Change Management

MANDATORY CRITERIA

1. Does the tool facilitate the recording and storage of Request for Changes (RFC) in an easily accessible format?

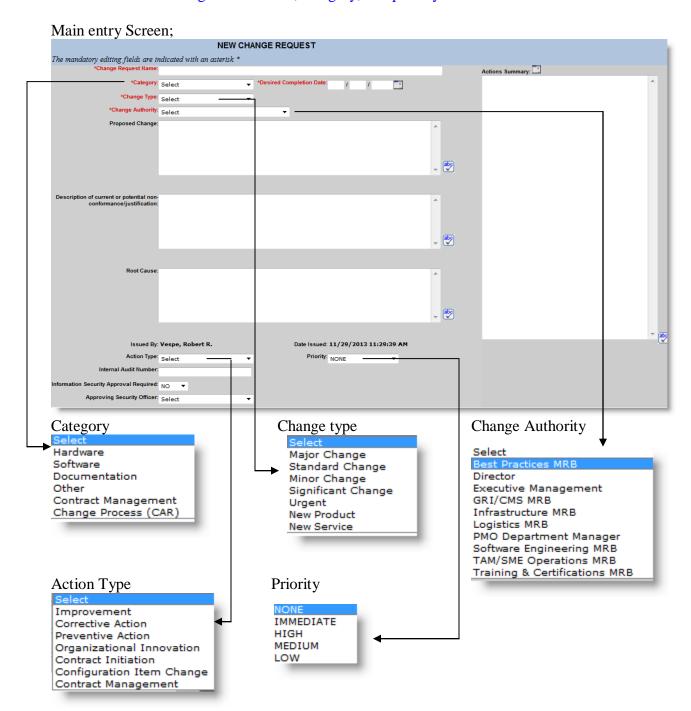Comments: Yes. The recording tool provides easy input formats.

Main entry Screen;

2. Does the tool allow only authorized personnel to submit RFCs?
Comments: Yes. All access is controlled via group privileges for viewing, creation, and edit rights. *From: 'ITG CENTRE Introduction'* **Document Control # 180-v2**

1. ***System Administrator attributes. The System Administrator attributes allow control to be exercised over the Users of "ITG CENTRE" by assigning permissions, passwords, and controlling the Users' ability to see and manipulate data within the system.***

3. Can the tool support the entry of free text as well as the use of codes for RFC classification (category and priority)?

Comments: Yes. The tool has multiple free text areas and supports various RFC classifications including classification, category, and priority.

Main entry Screen;

Category

Change type

Change Authority

Action Type

Priority

4. Does the tool facilitate the monitoring and tracking of the lifecycle of a Change request? For example, tracking a Change through the different stages of authorization, coordination, and review.

Comments: Yes. Using the 'Search Change Request' screen, users may tailor a report by entering (singularly or a combination of) field criteria to track or monitor specific stages or dates of the RFC. Additionally, users may devise (and save for future use) an ad-hoc report to produce desired tracking or monitoring requirements.

Search Screen Report

Clicking on any of the hyperlinks will sort the list in descending or ascending order

5. Does the tool facilitate the ability to control, read, write, and modify access for Change Management staff, Change builders, testers, etc., to update Change records throughout the Change lifecycle?

Comments: Yes. Access to CENTRE is provisioned by user ID and passwords at all screen field viewing/modifying and reporting levels. *From: 'ITG CENTRE Introduction' Document Control # 180-v2*

> ***System Administrator attributes. The System Administrator attributes allow control to be exercised over the Users of "ITG CENTRE" by assigning permissions, passwords, and controlling the Users' ability to see and manipulate data within the system.***
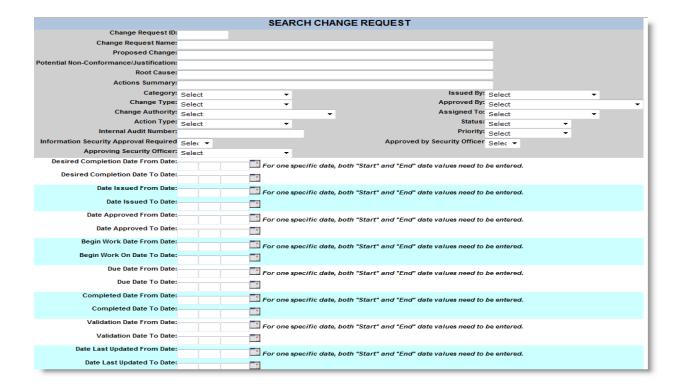
- Each time the RFC record is modified:
    o The 'Date Last Updated' and 'Last Updated By' information is captured.
    o The Record may only be edited by the issuer or the Chairman/Deputy Chairman until the 'Status is set to 'Approved', then, **_only_** the Chairman/Deputy Chairman or the 'Assigned To' individual may edit the record.
    o Each time a change is made to the record, the details of the change are chronologically reflected in the 'Track Changes' field.

RFC Track Change

6. Does the tool facilitate the routing of RFCs to the appropriate authorization bodies as defined within the ITIL Change Management Process? For example, Category 1 – Change Manager, Category 2 – Change Advisory Board, Category 3 – IT Executive.

Comment: Yes. Users are able to assign the Change Authority, if no authority is assigned; the RFC goes to the Best Practices MRB. All RFC's generate an alert notice that an RFC has been issued to the Authority's Chair.

The system uses a customizable assignment approval matrix which automatically approves RFC's based upon the Category, Change Authority, and the RFC Priority

RFC Approval Matrix

CHANGE REQUEST INITIALIZATION			
CATEGORY	CHANGE AUTHORITY	AUTO-APPROVAL	PRIORITY
Standard Change	Infrastructure MRB	Yes	IMMEDIATE
Standard Change	Infrastructure MRB	Yes	NONE
Standard Change	Infrastructure MRB	Yes	HIGH
Standard Change	Infrastructure MRB	Yes	MEDIUM
Standard Change	Infrastructure MRB	Yes	LOW
Minor Change	Infrastructure MRB	Yes	IMMEDIATE

Additionally; the 'Scan Request' system can evaluate all RFC's issued within the past day (or any number of days) for a particular change authority (or any elements of the request) and provide an e-mail notice and report of these RFC's to individuals or e-mail groups.

E-mail notice of Software Engineering RFC's for the past day.

E-mail Message


```
Scan process has found 1 potential problem record(s)
```

7. Does the tool facilitate the ability to reject Changes? For example, status of reject, ability to record reason for rejects notification to the Service Desk and End Users.
Comments: Yes. If the status of the change request is set to "Denied" the system automatically notifies the issuer". Information on the rejection is recorded within the 'Action Summary' of the RFC.

8. Does the tool facilitate the recording of impact assessment information within the Change record in order to support the Change authorization process? For example, the embedding of attachments such as technical reviews and reports.

Comments: Yes. Information assessment can be captured by inputting support information into the 'Change Analysis' screens, and the RFC supports the embedding of attachments.

9. Does the tool facilitate the production of Change schedules? For example, build, testing, and implementation schedules.

Comments: Yes. The RFC maintains several dates (Begin Work Date, Desired Completion date, and, Due Date) which may be queried via the search screen or by using the Ad-hoc reporting system. The RFC may also include software requirements or Project CI's to facilitate the collection of the current on-going work requirements.

Ad-hoc Report Generation Selecting Desired Fields and Dates

| Tables | Joins | >> Columns | Aggregates | Filters | Group By | Sorting | Options | Run Report |

COLUMN NAME IN Select All ▾   ➡   SE

ChangeRequest.ActionSummary
ChangeRequest.ActionTypeID
ChangeRequest.ApprovedByID
ChangeRequest.ApprovedBySecurityOfficer
ChangeRequest.ApprovedDate
ChangeRequest.AssignedToID
ChangeRequest.BeginWorkDate
ChangeRequest.CategoryID
ChangeRequest.ChangeAuthorityID
ChangeRequest.ChangeRequestID
ChangeRequest.ChangeRequestName
ChangeRequest.ChangeTypeID
ChangeRequest.CompletedDate
ChangeRequest.CompletionDateNotified
ChangeRequest.DesiredCompletionDate
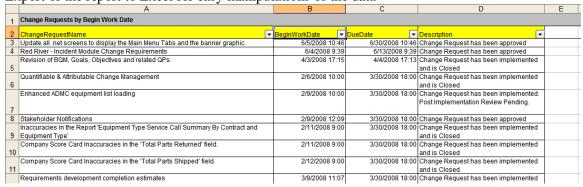ChangeRequest.DueDate
ChangeRequest.ImpactContracts
ChangeRequest.ImpactDepartments

>
<
<<
>>

Simple Adhoc Report by Begin Work Date

Change Requests by Begin Work Date

ChangeRequestName	BeginWorkDate	DueDate	Description
Test Change Management Processes			Request was cancelled or withdrawn.
REQUEST WITHDRAWN - ITIL Requirement - Record (Log) Asset Modifications			Request was cancelled or withdrawn.
ITIL Requirement - Modify the Asset Record - Add a Lifecycle Status Field			Change Request has been implemented and is Closed
Add Dependency Relationship Descriptions to Assets (CI's).			Denied
Formal internal QA process for the Purchasing and Subcontractor Relations groups			Change Request Issued
Client Managment Module			Change Request has been approved
Change Request for Naming Convention of Make/Model Equipment in the CED			Change Request Issued
Subcontractor's Number of Technicians			Request was cancelled or withdrawn.
ISO 20000 Registration NC 2			Request was cancelled or withdrawn.
ISO Implementation NC 5			Request was cancelled or withdrawn.
ISO 20000 Registration NC1A			Request was cancelled or withdrawn.
SLA Codes Request			Change Request has been approved

Export of the report to Excel for easy manipulations of the data

	A	B	C	D	E
1	Change Requests by Begin Work Date				
2	ChangeRequestName ▾	BeginWorkDate ▾	DueDate ▾	Description ▾	
3	Update all .net screens to display the Main Menu Tabs and the banner graphic.	6/5/2008 10:46	6/30/2008 10:46	Change Request has been approved	
4	Red River - Incident Module Change Requirements	6/4/2008 9:39	6/13/2008 9:39	Change Request has been approved	
5	Revision of BQM, Goals, Objectives and related QPs	4/3/2008 17:15	4/4/2008 17:13	Change Request has been implemented and is Closed	
6	Quantifiable & Attributable Change Management	2/6/2008 10:00	3/30/2008 18:00	Change Request has been implemented and is Closed	
7	Enhanced ADMC equipment list loading	2/9/2008 10:00	3/30/2008 18:00	Change Request has been implemented. Post Implementation Review Pending.	
8	Stakeholder Notifications	2/9/2008 12:09	3/30/2008 18:00	Change Request has been approved	
9	Inaccuracies in the Report 'Equipment Type Service Call Summary By Contract and Equipment Type'	2/11/2008 9:00	3/30/2008 18:00	Change Request has been implemented and is Closed	
10	Company Score Card Inaccuracies in the 'Total Parts Returned' field.	2/11/2008 9:00	3/30/2008 18:00	Change Request has been implemented and is Closed	
11	Company Score Card Inaccuracies in the 'Total Parts Shipped' field.	2/12/2008 9:00	3/30/2008 18:00	Change Request has been implemented and is Closed	
	Requirements development completion estimates	3/9/2008 11:07	3/30/2008 18:00	Change Request has been implemented	

10. Does the tool facilitate the recording of back-out procedures within the Change record?
Comments: Yes. Back-out recording is provided within the RFC.

VIEW ANALYSIS FOR CHANGE REQUEST [548]

Describe the potential risks, impacts, and business benefits associated with the change request:

The risks associated with this Change Request are that there may be unforseen problems or compatibility issues with the new version of the GCS Premier account software. The upgrade is needed to get the benefit of the accounting department aquiring all new desktop PCs with updated Windows 7 OSes and updated Office software (2010). They should experience better daily percieved work performance with the fast server and workstations.

Identify and describe a methodology for reverting or remedying the change if found unsatisfactory after implementation:

The revertion methodology is that we will maintain the old server "as is" until the migration is confirmed a success.

11. Does the tool facilitate the scheduling of Change reviews for implemented Changes after definable time periods?
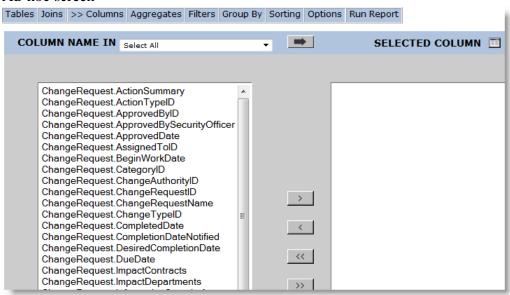
       Comments: Yes. The RFC has a 'Post Implementation Review tab which allows the establishment of a review schedule. Automatic notification is sent to the issuer when a review is due.

12. Does the tool facilitate customization of reporting functions? For example, ability to build custom report types based upon multiple field, multiple record selection.

Comments: Yes. This can be accomplished using CENTRE's Ad-hoc reporting module. In this example, the change request data may be interrogated. Additionally, most of CENTRE's entry screens provide search capabilities on any single or combination of fields.

Ad-hoc screen

Change Search Screen

Change Management

INTEGRATION CRITERIA

Terminology
1. Does the tool's use of terms and definitions align with ITIL terms and definitions?
Comments: Yes.

Incident Management
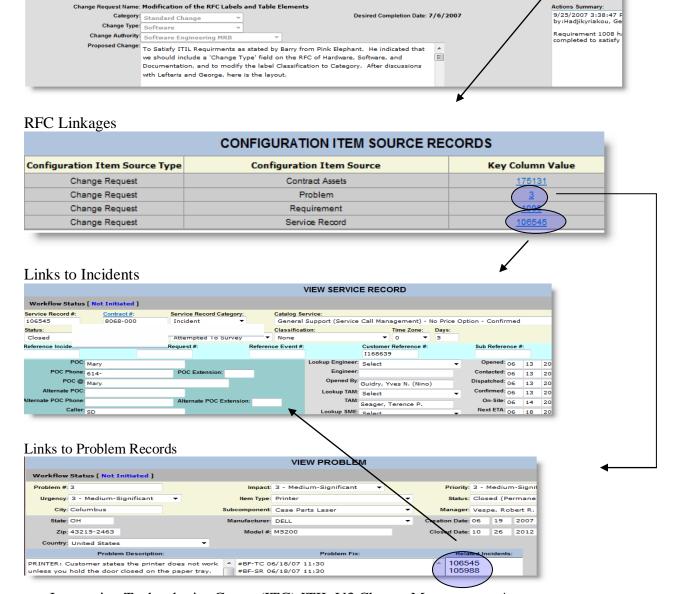1. Do facilities exist for establishing and maintaining the logical association between Incidents and Changes? For example, automated linkage when a Change record is created based on an existing incident record.
Comments: Yes. The Incident maintains links to associated RFC's and vise versa.

RFC Linkages

Links to Incidents

Links to Problem Records

2. Does the tool facilitate the communication of Change information and schedules that can be distributed to the Service Desk and user groups? For example, the use of email, change schedules and whiteboard communication methods.

Comments: Yes. All change requests are identified on the user's home screen. The user has the option to view the stages of their individual RFC's or view the stages of all RFC's

Vespe, Robert R.
Welcome to CENTRE Version 4.8.9

My Change Requests As the Issuer	Records
Active Records of Interest:	2
with Status Issued:	1

My Workflows	
Pending Actions	0
Initiated	0
Cancelled	1
Completed	0
Expired	0

New Service Records Not Yet Assigned	Records
Active Records of Interest:	2
Created by Remote Users:	2

Change Requests of Interest	Records
Active Records of Interest:	183
with Status Issued:	44
with Status Approved:	103
with Status Post Implementation Review:	9

Developed by ITG Inc. 2745 Hartland Road, Falls Church, Va. 22043
All Rights Reserved © 2010

Change Management

Problem Management

1. Do facilities exist for establishing and maintaining the logical association between Problem Records and Changes? For example, automated linkage when a Change record is created based on an existing problem record.

Comments: Yes. The linkage between the RFC and the Problem record is facilitated on the RFC 'Configuration Items' screen. Problem Records may be identified as 'Problem', 'Known Error', or, 'Closed'. Additionally, Problem records maintain links to RFC's

RFC

RFC Linkages

Links to Problem Records

Problem Record Links

Configuration Management

1. Does the tool facilitate the task of updating CI information in the CMDB? For example, is the Change tool integrated with the CMDB to the level that CI records can be associated to the Change record and be updated as part of the Change Management workflow?

Comments: Yes. CENTRE facilitates this by maintaining the CI information and linkage within the RFC

RFC Linkages

2. Is the change tool able to access CI detail to assist in the assessment of Change authorization? For example, the use of impact information such as relationships and CI criticality when considering authorization of a Change request?

Comments: Yes. The change management record links to the CI via the selection of configuration items source records. The CI record maintains the Urgency, Impact, and Priority values which may be used in the authorization of a change request.

Selected CI's associated to the change record

CONFIGURATION ITEM SOURCE RECORDS

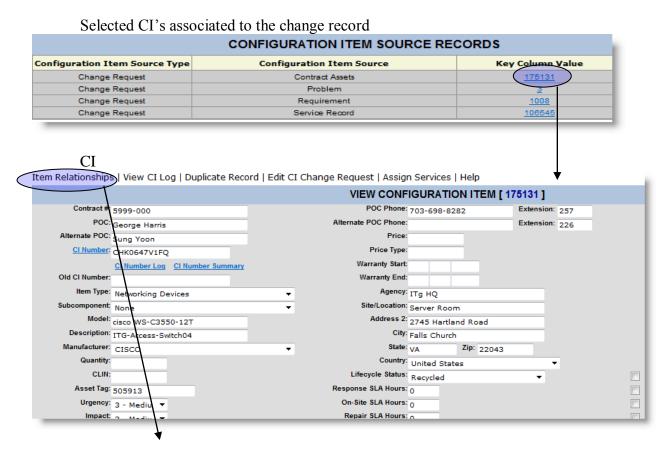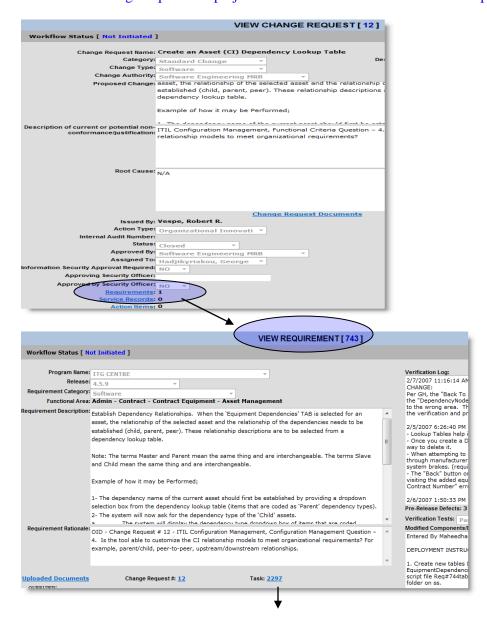| Configuration Item Source Type	Configuration Item Source	Key Column Value
Change Request	Contract Assets	175131
Change Request	Problem	3
Change Request	Requirement	1008
Change Request	Service Record	106545

CI

Item Relationships | View CI Log | Duplicate Record | Edit CI Change Request | Assign Services | Help

VIEW CONFIGURATION ITEM [175131]

Field	Value	Field	Value
Contract #	5999-000	POC Phone:	703-698-8282 Extension: 257
POC:	George Harris	Alternate POC Phone:	Extension: 226
Alternate POC:	Sung Yoon	Price:	
CI Number:	CHK0647V1FQ	Price Type:	
	CI Number Log CI Number Summary	Warranty Start:	
Old CI Number:		Warranty End:	
Item Type:	Networking Devices	Agency:	ITg HQ
Subcomponent:	None	Site/Location:	Server Room
Model:	cisco WS-C3550-12T	Address 2:	2745 Hartland Road
Description:	ITG-Access-Switch04	City:	Falls Church
Manufacturer:	CISCO	State: VA	Zip: 22043
Quantity:		Country:	United States
CLIN:		Lifecycle Status:	Recycled
Asset Tag:	505913	Response SLA Hours:	0
Urgency:	3 - Medium	On-Site SLA Hours:	0
Impact:	3 - Medium	Repair SLA Hours:	0

The CI may also identify dependencies when considering RFC's

CONFIGURATION ITEM RELATIONSHIPS

CI Number: CHK0647V1FQ	City: Falls Church	Urgency: 3 - Me
Manufacturer: CISCO	State: VA	Impact: 3 - Me
Configuration Item Type: Networking Devices	Zip: 22043	
Model: cisco WS-C3550-12T	Country: United States	
Description: ITG-Access-Switch04		

Relationship Type	CI Number	Manufacturer	Configuration Item Type	Model	City	State	Zip Code	Country	Urgency	Impact	Add/
PARENT TO	BZDS72300030	INTEL	Server	SE7501CW2	Falls Church	VA	22043	United States	5 - High	5 - High	
PARENT TO	ECHK4490481	INTEL	Server	SE7501CW2	Falls Church	VA	22043	United States	5 - High	5 - High	
PARENT TO	ECHK4490327	INTEL	Server	SE7501CW2	Falls Church	VA	22043	United States	5 - High	5 - High	
PARENT TO	FOC0801W24C	CISCO	Networking Devices	C2950G-24				United States	5 - High	3 - Medium	

Release & Deployment Management

1. Does the tool facilitate integration with Release and Deployment activities by supporting Release and Change workflow integration at the task and record level?

Comments: Yes. RFC's become Software Requirements when approved and scheduled. Software requirements get bundled to form a release (delta, full, etc.) Software requirements are linked to the change request and project task where hours are estimated and captured.
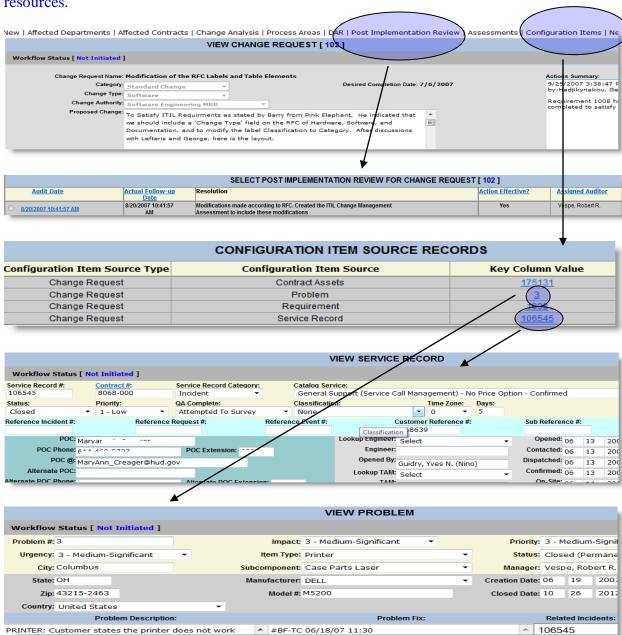
VIEW TASK UNDER PROJECT [CENTRE - Release 4.5.9]

Workflow Status [Not Initiated]

Task Name:	Requirement 743
Task Description:	
Predecessor Task:	None
	☐ Milestone
Region/Area:	

Task Type:	Select
Task Manager:	Select
Task Status:	Completed

Release 4.5.9. including Requirement 743

Requirements Score Card for Program [ITG CENTRE] - Release [4.5.9]

Line Item	Requirement ID	Tasks	Status	Assigned To Resource	Requirement Type	Validation By	Requirement Review Issues Identified	Peer Review Issues Identified	Resource Conducted Peer Review	Total Estimated Hours	Total Actual Hours	% Variance	Total Defects Pre-Release	Total Defect Post-Releas
1	743	2	Closed	Ludwig, Michael	New Functionality	Hadjikyriakou, George	No	No	Hadjikyriakou, George	12	16	-33.33	0	0
2	743	1	Closed	Srikanth K	New Functionality	Hadjikyriakou, George	No	No	Hadjikyriakou, George	62	60	3.23	3	5
3	744	1	Closed	Guttikonda, Maheedhar	New Functionality	Hadjikyriakou, George	No	No	Hadjikyriakou, George	37	46	-24.32	0	0
4	750	1	Closed	Pangalos, Spyro (n)		None	No	No	Hadjikyriakou, George	21.38	30	-40.32	0	6
5	751	1	Closed	Guttikonda, Maheedhar	New Functionality	Hadjikyriakou, George	No	No	Hadjikyriakou, George	34.5	40	-15.94	1	1
6	769	1	Closed	Hadjikyriakou, George	Defect	None	No	No	Fellers, Bridget S.	1	1	0	0	0
7	770	1	Closed	Guttikonda, Maheedhar	Defect	None	No	No	Hadjikyriakou, George	8	8	0	0	0
8	771	1	Closed	Fellers, Bridget S.	New Functionality	Gardner, Glenn	No	No	Hadjikyriakou, George	37	40	-8.11	0	1
9	772	0	Closed	Pangalos, Spyro (n)	Defect	None	No	No	Fellers, Bridget S.	4.5	4	11.11	0	0
10	776	1	Closed	Fellers, Bridget S.	Defect	None	No	No	Hadjikyriakou, George	1	1	0	0	0
11	777	0	Closed	Pangalos, Spyro (n)		None	No	No	Hadjikyriakou, George	1.5	1	33.33	0	0
12	783	0	Closed	Hadjikyriakou, George		None	No	No	Fellers, Bridget S.	2	2	0	0	0
13	790	0	Closed	Pangalos, Spyro (n)	Defect	Gardner, Glenn	No	No	Fellers, Bridget S.	2.25	2	11.11	0	0
14	791	0	Closed	Hadjikyriakou, George	Defect	Gardner, Glenn	No	No	Fellers, Bridget S.	2	2	0	0	0
15	792	0	Closed	Guttikonda, Maheedhar	Defect	None	No	No	Hadjikyriakou, George	2	2	0	0	0
16	793	0	Closed	Guttikonda, Maheedhar	Defect	None	No	No	Hadjikyriakou, George	2	3	-50	0	0
17	796	0	Closed	Pangalos, Spyro (n)		None	No	No	Hadjikyriakou, George	11.25	10	11.11	0	0

OPTIONAL CRITERIA

1. Does the tool facilitate the identification of post implementation impact and resource utilization for completed Changes? For example, are Incidents and Problems resulting from an implemented Change easily identified? Also, can planned vs. actual resource utilization be tracked and analyzed?

Comments: Yes. The tool maintains post implementation review notes and dates. Problem record ID's are hyperlinked within the RFC record and the Problem records maintain a list of the incident(s). The RFC may also be linked to the 'Project Management' system to track and analyze the planned vs. actual utilization of project resources.

Organization Name	Integration Technologies Group, Inc.
Brand name of Product	CENTRE (Common ENTerprise, REsource, system)
Version of Product to be Assessed	Release 4.6.8
Client Contact Name and Title	Robert R. Vespe Consultant
Address	2745 Hartland Road, 2nd Floor Falls Church, VA 22043
Phone #	305 909-3591
Email	Robert.Vespe@ITGOnline.com

Revised 12/23/2013