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## Purpose

This document specifies the procedure for processing requests for information technology service changes. A change involves the addition, modification, or removal of anything that could have an effect on IT Services. Procedures are documented here for standard changes, normal changes, and emergency changes. The procedures have been developed in an effort to minimize the impact of changes to computing assets, reduce implementation risk, and document the results associated with requests for change.

## Scope

This procedure shall be followed by all IT Services Staff and Department Technicians including but not limited to system administrators, programmers, network engineers, desktop support technicians, and others involved in administering, managing, or modifying any service, computer, device, program, component, system, or other configuration item that enables an IT or technology service offering.

This procedure applies to changes made to any IT service offering, configuration item, software application, and system. It can also apply to changes made to technical documentation. Refer to the SJSU-ITS Change Management Standard for information on planning and implementing changes into production.

## Standard Change Procedure

A Standard Change is a pre-authorized change that is low risk, relatively common (routine), and follows a documented procedure or work instruction (i.e., iSupport template). Standard changes are pre-authorized and may be implemented immediately. Includes request for information or general assistance. Refer to the SJSU-ITS Change Management Standard for information on how to establish a Standard Change.

## Procedural Steps

1. **Initiation** – The initiator will either complete the iSupport Change ticket or contact the ITS Help Desk or other person who has rights to complete a Change ticket in iSupport. The person completing the change ticket will:
  - **Template** – Select the appropriate template. The template should at minimum automatically assign the change ticket to the appropriate group and categorize the ticket
  - **Heading Information** - Complete fields in the Change ticket header section as shown in the following table
  - **Type** – Make sure to set the change type to Standard
  - **Automatic Notification Assignee** – If the template selected does not automatically close the ticket, the member(s) within the assigned group will be sent an email notifying them that the change request has been received
  - **Automatic Notification Customer** – If the template selected is configured to automatically set the ticket to implemented (closed), or the ticket is set to implemented (closed) manually, the customer will be sent an email notifying them that the change request has been received, authorized, and implemented
  - **Automatic Notification Others to Notify** – If the template selected does not automatically close the ticket, the reps or customers listed on the Others to Notify tab will be sent an email notifying them that the change request has been received

2. **Review & Assign** – the Service Owner, Change Manager, Unit Manager(s), or Unit Lead(s) of the group or team to which the change request was assigned will review the change request and assign the change request to the person who will be responsible to either perform the work or insure that the work is accomplished. Otherwise, one of the members within the assigned group will review the change request and assign themselves the change request and either perform the work or insure that the work is accomplished.
  - **Status** – Set the status to Assigned
  - **Assignee** – Select the person who is responsible to make sure the change is worked on and implemented
  - **Automatic Notification Assignee** – The assignee will be sent an email notifying them that the change request has been received
  - **Automatic Notification Customer** – Customer will receive an email notifying them that the change request has been received and assigned to a technician
3. **Implement** - Upon completion of the work and implementation of the change:
  - **Status** - Set the status to Implemented
  - **History** – Update history to reflect the work done and activities performed during the implementation of the change
  - **Results** – Describe the results of the implementation or implementation attempt of the change. Indicate why it was a success, failed, rolled back, or postponed
  - **Automatic Notification Customer** – Customer will receive an email notifying them that the change has been completed and implemented

# Processing the Standard Change Ticket (iSupport)

## 1. Initiate the Standard Change

- **Customer:** Select the customer or user who requested the change
- **Template:** Select the template associated with the service change request
- **Status:** Leave status as New
- **Assignee:** Select the group to which the change is assigned
- **Category:** Select the appropriate category
- **Type:** Select the type of Standard
- **Scheduled Implementation Start:** Enter a scheduled start date and time (optional)
- **Reason:** Why – Explain the reason for the change or the expected benefit from the change
- **Description:** What Details – Provide the technical details of what service or system is being changed. Describe the scope of work associated with the change
- **Results:** Leave blank

The screenshot shows the iSupport Standard Change Ticket form. The form is divided into several sections. At the top, there is a navigation bar with tabs for Change, New, and View. Below this is a toolbar with icons for Save, Save And Close, Print, Font Size, Counters, Add History, Categorize, Schedule, Route, Customer, Templates, Hierarchy, and Sign. The main form area is divided into three main sections: Customer, Status/Assignee, and Category. The Customer section shows a profile for Leon Nguyen, Information Support Services, with email leon.nguyen@sjsu.edu and phone number 4089247314. The Status/Assignee section shows Status as New, Impact as Low, Urgency as Low, Priority as Low, and Number as E4IC51146A. The Assignee is Ryan Campbell. The Category section shows Change Management, ITS Change Request, Change Category as Select, Risk Category as Select, Type as Standard, and Rule Group as SJSU - ITS. Below these sections are tabs for Details, More Details, History, Others to Notify, Associated Work Items, and Attachments. The Details tab is active, showing a Reason section with the text 'Support ending for iSupport 12.6' and a Description section with the text 'Update iSupport 12.6 to 12.7'. On the right side of the Details tab, there are input fields for Scheduled Implement Start, Scheduled Implement End, Actual Implementation, and Review Date, each with a calendar icon. The Results section is empty.

## 2. Review and Assign the Standard Change

The Service Owner, Change Manager, Unit Manager(s), or Unit Lead(s) of the group or team to which the change request was assigned will review the change request and assign the change request to the person who will be responsible to either perform the work or insure that the work is accomplished. Otherwise, one of the members within the assigned group will review the change request and assign themselves the change request and either perform the work or insure that the work is accomplished.

- **Status:** Set the status to Assigned
- **Assignee:** Select the person who is responsible to make sure the change is worked on and implemented
- **History:** Click the Add History button and describe the work done to this point, what is needed to be done, or other information that will help the assignee get the change implemented

The screenshot shows the 'Change' management interface. The 'Status' dropdown is set to 'Assigned'. The 'Assignee' is 'Ryan Campbell'. The 'Add History' button is highlighted with a red circle. The 'Customer' section shows 'Leon Nguyen' with email 'leon.nguyen@sjsu.edu' and ID '4089247314'. The 'Reason' field contains 'Support ending for iSupport 12.6'. The 'Description' field contains 'Update iSupport 12.6 to 12.7'. The 'Scheduled Implement Start' and 'Scheduled Implement End' fields are empty. The 'Actual Implementation' field is empty. The 'Review Date' field is empty.

## 3. Implement the Standard Change

Upon completion of the work and the implementation of the change, update the change ticket as follows:

- **Status:** Set the status to Implemented
- **History:** Update the history section to reflect the chronology of the activity and work done
- **Results:** Describe the results of the implementation

*Note: If the representative is able to complete the change request at the time of opening the ticket, the status can be set to Implemented and the ticket closed in the first step.*

The screenshot shows the 'Change' management interface. The 'Status' dropdown is set to 'Implemented'. The 'Assignee' is 'Ryan Campbell'. The 'Add History' button is highlighted with a red circle. The 'Customer' section shows 'Leon Nguyen' with email 'leon.nguyen@sjsu.edu' and ID '4089247314'. The 'Reason' field contains 'Support ending for iSupport 12.6'. The 'Description' field contains 'Update iSupport 12.6 to 12.7'. The 'Scheduled Implement Start' and 'Scheduled Implement End' fields are empty. The 'Actual Implementation' field is empty. The 'Review Date' field is empty. The 'Results' section contains the text 'Update completed successfully, no problems detected in testing.'

# Normal Change Procedure

A normal change is any change that has not been defined as a standard change and is not an emergency change. It is a change that must be reviewed and authorized by the Change Manager under the advice of the Change Advisory Board (CAB).

## Status Progression

1. New (open) [set by author of change request]
2. Assigned (open) [set by work unit sup/mgr/staff]
3. Reviewed (open) [set by Change Advisory Board (CAB) as optional part of review of change process]
4. Scheduled (open) [set by assignee doing the work as the way to ask the CAB to authorize the change to be implemented into production]
5. Authorized, Suspended, Declined (open) [typically set by CAB when considering implementation schedule; but may be set by work unit supervisor or manager]
6. Implemented (closed), Backed Out (open) [set by assignee who did the work]

## Procedural Steps

1. **Initiation** – The initiator will either complete the iSupport Change ticket or contact the ITS Help Desk or other person who has rights to complete a Change ticket in iSupport. The person completing the change ticket will:
  - **Status** – Set status to New
  - **Type** – Set the change type to Normal
  - **Assignee** – Assign the change to the appropriate group
  - **Automatic Notification Assignee** – The assignee (member(s) within the assigned group or individual) will be sent an email notifying them that the change request has been received
  - **Automatic Notification Customer** – The customer will be sent an email notifying them that the change request has been received and is being reviewed
  - **Automatic Notification Other to Notify** – The reps or customers listed in the Others to Notify tab will be sent an email notifying them that the change request has been received
2. **Review & Assign** – The Service Owner, Change Manager, Unit Manager(s), or Unit Lead(s) of the group to which the change request was assigned will:
  - **Review the change request** – Details to determine the appropriateness of the request and who should facilitate or perform the work
  - **Assign** – The change request to the person who will perform the work. Otherwise, one of the members within the assigned group will review the change request and assign themselves the change request and perform the work

- **Status** – Set the status to Assigned
  - **Automatic Notification Assignee** – Upon save with a status of Assigned, the assignee will be sent an email notifying them that they have been assigned a change request
  - **Automatic Notification Customer** – Upon save with a status of Assigned, the customer will be sent an email notifying them that the change request has been assigned and is in process
3. **Perform Work** – The assignee performs the work and updates the appropriate fields in the change request, paying special attention to:
- **Description** – Update the description for clarification if needed
  - **History** – Update the history with a log of the activity performed
4. **Request Implementation** – When the assignee is ready to implement, the work into production the assignee will:
- **Status** – Set the status to Scheduled
  - **Scheduled Implementation Start** – Enter a Scheduled Implementation date and time (represents implementation process start date and time)
  - **Due** – Enter a Due date and time (represents implementation process end date and time)
5. **CAB Review** (Review of Scheduled) – The CAB will proactively review, via iSupport views, all Scheduled changes.
- Note - The CAB review of Scheduled changes is required. Change Requests to be reviewed at the scheduled CAB meeting should be submitted by 3pm the workday prior to the meeting
  - **Status** (If Approved) – Change Manager will set the status to Authorized
  - **Scheduled Implementation Start** – When appropriate, the Change Manager will modify the scheduled implementation date and time
  - **History** – Change Manager will update History with an explanation of the reasons for the status and/or schedule change
  - **Automatic Notification Assignee** – Upon save with a status of Authorized the assignee will be sent an email notifying them of authorization to put the change into production
  - **Status** (If Not Approved) – Change Manager will set the status to either Suspended or Declined
  - **History** – Change Manager will update History with an explanation
  - **Automatic Notification Assignee** – Upon save with a status of Suspended or Declined the assignee will be sent an email notifying them that the change request has been suspended or declined
  - **Manual Notification Customer** – Service Owner or assignee contacts the customer to let them know of the decision to Suspend or Decline the change and the reason why

6. **Implementation Backed Out** – If the back out plan is executed, the assignee will:
  - **Status** – Set the status to Backed Out
  - **History** – Update the history with the reason for the back out and any other pertinent information and suggested next steps
  - **Change Manager Review** (Review of Backed Out) – The Change Manager will proactively review Backed Out changes and facilitate next steps
7. **Implementation Complete** – When the assignee completes implementation of the change, the assignee will:
  - **Status** – Set the status to Implemented
  - **Actual Implementation** – Enter the actual implementation date and time
  - **Automatic Notification Customer** – Upon save with a status of Implemented, the customer will be sent an email notifying them that the change has been implemented within production and the change request has been closed



# Processing the Normal Change Ticket (iSupport)

## 1. Initiate the Normal Change

- **Customer:** Select the customer or user who requested the change
- **Status:** Leave status as New
- **Assignee:** Select the group to which the change is assigned
- **Category:** Select the appropriate category
- **Impact:** Select the appropriate impact value
- **Change Category:** Set to match Impact
- **Risk Category:** Select the level of Risk
- **Type:** Select the type of Normal
- **Urgency:** Select the appropriate urgency value
- **Priority:** Accept the value that appears. This is a mapped value as a result of impact and urgency
- **Scheduled Implementation End:** Enter the date and time for which the customer requires the change be implemented on or before
- **Reason:** Why – Explain the reason for the change or the expected benefit from the change
- **Description:** What Details – Provide the technical details of what service or system is being changed. Describe the scope of work associated with the change
- **Results:** Leave blank

The screenshot shows the iSupport system interface for creating a new change ticket. The interface is divided into several sections:

- Header:** Includes tabs for 'Change', 'New', and 'View'. Below these are icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Counters', 'Add History', 'Categorize', 'Schedule', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Sign'.
- Customer Section:** Displays the customer's name 'Leon Nguyen', email 'leon.nguyen@sjsu.edu', and phone number '4089247314'.
- Status and Assignee Section:** Includes dropdown menus for 'Status' (set to 'New'), 'Impact' (set to 'Medium'), 'Urgency' (set to 'Low'), and 'Priority' (set to 'Low'). The 'Assignee' is set to 'Ryan Campbell'.
- Category Section:** Includes dropdown menus for 'Category' (set to 'Change Management'), 'Change Category' (set to 'ITS Change Request'), 'Risk Category' (set to '3 = Medium Low'), and 'Type' (set to 'Normal').
- Details Section:** Includes a 'Reason' field with the text 'Support ending for iSupport 12.6', a 'Description' field with the text 'Update iSupport 12.6 to 12.7', and a 'Results' field.
- Implementation Dates:** Includes fields for 'Scheduled Implement Start', 'Scheduled Implement End', 'Actual Implementation', and 'Review Date'.

## MORE DETAILS TAB

- **Responsible Team:**  
Group of people responsible for performing the work
- **System Status Summary:**  
Summarize what will be done using a one or two sentence description of the change for the non-technical person
- **Configuration Items:** List all configuration Items involved in the change. These are any components that will be modified or removed as part of the change implementation. Items such as IT Services, hardware, software, and buildings
- **Communication Plan:**  
List the stakeholders such as customers, users, and anyone else who may be affected by the change, and how the change will be communicated
- **Third Party Involvement:**  
Identify vendors, consultants, or contractors that will be involved in the change implementation
- **Decline Effect:** Describe the impact on the stakeholders and business if this change were to be declined
- **Dependencies or Relationships:** Identify any services or systems that are dependent upon or related to the service or system being changed
- **Services Impact:**  
Describe how the change will affect systems, whether positive or

The screenshot displays the 'More Details' tab in a change management system. The sidebar on the left lists the following sections: Custom Fields, Responsible Team, System Status Summary, Configuration Items, Communication Plan, Third Party Involvement, Decline Effect, Dependencies or Relationships, Services Impact, Security Implication, and Back Out or Remediation Plan. The main content area contains text input fields for each of these sections, with the following prompts:

- Responsible Team:** Team responsible for doing the work.
- System Status Summary:** Summarize what will be done using a one or two sentence description of the change for the non-technical person.
- Configuration Items:** List all configuration Items involved in the change. These are any components that will be modified or removed as part of the change implementation. Items such as IT Services, hardware, software, and buildings.
- Communication Plan:** List the stakeholders such as customers and users along with anyone else who may be affected by the change or how we communicate.
- Third Party Involvement:** Identify vendors, consultants, or contractors that will be involved in the change implementation.
- Decline Effect:** Describe the impact on the stakeholders and business if this change were to be declined.
- Dependencies or Relationships:** Identify any services or systems that are dependent upon or related to the service or system being changed.
- Services Impact:** Describe how the change will impact the systems whether positive or negative.
- Security Implication:** Describe any effect the change will have on the campus information security posture?
- Back Out or Remediation Plan:** Explain how the change will be rolled-back in the event of trouble or unintended results.

The interface includes a top navigation bar with icons for Details, More Details (selected), History, Others to Notify, Associated Work Items, and Attachments. A chat window at the bottom right shows 'Chat (26)'.

negative

- **Security Implication:** Describe any effect the change will have on the campus information security posture
- **Back out or remediation plan:** Explain how the change will be rolled-back in the event of trouble or unintended results

## 2. Review and Assign

- **Assignee:** Assign the change request to the person who will perform the work. Otherwise, one of the members within the assigned group will review the change request and assign themselves the change request and perform the work
- **Status:** Set the status to Assigned
- **History:** Update history with activity and work history

The screenshot displays a web-based Change Management interface. At the top, there is a navigation bar with tabs for 'Change', 'New', and 'View'. Below this is a toolbar with various icons for actions like 'Save', 'Save And Close', 'Print', 'Font Size', 'Counters', 'Add History', 'Categorize', 'Schedule', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Sign'. The main content area is divided into several sections. On the left, there is a 'Customer' section showing a profile for 'Leon Nguyen' with contact information. The central part of the interface contains a form for the change request, with fields for 'Status' (set to 'Assigned'), 'Impact' (Medium), 'Urgency' (Low), 'Priority' (Low), and 'Number' (E4IC51145A). The 'Assignee' is listed as 'Ryan Campbell'. To the right of the form, there are dropdown menus for 'Category' (Change Management), 'Change Category' (ITS Change Request), 'Change Category' (Medium), 'Risk Category' (3 = Medium Low), 'Type' (Normal), and 'Rule Group' (SJSU - ITS). Below the form, there is a 'Details' section with tabs for 'Details', 'More Details', 'History', 'Others to Notify', 'Associated Work Items', and 'Attachments'. The 'Details' tab is active, showing a 'Reason' section with the text 'Support ending for iSupport 12.6' and a 'Description' section with the text 'Update iSupport 12.6 to 12.7'. On the right side of the 'Details' section, there are input fields for 'Scheduled Implement Start', 'Scheduled Implement End', 'Actual Implementation', and 'Review Date', each with a calendar icon.

### 3. Perform Work

- **Description:** Update the description with clarification of the change if needed
- **History:** Update history with work activity

The screenshot shows the 'Perform Work' section of the Change Management system. The status is 'Assigned'. The description field is highlighted with a red box, showing 'Update iSupport 12.6 to 12.7'. The history tab is also highlighted.

### 4. Request Implementation

- **Status:** Set the status to Scheduled. This will put the request for change into the CAB view for authorization consideration
- **Scheduled Implementation Start:** Enter a scheduled start date and time
- **Scheduled Implementation End:** Enter a due date and time
- **More Details:** Update fields as needed to make sure the Change Manager has all the information needed to make an informed decision regarding authorization

The screenshot shows the 'Request Implementation' section of the Change Management system. The status is 'Scheduled'. The 'Scheduled Implementation Start' and 'Scheduled Implementation End' fields are highlighted with red boxes, showing dates and times.

## 5. Change Advisory Board Review

- **Status:** If Authorized, the Change Manager will set the status to Authorized
  - **Scheduled Implementation End:** When appropriate, the Change Manager will modify the scheduled implementation date and time with a new date and time
  - **History:** The Change Manager will update History with an explanation of the reasons for the status and/or schedule change
- 
- **Status:** If Not Authorized, the Change Manager will set the status either to Suspended or Declined
  - **History:** The Change Manager will update History with an explanation of the reasons for the suspension or declination

The screenshot displays a web-based Change Management interface. At the top, there is a menu bar with options like 'Change', 'New', and 'View'. Below this is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Counters', 'Add History', 'Categorize', 'Schedule', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Sign'. The main content area is divided into several sections. On the left, there is a 'Customer' section for 'Leon Nguyen' with contact information. The central part of the screen shows the details of a change request, including 'Status' (set to 'Authorized'), 'Impact' (Medium), 'Urgency' (Low), 'Priority' (Low), and 'Number' (E4IC51146A). It also lists the 'Assignee' (Ryan Campbell), 'Created Date' (4/18/2014 11:40:03 AM), 'Author' (Ryan Campbell), 'Closed Date', and 'Closed By'. To the right, there are dropdown menus for 'Category' (Change Management), 'ITS Change Request', 'Change Category' (Medium), 'Risk Category' (3 = Medium Low), 'Type' (Normal), and 'Rule Group' (SJSU - ITS). Below these, there are tabs for 'Details', 'More Details', 'History', 'Others to Notify', 'Associated Work Items', and 'Attachments'. The 'Details' tab is active, showing a 'Reason' section with the text 'Support ending for iSupport 12.6' and a 'Description' section with the text 'Update iSupport 12.6 to 12.7'. On the right side of the 'Details' tab, there are date and time pickers for 'Scheduled Implement Start' (4/23/2014 12:00 AM), 'Scheduled Implement End' (4/30/2014 12:00 AM), 'Actual Implementation', and 'Review Date'. The 'Scheduled Implement End' date is circled in red.

## 6. Implementation Complete

- **Status:** Assignee sets the status to Implemented
- **Actual Implementation:** Assignee enters the actual implementation date and time
- **Results:** Describe the results of the implementation

The screenshot shows the 'Change Management ITS Change Request' form. The 'Status' dropdown is set to 'Implemented'. The 'Assignee' is Ryan Campbell. The 'Created Date' is 4/18/2014 11:40:03 AM. The 'Author' is Ryan Campbell. The 'Closed Date' and 'Closed By' are empty. The 'Category' is Change Management ITS Change Request. The 'Change Category' is Medium. The 'Risk Category' is 3 = Medium Low. The 'Type' is Normal. The 'Rule Group' is SJSU - ITS. The 'Reason' field contains 'Support ending for iSupport 12.6'. The 'Description' field contains 'Update iSupport 12.6 to 12.7'. The 'Results' field contains 'Update was successful. Testing shows normal operation.' The 'Scheduled Implement Start' is 4/23/2014 12:00 AM. The 'Scheduled Implement End' is 4/30/2014 12:00 AM. The 'Actual Implementation' date is 4/30/2014 12:00 AM. The 'Review Date' is empty.

## 7. Implementation Back Out

- **Status:** Assignee sets the status to Backed Out
- **History:** Assignee updates the history with the reason for the back out and any other pertinent information and suggested next steps

The screenshot shows the 'Change Management ITS Change Request' form. The 'Status' dropdown is set to 'Backed Out'. The 'Assignee' is Ryan Campbell. The 'Created Date' is 4/18/2014 11:40:03 AM. The 'Author' is Ryan Campbell. The 'Closed Date' and 'Closed By' are empty. The 'Category' is Change Management ITS Change Request. The 'Change Category' is Medium. The 'Risk Category' is 3 = Medium Low. The 'Type' is Normal. The 'Rule Group' is SJSU - ITS. The 'Reason' field contains 'Support ending for iSupport 12.6'. The 'Description' field contains 'Update iSupport 12.6 to 12.7'. The 'Scheduled Implement Start' is 4/23/2014 12:00 AM. The 'Scheduled Implement End' is 4/30/2014 12:00 AM. The 'Actual Implementation' date is empty. The 'Review Date' is empty. The 'Add History' button in the top toolbar is highlighted with a red circle.

# Emergency Change Procedure

An emergency change is a change that must be implemented as soon as possible, for example to resolve a major incident or implement a security patch.

It is a change that must be reviewed and authorized by the Change Manager under the advice of the Emergency Change Advisory Board (ECAB).

## Procedural Steps

1. **Initiation** – the initiator will either complete the iSupport Change ticket or contact the ITS Help Desk or other person who has rights to complete a Change ticket in iSupport. The person completing the change ticket will:
  - **Customer** – Select the appropriate customer
  - **Type** – Set the change type to Emergency
  - **Status** - Set the status to Scheduled
  - **Scheduled Implementation Start** – Enter a Scheduled Implementation date and time (represents implementation process start date and time)
  - **Scheduled Implementation End** – Enter a due date and time (represents implementation process end date and time)
  - **Assignee** – Set the assignee to be the Change Manager
  - **Others to Notify (tab)** – Add any other contacts who should be notified
  - **Automatic Notification Assignee** – The assignee will be sent an email notifying them that the change request has been submitted
  - **Automatic Notification Customer** – The customer will be sent an email notifying them that the change request has been received and is being reviewed
  - **Automatic Notification Others to Notify** – The list of reps or customers specified in the Others-to-Notify tab will be sent an email notifying them that the change request has been submitted
2. **Review and Authorize** – Upon receiving notification of the emergency change request, the Change Manager will review the change request and decide the appropriate action.
  - **Status** (If Approved) – Change Manager will set the status to Authorized
  - **Assignee** – Change Manager will assign the ticket to the person who is responsible to make sure the change is implemented
  - **Scheduled Implementation Start** – When appropriate, the Change Manager will modify the scheduled implementation date and time
  - **History** – Change Manager will update History with an explanation of the reasons for the status and/or schedule change

- **Automatic Notification Assignee** – Upon save with a status of Authorized, the assignee will be sent an email notifying them of authorization to put the change into production
  - **Status** (If Not Approved) – Change Manager will set the status to either Suspended or Declined
  - **Assignee** – Change Manager will assign the ticket to the person who is responsible to make sure the change is implemented
  - **History** – Change Manager will update History with an explanation
  - **Automatic Notification Assignee** – Upon save with a status of Suspended or Declined, the assignee will be sent an email notifying them that the change request has been suspended or declined
  - **Manual Notification Customer** –Service Owner or assignee contacts the customer to let them know of the decision to Suspend or Decline the change and the reason why
3. **Implementation Complete** – when the assignee completes implementation of the change, the assignee will:
- **Status** – Set the status to Implemented
  - **Actual Implementation** – Enter the actual implementation date and time
  - **Automatic Notification Customer** -- Upon save with a status of Implemented the customer will be sent an email notifying them that the change has been implemented within production and the change request has been closed



# Processing the Emergency Change Ticket (iSupport)

## 1. Initiation

- **Customer:** Select the appropriate customer
- **Type:** Set the change type to Emergency
- **Status:** Set the status to Scheduled
- **Scheduled Implementation Start:** Enter a Scheduled Implementation date and time
- **Scheduled Implementation End:** Enter a due date and time (represents implementation process end date and time)
- **Assignee:** Set the assignee to be the Change Manager
- **Others to Notify (tab):** Add any other contacts who should be notified

The screenshot displays the iSupport Change Management interface. The top navigation bar includes 'Change', 'New', and 'View' tabs. Below this is a toolbar with icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Counters', 'Add History', 'Categorize', 'Schedule', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Sign'. The main form is divided into several sections:

- Customer:** A dropdown menu is set to 'Leon Nguyen' (C Information Support Services, 4089247314, leon.nguyen@sjsu.edu).
- Status:** A dropdown menu is set to 'Scheduled'.
- Assignee:** A dropdown menu is set to 'Change Manager'.
- Category:** A dropdown menu is set to 'Change Management ITS Change Request'.
- Change Category:** A dropdown menu is set to 'Select'.
- Risk Category:** A dropdown menu is set to 'Select'.
- Type:** A dropdown menu is set to 'Emergency'.
- Rule Group:** Set to 'SJSU - ITS'.
- Impact:** A dropdown menu is set to 'Select'.
- Urgency:** A dropdown menu is set to 'Select'.
- Priority:** A dropdown menu is set to 'Low'.
- Number:** Set to 'E4IC51146A'.
- Created Date:** Set to '4/18/2014 11:40:03 AM'.
- Author:** Set to 'Ryan Campbell'.
- Closed Date:** Set to 'Closed'.
- Closed By:** Set to 'Closed'.

Below the main form, there are tabs for 'Details', 'More Details', 'History', 'Others to Notify', 'Associated Work Items', and 'Attachments'. The 'Others to Notify' tab is currently selected. The 'Reason' field contains 'Support ending for iSupport 12.6'. The 'Description' field contains 'Update iSupport 12.6 to 12.7'. The 'Scheduled Implement Start' date is set to '4/23/2014 12:00 AM'. The 'Scheduled Implement End' date is set to '4/30/2014 12:00 AM'. The 'Actual Implementation' and 'Review Date' fields are empty.

## 2. Review and Authorize

- **Status (If Approved):**  
Change Manager will set the status to Authorized
  - **Assignee:** Change Manager will assign the ticket to the person who is responsible to make sure the change is implemented
  - **Scheduled Implementation Start:**  
When **appropriate**, the Change Manager will modify the scheduled implementation date and time
  - **History:** Change Manager will update History with an explanation of the reasons for the status and/or schedule change
- 
- **Status:** If Not Authorized, Change Manager will set the status to either Suspended or Declined
  - **History:** Change Manager will update History with an explanation of the reasons for the suspension or declination

The screenshot displays the Change Manager interface for a specific change request. The top navigation bar includes tabs for 'Change', 'New', and 'View'. Below this, a toolbar contains icons for 'Save', 'Save And Close', 'Print', 'Font Size', 'Counters', 'Add History', 'Categorize', 'Schedule', 'Route', 'Customer', 'Templates', 'Hierarchy', and 'Sign'. The main content area is divided into several sections. On the left, the 'Customer' section shows the profile of Leon Nguyen, an Information Support Services employee with ID 4089247314. The central 'Status' section shows a dropdown menu with 'Authorized' selected, and the 'Assignee' field is set to Ryan Campbell. Other fields include 'Impact' (Select), 'Urgency' (Select), 'Priority' (Low), 'Number' (E4IC51146A), 'Created Date' (4/18/2014 11:40:03 AM), 'Author' (Ryan Campbell), 'Closed Date', and 'Closed By'. On the right, the 'Category' section shows 'Change Management' and 'ITS Change Request'. Below this, there are dropdowns for 'Change Category' (Select), 'Risk Category' (Select), 'Type' (Emergency), and 'Rule Group' (SJSU - ITS). The bottom section contains tabs for 'Details', 'More Details', 'History', 'Others to Notify', 'Associated Work Items', and 'Attachments'. The 'Reason' section shows 'Support ending for iSupport 12.6'. The 'Description' section shows 'Update iSupport 12.6 to 12.7'. The 'Scheduled' section shows 'Scheduled Implement Start' (4/23/2014 12:00 AM), 'Scheduled Implement End' (4/30/2014 12:00 AM), 'Actual Implementation', and 'Review Date'.

### 3. Implementation Complete

- **Status:** Set the status to Implemented
- **Actual Implementation:** Enter the actual implementation date and time
- **Results:** Describe the results of the implementation

The screenshot displays a web-based Change Management system interface. At the top, there is a navigation bar with tabs for 'Change', 'New', and 'View'. Below this is a toolbar with various icons for actions like Save, Save And Close, Print, Font Size, Counters, Add History, Categorize, Schedule, Route, Customer, Templates, Hierarchy, and Sign.

The main content area is divided into several sections:

- Customer:** A search bar with 'Leon Nguyen' entered. Below it, a profile card for 'Leon Nguyen' (C Information Support Services, 4089247314, leon.nguyen@sjsu.edu) is shown.
- Status:** A dropdown menu is set to 'Implemented'. Other fields include Impact (Select), Urgency (Select), Priority (Low), and Number (E4IC51146A).
- Assignee:** Ryan Campbell.
- Created Date:** 4/18/2014 11:40:03 AM.
- Author:** Ryan Campbell.
- Closed Date:** (empty).
- Closed By:** (empty).
- Category:** Change Management.
- ITS Change Request:** (empty).
- Change Category:** Select.
- Risk Category:** Select.
- Type:** Emergency.
- Rule Group:** SJSU - ITS.

Below the status section, there are tabs for 'Details', 'More Details', 'History', 'Others to Notify', 'Associated Work Items', and 'Attachments'. The 'Details' tab is active, showing the following information:

- Reason:** Support ending for iSupport 12.6.
- Description:** Update iSupport 12.6 to 12.7.
- Scheduled Implement Start:** 4/23/2014 12:00 AM.
- Scheduled Implement End:** 4/30/2014 12:00 AM.
- Actual Implementation:** 4/24/2014 12:00 AM (circled in red).
- Review Date:** (empty).

At the bottom, there is a 'Results' section with a text box containing the text: 'Updated completed successfully, and testing showed no errors'.