new change that it is used to collect the necessary approvals for the adjusted change to which it is linked. Be sure to include the unique identifier of the change which implementation plan has been adjusted.
	5.7.4	Ensure that you are selected in the Change Coordinator+ field.
	5.7.5	Select the change manager in the Change Manager field of the new change and set its Status✗ field to "Scheduled for Review". This ensures that the change manager knows that the change is waiting for approval.
5.8 Complete task(s) for final preparations Support Technician	5.8.1	When the Status✗ field of your task has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.
	Note:	The tasks for completing the final preparations include all steps required to ensure operational readiness. This can include tasks like: • creating a master copy of the new release so that the configuration administrator can place it in the DML, • adding storage capacity for the production and continuity environments, • delivering training to users, • etc.

	Note:	If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment.
	5.8.2	As soon as you are ready to work on the task, set its Status× field to "Work in Progress" and make the final preparations for transferring the new release into production.
	Note:	If for any reason you cannot continue your work on the task (e.g. because you are waiting for equipment to be delivered), set its Status× field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	5.8.3	As soon as you have completed the work, set the Status× field of the task to "Closed". If the work was completed as requested, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. On the other hand, if the desired result could not be achieved, set the Status Reason field to "Failed". If you selected the option "Failed", or if you achieved the desired result in a different manner, explain the reason why on the Work Info tab.
5.9 Complete task for transfer to production Release Administrator	5.9.1	When the Status× field of your task for the transfer of the new release has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field.
	Note:	If the task had better be assigned to another release administrator, contact the change coordinator and ask him/her to change its assignment.
	5.9.2	As soon as you are ready to start the transfer of the new release to the production environment, set the Status× field of the task to "Work in Progress".
	Note:	If for any reason you cannot continue your work on the task (e.g. because you have not been provided with the required access rights), set its Status× field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed.
	5.9.3	As soon as you have completed the transfer of the new release to the production environment, set the Status× field of the task to "Closed". If the work was completed as requested, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the work in a manner that deviated from the instructions provided. On the other hand, if the desired result could not be achieved, set the Status Reason field

	to "Failed". If you selected the option "Failed", or if you achieved the desired result in a different manner, explain the reason why on the Work Info tab.

7.6 Planned Change Closure

After the change has been put into production, a specialist (with the help of a user if the specialist does not have sufficient access rights) performs the production test to verify the success of the implementation. The CMDB, the Capacity Management and the Continuity Management information is updated as needed after the specialist has determined that all the requirements of the change have been met.

If all change requirements have not been fulfilled, however, the specialist who performed the production test determines if the change implementation should be backed out. The change is backed out if its implementation does not provide an improvement over the previous situation, or causes a security or data integrity risk. If the unsuccessful change implementation can still be made into a success, the change coordinator creates and assigns the necessary additional tasks.

Before closing a change, the change coordinator ensures that its requesters and approvers are informed.
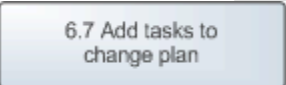
The *Planned Change Closure* procedure is presented on the next page.

Procedure 6, Planned Change Closure

From Change Management 4.3 or 5.9

Specialist

6.1 Complete task for production test

6.2 All change requirements fulfilled ?
- Yes → To Configuration Management 1.1
- To Capacity Management 1.1
- To Continuity Management 5.4
- To Continuity Management 6.1
- No

6.3 Should implementation be backed out ?
- Yes → 6.4 Restore original environment
- No → 6.5 Inform change coordinator

Change Coordinator

From Change Management 3.11

6.6 Can all requirements still be fulfilled ?
- Yes → 6.7 Add tasks to change plan → To Change Management 3.1
- No → 6.8 Complete task for requester & approver update
  - To Incident Management 6.6
  - To Problem Management 4.1
  - To Release Management 4.3

From Configuration Management 5.7
From Capacity Management 1.8
From Continuity Management 5.14 or 6.8

6.9 Close change

Procedure 6 Steps	Work Instructions
6.1 Complete task for production test Support Technician	**6.1.1** When the Status✗ field of your task for testing the implemented change has changed from "Staged" to "Assigned", open it and read the instructions in the Notes field. Note: If the task had better be assigned to another specialist, contact the change coordinator and ask him/her to change its assignment. **6.1.2** As soon as you are ready to start testing the implemented change, set its Status✗ field to "Work in Progress" and perform a final test in the production environment to verify that all change requirements have been met. Note: If you do not have the access rights to perform a test in the production environment, work with a user who does. **6.1.3** Describe the test and its result on the Work Info tab of the task. Note: If for any reason you cannot continue your work on the task (e.g. it is temporarily not possible to access the production environment), set its Status✗ field to "Pending", select the most appropriate option in the Status Reason field and specify on the Work Info tab what you are waiting for and when the task is expected to be completed. **6.1.4** As soon as you have completed the test, set the Status✗ field of the task to "Closed". **6.1.5** If all change requirements appear to have been fulfilled, set the Status Reason field to "Success". Also select this option if you encountered unexpected issues that caused you to complete the test in a manner that deviated from the instructions provided. In that case, explain the reason why on the Work Info tab. **6.1.6** On the other hand, if the implementation failed the test because not all change requirements appear to have been fulfilled, set the Status Reason field to "Failed". In such a case, keep the task open so that you can still add information on its Work Info tab as you complete the next steps.
6.2 All change requirements fulfilled ?	**6.2.1** If all change requirements appear to have been met by the implementation of the change, go to 6.8.1. Continue with 6.3.1 if none, or only some, of the change requirements have been fulfilled.

6.3 Should implementation be backed out ?	6.3.1	Specify whether or not the change implementation needs to be backed out on the Work Info tab of the task for performing the production test. Also include the reasoning behind this decision.
	Note:	A change implementation does not need to be backed out when it provides an improvement over the previous situation and does not cause a security or data integrity risk.
	6.3.2	Continue with 6.4.1 if the change implementation needs to be backed out. Otherwise go to 6.5.1 (in this case the task for performing the production test no longer needs to be kept open for further updates).
6.4 Restore original environment Support Technician	6.4.1	Return the environment to its state prior to the change implementation by following the back out plan if one was prepared in step 2.1.4.
	6.4.2	Add a description of how the original environment was restored in the Work Info tab of the task for performing the production test. This task no longer needs to be kept open for further updates.
6.5 Inform change coordinator Support Technician	6.5.1	Contact the change coordinator and explain that the change implementation was not completely successful. Also specify whether or not the change implementation has been backed out.
	6.5.2	Discuss the possibilities to still fulfill all the change requirements with the change coordinator.
6.6 Can all requirements still be fulfilled ?	6.6.1	Determine if all change requirements can still be met when additional tasks are completed. Ask the support technicians to help you with this decision as needed.
	6.6.2	If you conclude that all change requirements can still be met, continue with 6.7.1. Otherwise go to 6.8.1.
6.7 Add tasks to change plan Change Coordinator	6.7.1	Add the necessary tasks to the change to ensure that all of its requirements will be fulfilled. Do this by following the field utilization guidelines for the Task form.
	Note:	When multiple tasks need to be assigned to the same person, and if these tasks are to be completed in sequence without interruption, a single task can be created to cover all these tasks.
	6.7.2	Make sure that the Notes field of each new task provides the necessary instructions for the person to whom the task will be assigned.

	6.7.3	Determine for each of the new tasks who the appropriate person is to execute it and select this person in the Assignee+ field.
	Note:	If a task needs to be completed by another group, discuss it with the group coordinator of this group. Work with this person to determine who the most appropriate person is (in terms of skills, availability and access rights) to do the work and agree on a realistic completion target. Select this person in the Assignee+ field of the task. However, select only the group in the Assignee Group+ field, if the group coordinator indicated that it is not yet known who should be asked to complete the task. In that case the group coordinator can select the most appropriate person in the Assignee+ field after the task's Status× field has been set to "Assigned".
	6.7.4	Fill out the Scheduled Start Date+ and Scheduled End Date+ fields of each new task that is linked to the change. If necessary, also update the scheduled dates of the tasks that were planned earlier and that need to be completed after the new tasks have been executed.
	6.7.5	Ensure that the Status× field of each task is set to "Staged".
	6.7.6	Use the Sequence column in the Tasks and Task Groups table of the change to place the tasks in the correct sequence. This ensures that they will be assigned in the right order.
	6.7.7	Describe how the additional tasks will ensure that all change requirements will be met on the Work Info History table of the change. Also specify there that the change needs to be approved again.
	6.7.8	Set the Status× field of the change to "Pending" and set its Status Reason field to "Task Review".
	6.7.9	Go to the Relationships tab and create a new change for the approval of the adjusted implementation plan. Specify in the Summary× field of this new change that it is used to collect the necessary approvals for the adjusted change to which it is linked. Be sure to include the unique identifier of the change which implementation plan has been adjusted.
	6.7.10	Ensure that you are selected in the Change Coordinator+ field.
	6.7.11	Select the change manager in the Change Manager field of the new change and set its Status× field to "Scheduled for Review". This ensures that the change manager knows that the change is waiting for approval.
6.8 Complete task for requester & approver update	6.8.1	When the Status× field of your task for updating the requester(s) and approver(s) of the change has changed from "Staged" to "Assigned", or if the change requirements

Change Coordinator		cannot be fulfilled completely, set the Status× field of this task to "Work in Progress".
	6.8.2	Summarize in a Work Info entry of the change what has been done. If the change could not be implemented (e.g. because it conflicts with an internal standard or policy, or because the change was rejected by one or more of its approvers), or if the change requirements have not all been met (e.g. because the change had to be backed out), explain the reasons for this on the same tab.
	6.8.3	Update the related incident requests which requirements have been fulfilled, by explaining in their Resolution field that the request has been implemented successfully. Set the Status× field of such incident requests to "Resolved" and select the most appropriate option in their Status Reason field. Specify in the Resolution field for related incident request which requirements could not be fulfilled (completely) why this could not be done. Set the Status× field of such incident requests to "Closed". Send an email to the requesters of such incident requests to explain to them why their change requirements could not be fulfilled (completely).
	6.8.4	Copy the implementation summary from the change to a Work Info entry of any known error that is related to the change. Select the responsible problem coordinator (specified in the Problem Coordinator field) in the Assignee field of the related known errors. Set the Status× field of the related known errors, which requirements have been fulfilled, to "Corrected". Set the Status× field of a known error back to "Assigned" instead, if its requirements could not be fulfilled (completely).
	6.8.5	If the requirements for the change were received from Release Management in the form of a document, send an email to the release coordinator to inform him/her whether or not the change was implemented successfully. If the change implementation was not successful, include the reason for the failure in the email.
	6.8.6	If the change implementation was performed to return a service to production after it had been recovered by Continuity Management, send an email to the service owner to inform him/her whether or not the change was implemented successfully. If the change implementation was not completely successful, include the reason for the failure in the email.
	6.8.7	Send an email with the implementation summary to the approvers of the change to let them know whether or not the change was implemented successfully.
	6.8.8	As soon as you have completed the requester and approver update task, set its Status× field to "Closed" and set its Status Reason field to "Success".

6.9 Close change Change Coordinator	**6.1.1** If the implementation of the change was unsuccessful, check the change to see if there are any tasks related to it that have not yet reached the status "Closed" or "Bypassed". Set the Status× field of such tasks to "Closed" and set their Status Reason field to "Canceled". Also specify on the Work Info tab of such tasks why they are cancelled.
	6.1.2 If the change was unsuccessful because its implementation could not be started due to a conflict with an internal standard or policy, or because it was rejected by one or more of its approvers, set the Status× field of the change to "Cancelled" and select the most appropriate option in its Status Reason field. Likewise, if the implementation of the change started but was not (completely) successful, set the Status× field of the change to "Closed". Set the Status Reason field to "Unsuccessful" if none of the change requirements could be met, or to "Successful with Issues" if only some of the requirements could be fulfilled. If the implementation had to be backed out, select the status reason "Backed Out".
	6.1.3 If the change was successfully implemented, set its Status× field to "Closed" and its Status Reason field to "Successful".

7.7 Emergency Change Implementation

After the service owner (or on-duty manager if the service owner was not available) has asked a specialist to resolve an incident by implementing an emergency change, the specialist starts to work on the implementation. If the emergency change concerns an infrastructure change, the specialist performs the implementation as if completing a normal incident request.

Alternatively, if the emergency change is an application change, the specialist first builds a new release in the development environment and makes sure that it will fix the incident without introducing new bugs. The specialist subsequently asks a release administrator to transfer the new release to the test environment. In the test environment, the specialist tests the new release.

If the new release did not pass the test, the specialist goes back to the development environment to correct it. On the other hand, if the new release passed the tests, the specialist asks the release administrator to transfer it to the production environment.

The *Emergency Change Implementation* procedure is presented on the next page.

Procedure 7, Emergency Change Implementation

pennsylvania
DEPARTMENT OF TRANSPORTATION
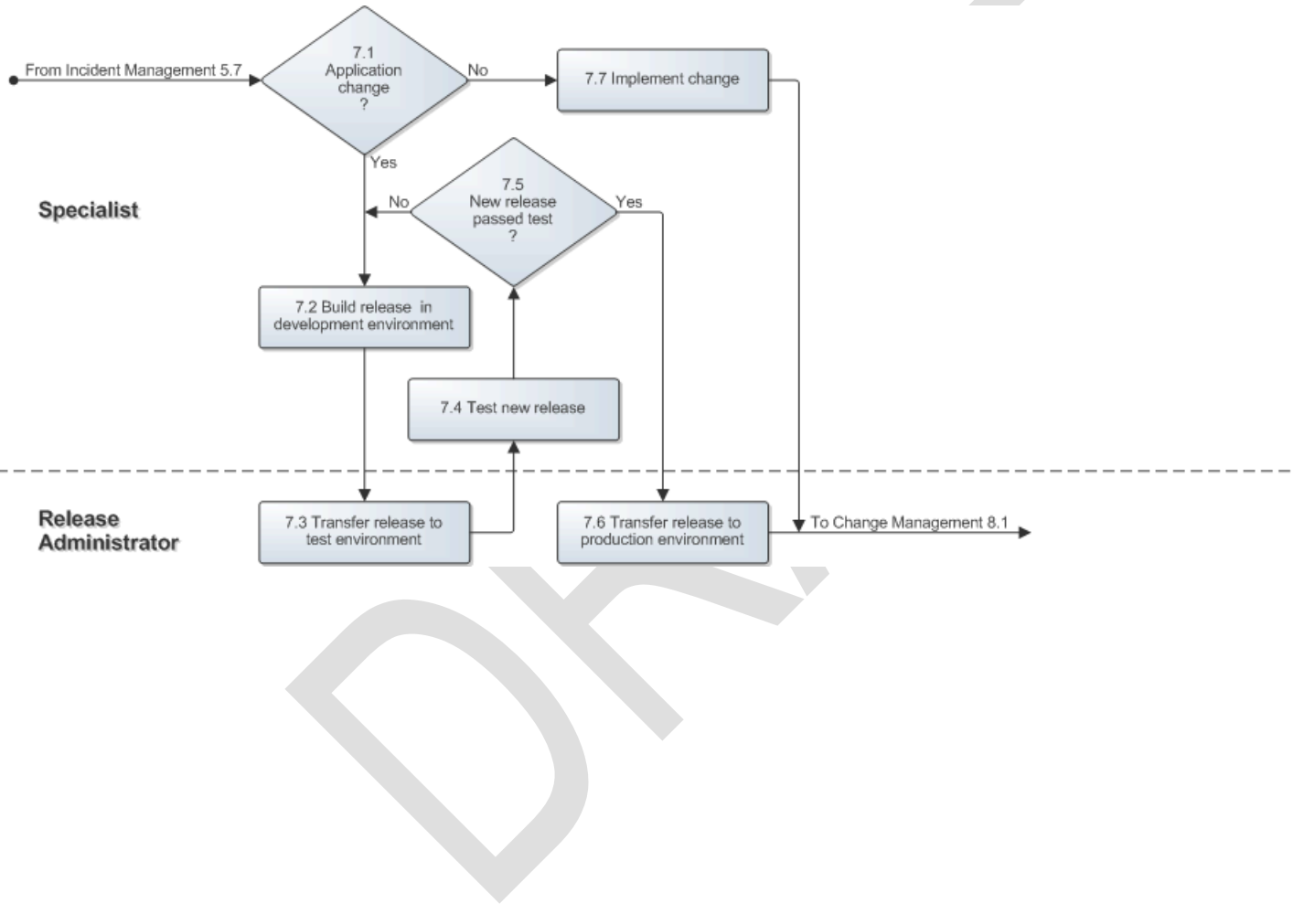
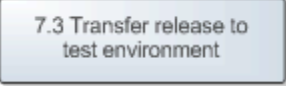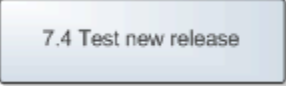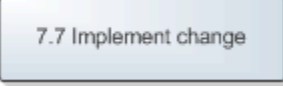| Procedure 7 Steps	Work Instructions
7.1 Application change ? 	7.1.1 Add a work info entry to the Work Info History table of the incident request. Use it to summarize your conversation with the service owner (or on-duty manager if the service owner was not available). 7.1.2 Go to 7.7.1 if it concerns an infrastructure change. Continue with 7.2.1 if it concerns an application change.
7.2 Build release in development environment Support Specialist	7.2.1 Implement the change as discussed with the service owner (or on-duty manager if the service owner was not available) in the development environment. Test the change in a separate test environment if one has been made available to you for this purpose. Otherwise, perform your tests in the development environment. If (automated) scripts for regression testing are available for the application, ensure that they are run. Use the development environment to fix any errors that you encounter during your tests. Request the help from other support technicians as needed. 7.2.2 Once you have confirmed that the correction works and no new bugs have been introduced, contact the release administrator and request the transfer of the new release to the test environment. 7.2.3 Add a work info entry to the Work Info History table of the incident request. Use it to specify what you have changed in the application, which tests you have performed, and who you asked to transfer the new release.
7.3 Transfer release to test environment Release Administrator	7.3.1 Transfer the new release to the test environment. 7.3.2 Contact the specialist to inform him/her that the transfer has been performed.
7.4 Test new release Support Specialist	7.4.1 Test the new release in the test environment. 7.4.2 Add a work info entry to the Work Info History table of the incident request. Use it to summarize the tests that you have conducted, along with their results.
	7.1.1 If the new release appeared to function as intended, contact the release administrator to request the transfer of the new release to the production environment. Add a work info entry to the Work Info History table of the incident request. Use it to specify whom you asked to transfer the new release before continuing with 7.6.1.

7.5 **New release** **passed test** **?**	If, on the other hand, the new release did not pass your tests, return to 7.2.1.
7.6 Transfer release to production environment Release Administrator	7.6.1 Ensure that a back out is possible. Make a backup if necessary. 7.6.2 Transfer the new release to the production environment. 7.6.3 Contact the specialist to inform him/her that the transfer has been performed.
7.7 Implement change Support Specialist	7.7.1 Implement the change as planned with the service owner (or on-duty manager if the service owner was not available). Request the help from other support technicians as needed. 7.7.2 Add a work info entry to the Work Info History table of the incident request. Use it to specify how the change has been implemented.

7.8 Emergency Change Closure

The specialist performs the production test (with the help of a user if the specialist does not have sufficient access rights) after the implementation has been completed. If the implementation turns out to be unsuccessful, the specialist informs the service owner (or on-duty manager if the service owner is not available) to discuss the situation.

Conversely, if the specialist has determined that the implementation is successful, he/she completes the incident request. In addition, the specialist asks the change coordinator of the affected service to register a change in the service management application for the emergency change that he/she just implemented.

The change coordinator registers the change and, if required, ensures that the CMDB and the Capacity Management information are updated. Before closing the change, the change coordinator informs the service owner (and the on-duty manager if he/she approved the emergency change implementation) via email that the emergency change has been implemented successfully.

The Emergency Change Closure procedure is presented on the next page.

Procedure 8, Emergency Change Closure

Specialist

From Change Management 7.6 or 7.7 → 8.1 Perform production test

8.2 Implementation successful ?

Yes → 8.4 Complete incident request

To Incident Management 6.6

To Problem Management 1.1

No → 8.3 Inform service owner → To Incident Management 5.1

8.5 Inform change coordinator

Change Coordinator

From Continuity Management 3.9 → 8.6 Register change and assign tasks

To Configuration Management 1.1

To Capacity Management 1.1

8.7 Complete task for service owner update

From Configuration Management 5.7

From Capacity Management 1.8

8.8 Close change

Procedure 8 Steps	Work Instructions
8.1 Perform production test Support Technician	8.1.1 Perform a final test in the production environment to ensure that the change has been implemented successfully. Note: If you do not have the access rights to perform a test in the production environment, work with a user who does. 8.1.2 Add a work info entry to the Work Info History table of the incident request. Use it to summarize the test that you have conducted, along with its results.
8.2 Implementation successful ?	8.2.1 Go to 8.4.1 if the implementation of the emergency change was successful. Otherwise continue with 8.3.1.
8.3 Inform service owner Support Technician	8.3.1 Contact the service owner (in person or by telephone) to inform him/her that the emergency change implementation has failed. Note: Contact the on-duty manager instead if the service owner is not available.
8.4 Complete incident request Support Technician	8.4.1 Use the Resolution field of the incident request to provide a concise, step-by-step account of how the emergency change was implemented. 8.4.2 Select the appropriate CI in the CI+ field of the incident request if this has not been done yet, or if the wrong CI was selected before. 8.4.3 Set the Statusx field of the incident request to "Resolved" and select the most appropriate option in its Status Reason field. 8.4.4 Perform a final review of the incident request to ensure that its information is accurate and complete. 8.4.5 If the emergency change that you implemented provides a workaround, and you believe that incidents similar to this one are likely to occur if the root cause is not removed quickly, contact the problem coordinator of the affected service. Give him/her the incident ID so that he/she can easily find the incident request in the service management application.

8.5 Inform change coordinator Support Technician	8.5.1	Contact the change coordinator of the service that was affected and provide him/her with the incident ID. Ask the change coordinator to register an emergency change for it in the service management application.
8.6 Register change and assign tasks Change Coordinator	8.6.1	Register a new change using the change template for emergency changes.
	8.6.2	Ensure that the Class✕ field of the change is set to "Emergency", that the Change Reason field is set to "Fix/Repair".
	8.6.3	Enter a summary of how the change was implemented in the Summary✕ field of the change, and use the Relationships tab to link it to the incident request, as well as the service infrastructure (i.e. the business service record) that was affected by the incident for which the emergency change was implemented. Select yourself as the requester on the Requester For navigation link and also select yourself as the change coordinator in the Change Assignee+ field.
	8.6.4	Go to the Tasks tab of the change and open the CMDB update task. This task was generated by the change template when the emergency change was registered. If the CMDB needs to be updated, select the configuration administrator of your group in the Assignee+ field and set the task's Status✕ field to "Assigned" to ensure that the configuration administrator is notified. If an update of the CMDB is not required, set the Status✕ field of this task to "Closed" and set its Status Reason field to "Canceled".
	8.6.5	Open the task for the update of the capacity tracking information. This task was generated by the change template when the emergency change was registered. If the available capacity level(s) of the affected service infrastructure have been adjusted, select the capacity manager of the service in the Assignee+ field and set the task's Status✕ field to "Assigned" to ensure that the capacity manager is notified. If an update of the capacity tracking information is not required, set the Status✕ field of this task to "Closed" and set its Status Reason field to "Canceled".
	8.6.6	Open the task for the service owner update. This task was generated by the change template when the emergency change was registered. Select yourself in the Assignee+ field and set the task's Status✕ field to "Work in Progress".
	8.6.7	Set the Status✕ field of the change to "Implementation In Progress".
8.7 Complete task for service owner update	8.7.1	Let the service owner (and the on-duty manager if he/she approved the emergency change implementation) know that the emergency change has been implemented

Change Coordinator		successfully. Do this by sending an email that summarizes the change that has been implemented.
	8.7.2	Go to the Work Info tab of the task and paste the content of this email into the Work Info Notes field.
	8.7.3	As soon as you have completed the service owner update task, set its Status× field to "Closed" and set its Status Reason field to "Success".
8.8 Close change Change Coordinator	8.8.1	Set the Status× field of the emergency change to "Closed" and set its Status Reason field to "Successful".

8. <u>Forms</u>

Within the ITSM tool, a form is defined as a collection of fields in which information is entered and displayed. The collection of fields represents a record of information in the ITSM tool. Within the ITSM tool, fields assist users in navigating through the system and identifying mandatory fields when completing requests. For example:

- **Bold** fields with an asterisk (*) are mandatory fields and must be completing before submitting or updating the form
- Fields with a plus sign (+) indicate that the field is searchable or has predictive text functionality

The forms listed below are available in the service management application for the support of the Configuration Management process. Click on a form to review the field utilization guidelines for each of its fields.

8.1   Change Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details	
Field	**Description**
Change ID✕+	This field displays the unique change identifier after the change has been saved for the first time. Do this by filling out (part of) the Change ID and subsequently pressing the Enter key or use the Find as you type feature.
Coordinator Group*+	Use this field to select the group of the change coordinator. Do this by filling out (part of) the coordinator group's name and subsequently pressing the Enter key.
Change Coordinator+	Use this field to select the change coordinator. Do this by filling out (part of) the change coordinator's name and subsequently pressing the Enter key or use the Find as you type feature.
Change Location	The location of the person who registered the change is automatically filled out in this field. Select another location if this is not the location that will be affected by the change. Do this by opening the Location Lookup.

Service+	Use this field to select the service for which the change is to be implemented.Do this by filling out (part of) the Service and subsequently pressing the Enter key or use the Find as you type feature.
Template+	Use this field to select a template which information should be used to help register the change request. Do this by filling out (part of) the template's name and subsequently pressing the Enter key or use the Find as you type feature..
Summary×	Use this field to enter a summary that describes the change.
Notes	Use this field to provide the more complete description of the change request.
Class×	Use this field to select the class of the change. The available options are: Emergency Expedited Latent Normal No Impact Standard
Change Reason	Use this field to select the reason for change. The available options are: Fix/Repair New Functionality Maintenance Upgrade Other
Target Date	Use this field to specify when the proposed change should be in production.
Impact×	Use this field to select the impact that the change implementation will have on the user community. The available options are: 1-Extensive/Widespread — Service down for more than one user. 2-Significant/Large — Service degraded for more than one user. 3-Moderate/Limited — Service down for one user. 4-Minor/Localized — No degradation of service or service degraded for one user.
Urgency×	Use this field to provide an indication of how urgent the implementation of the change is to the requester. The available options are: 1-Critical 2-High 3-Medium

	4-Low
Priority	This field is automatically set to the appropriate option based on the combination of the Impact× and Urgency× field values. The available options are: Critical High Medium Low
Risk Level×	Use this field to select the risk level for the change. Risk Level 5 signifies a high chance that the implementation will fail. The available options are: Risk Level 1 Risk Level 2 Risk Level 3 Risk Level 4 Risk Level 5
Status×	Use this field to select the status of the change. The available options are: • **Draft** – The need to change has been identified but the registration of the change details still needs to be completed before the change can progress. • **Request For Authorization** – The authorization to plan the change has been requested. • **Request For Change** – The planning of the change implementation can start. • **Planning In Progress** – The risk and impact analysis is being performed to prepare an implementation plan that minimizes both the risk of failure and the impact on users. • **Scheduled For Review** – The change has been planned and approval can be requested. • **Scheduled For Approval** – The necessary approvals for the change have been requested. • **Scheduled** – The implementation of the change has been scheduled. The related tasks of the first sequence have automatically been set to the status "Assigned". • **Implementation In Progress** – One or more tasks related to the change have reached the status "Work in Progress", or the change has been linked to another change that was prepared earlier and that already covers the requirements of the change. • **Pending** – The progress of the change has temporarily halted. The reason for this is specified in the Status Reason field. • **Rejected** – The change has been rejected by an approver. Further action needs to be taken to determine if the change can still be implemented. The reason for the rejection is specified in the Status Reason field.

	• **Completed** – The last task related to the change has reached the status "Closed". • **Closed** – The requester has accepted the closure of the change, or it has been concluded that the change requirements cannot be fulfilled completely. • **Cancelled** – No further action will be taken on this change for the reason specified in the Status Reason field.
Status Reason	Use this field to select the reason behind the status. Only use this field if the Statusx field is set to "Planning In Progress", "Implementation In Progress", "Pending", "Rejected", "Completed", "Closed" or "Cancelled". The available options for the status "Planning In Progress" are: Accepted Assigned Built The available options for the status "Implementation In Progress" are: In Rollout In Development In Test In Build In Rollback In Documentation In Verification The available options for the status "Pending" are: Manager Intervention Miscellaneous Vendor Purchase Future Enhancement Support Group Communication Task Review The available options for the status "Rejected" are: Insufficient Task Data Insufficient Change Data Schedule Conflicts The available options for the status "Completed" are: Final Review Required Final Review Complete Additional Coding Required

	The available options for the status "Closed" are:
	Successful
	Successful with Issues
	Unsuccessful
	Backed Out
	Automatically Closed
	The available options for the status "Cancelled" are:
	No Longer Required
	Funding Not Available
	To Be Re-Scheduled
	Resources Not Available
Manager Group✕	Use this field to select the group of the change manager.
Change Manager	Use this field to select the change manager.
Vendor Group+	Use this field to select the vendor group that has been asked to implement or manage change requests in order to support change request under consideration. Do this by filling out (part of) the group's name and subsequently pressing the Enter key or use the Find as you type feature.
Vendor Ticket Number	Use this field to enter the unique ticket number under which the change request has been registered by the vendor organization.

Tab – Work Detail

Field	Description
Work Info History	
Table	This table shows the Work Info entries for the change. Add an entry that provides a detailed description of the actions performed in Notes Section and Click Add button.
Add Work Info	

Approval Phase	This field automatically displays the current approval phase of the change.
Show	Use this field to select an approval status to ensure that only the change signature lines with that status will be displayed in the Approvers table. The available options are: Pending Approved Rejected Hold More Information Cancelled Error Closed
Approvers	
Table	This table displays both the change signature lines (i.e. the approval requests) that have been generated automatically, as well as the manually added change signature lines for the change.

Tab – Tasks

Field	Description
Tasks and Tasks Groups	
Tasks and Task Groups	This table lists the tasks and task groups that have been related to the change. Use the Sequence column of the table to place all tasks related to the change in the correct order.
Phase	Shows active phases that have been defined in the Phase Management Configuration form for the specified Location Company and must be specified in order to relate tasks. Once a Phase is selected, the table will only show tasks for that phase.
Request Type	Create additional tasks and/or task groups by selecting the appropriate request type and subsequently clicking the Relate button. The available options are: Task Template Task Group Template Ad hoc
Work Info of Selected Task	

Table	This table lists the Work Info entries for the task that is selected in the Tasks and Task Groups table.	
Children of Selected Task Group		
Table	This table lists the tasks of the task group that is selected in the Tasks and Task Groups table.	

Grouping Name	
Name	Description

8.2   Task Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	
Field	**Description**
Name	Description
Grouping Name	
Name	Description

8.3 Task Effort Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	
Field	**Description**
Name	Description
Grouping Name	
Name	Description

8.4 Change Signature Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	
Field	**Description**
Name	Description
Grouping Name	
Name	Description

8.5 More Information Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	

Field	Description
Name	Description
Grouping Name	
Name	Description

8.6 Release Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	
Field	**Description**
Name	Description
Grouping Name	
Name	Description

8.7 Activity Form

The table below lists fields for the [Click **here** and type text] form and provides a description for each field.

Details / Tab – Name	
Field	**Description**
Name	Description
Grouping Name	

Name	Description

8.8   Change Form

[Click **here** and type text]

The table below lists the fields of the [Click **here** and type text] form and provides utilization guidelines for each field.

8.8.1 Tab	*8.8.2* Tasks
8.8.2.1 Field	**8.8.2.2 Utilization**
Tasks and Task Groups	
Tasks and Task Groups	This table lists the tasks and task groups that have been related to the change. Use the Sequence column of the table to place all tasks related to the change in the correct order.
Phase	Shows active phases that have been defined in the Phase Management Configuration form for the specified Location Company and must be specified in order to relate tasks. Once a Phase is selected, the table will only show tasks for that phase.
Request Type	Create additional tasks and/or task groups by selecting the appropriate request type and subsequently clicking the Relate button. The available options are: Task Template Task Group Template Ad hoc
Work Info of Selected Task	
Work Info of Selected Task	This table lists the Work Info entries for the task that is selected in the Tasks and Task Groups table.
Children of Selected Task Group	
Children of Selected Task Group	This table lists the tasks of the task group that is selected in the Tasks and Task Groups table.

_8.8.3_ Tab	_8.8.4_ Relationships
8.8.4.1 Field	**8.8.4.2 Utilization**
Alternate Data Set	Use this field to select an alternate data set from which to relate CIs to the change.
Show Related	Use this field to select one of the following options to indicate which type of related record you would like to see displayed in the table below: ALL CI Unavailability Configuration Item Incident Infrastructure Change Known Error LDAP Object Problem Investigation Release Software Library Item
Relationships	This table lists the records that are linked to the change.
Request Type	Use this field to select one of the following options to indicate which type of record you would like to search for or create: CI Unavailability Configuration Item Incident Infrastructure Change Known Error LDAP Object Problem Investigation Release Software Library Item After having selected the appropriate option, click on the Search or Create button to either start the search or to open a new record that will be linked to the change when it is saved. When a search is performed, the records in the search result can subsequently be linked to the change.
Quick Actions	Use this field to select an action to be executed for the related item that is selected. If the selected item is a configuration item, the available options are: Create New CI Unavailability Explore CI Get CI Impact/Urgency Get CI Product Categorization

	Get Impacted Areas Get Related Relationships Modify Relationship Type Show Related Services If the selected item is a CI unavailability, the available options are: Broadcast CI Unavailability Get Related Relationships Modify Relationship Type If the selected item is an incident, infrastructure change, known error, problem investigation, or release the available options are: Get Related Relationships Modify Relationship Type
8.8.5 Tab	*8.8.6* Dates/System
8.8.6.1 **Field**	**8.8.6.2** **Utilization**
Date Information	
Scheduled Start Date+	Use this field to specify the date and time at which the change implementation is scheduled to start (i.e. the moment at which the first task is scheduled to be set to the status "Work in Progress").Do this by filling out (part of) the Scheduled Start Date and subsequently pressing the Enter key or use the Find as you type feature.
Scheduled End Date+	Use this field to specify the date and time at which the change implementation is scheduled to be completed (i.e. the moment at which the last task is scheduled to be set to the status "Closed").Do this by filling out (part of) the Scheduled End Date and subsequently pressing the Enter key or use the Find as you type feature.
Actual Start Date+	Use this field to specify the date and time at which the change implementation actually started (i.e. the moment at which the first task was set to the status "Work in Progress").Do this by filling out (part of) the Actual Start Date and subsequently pressing the Enter key or use the Find as you type feature.
Actual End Date+	Use this field to specify the date and time at which the change implementation was actually completed (i.e. the moment at which the last task was to be set to the status "Closed").Do this by filling out (part of) the Actual End Date and subsequently pressing the Enter key or use the Find as you type feature.
Completed Date	This field is automatically set to the current date and time when the status of the change is set to "Completed".

Earliest Start Date	Use this field to specify the earliest date and time at which the change implementation can start (i.e. the earliest moment at which the first task may be set to the status "Work in Progress").
Requested Start Date+	Use this field to specify the date and time at which the change implementation is requested to start (i.e. the requested moment at which the requester would like the first task to be set to the status "Work in Progress").Do this by filling out (part of) the Requested Start Date and subsequently pressing the Enter key or use the Find as you type feature.
Requested End Date+	Use this field to specify the date and time at which the change implementation is requested to be completed (i.e. the moment at which the last task is supposed to be set to the status "Closed").Do this by filling out (part of) the Requested End Date and subsequently pressing the Enter key or use the Find as you type feature.

Timing Reason	Use this field to select the reason behind the timing. Only use this field if the Class× field is set to "Expedited". The available options are:
	
	    Customer/business need
	    Insufficient lead-time
	    Known error correction
	    Scheduling conflict

Time Spent Resolving Change Request	
Start Time	The current date and time is filled out in this field when you click on the Start Clock button.
End Time	The current date and time is filled out in this field when you click on the Stop Clock button.
Time Spent (min)	This field is automatically set to the difference (in minutes) between the values in the End Time field and the Start Time field when the Start Clock button and the Stop Clock button have been used. Alternatively, use this field to manually enter the time (in minutes) that you have actually spent working on the change before saving it. After you have saved the change, this time will be added to the Total Time Spent(min) field and this field will be cleared.
Total Time Spent(min)	This field displays the total number of minutes that people have spent working on the change. This number is the sum of all entries made in the Time Spent (min) field while the Change form was open. As soon as the change is saved, an entry is added to the Assignment Log with the value of this field and this field will be empty again.
System Information	
Submitter×	This field is automatically set to the unique login name of the person who registered the change.

Submit Date	This field is automatically set to the date and time at which the change was registered.
8.8.7 Tab	*8.8.8* Additional Search
8.8.8.1 Field	**8.8.8.2 Search Only**
Change Coordinator Company	Use this field to select the support company of the change coordinator.
Change Manager Company	Use this field to select the support company of the change manager.
Change Location Company	The location that will be affected by the change.
Requested By Company	The company of the person who registered the change.
Operational Categorization	
Tier 1+	Use this field to select the first tier of the operational categorization that is most relevant for the change.Do this by filling out (part of) the Tier 1 and subsequently pressing the Enter key or use the Find as you type feature.
Tier 2	Use this field to select the second tier of the operational categorization that is most relevant for the change.
Tier 3	Use this field to select the third tier of the operational categorization that is most relevant for the change.
Product Categorization	
Tier 1	Use this field to select the first tier of the product categorization that is most relevant for the change.
Tier 2	Use this field to select the second tier of the product categorization that is most relevant for the change.
Tier 3	Use this field to select the third tier of the product categorization that is most relevant for the change.
Product Name+	Use this field to select the product name of the product categorization that is most relevant for the change. Do this by filling out (part of) the product's name and subsequently pressing the Enter key or use the Find as you type feature.
Model/Version	Use this field to select the model or version of the product categorization that is most relevant for the change.
Manufacturer	This field shows the manufacturer of the product selected in the Product Name+ field.