

Change Management Template

Date: _____

Category Name: _____

Area/Department: _____

Contact/Liaison: _____

Approvers

Approvers are related to the category. Who are the staff members that control or must be aware of what changes are being made to the environment.

1. _____

2. _____

3. _____

Staff Members and Group Name

Who are the members of your group? Is there an established name already in Service Center?

Group Name: _____

Staff Member

JHED Id

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Products

Products are related to the category. What Products/applications/hardware is your area responsible for?

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

Category Specific Fields

Each Category has a specific tab for information related to that category. What information do you wish to capture for each change of your environment?

Some Examples are: Version, Testers, Maintenance Level, Upgrade Type, IPL Required, Domain Name, Subnet Name, Type of Change, Building, Floor, Hospital or JHU Change.

What are the fields specific to your organization you would like to trend or capture?

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Go Live Date: _____

Training Dates: _____

Example of a Change Request

General Info Tab

Change No.: 23975
Category: System SW
Phase: Production Preparation 3
Approval Status: pending

Planned Start: [Date/Time syntax: mm/dd/yy hh:mm (F9)]
Planned End: [Date/Time syntax: mm/dd/yy hh:mm (F9)]
Status: initial

Risk Level: [Field]
Type: Normal Emergency
Priority: [Field]
Alert Stage: [Field]

Scheduled Downtime:
Start: [Field]
End: [Field]
HIT F9 for syntax

Assigned To:
Primary Group: [Field]
Secondary Group: [Field]
Name: [Field]
Phone No.: [Field]

Opened By:
Name: pcappuc1
Phone: 410-735-7611
Opened: [Field]

Messages:
macro record updated.
macro record updated.

All Change requests follow the same format, using the same formatted tabs. Only the category tab is different.

Change No.: 23832
Category: System SW
Phase: Production 3
Approval Status: pending

Planned Start: 02/24/07 21:00:00
Planned End: 02/24/07 23:00:00
Status: initial

Product Information:
CICS region: [Field]
Product: ServiceCenter
Platform: [Field]
Version: [Field]
Maint. Level: [Field]
New Maint. Level: [Field]
Upgrade Type: [Field]
Vendor: [Field]

Add broadcast message?
 Recycle CICS?
 Update tables?
 Run JCL check?
 IPL required?
Please select one, both, or none if applicable:
 JHH - Hospital JHU - University

Messages:
macro record updated.
macro record updated.

Here is an example of a category specific tab.

Description

The description tab is the same for any type of change.

Change No.: 23977
Category: System SW
Phase: Production Preparation 3
Approval Status: pending

Planned Start:
Planned End:
Status: initial

Short Description:
Detailed Description:
Updates to Request:

Approve
Deny Approval
Denied/Retract Comments

jhs.cm3r.3.g(cm.view.display)

The Short Description is used for reporting, while the long description should contain all details.

Approvals

Change No.: 23832
Category: System SW
Phase: Production 3
Approval Status: pending

Planned Start: 02/24/07 21:00:00
Planned End: 02/24/07 23:00:00
Status: initial

Current Approvals | Approval Log | Pending Reviews

Approval Type	Approval Status	# Approved	# Denied	# Pending	Pending Approvals
Production	pending	0	0	1	CHGMGR

Find out who APPROVES click here...
[Search Box]

Approve
Deny Approval
Denied/Retract Comments

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The approvals tab will show who is required to approve the request and move to next phase. The approvals will show once the request is opened. Approval log will show previous approvals for the request.

Justification/Backout Tab

Internal Audit requires these fields for every change. Justification should show why the change is being made, or requested by whom. The backout method should reflect how to remove the change request, once completed. The impact field is needed for the weekly change committee meeting to assess if the change could impact other systems or applications.

Notify/Attachment

The notify tab is a place to store those who have been notified of the pending change. It is not a required field unless the category of the change is Network Communications.

Closing Comments

The screenshot displays the 'Closing Comments' tab in the Peregrine ServiceCenter Client. The top section contains a form with the following fields:

Change No.:	23977	Date/Time syntax: mm/dd/yy hh:mm (f9)	
Category:	System SW	Planned Start:	
Phase:	Production Preparation 3	Planned End:	
Approval Status:	pending	Status:	Initial

Below this is a tabbed interface with the 'Closing C...' tab selected. It includes:

- A 'Completion Code' dropdown menu.
- 'Time Worked' fields for 'Hours' and 'Minutes'.
- A 'Closing Comments' text area with a 'Completed waiting approval' checkbox.
- A 'Previous Closing Comments' text area.
- An 'Updates to Request' text area.
- Three action buttons on the right: 'Approve', 'Deny Approval', and 'Denied/Retract Comments'.

The bottom right corner of the window shows the text 'jhu.cm3r.3.g(cm.view.display)'.

After the request has been completed or implemented, the assignee should update the request with closing comments, noting if the request was successful or unsuccessful.

The Change Manager will then close the request, after ensuring any related issues are associated to the change request.