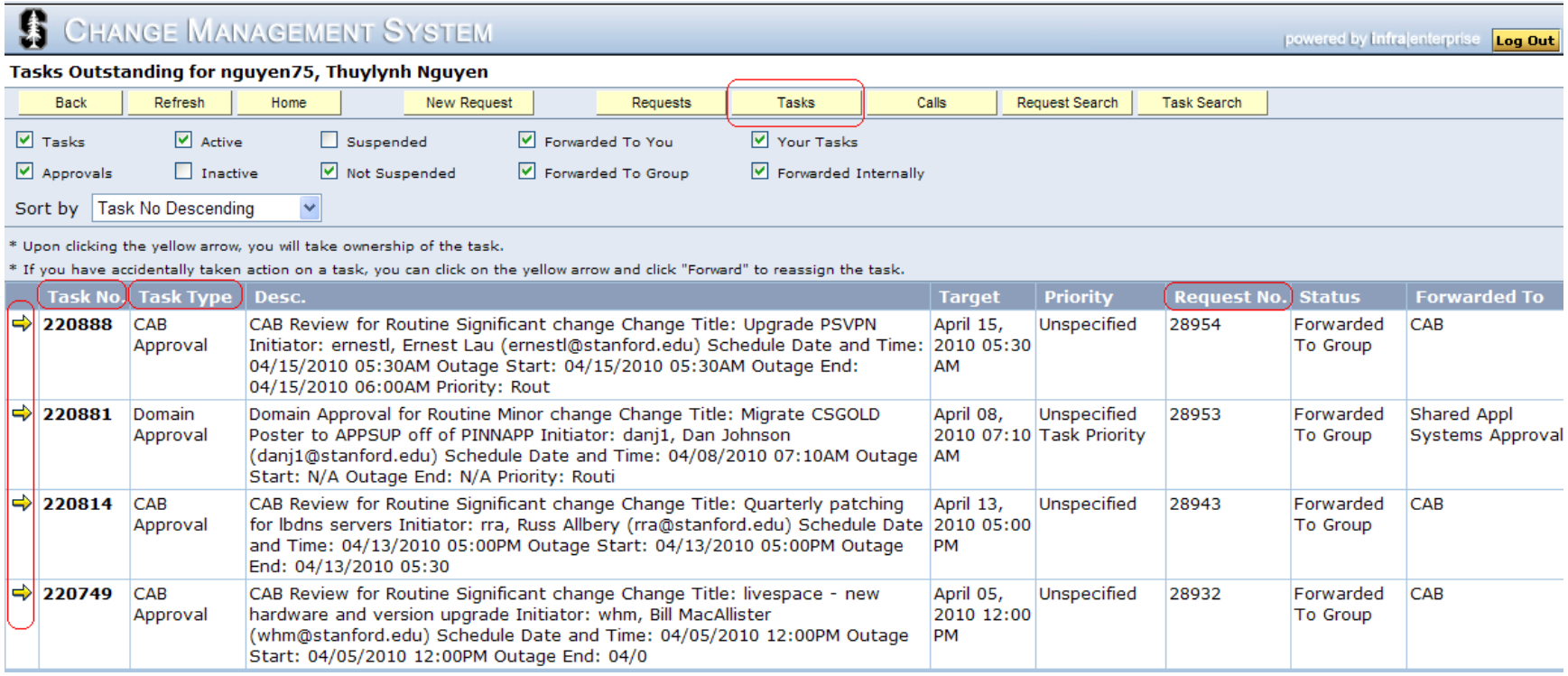
Quick “How-to” Q&A for Infra Enterprise Change Management Application

1. How do I view and complete the tasks pending my action?
2. How do I view and properly close the requests initiated by me?
3. How do I see pending domain approvals for my particular CMR?
4. How do I see a list of the domain approvers for my ticket?
5. How do I modify a request that was already submitted? (Same as question 6)
6. How do I cancel a submitted ticket, with the intention to clone it for resubmission?
7. How do I cancel a submitted ticket, without cloning it for resubmission?
8. How do I clone a request?
9. How do I search for a specific request?
10. How do I search for tasks of a specific request?

Q1. How do I view and complete the tasks that are pending my action?

1. Log into Infra Enterprise Change Management System
2. Click the "Tasks" button to view all pending task(s) sitting in your queue awaiting your action. Each task (i.e. each row of record) should begin with a yellow arrow ➪ and have at least the task number, task type, and request number. (See figure 1 for sample of pending tasks; you might have different tasks but in a similar format).
3. To take action on a particular task of a change request, click the yellow arrow ➪ on the far left of that row
4. The next screen would give you the option to "Complete" the task by approving or rejecting it.

Note: Clicking the yellow arrow also means that you now own the task and nobody else can take action on that task but you. So, make sure you thoroughly complete the task once you click that yellow arrow. Otherwise, the task will be sitting there forever pending your action.



	Task No	Task Type	Desc.	Target	Priority	Request No.	Status	Forwarded To
➪	220888	CAB Approval	CAB Review for Routine Significant change Change Title: Upgrade PSVPN Initiator: ernestl, Ernest Lau (ernestl@stanford.edu) Schedule Date and Time: 04/15/2010 05:30AM Outage Start: 04/15/2010 05:30AM Outage End: 04/15/2010 06:00AM Priority: Rout	April 15, 2010 05:30 AM	Unspecified	28954	Forwarded To Group	CAB
➪	220881	Domain Approval	Domain Approval for Routine Minor change Change Title: Migrate CSGOLD Poster to APPSUP off of PINNAPP Initiator: danj1, Dan Johnson (danj1@stanford.edu) Schedule Date and Time: 04/08/2010 07:10AM Outage Start: N/A Outage End: N/A Priority: Routi	April 08, 2010 07:10 AM	Unspecified Task Priority	28953	Forwarded To Group	Shared Appl Systems Approval
➪	220814	CAB Approval	CAB Review for Routine Significant change Change Title: Quarterly patching for lbdns servers Initiator: rra, Russ Allbery (rra@stanford.edu) Schedule Date and Time: 04/13/2010 05:00PM Outage Start: 04/13/2010 05:00PM Outage End: 04/13/2010 05:30	April 13, 2010 05:00 PM	Unspecified	28943	Forwarded To Group	CAB
➪	220749	CAB Approval	CAB Review for Routine Significant change Change Title: livespace - new hardware and version upgrade Initiator: whm, Bill MacAllister (whm@stanford.edu) Schedule Date and Time: 04/05/2010 12:00PM Outage Start: 04/05/2010 12:00PM Outage End: 04/0	April 05, 2010 12:00 PM	Unspecified	28932	Forwarded To Group	CAB

Figure 1 – Sample tasks sitting in your queue pending your action

Q2. How do I view and properly close the tickets initiated by me?

Assumptions: All approval tasks of a CMR have occurred, and implementation tasks have been forwarded to you automatically by system.

1. Log into Infra Enterprise Change Management System
2. Click the "Requests" button to view all requests sitting in your queue pending your action. Each request (i.e. each row of record) should begin with a yellow arrow ➪ and have at least the request number, primary domain, scheduled date/time, request status. (See figure 2 for sample requests of an initiator being displayed).
3. To take action on a particular change request, click the yellow arrow ➪ on the far left of that row
4. The next screen would give you the option to "Complete" and close the ticket.

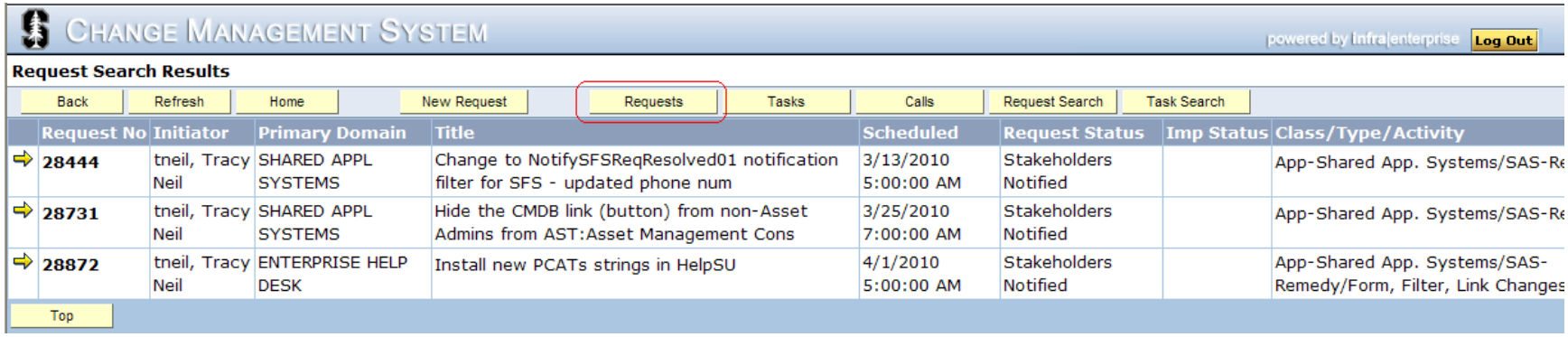


Figure 2 – Sample change requests sitting in your queue pending your action

Note:

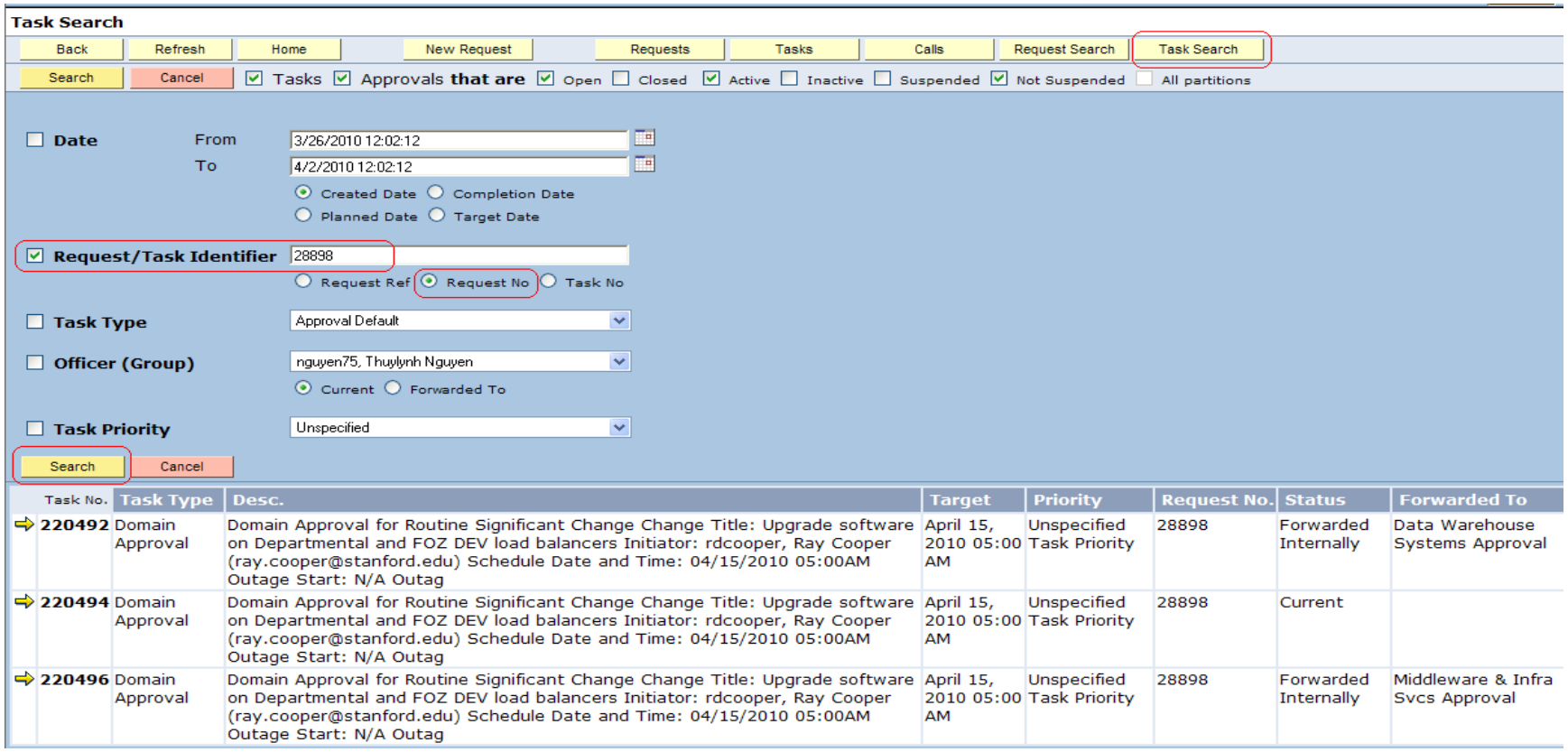
In order for you to properly close the ticket, all the task(s) associated with that ticket must be closed first.
If you are unable to close the ticket and receive the following message:

> *"**You are not authorized to take any actions on this Task since it is either inactive or closed. Please contact the Change Coordinator for further assistance."***

Then you might want to check if all tasks have been approved (see answer for question 3 "How I see pending domain approvals for my particular CMR?" A follow up with the domain approver(s) might be needed if you see any pending approvals for your ticket.

Q3. How do I see pending domain approvals for my particular CMRs?

1. Log into Infra Enterprise Change Management System
2. Do a task search by hitting the “Task Search” button. (You might need to hit “Task” button to see “Task Search” option.)
3. Input the request number (e.g. 28898) and select the radio button “Request No.”
4. Click Search; the search result will display all the task(s) pending either approvals from particular domain groups or actions from certain people.



Task No.	Task Type	Desc.	Target	Priority	Request No.	Status	Forwarded To
220492	Domain Approval	Domain Approval for Routine Significant Change Change Title: Upgrade software on Departmental and FOZ DEV load balancers Initiator: rdcooper, Ray Cooper (ray.cooper@stanford.edu) Schedule Date and Time: 04/15/2010 05:00AM Outage Start: N/A Outag	April 15, 2010 05:00 AM	Unspecified Task Priority	28898	Forwarded Internally	Data Warehouse Systems Approval
220494	Domain Approval	Domain Approval for Routine Significant Change Change Title: Upgrade software on Departmental and FOZ DEV load balancers Initiator: rdcooper, Ray Cooper (ray.cooper@stanford.edu) Schedule Date and Time: 04/15/2010 05:00AM Outage Start: N/A Outag	April 15, 2010 05:00 AM	Unspecified Task Priority	28898	Current	
220496	Domain Approval	Domain Approval for Routine Significant Change Change Title: Upgrade software on Departmental and FOZ DEV load balancers Initiator: rdcooper, Ray Cooper (ray.cooper@stanford.edu) Schedule Date and Time: 04/15/2010 05:00AM Outage Start: N/A Outag	April 15, 2010 05:00 AM	Unspecified Task Priority	28898	Forwarded Internally	Middleware & Infra Svcs Approval

Figure 3 – Sample task search (by request number)

Q4. How do I know the approvers for my CMR?

The list of approvers for your domain/sub-domain groups can be found in the New Request form (as seen in figure 4).
This is the form you use when you open a change request.

1. Log into Infra Enterprise Change Management System
2. Click “New Request” button; it’ll bring up the new request form.
3. Specify the domain/sub-domain for your CMR once you get to half way of the form
4. Select “Approver”, and hit “Refresh List”
5. Remember to hit the “Refresh List” button!
6. Keep in mind that there might be multiple approvers for one domain group, but only one approval “signature” is needed per domain.

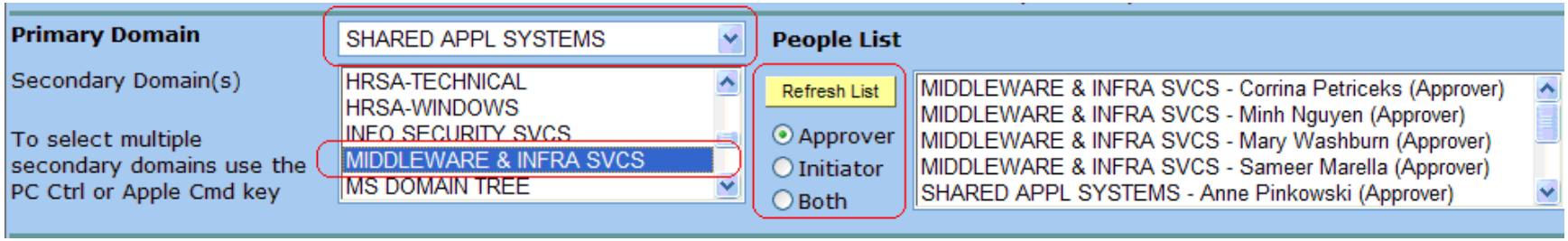


Figure 4 – Sample list of domain approvers

Q5. How do I modify a request that was already submitted?

Unfortunately, you can't. Infra application does not have this option. Once a CMR is submitted, it can't be modified. You'd have to resubmit the ticket and cancel the old one.

If you really need to modify the info you specified in a submitted CMR, the best way is to do "Cancel/Clone Request" as it saves you time from doing "copy and paste". What this does is that it would clone the "unwanted" request allowing you to make changes in the new request form, and then it would cancel that "unwanted" request afterward. As a result, the old request is cancelled, and the new CMR is created with a completely different request number.

1. Log into Infra Enterprise Change Management System
2. Do a "Request Search" by "Request No." or by "Initiator" criteria (figure 5)
3. Hit "Search"; the CMR of interest will be retrieved and displayed
4. Click the yellow arrow ➪ to get to the details of the CMR (figure 6)
5. Once there, you'll see the option "Cancel/Clone Request" (figure 7)
6. Follow the screen instructions to do the rest.

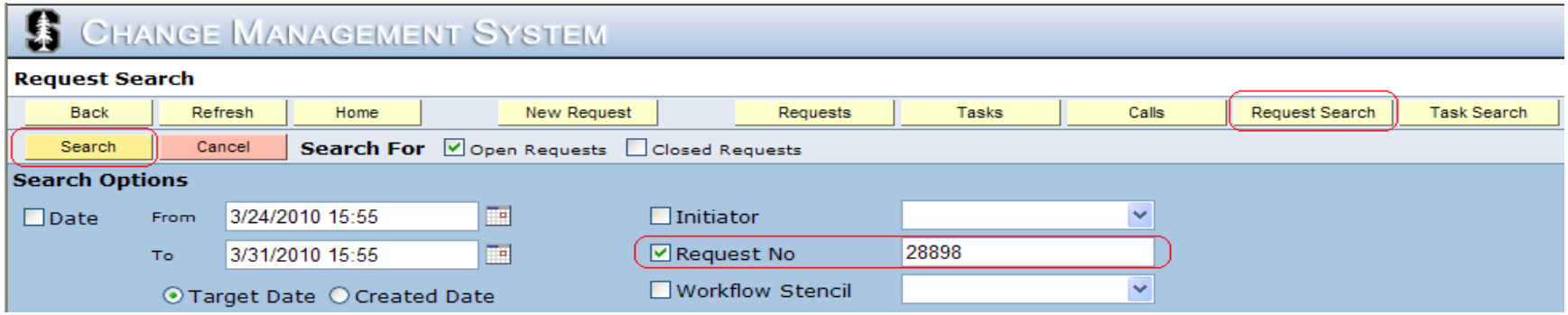


Figure 5 – Sample request search (by request number)

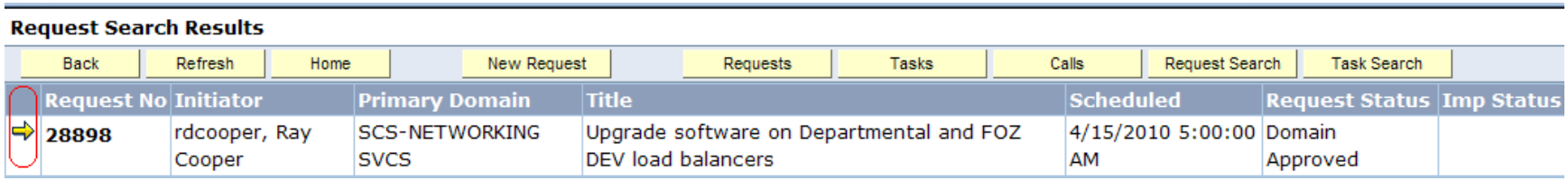


Figure 6 – Sample request search result

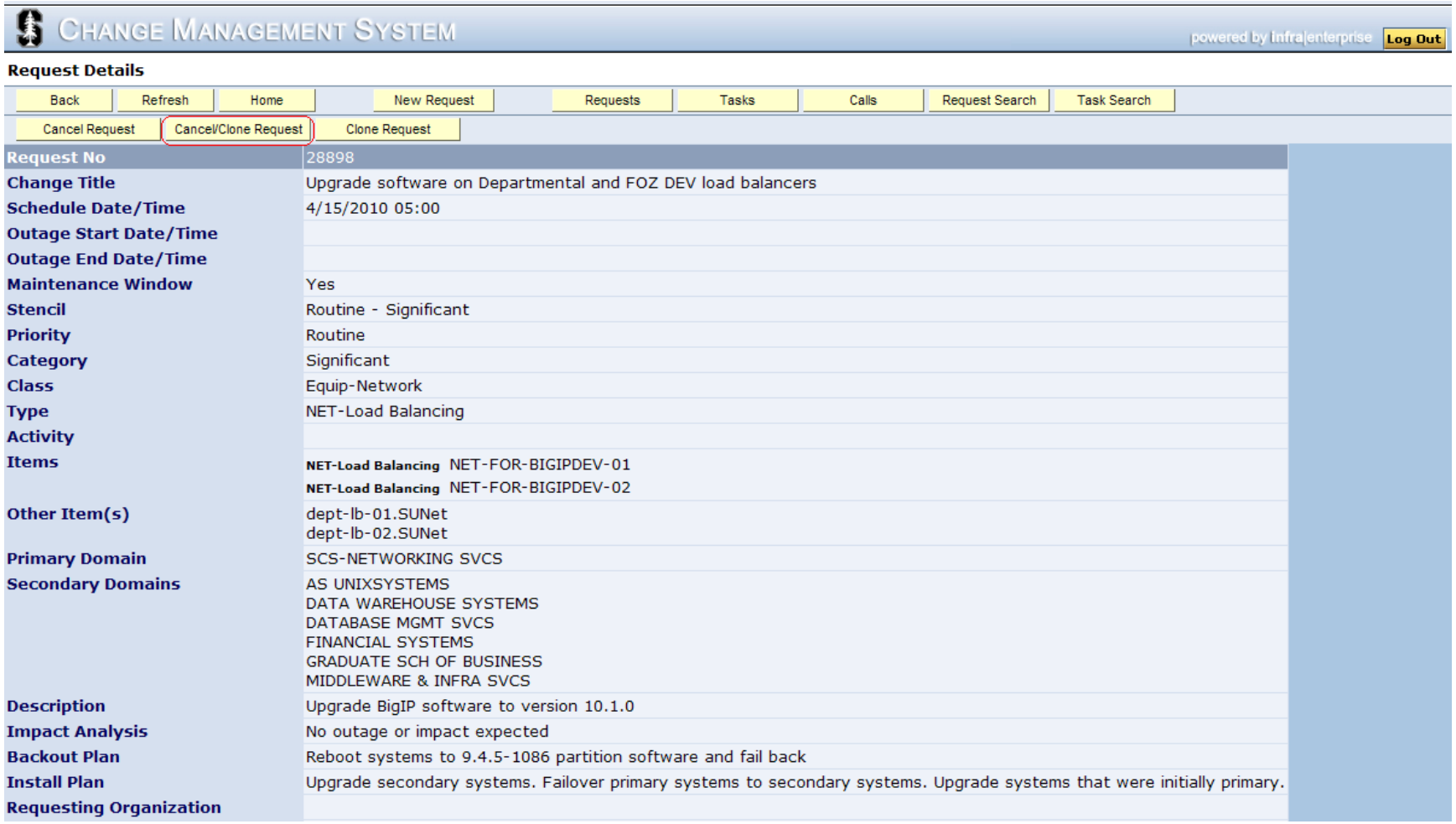


Figure 7 – Detail of a change request (with option to “Cancel/Clone Request”)

Q6. How do I cancel a submitted ticket, with the intention to clone it for resubmission?

1. Log into Infra Enterprise Change Management System
2. Do a “Request Search” by “Request No.” or by “Initiator” criteria (figure 8)
3. Hit “Search”; the CMR of interest will display
4. Click the yellow arrow ⇨ to get to the details of the CMR (figure 9)
5. Once there, click the “Cancel/Clone Request” button (figure 10)
6. Next, just follow the screen instructions to cancel and clone the request

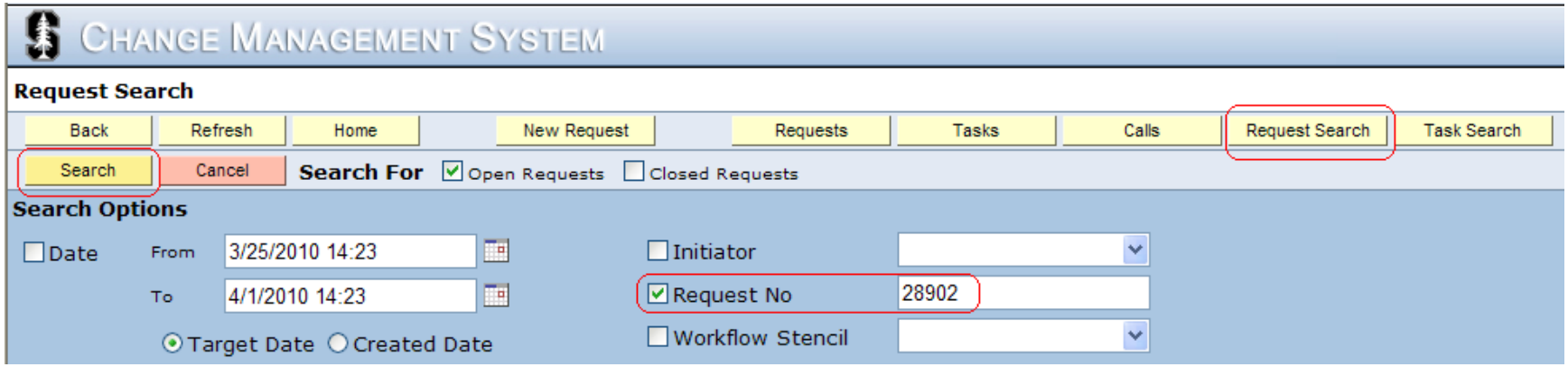


Figure 8 – Sample request search (by request number)

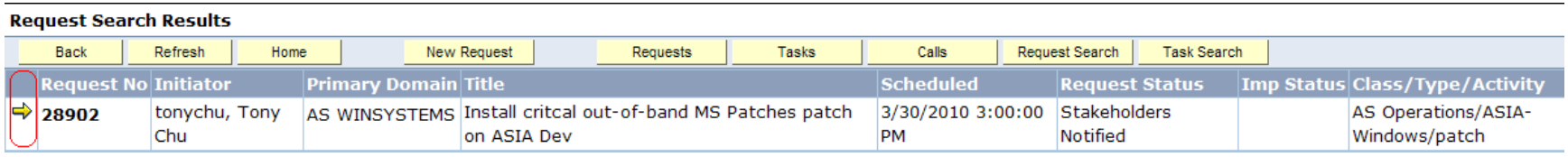


Figure 9 – Sample request search result

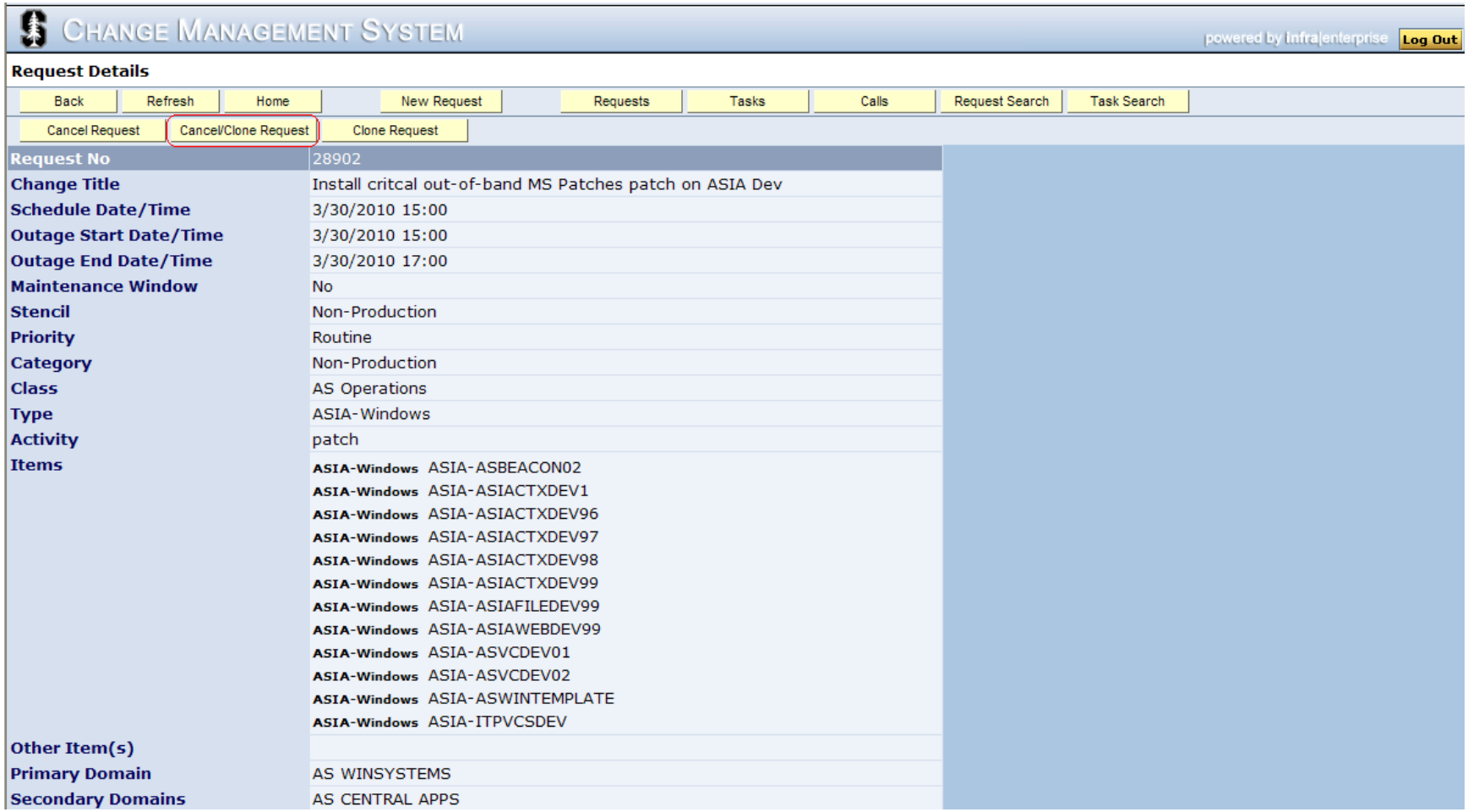


Figure 10 – Detail of a change request (with option to “Cancel/Clone Request”)

Q7. How do I cancel a submitted ticket, without cloning it for resubmission?

1. Log into Infra Enterprise Change Management System
2. Do a “Request Search” by “Request No.” or by “Initiator” criteria (figure 11)
3. Hit “Search”; the CMR of interest will display
4. Click the yellow arrow ⇨ to get to the details of the CMR (figure 12)
5. Once there, click the “Cancel Request” button (figure 13)
6. Next, just follow the screen instructions to cancel the request

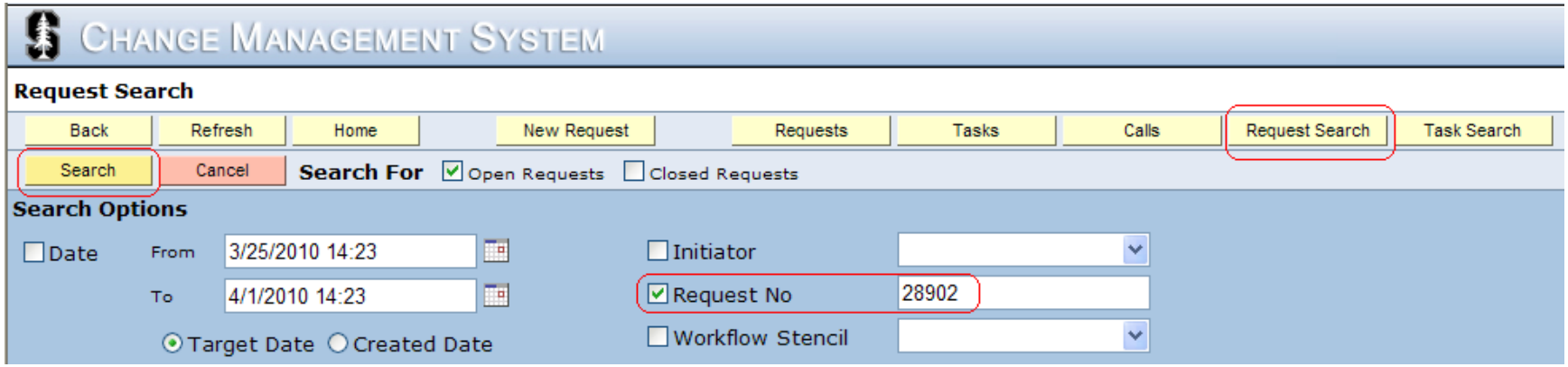


Figure 11 – Sample request search (by request number)

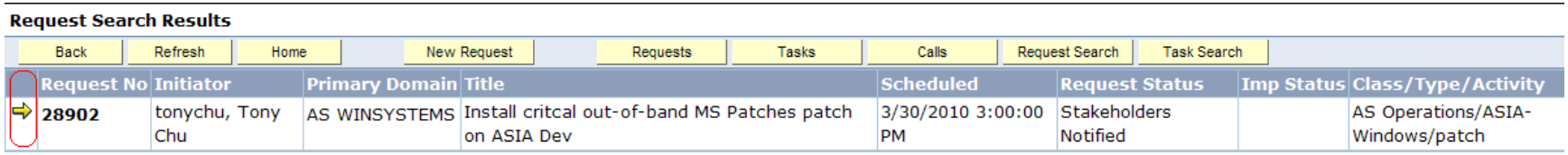


Figure 12 – Sample request search result

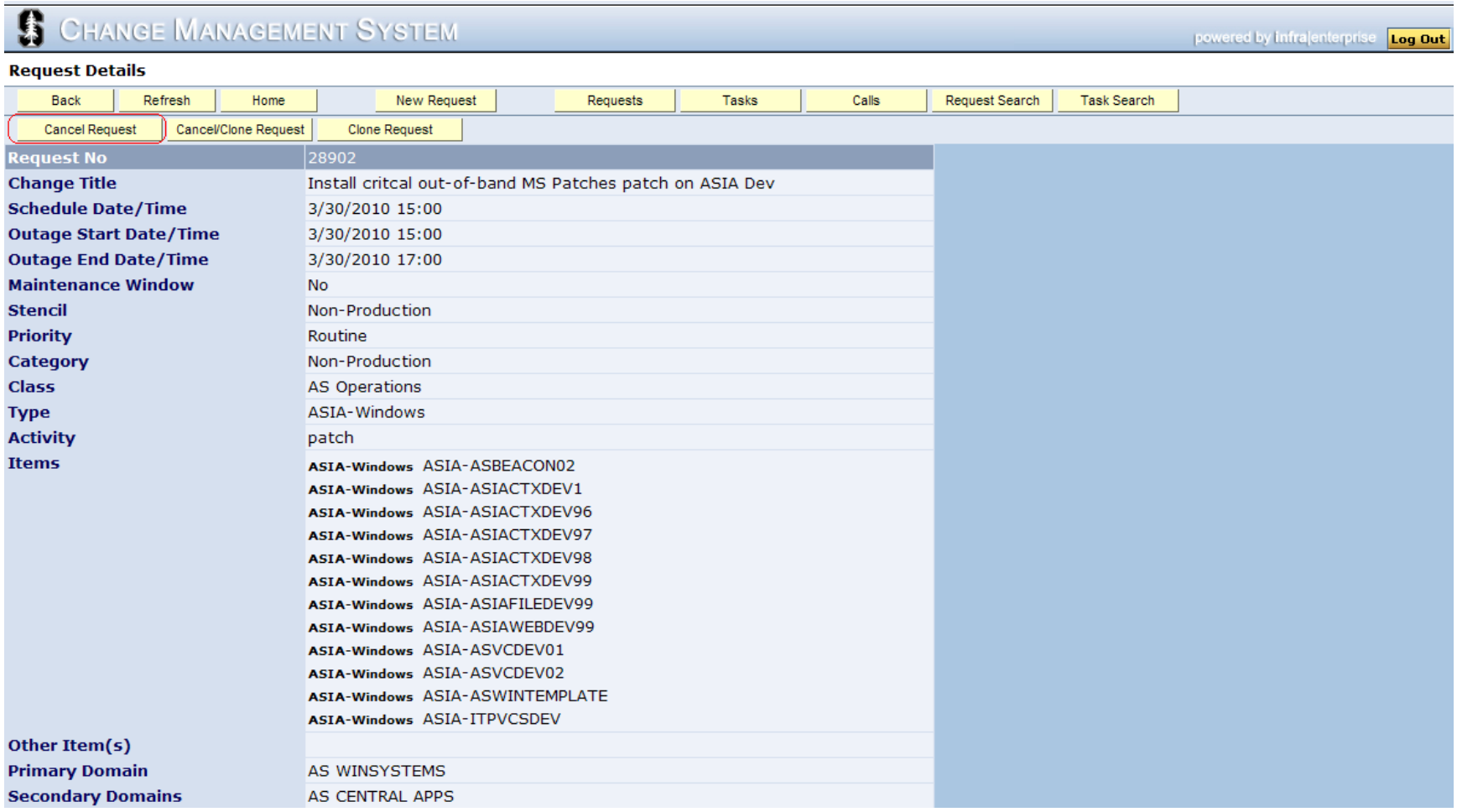


Figure 13 – Detail of a change request (with option to “Cancel Request”)

Q8. How do I clone a request?

1. Log into Infra Enterprise Change Management System
2. Do a “Request Search” by “Request No.” or by “Initiator” criteria
3. Make sure to also click checkbox “Closed Requests” if the CMR has been closed (figure 14)
4. Hit “Search”; the CMR of interest will display
5. Click the yellow arrow ⇨ to get to the details of the CMR (figure 15)
6. Once there, click the “Clone Request” button (figure 16)
7. Next, just follow the screen instructions to clone the request

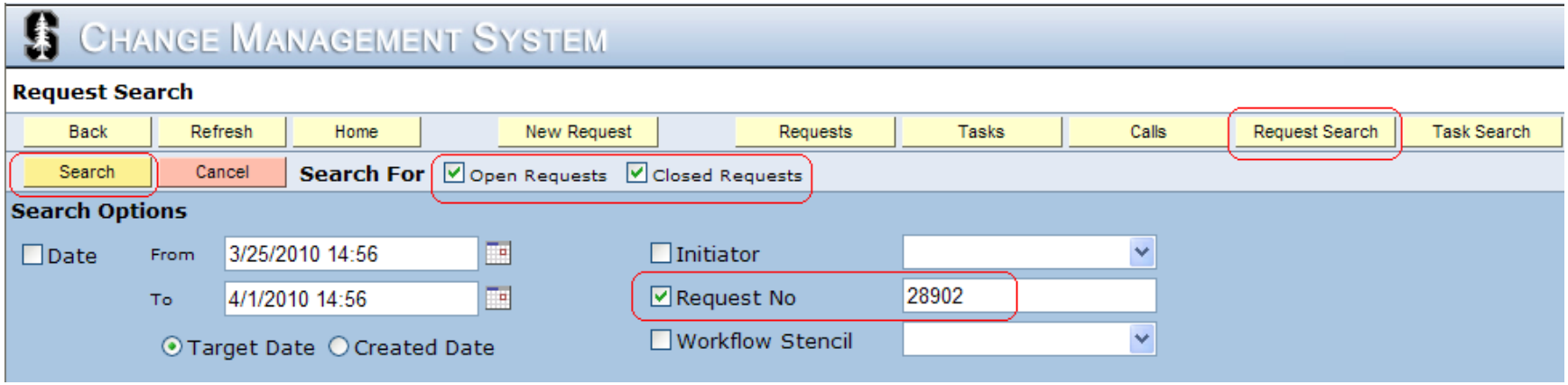


Figure 14 – Sample request search (by request number)

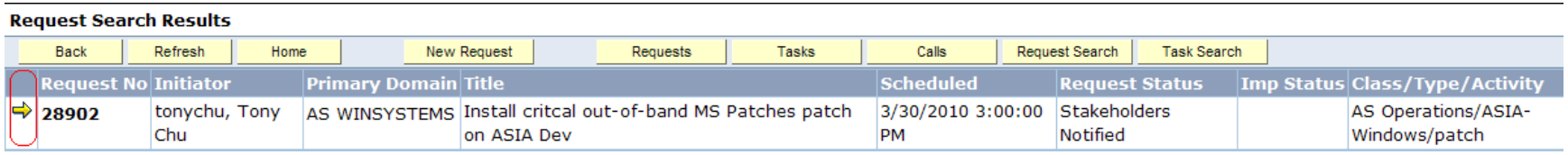


Figure 15 – Sample request search result

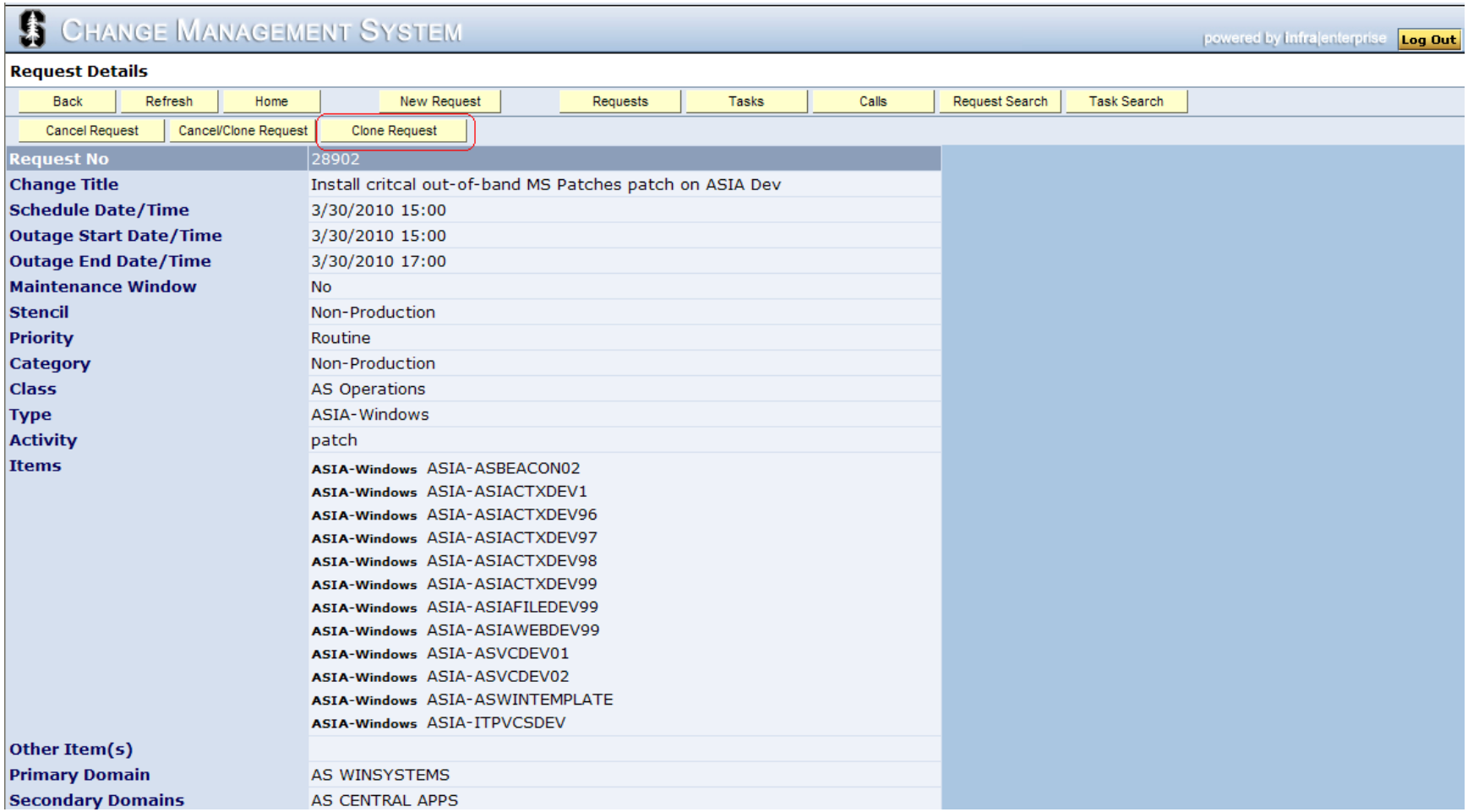


Figure 16 – Detail of a change request (with option to “Clone Request”)

Q9. How do I search for a specific request?

1. Log into Infra Enterprise Change Management System
2. Do a “Request Search” by “Request No.” or by “Initiator” criteria
3. Make sure to also click checkbox “Closed Requests” if the CMR has been closed (figure 17)
4. Hit “Search”; the CMR of interest will display
5. Click the yellow arrow ⇨ leading the request of interest to get to the details (figure 18)

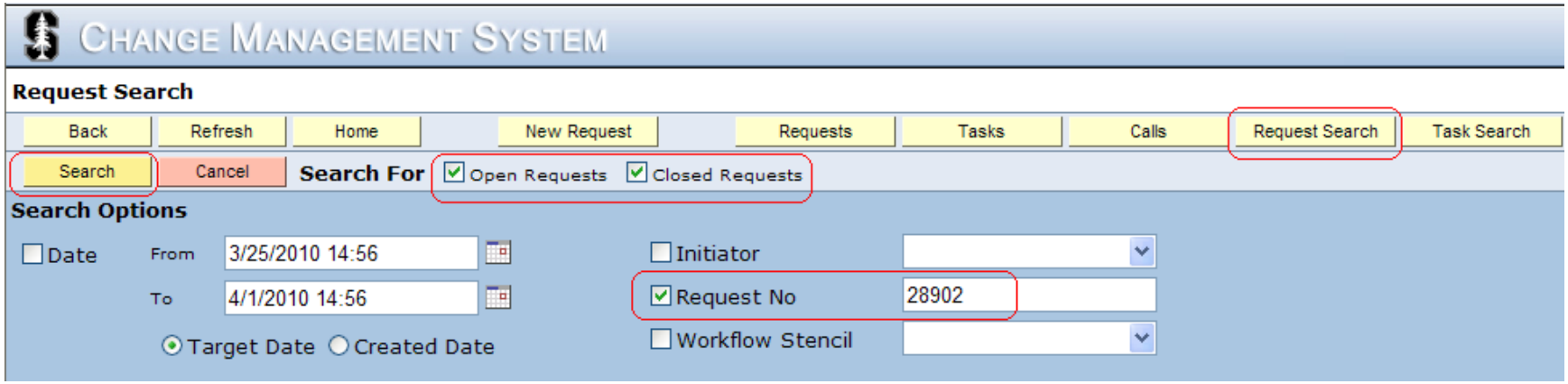


Figure 17 – Sample request search (by request number)

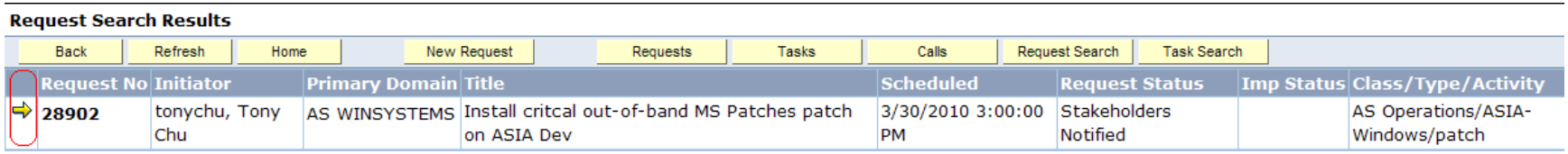
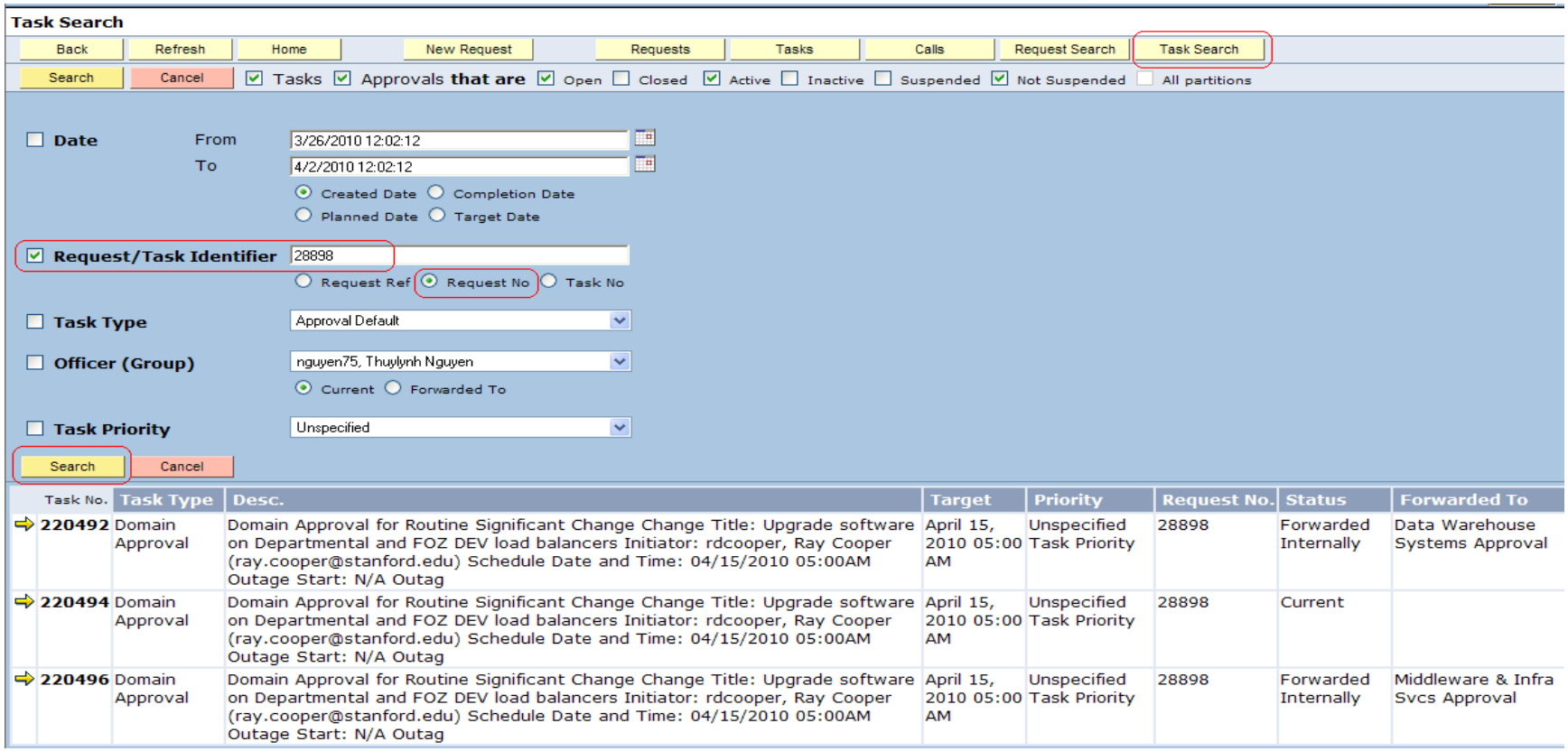


Figure 18 – Sample request search result

Q10. How do I search for tasks of a specific request?

1. Log into Infra Enterprise Change Management System
2. Do a task search by hitting the “Task Search” button. (You might need to hit “Task” button to see “Task Search” option.)
3. Input the request number (e.g. 28898) and select the radio button “Request No.” (or search by “Officer”)
4. Click Search; the search result will display all pending task(s) for that particular CMR.



Task No.	Task Type	Desc.	Target	Priority	Request No.	Status	Forwarded To
220492	Domain Approval	Domain Approval for Routine Significant Change Change Title: Upgrade software on Departmental and FOZ DEV load balancers Initiator: rdcooper, Ray Cooper (ray.cooper@stanford.edu) Schedule Date and Time: 04/15/2010 05:00AM Outage Start: N/A Outag	April 15, 2010 05:00 AM	Unspecified Task Priority	28898	Forwarded Internally	Data Warehouse Systems Approval
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Figure 19 – Sample task search (by request number)