Netscape - [EMAN User Guide Contents]

File Edit View Go Bookmarks Options Directory Window Help

Back | Forward | Home | Reload | Images | Open | Print | Find | Stop | Netscape

Netsite: http://eman/EMAN/Documentation/user_guide/change_management/index.cgi

What's New? | What's Cool? | Destinations | Net Search | People | Software

EMAN | Documentation | User Guide | Site Map | Glossary |

User Guide Change Management

Cisco Systems

Contents

Overview
QuickSteps
Creating Requests
- New Change Request
- Application Outage
- Host Outage
- Non-Outage
- Recurring Outages
- Application Host
- View a Change Request

Administering Requests
- Approve Cancel
- Delete Deny
- Modify Move to Pend
- Signoff

How It Works
- Approval Process
- Change Types
- Notification
- Change Meeting Agenda

Related Tools

Overview

The Change Management application provides a central access point to view and work with change requests, host outages, and application outages. Use this quickstart guide to help create a new change request or to administer an existing change request.

QuickSteps

Create a New Change Request

1. From the Change Management "Create a New Change Request" page select the Type of Outage from the drop down menu.
   - Host and Application Outages refer to hosts and applications that are ***monitored*** by EMAN.
   - Non-Outage refers to a host or application that is ***not monitored*** by EMAN.

   See Also: Create a Host Outage, Create an Application Outage, Create a Non-Outage.

2. Select/De-Select Approval Required.
3. Select the "Create New Request" button.
4. Complete the Change Request Form. ***Required*** fields include: "Change Title", "Start Time/Date", "End Time/Date" and "Technical Description". **Note: Please make the title meaningful and include the name of the host, application or site impacted.**

Document: Done

Overview

The Change Management application provides a central access point to view and work with change requests, host outages, and application outages. Use this quickstart guide to help create a new change request or to administer an existing change request.

QuickSteps

Create a New Change Request

1. From the Change Management "Create a New Change Request" page select the Type of Outage from the drop down menu.

    - Host and Application Outages refer to hosts and applications that are ***monitored*** by EMAN.
    - Non-Outage refers to a host or application that is ***not monitored*** by EMAN.

    See Also: Create a Host Outage, Create an Application Outage, Create a Non-Outage.

2. Select/De-Select Approval Required.
3. Select the "Create New Request" button.
4. Complete the Change Request Form. ***Required*** fields include: "Change Title", "Start Time/Date", "End Time/Date" and "Technical Description". **Note: Please make the title meaningful and include the name of the host, application or site impacted.**
5. Select "Request a Change" to submit your change.
6. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progress of your change.

View a Change Request

1. Start from the View/Modify Change Requests sub-menu.
2. Use any of the options listed below to filter the list of change requests:

    - Use the "View" pull down to filter on "All Change Requests", "Outages Only"(This includes both Host and Application Outages), "Non-Outages Only", "Host Outages Only" and "Application Outages Only"
    - Use the Show User's Change Requests option to display a single user's request. Click the check box and type the userid into the field.

      Note: The field is defaulted to the person viewing the changes.

    - Click the "Hide History" check box to prevent completed changes from being displayed.
    - Use the "Search Back To" feature to determines the date from which the changes are being displayed

- Use the "Search On" to determines whether the Seach Back To Date is applied to the Date Requested or the Change Start time.
- Use the "Find Change Request #" to locate a specific change request.

3. From the Change Management main page select the "View List of Change Requests" button. A list of active and completed change requests will be displayed.
4. View a change Request in one of two ways: Either click on the Change Request Number to display a specific change request in a new window or press the radio button next to the change request you would like to view and then press the "View" button.

Modify a Change Request

Note: To modify a Change Request you must either have submitted the request or be logged in as a change administrator.

1. From the Change Management main page select the "View List of Change Requests" button. A list of "Active Change Requests" and "Completed Change Requests" will be displayed.
2. Select the radio button next to the change request you would like to modify, then select the "Modify" button.
3. Modify the change request form and then select the "Save Request Modifications" button.

Cancel a Change Request

Note: To cancel a Change Request you must either have submitted the request or be logged in as a change administrator.

1. From the Change Management main page select the "View List of Change Requests" button. A list of "Active Change Requests" and "Completed Change Requests" will be displayed.
2. Select the radio button next to the change request you would like to cancel, then select the "Cancel" button.
3. A cancellation form will appear in a new browser window. Complete the form and press the "Cancel" button.
4. The change request will be cancelled. History information is retained for cancelled requests whereas all information related to a deleted request is purged from the database.

Signoff a Change Request

Note: In order to signoff a Change Request it must have been approved.

1. From the Change Management main page select the "View List of Change Requests" button. A list of "Active Change Requests" and "Completed Change Requests" will be displayed.
2. Select the radio button next to the change request you would like to signoff on, then select the "Signoff" button.
3. A signoff form will appear in a new browser window. Complete the form and submit it to complete the change management process.

Approve a Change Request

Note: To approve a change request you must be logged into the system as a change administrator.

1. From the Change Management main menu select 'View List of Change Requests".
2. Scroll down to the lower portion of the screen and select the change request you would like to approve by pressing the radio button to the left of it.
3. Select the "Approve" button.
4. The system will prompt you that the change request has been approved. This approval occurs in a second browser window.
5. An automatic email notification will be sent to the requester of this change request notifying them that the request has been approved.

Deny a Change Request

Note: To deny a change request you must be logged into the system as a change administrator.

1. From the Change Management main menu select 'View List of Change Requests".
2. Scroll down to the lower portion of the screen and select the change request you would like to deny by pressing the radio button to the left of it.
3. Select the "Deny" button.
4. The system will prompt you in a second browser to enter the reason for denying the selected request.
5. Press the "Deny Request" button to complete the process.
6. An automatic email notification will be sent to the requester of this change request notifying them that the request has been denied.

Move a Change Request to Pending

Note: To move a change request to pending you must be logged into the system as a change administrator.

1. From the Change Management main menu select 'View List of Change Requests".
2. Scroll down to the lower portion of the screen and select the change request you would like to move to pending by pressing the radio button to the left of it.
3. Select the "Move to Pending" button.
4. The system will prompt you that the change request has been moved to pending. This approval occurs in a second browser window.
5. An automatic email notification will be sent to the requester of this change request notifying them that the request has been moved to pending.

Delete a Change Request

Note: To delete a change request to pending you must be logged into the system as a change administrator.

1. From the Change Management main menu select "View List of Change Requests".
2. Scroll down to the lower portion of the screen and select the change request you would like to move to pending by pressing the radio button to the left of it.
3. Select the "Delete" button.
4. The system will prompt you in a second browser to confirm the deletion of the change request.
5. Press the "Delete Request" button to complete the process. This process will purge the database of all information associated with this request.
6. The system will prompt you in a second browser that the deletion was successfully performed.
7. An automatic email notification will be sent to the requester of this change request notifying them that the request has been deleted.

Create a Host Outage

To schedule a host outage the host must be registered in EMAN:

1. From the Change Management main menu select "Host Outage" from the drop down menu.
2. Click the "Create New Request" button.
3. Enter a "Change Title" and who you would like to "CC" this change request information to.
4. Next, specify a search for the host you would like to schedule for an outage. This can be done by specifying one or a combination of attributes includingHost Type, Hostname, Host Area or Support Group.
5. When you select the "Search" button the results are displayed in a new browser window.
6. Select hosts from the "Host List" and move them to the "Host Outage" window with the "Add to Host/App Outage List" button.
7. Complete the rest of the Change Request Form. The "Start Time/Date", "End Time/Date" and "Technical Description" fields are all ***required*** and must be filled out for your request to be accepted by the system.
8. If this is a Recurring Outage select the "Yes" radio button and specify the days when the outages will be recurring.
9. Select "Request a Change" to submit your change.
10. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progess of your change.

Create an Application Outage

To schedule an application outage the application must be registered in EMAN:

1. From the Change Management main menu select "Application Outage" from the drop down menu.
2. Click the "Create New Request" button.
3. Enter a "Change Title" and who you would like to "CC" this change request information to.
4. Next, specify a search for the host you would like to schedule for an outage. This can be done by specifying one or a combination of attributes includingApplication, Host Type, Hostname, Host Area or Support Group.
5. When you select the "Search" button the results are displayed in a new browser window.
6. Select applications from the "Host/Application List" and move them to the "Application Outage" window with the "Add to Host/App Outage List" button.
7. Complete the rest of the Change Request Form. The "Start Time/Date", "End Time/Date" and

"Technical Description" fields are all ***required*** and must be filled out for your request to be accepted by the system.
8. If this is a Recurring Outage select the "Yes" radio button and specify the days when the outages will be recurring.
9. Select "Request a Change" to submit your change.
10. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progess of your change.

Create a Non-Outage

Use the non-outage option to schedule host and applications that are ***not registered*** in EMAN. To schedule a non-outage change request:

1. From the Change Management main page select "Non-Outage" from the Type of Outage drop down menu.
2. Select/De-Select Approval Required.
3. Select the "Create New Request" button.
4. Complete the Change Request Form. ***Required*** fields include: "Change Title", "Start Time/Date", "End Time/Date" and "Technical Description".
5. Select "Request a Change" to submit your change.
6. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progess of your change.

Create a Recurring Outage

Recurring outages can be scheduled for application and host outages. Recurring outages are specified on the change request form for a scheduled outage.

Create a Recurring Application Outage

To schedule a recurring application outage follow these steps:

1. From the Change Management main menu select "Application Outage" from the drop down menu.
2. Click the "Create New Request" button.
3. Enter a "Change Title" and who you would like to "CC" this change request information to.
4. Next, specify a search for the application you would like to schedule for an outage. This can be done by specifying one or more attributes including Application, Host Type, Hostname, Host Area or Support Group.
5. When you select the "Search" button the results are displayed in a new browser window.
6. Select applications from the "Host/Application List" and move them to the "Application Outage" window with the "Add to Host/App Outage List" button.
7. Complete the rest of the Change Request Form. The "Start Time/Date", "End Time/Date" and "Technical Description" fields are all ***required*** and must be filled out for your request to be accepted by the system.
8. Select the "Yes" radio button next to "Recurring Outage" and specify the days when the outages will be recurring.
9. Select "Request a Change" to submit your change.

10. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progress of your change.

Create a Recurring Host Outage

To schedule a recurring host outage follow these steps:

1. From the Change Management main menu select "Host Outage" from the drop down menu.
2. Click the "Create New Request" button.
3. Enter a "Change Title" and who you would like to "CC" this change request information to.
4. Next, specify a search for the host you would like to schedule for an outage. This can be done by specifying one or more attributes including Host Type, Hostname, Host Area or Support Group.
5. When you select the "Search" button the results are displayed in a new browser window.
6. Select hosts from the "Host List" and move them to the "Host Outage" window with the "Add to Host/App Outage List" button.
7. Complete the rest of the Change Request Form. The "Start Time/Date", "End Time/Date" and "Technical Description" fields are all ***required*** and must be filled out for your request to be accepted by the system.
8. Select the "Yes" radio button next to "Recurring Outage" and specify the days when the outages will be recurring.
9. Select "Request a Change" to submit your change.
10. The system will prompt you that your proposed change has been accepted. A unique change request # is generated that you can use to track the progress of your change.

How It Works

The fundamental purpose of Change Management is to ensure that changes are communicated and scheduled cross-functionally to promote timely installation without negatively impacting service availability.

Approval Process

The Change Management Approval Process is dependant upon the type of change submitted. The types of changes and the required approvals are outlined below.

Change Types

Standard Service Request

- Not considered a Priority Request (see below for definition of a Priority request)
- Falls outside of Code Freeze
- Does not violate current change policies
- High or Moderate Impact Change

Approval Policy: All change requests must be approved by the representatives present in the change management meeting. This includes a representatives from Operations, SysAdmin, Networking, DBA, EMEA and Telecom.

Priority Service Request

Priority requests deal specifically with a problem which is causing any business group to be unable to perform their job, or deliver information which is critical to the daily operations of their organization. And - cannot wait on the standard request time frames for installation.

Approval Policy: Change requests as a result of a P1 (which did not take place at the time of the P1) still need to be reviewed for QA and scheduling concerns.

Request Fulfillment Policies All priority requests require a ISSU ticket in order to perform work. All change details will be included within the case itself. If the changes are not performed at the time of the P1 then they must be submitted to change management.

Special Service Request

Special requests fall outside the standard change process and pose a possible serious risk to the availability of any critical business system (i.e., CCO, ERP, CARE, ASTRO, etc.). These changes include:

- Access under the data center floors during the business day (7am to 6pm, Mon - Fri)

  Approval Policy: In addition to approval by the representatives present in the change management meeting this type of change requires Data Center Manager Approval.

- Changes during system's scheduled availability periods

  Approval Policy: In addition to approval by the representatives present in the change management meeting this type of change requires Data Center Manager, Project Manager, Director level, (and possible client) Approval.

- Changes requested during freeze periods (seeFreeze Standards for complete details)

Change Notification

Change Notifications are changes which do not need to be approved by Change Management but should be submitted for visibility and reviewed for conflict with other scheduled changes.

Responsibilities:

Who is responsible for seeking approval.

Data Center Manager Approval	Operations Lead
Project Manager Approval	Requestor

Director Level Approval	Requestor or CM Representative

The Approval Process is set up as a guide and is not expected to cover every possible scenario.

Notification

1. **Desktop Changes:** User notification for desktop server changes are done by the desktop group after identifying which users have accessed the affected servers within the last two weeks.
2. **Network Changes:** User notification for network changes are done by the network group after identifying which users may access the affected systems.
3. **UNIX Server Changes:** User notification for UNIX, Database and Facility changes are done by the Sysadmin who will send out notification to the appropriate alias if the downtime is required outside of the pre-scheduled window.
4. **NT Server Changes:** Typically the NT servers operate solely as documentation servers. For those changes, the NT SysAdmins will notify the users of these documentation servers via an e-mail that goes out to all those who have used the server within the last two weeks. The NT SysAdmin group supports this script.

   There are a few NT servers that support production applications directly. They and their respective project managers are listed below.

   Treasury-info -- Dan Farrand
   payroll-info -- Annika Lewis
   Facility_info -- Deborah Woodward
   ASTRO -- George Passidakis
   Marcom -- Beverly Lawrence

   For the above applications, notification of the client will be handled by the respective Project Manager.

5. **ALL ERP Production System Changes:** DBA manager must be notified of all ERP system changes. In addition, the ERP client base will be notified via the erp-users mail alias.

Agenda for Change Management Meeting

The Daily Status and Change Management meeting will be held at 8:00.

1. **Review P1's:** At the beginning of the meeting, a representative from the TRC will discuss the previous day's (or weekend's) P1's. Relevant information around P1s should be provided to the TRC by the support staff who were involved in the case either before or during this meeting.

   Relevant information includes

   - Start/stop date/times of outage
   - System affected; (Corvette, Porsches, Soot, etc)
   - Applications affected; (ERP,CDW...)
   - Type of failure; Hardware, Software, Operating System, Application, Database,

Backup

- Was the system down?
- Was the application down?
- Root Cause; high-level recap of cause
- Resolution; high-level recap of action to resolve problem

In addition, an action item for long-term resolution of the problem will be assigned out of the meeting. This action item will receive a date of resolution, a responsible party, and an explanation of what will need to be done to address the previously stated root cause. These items will be added to the issu case and tracked.

DBA's, SysAdmin, and Ops will present information relating to the P1 as part of this meeting. Operations will provide a print-out of P1 logging to attend the following change management meeting. activities. Any party involved in the cause or resolution of P1 is required

A detailed post-mortem of the problem will also be heard in the P1 report and/or the P1 update voicemail. All P1 information will be logged in the ISSU ticket.

2. **Review of Change Requests:** Change request which have been submitted by 8am will be reviewed along with any updates or alterations in previously reviewed changes. Information generally covered will be requestor, date/time and the technical overview of the change. Further details are discussed on a case by case basis.
3. **Review of Previous Changes:** Changes completed since the previous meeting are reviewed. Requestor is required to notify change management upon completion of a change. This can be done by calling into the meeting and providing status or updating the change request ticket.

Related Tools

Path: http://eman/EMAN/Documentation/user_guide/change_management/quickstart.html
Owner: Pete Feighner, pfeighne@cisco.com
Last Modified: October 02, 1998
This is an eman-docs controlled document. Uncontrolled if printed.
