## NEW ITR Change Management Cheatsheet Rev 0

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<table>
<thead>
<tr>
<th>State</th>
<th>Expected</th>
<th>Next Logical Step</th>
<th>Alternate Next Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Easy to make changes before approval requested.</td>
<td>• Request Change (Mgr) Approval</td>
<td>• Cancel Change</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Delete Change</td>
<td></td>
</tr>
<tr>
<td>Waiting for Chg Mgr Approval</td>
<td>Should be approved or rejected within 2 days</td>
<td>• Implementing</td>
<td>• Draft (rejected)</td>
</tr>
<tr>
<td>Open (for risky changes)</td>
<td>Change being developed but needs Release Mgr Approval</td>
<td>• Request Release Manager Approval</td>
<td></td>
</tr>
<tr>
<td>Implementing</td>
<td>All approvals received. Make the change in production.</td>
<td>• Work Completed</td>
<td>• Reset to Draft (reschedule)</td>
</tr>
<tr>
<td>Work Completed</td>
<td>All work is done, completing PIR</td>
<td>• Closed</td>
<td>• Cancel Change</td>
</tr>
<tr>
<td>Closed</td>
<td>All work completed or cancelled</td>
<td>• Nothing</td>
<td>Reopen to draft</td>
</tr>
</tbody>
</table>

### Maintenance Calendar or Forward Schedule of Changes – Parsing rules

Planned or Unplanned

- Impact
- Application
  - Location (primarily for network/phone outages)
  - Time (military) or days (if multiple days)

Example:

- Planned – Outage - MOSS- 20:00 to 22:00
- Unplanned-Outage – Network-Delaware-17:25-12:00am

Note: [unplanned end date will default to midnight, end date/time can be revised when event actually ends]
Exercises with a partner
(A partner can be your Release Manager)

1. Create a new change. Do this from an Incident if you have been through Incident training already.
2. Choose an Application, search and use a filter (little triangle) that “Contains”. If you don’t find your application, check the “Assignment Lookup” under the Service Desk Application.
3. Find the application assignment group manager and group members.
4. Complete the mandatory fields, including the ones under that tab (make sure you are in Tab view) containing the deployment, test, backout, and communication plans.
5. Change the Release Manager to your partner. If your risk is low or moderate, manually assign them below under “Approvals”
6. Request Change mgt approval (send a note to Marian or Dan Sanderson and we can approve in Learn. Normally we would get an email, but Learn is not email enabled).
7. Update your test plan with your results and a Request Release Mgr approval.
8. If you are the release mgr, check “My Approvals” for the request and approve or reject...your choice! Add a comment, especially if you reject.
9. If it is your change either complete the additional information/work that the release manger wants (check the approvals tab near the bottom of your change). Request release approval again.
10. When approved, implement your change, complete the PIR and close.

That’s It!