

Service Desk Change Management System

RFC submission process

CALIFORNIA STATE
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E A S T B A Y

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Overview

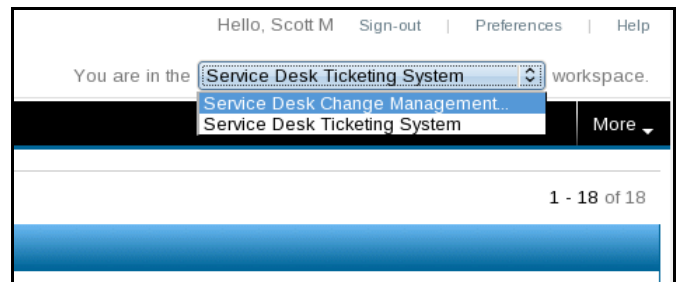
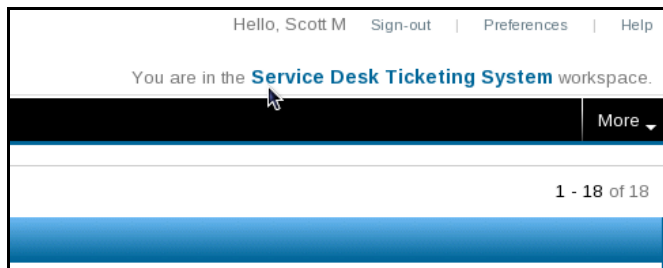
Information and Technology Services has moved its Request for Change (RFC) submission process to the Service Desk, via the *Service Desk Change Management System*. To complete and submit an RFC in the system, follow the process in this document.

Getting to the Service Desk Change Management System

To get to the CSUEB Service Desk Change Management System, browse to the Service Desk at <http://servicedesk.csueastbay.edu> and log in with your NetID and password.

The general layout of this screen should already be familiar to users of the Service Desk Ticketing System.

To access the Service Desk Change Management System, click the **Service Desk Ticketing System** link in the top right corner of the screen and select **Service Desk Change Management System** from the drop down as shown below.



The general layout of the screen will stay the same, but the specific options on the top will change. You will now see an option for creating a new RFC.

In the middle of the screen is a listing of any RFCs that currently include you as an assignee. See below for an example. As in the Ticketing System, this view can be changed at any time to display RFCs filtered by other preset or customized criteria.

Number	Request	Assignees	Last Edited On	Status	Short Description	Last Updated
148	RFC	Rich Avila...	03/30/2010	CAB Approved	Replace bad disk in 3Par SAN storage array Approved - Thuthu Tonnu, John Chemiss, Swapna Budidha, Terry Smith, Thomas Dixon, Scott McDaniel, Matt Collins, Dan Bellone [more...]	1 day 16 hrs ago
130	RFC	Rich Avila...	03/30/2010	CAB Approved	Test RAM on Crosby Approved - Thuthu Tonnu, John Chemiss, Swapna Budidha, Terry Smith, Thomas Dixon, Scott McDaniel [more...]	1 day 17 hrs ago
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69	RFC	Scott McDaniel	03/15/2010	Withdrawn	Please be descriptive here, for the sake of those outsid... [no Description entered] [more...]	17 days ago
53	RFC	Rich Avila...	03/15/2010	Withdrawn	Email List Manager - reconfigure to relay mail to pcs.cs... NOC has asked that I leave the list manager relaying mail off of the Ironports until they are decommissioned. [more...]	17 days ago
20	RFC	Rich Avila...	12/08/2009	Withdrawn	Onstor - mirror Blackboard prod Content System to test C... Please approve this with High priority. [more...]	3 mos 23 days ago

Creating a new RFC

New RFCs may be submitted by ITS representatives or customers (*Change Requester*), but the request must be approved by an ITS MPP.

To create a new RFC, click the **Create RFC** button at the top of the screen, much as you would do to create a new ticket in the Ticketing System. A new window will pop up with a blank RFC form. A description of each section follows, along with guidance on filling each section out.

Note that until you send the RFC to Management for approval, you can edit and submit it any number of times. The only requirement is that items in **red** must be filled in the first time around.

A note about RFC layouts: The default layout for RFCs in the Change Management System is **Tabs**, just as it is in the Ticketing System. Most users find it easier to create and view RFCs in the **Expand/Collapse** view, where all sections are presented in a contiguous page view. For information on how to change this default view, see [Appendix A. Changing your Interface Style](#) at the end of this document.

New RFC -- General Information

Short Description *

As with Tickets, this is the description seen in the RFC list. Please be descriptive enough for someone outside of your department to recognize it. For example, "COGNOS - Switch admin user account" is helpful, while "DB RFC 024" is not.

Request *

RFC is the only choice.

Status *

The RFC will default to **New**. Leave the status as **New** until you are ready to send it to ITS Management for approval.

NetID

Enter your NetID and hit return. Your name will be automatically looked up.

First Name & Last Name *

These fields will be automatically populated when you enter your NetID into the box above.

Description

Complete Description

This is an overall description of the change to be made. This field is analogous to the first section of the previous paper RFC form.

RFC Information

Type of RFC

RFCs submitted should be **Normal**.

The **Emergency** type is reserved for *{See CM Criteria - to be done}*.

The **Standard** type is only reserved for RFCs that have been previously designated so by the Change Advisory Board.

Manager

Select your manager from the drop down list. Note that this is the only other required field.

Special Circumstance

Special Circumstance

Yes or No

Describe Special Circumstance

If yes, use this field for description or justification of RFCs outside of the norm. (Emergency, very short date, or time outside of normal maintenance window).

Proposed Implementation Schedule

Start Date & Time, End Date & Time

If the change requires multiple discrete tasks, include start of first task and end of last. In the case of such a schedule, please explain it in further detail in the "Explanation of Schedule" section.

Within a scheduled maintenance window?

For certain activities, there are scheduled maintenance windows previously agreed upon by management and the CAB. This section only refers to those maintenance windows.

Explanation of schedule - Specify which maintenance window, or explain why it needs to occur outside of one

Specify the scheduled maintenance window that fits the above requirement, or justification of why it needs to occur outside of one. This may include some of the information provided under "Special Circumstance".

Testing

Testing completed?

Yes, No or Other. Use "No" when testing is not yet complete. "Other" here may be used to cover situations where testing is not possible or feasible, but should be a rare exception.

Test completion date

The date that testing was or will be completed. This may be set to a date in the future if above is set to "No".

Testing completed - If Other, please explain

An explanation of why above is set to "Other" or "No". Please be aware that untested or untestable changes are heavily scrutinized. Such reasons should be explained in good detail here.

Test plan - if attached, please indicate

An explanation of the test plan, including detailed testing steps. Remember here that **testing** includes verifying *beforehand* that the change will produce the intended results and do no harm, as well as verifying *afterward* that the change produced the intended result and did no harm.

The former would normally include making the change on a test system. The latter, verifying that the health of the production system after the change.

Demonstrating adequate testing is a crucial aspect of getting an RFC approved.

Are test scripts reusable?

Yes or No. This essentially is asking whether the testing methods are well documented, and can be applied to future changes of this type.

Restoration plan, in the event that the change does not work?

Details of restoration plan

An explanation of how you will undo the change if it produces unintended or undesired results. Include any downtime that would be required. Be aware that adequately describing a reliable restoration plan is also crucial in getting an RFC approved.

1. Who RAISED the change?

Requestor information

Who initiated the process of making this change? The person could likely not be the person making the change. This could be the manager who decided the change must be made, or another staff member who made a request for a service.

2. What is the REASON for the change?

Reason check boxes

Choose the box or boxes most appropriate.

Details of reason for change

Explain why the change is being made.

3. What is the RETURN required from the change?

Details for return from the change

Explain what the change will accomplish.

4. What are the RISKS involved in the change?

Impact

If the change were to produce an unintended negative effect, would the impact to ITS services as a whole be high or low?

For example, if the majority of the CSUEB community relies on the service that is being changed, that change would qualify as “High Impact”. If a minor process relies on the service, that change would qualify as “Low Impact”.

Remember that the Relationship between devices and services comes heavily into play. A mission-critical application that relies on the service being changed would qualify the impact as “High” as well.

See [CSUEB Change Management Policy documentation](#) for more information.

Probability

What is the likelihood that the change could produce an unintended, negative effect? For example, a change that has been performed many times without an error would qualify as “Low Probability”. An untested change should likely be characterized as “High Probability”.

Risk Assessment Category

This field is automatically calculated, based on the previous two choices.

Actual Risk

This is the negative effect on production services that could occur as a result of making the change, and the likelihood of those negative effects. This is NOT the downside of not making the change. (e.g. “If the change isn't made, we won't have the new feature”)

Note that this is “reasonably possible” effect. Mentioning how the testing and restoration plans mitigate risk is also helpful.

5. What RESOURCES are required to deliver the change?

Staff Resources

The people required to build, test and implement the change. These people will be listed in section #6 below as well. Testers can include functional users who need to test the system after the change.

System Resources

The devices, software, or other tools required to make the change.

6. Who is RESPONSIBLE for the build, test and implementation of the change?

Responsible to Build

The people responsible for all work done up to the actual implementation of the change.

Responsible to Test

Those responsible for the testing of the change beforehand, as well as afterward. See the "Testing" section above for more information.

Responsible to Implement

The people responsible for actually implementing the change.

7. What is the RELATIONSHIP between this change and other changes?

Between this RFC and other RFCs submitted

List any RFCs that depend on this change, as well as any that it depends on. Include details of that dependency.

If the RFC is for server/s, list all applications on the server or potentially affected.

Provide the requested information. Try to accurately assess the interconnectedness between the device being changed and all devices or application which depend on it. This may require communicating with people in other groups or departments.

If the RFC is for a service, list server/s and other applications on server/s and any applications potentially affected.

Provide the requested information. Try to accurately assess the interconnectedness between the service being changed and all services or applications which depend on it. This may require communicating with people in other groups or departments.

CI's Impacted

Information will be forthcoming on the use of this section.

Relationship to other changes or CIs

Information will be forthcoming on the use of this section.

Submitting a new RFC

When you are done filling out the RFC, click the Submit button at the top or bottom of the form. This will save your work. The first time a new RFC is saved, the system will also assign it a number and fill in any automatically calculated fields. As previously mentioned, as long as you leave the Status as **New**, you can continue to edit and submit the RFC to save it. The newly created RFC will now appear in your RFC list on the Service Desk Change Management System home page as shown below:

Number	Request	Assignees	Last Edited On	Status	Short Description	Last Updated	
148	RFC	Rich Avila...	03/30/2010	CAB Approved	Replace bad disk in 3Par SAN storage array	Approved - Thuthu Tonnu, John Chemiss, Swapna Budidha, Terry Smith, Thomas Dixon, Scott McDaniel, Matt Collins, Dan Bellone [more...]	1 day 16 hrs ago
130	RFC	Rich Avila...	04/01/2010	CAB Approved	Test RAM on Crosby	[more...]	now
90	RFC	Rich Avila...	03/02/2010	CAB Approved	Replace legacy load balancer unit with new unit	Approved - Thuthu Tonnu, Marie Kemper, Thomas Dixon, Dan Bellone, Scott McDaniel, Matt Collins [more...]	29 days ago
69	RFC	Scott McDaniel	03/15/2010	Withdrawn	Please be descriptive here, for the sake of those outsid...	[no Description entered] [more...]	17 days ago
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20	RFC	Rich Avila...	12/08/2009	Withdrawn	Onstor - mirror Blackboard prod Content System to test C...	Please approve this with High priority. [more...]	3 mos 24 days ago

When you are ready for your manager to review your RFC, click the blue RFC description to open it in the edit pop-up window. Go to the **Status** drop down box at the top, and change the status to **Manager Pending**:

The screenshot shows the 'Status*' dropdown menu open in the edit form. The options listed are: CAB Approved, New, Manager Pending (highlighted in blue), Manager Hold, Manager Approved, Manager Rejected, CAB Pending, CAB Hold, CAB Approved, CAB Rejected, PIR, Withdrawn, and Completed.

If you would like your manager to be automatically notified via email that a change awaits their approval, click the **Assignees** button in the **Send Email To** section:

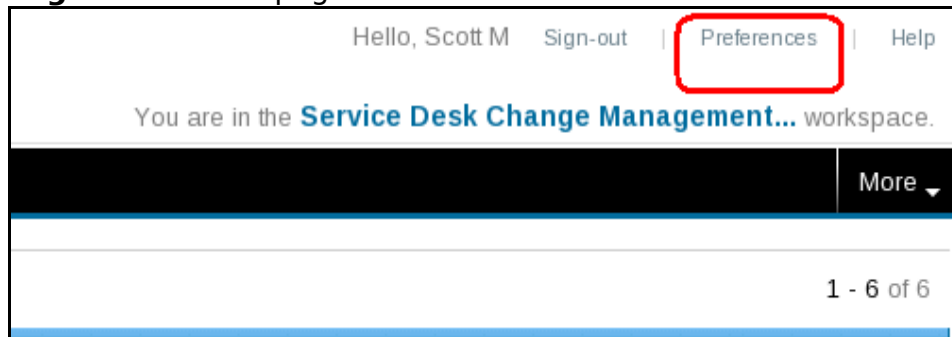
The screenshot shows the 'Send Email To' section with the 'Assignees' checkbox checked. There is also an 'Update RFC' button at the bottom right of the form.

Click **Submit** to save and send the RFC to your manager for review.

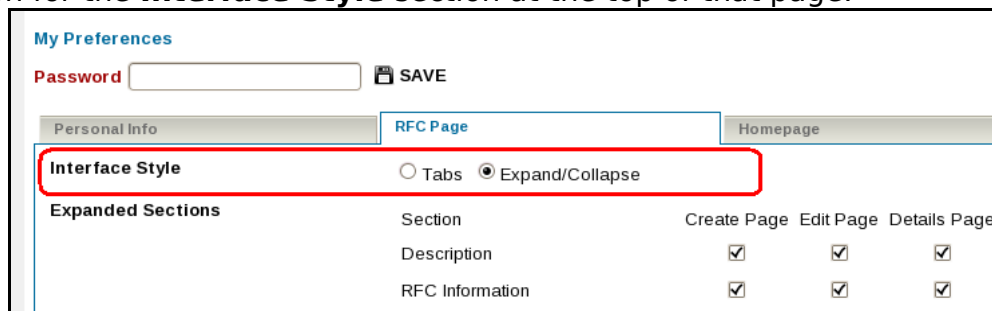
Appendix A. Changing your Interface Style

This section explains how to change your RFC editing layout from the **Tabs** view to the **Expand/Collapse** view. As stated before, many people find it easier to create and view RFCs in the **Expand/Collapse**, where all sections are presented in a contiguous page view. Note that this view change is completely optional and depends on the user's preference.

Click on the **Preferences** link at the top right corner of the **Service Desk Change Management** home page:



Click the **RFC Page** tab at the top of the screen. Then click the **Expand/Collapse** radio button for the **Interface Style** section at the top of that page:



To save your changes, enter your password at the top and click **save**. Your password is the same NetID password used to log in to the Service Desk system:



At any time, the Interface Style may be changed back to the **Tabs** view by following the process above.