



CHANGE TEMPLATES ESSENTIALS MAPP

PRESENTED BY: STRATACOM

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Change Template Essentials is simply a method of templating Change Requests to save time and to standardize Change Requests. You create a template, associate as many CI's as you want, and then can use that template to create consistent Change Requests VERY fast.

Many organizations do routine changes that require extensive change request documentation. Some examples include:

PATCHING – a large organization may do routine patching with dozens or hundreds of servers. Adding them all manually to a Change Request takes a great deal of time

UPGRADES – The same goes for upgrades to large groups of CI's, whether it's software or hardware.

COMPLIANCE – Many organizations have to make sure every Change Request is compliant with PCI, SOX, or other regulatory agencies. Building a new Change Request every time introduces risk – did the person creating the CR remember to include everything? Using a known Change Template insure consistency and compliance

WHAT THE MAPP INCLUDES AND DOES NOT INCLUDE

- New major Change Templates Object
- New Change Templates to Cis join table
- Provides Fields and Workflow to enable Change Templates
- Sample Change Form with the template fields
- Sample Dashboard to create changes using templates
- Does not alter your Change Workflow

APPLYING THE CHANGE TEMPLATES ESSENTIALS MAPP

The mApp may be applied to any system, however, it is recommended to apply this first to an out of box system (or a copy of your development system).

This mApp installs the basic forms and workflow to use the Change Templates.

Always remember to make a backup of your system before applying any mApp.

STEP BY STEP

- Apply mApp
- Click Agree to accept the terms
- Click Next through each of the Screens until you reach the Finish button
- Click Finish
- Publish blueprint (being sure to scan the blueprint)

USING THE CHANGE REQUEST TEMPLATES MAPP

POST INSTALL SETUP

- Decide what types of Changes and the corresponding forms the Change Templates should be enabled for. Typically for most organizations, this may be the Classify Phase for Normal and Standard Changes
- Create a New Blueprint. Navigate to the [StrataCom Template Example](#) form.
- Select the controls on this form and copy
- Change to the destination form and paste the copied controls.
- Re-arrange the fields as needed
- Repeat for any other desired forms
- Publish the blueprint

UPDATE SECURITY

As always, you should confirm that each of the necessary security groups have access to the new template field.

HOW THE CHANGE TEMPLATES WORK

These instructions assume that you have completed the post install setup on the previous page.

CREATE A CHANGE USING A CHANGE TEMPLATE

- Complete the Requestor. The Change Template field will not be visible until you have selected a requestor.
- Select a Change Template. This will automatically complete a number of the Change fields
- Optionally you can use the Add all template Cis to copy and link CI's which have been linked to this template.

CREATE A NEW CHANGE TEMPLATE

- From the New Menu, select Change Template
- Provide a Template Name (Required)
- Provide a Change Type (Required)
- Complete other template fields as required/desired
- Associate any CI's with this Change Template that can be loaded into the change

CREATE A CHANGE USING THE DASHBOARD

There is a Change Template dashboard with a Change Template dashboard on it. This will allow you to present a list of Change Templates and create a change right from the dashboard.

The dashboard shows two different ways to implement this. Go try it.

IDEAS TO BUILD ON

The Change Template Essentials is just that, essentials to get your feet wet and provide you with basic functionality. You could build in functionality that:

- Limit changes to specific teams or users
- Add more Change fields to the Change Templates table/form (Don't forget the workflow)

Thank You for choosing the StrataCom Change Templates Essentials mApp. We hope you find it adds value to your Cherwell solution. If you need additional training or support for this mApp please contact Laura Walker at lwalker@stratacominc.com