HelpMatics™

Service Management System

HelpMatics™ Change

Manual

1 Overview of HelpMatics™ Change

1.1 Introduction

Changes are part of life. In particular of IT life. Changes to the IT infrastructure and its components have, however, to be made in a planned, organized and controlled manner to minimize disruptive impacts on the operation. That's the job of Change Management. To provide a tool to support this - that's the job of HelpMatics™ Change.

HelpMatics™ Change portrays every individual step – from submitting a Request for Change (RFC) by authorized users to completing and documenting the Change. Prefabricated templates, input masks, communication templates etc. conveniently accompany you through the whole process. The procedures and wording used by HelpMatics™ Change are based on the Change Management process according to ITIL. The predefined processes can, however, be easily adapted to the specific requirements of your company.

1.2 Overview of features

In the following the services and functions offered by HelpMatics™ Change are listed:

- RFCs can be submitted via various definable web portals.
- Creation of requests for change (RFC) by authorized users via preconfigured templates.
- Classification of RFCs including prioritization and categorization
- Display of status and priority by colored icons
- Assignment of roles and process editors/process teams
- Prefabricated mail templates for scheduling for Change Managers / Change Advisory Board (CAB) and for information about changes of status.
- Scheduling & planning of RFCs
- Supervision and release by Change Managers or the CAB
- Tracking RFCs and changes through the different levels from authorization to implementation and logging
- Definition of changes, based on preconfigured templates and/or by integrating RFCs.
- Relation to RFCs, problem records (PR) and configuration items (CI)
- Process/workflow functionality including definition of tasks
- Storing back-out processes for a change
- Automatic notification if the time limits have been exceeded
- Generation of management information
- Creation of Quick Changes
- Release Management function

2 Main view and navigation

2.1 The Navigator

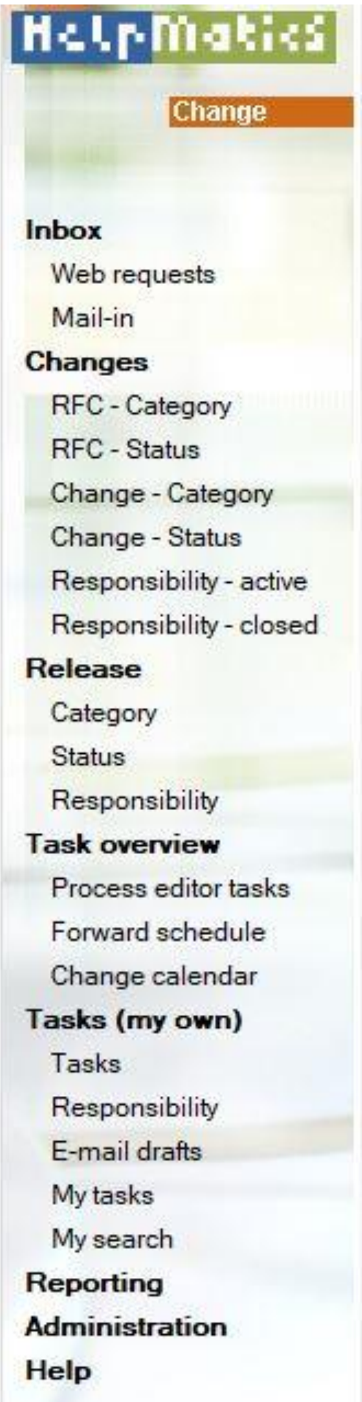


Fig. 1: The Navigator

The Navigator permits the navigation within HelpMatics™ Change. Depending on the level selected, further options are available. Navigation is made by mouse-click.

The information selected in the Navigator is displayed in the Viewer.

> Note
> The Navigator may be displayed in a different way, depending on the rights assigned.

2.2 The Viewer

The Viewer displays the main window on the right, where the information selected in the Navigator is shown.
The sorting order can be changed by clicking the column titles.
Documents are opened by double-clicking a line.

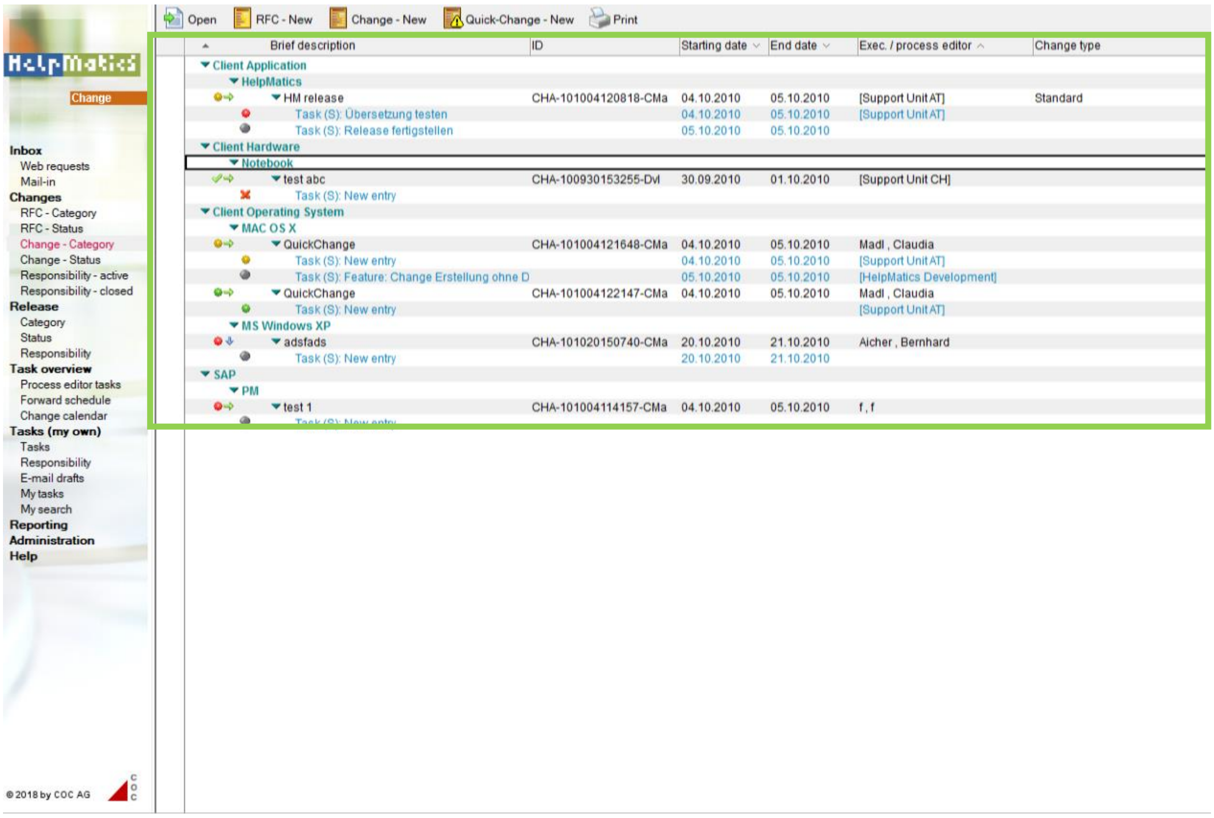


Fig. 2: The Viewer

2.3 The action bars

Depending on the view selected in the Navigator or in the document opened, you will see various buttons on the action bar. By default, you will find the buttons for opening and printing in the views, the buttons for closing, editing and printing documents in opened documents. In addition, context-sensitive buttons are available.

In Change and RFC documents, a distinction is made between the RFC/CHANGE action bar (at the top) and the task list ACTION BAR (in the TASKS area). If a Task that has not been closed yet is displayed in the editing area of the Change or RFC template, it has its own "TASK" action bar.

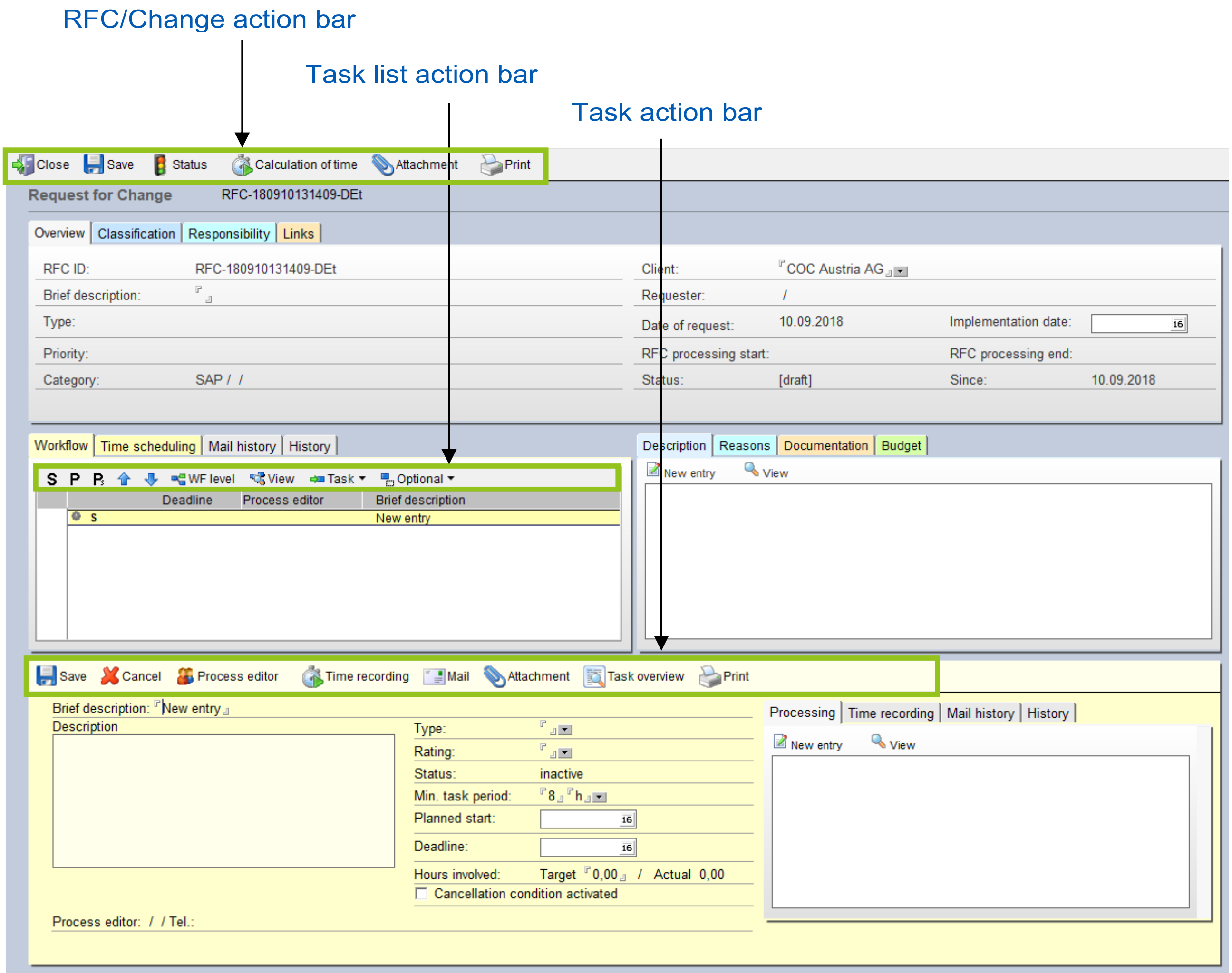


Fig. 3: Change template in Edit mode

3 Views

3.1 The HelpMatics™ Change Navigator

The Main Navigator leads you to Web requests, RFCs/Changes and Release documents as well as to the individual tasks in the different views.

Inbox	
Web requests	**Web requests** received via web portals, sorted by web portal RFC – New*:* Creates a new RFC from the selected web request. The data from the submitted RFC is transferred into the RFC template. CHANGE - NEW: Creates a new Change from the selected web request. The data from the RFC is transferred into the Change template. Request Rejected: The RFC is rejected; the requester is notified about the rejection by e-mail (the e-mail template to be used has to be configured when defining the web request form)
Mail-In	Overview of incoming mails. RfCs and changes can be created.
Changes	
RFC - category	**RFCs / Tasks** (excl. [Draft], Closed, Rejected status) by client and category The tasks relating to an RFC will also be displayed. RFC – New: Creates a new RFC Change - New: creates a new Change. If one or several authorized RFCs are selected, they can be transferred into the new Change. Quick Change – New: Creation of a Change for quick subsequent documentation of a standard or emergency Change. Print – View*:* Prints selected lines. Print – Document: After selecting a print template, contents of the selected document will be prepared as Word document, which can then be printed.
RFC - status	**RFCs** (excl. Closed, Rejected status) by client and status *RFC – New, Change – New* and Quick Change – New …see above (category)
Changes - category	**Changes / Tasks** (excl. [Draft], Closed, Rejected status) by client and category The tasks relating to the Changes will also be displayed. RFC – New: Creates a new RFC Change – New: Creates a new Change. Quick Change – New: Creation of a Change via Quick Change templates for quick subsequent documentation of a standard or an emergency Change. Print – View*:* Prints selected lines. Print – Document: After selecting a print template, contents of the selected document will be prepared as Word document, which can then be printed.
Changes - status	**Changes** (excl. Closed, Rejected status) by client and status *RFC – New, Change – New* and Quick Change – New …see above (category)
Responsibility - active	**RFCs / Changes / Tasks** (excl. [Draft], Closed, Rejected status) by client and responsibility (requester, reporter, change manager, executor, sponsor)

	RFC – New, Change – New and Quick Change – New …see above (category)
Responsibility - closed	**RFCs / Changes / Tasks** (excl. [Draft], New, Work in Progress status) by client and responsibility (requester, reporter, change manager, executor, sponsor) *RFC – New, Change – New* and Quick Change – New …see above (category)

Release	
Category	**Releases** by client and category Release – New: Creates a new release document Print – View: Prints selected lines. Print – Document: After selecting a print template, contents of the selected document will be prepared as Word document, which can then be printed.
Status	**Releases** by client and status Release – New ... see above (category)
Responsible person/team	**Releases / Changes and RFCs** by client and requester, executor and release manager Release – New ... see above (category)
Tasks - Overview	
Process editor tasks	**Change tasks** (excl. Closed status) by status and process editor or process team *RFC – New, Change – New* and Quick Change – New …see above (category)
Forward Schedule	For a tasks overview refer to chapt. 8.1
Change calendar	Calendar view for RFCs, Changes and Releases Filtering by person or category

Tasks (my own)	
Tasks	One's own **tasks** with status Open or Work in progress *RFC – New, Change – New* and Quick Change – New …see above (category)
Responsibility	**RFCs** and **Changes** (excl. Closed, Rejected status), in which you are registered as a requester, reporter, change manager, executor or sponsor. *RFC – New, Change – New* and Quick Change – New …see above (category)
E-Mail drafts	E-Mails created for an/a RFC/Change/Release/Task can be saved as draft and later be sent. The drafts categorized according to ID are contained in this view.
My tasks	**Active tasks** from HelpMatics™ Change, HelpMatics™ ServiceDesk and HelpMatics™ Knowledge *RFC – New, Change – New* and Quick Change – New …see above (category)
My search	Search window for RFCs/Changes/Releases/Tasks The search is carried out from the logged-in user's perspective (e.g. search for the x last edited documents) Criteria: - RFCs and/or Changes and/or Releases and/or Tasks - Status - Period of time (delete field contents to search without time limitation) - By the last n edited documents (activate/deactivate) - By a certain field content (activate/deactivate)

Necessary rights provided, you have access to the Administration and Reporting Navigator.

3.2 Administration Navigator

By clicking ADMINISTRATION in the Main Navigator, you open the Administration Navigator. The configuration of HelpMatics™ Change is made in the Administration area. For details refer to the HelpMatics™ Administration manual.

By clicking BACK you return to the main menu.

3.3 Reporting Navigator

By clicking REPORTING in the Main Navigator, you open the Reporting Navigator, where you can make various statistical analyses of RFCs, Changes and Tasks.

3.4 Icons in the views

Icons play an important role in the HelpMatics™ Change views since they concisely display information. Thus, the clarity of display is increased, enhancing the reading rate.

The following tables explain the icons used as well as their meaning.

3.4.1 Priority icon

Priorities	Icon	Text
High priority		Suggestion: “high”
Normal priority		Suggestion: “normal”
Low priority		Suggestion: “low”

Note
If more than three priority levels have been defined in the administration, the symbol specifying low priority is used for them.

3.4.2 Status icon

Status	Color	RFC	Change	Task
	red			closed (system)
	green	authorized	reviewed	-
	green	processing completed	processing completed	closed
	yellow	processing: active	processing: active	work in progress
	red	new	new	open
	violet	processing: on hold	processing: on hold	on hold
	gray	-	-	inactive
	red	-	-	on hold; triggers the interruption of a workflow

CLOSED (SYSTEM) is set for Tasks not only when the associated RFC or Change was rejected but also when the status – after a warning message has been displayed – is set to AUTHORIZED/REVIEWED or CLOSED before all Tasks have been completed.

3.4.3 More icons

Description	Icon	Text
Task in Web processing		Web task
Program execution		Program task
Automatic program execution		Automatic execution
Automatic program execution (error or timeout)		Execution stopped

4 Change management

4.1 Web request

RFCs can be submitted via various definable web portals. The change manager in charge is informed about new web requests via e-mail. Based on the web request, he creates an RFC or rejects the web request. In this case the requester will be informed via e-mail.

4.2 Mail-In

Changes or RFCs can be created in the mail-in on the basis of an incoming e-mail. E-mails can also be attached to changes or RFCs. Click the REPLY button to send an e-mail directly to the user. If you can assign the e-mail to an RFC/change/task, the reply feature is available until the RFC/change/task is closed.

The  button with the EMPTY RECYCLE BIN sub-menu is available to process editors with deletion rights and will remove all e-mails from the recycle bin.

Recovery feature for e-mails

If, while creating an RFC/Change on the basis of an e-mail, system incidents, such as a power failure or client crash, occur, the e-mail will first not be visible in the mail-in and the ticket might not be saved.

Via the ACTIONS -> ADMINISTRATION > Restore E-MAIL menu the e-mail can be recovered and put back to the mail-in, then a ticket can be created again.

If possible, the messages should be recovered soon since e-mails that are older than the month before will not be offered.

4.3 RFCs

4.3.1 Creation

In addition to the option of creating RFCs via web requests, change managers can create RFCs based on RFC templates or, directly, without using a template. Furthermore, the necessary rights (problem owner) provided, RFCs can be created directly in HelpMatics™ ServiceDesk with selected tickets or config. items being assigned to them.

The RFC is created via the 

button on the action bar (available in all RFC and Change views). The RFC is automatically given an ID consisting of creation date and creator's initials.

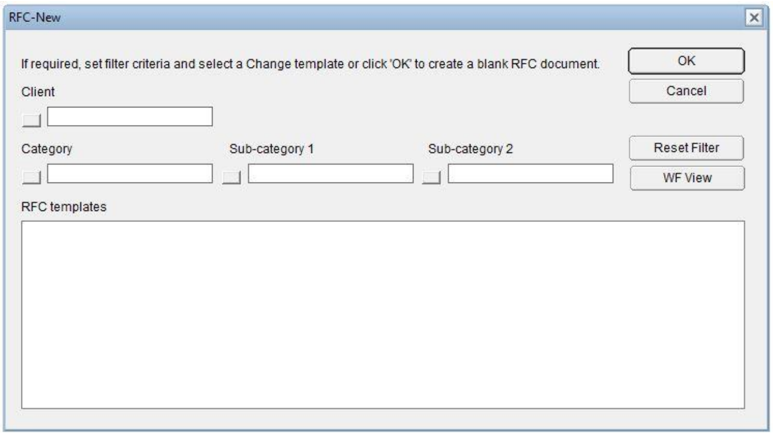


Fig. 4: RfC – New dialog window

The list of templates is filtered automatically when a client or a category is selected. Click the RESET FILTER button to reset the selection again. Use the WF VIEW in a selected template to display a workflow graphics in order to get a better overview of the tasks of the selected template.

4.3.2 Mandatory Fields dialog window

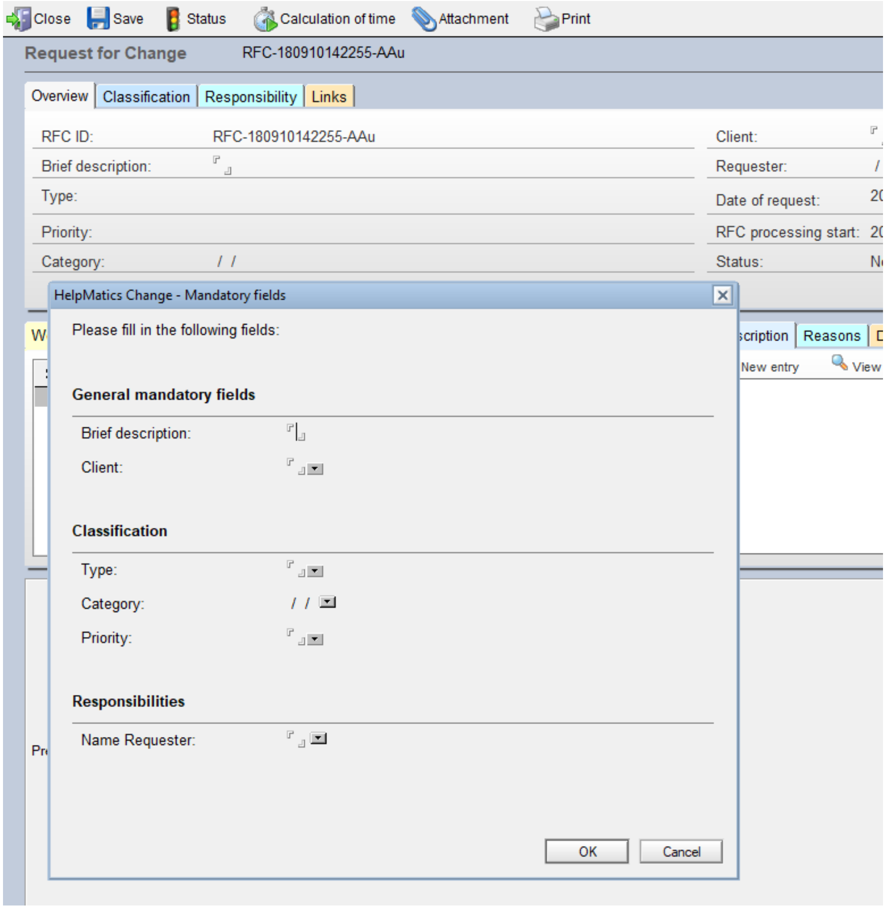


Fig. 5: Mandatory Fields dialog window for RFCs

When an RFC is saved, the mandatory fields will be checked, allowing the user to make missing entries in the mandatory fields via a dialog box.

4.3.3 Overview template section

In the OVERVIEW section of the RFC template, you find the most important information, such as brief description, some classification fields, requester, date of request and planned start and end date for processing the RFC as well as the desired implementation date.

The information described below is available in other tabs and template sections.

The current status as well as the information when it was set and by whom is displayed in the Status tab. The status can be changed by the change manager in the STATUS menu.

4.3.4 Classification template section

The following elements are available for selection in this section:

- Category (up to 3 levels)
- Type
- Priority

The following fields can be mandatory fields, optional fields or can be hidden:

- Urgency
- Business relevance
- Impact
- Risk

The list values available for classification and rating of an RFC can be configured via ADMINISTRATION -> CATEGORIES.

4.3.5 Responsibility template section

The persons responsible and contact persons for an RFC can be selected from configurable process editor and process team lists. Requester, reporter and sponsor can also be selected from the Notes address book or from the CMS.

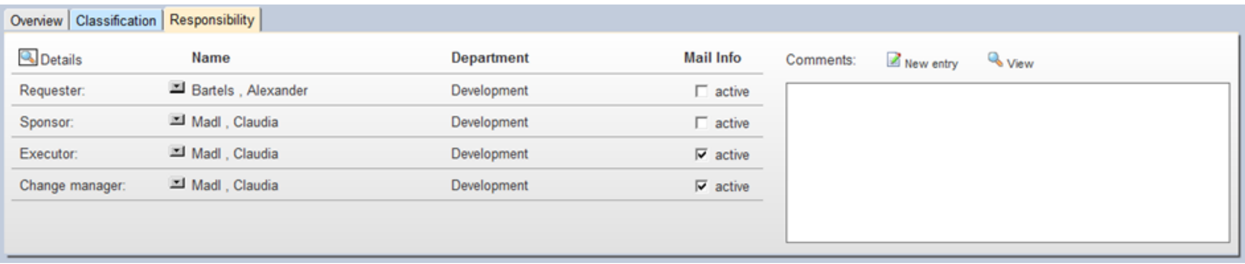


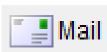
Fig. 6: Responsibility template section

Requester	Who is submitting the change, whose idea is it? (with REQUESTER = REPORTER option active the person sending the web request via web portal)
Reporter	Who reports the change (with REQUESTER = REPORTER option not active the person sending the web request via web portal)
Sponsor	Who will bear the costs of a possibly resulting Change?
Executor	Who will supervise the execution of the individual Tasks? The tasks are usually processed by various persons.
Change Manager	Who will bear the overall responsibility for the execution? (If created in HelpMatics™ Change, the creator of the document will automatically be entered unless a different change manager has been indicated in the template used).

You can also determine if the persons are to receive information via e-mail. By default, executor and change manager are selected for receiving information via e-mail.

Via the DETAILS button, detailed information on the responsible persons/teams and/or contact persons can be entered/displayed. Requester, reporter and sponsor can be selected or entered manually.

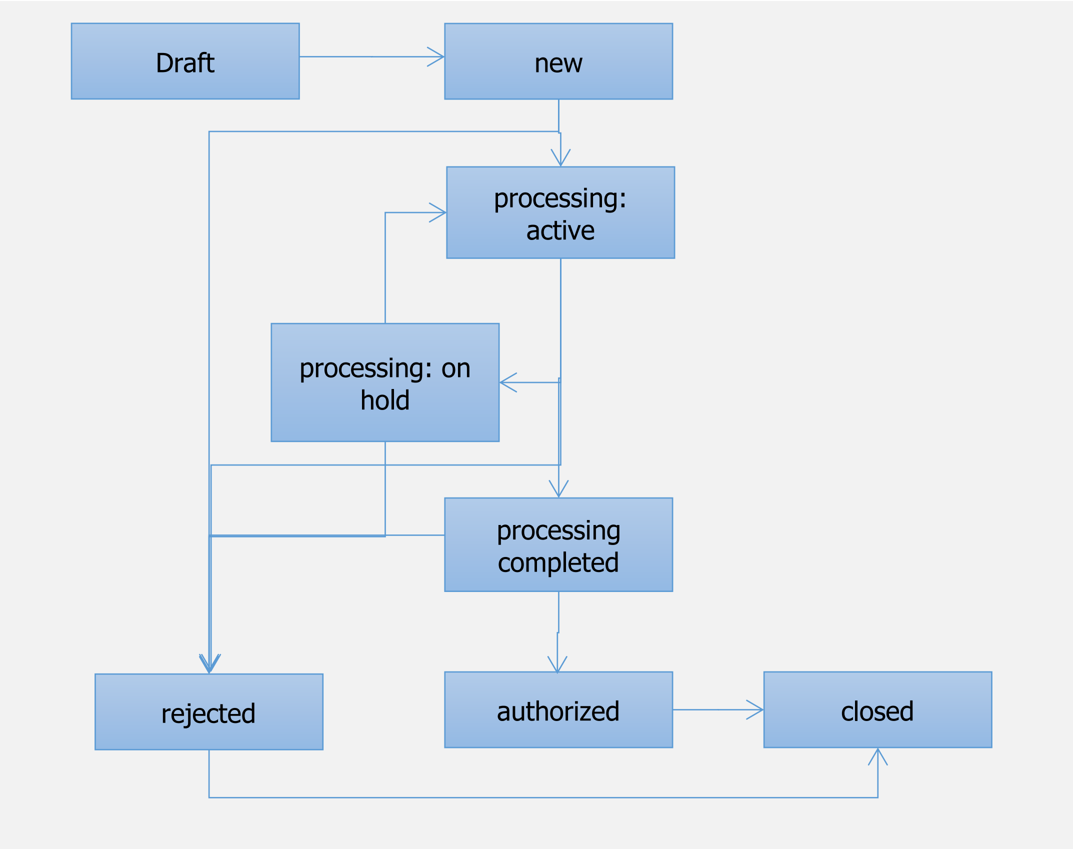
4.3.6 Template section for further details

- WORKFLOW
  List of all tasks assigned: Tasks can be selected and displayed in the editing area below.
- SCHEDULING
  Moreover, you can specify the criteria according to which the automatic RFC time calculation and its associated tasks are to be carried out.
- MAIL HISTORY
  All mails sent via the 

  button are displayed. You can send replies from an opened e-mail unless the RFC or change has the status CLOSED.
- HISTORY
  Important changes, such as changes of status, changes in the Classification template section (excl. category) as well as changes regarding the implementation time, are logged.
- DESCRIPTION
  A detailed description of the planned change can be entered here. Information will be transferred from the web request.
- REASONS
  Reasons for the necessity of a Change can be entered here. Possible effects caused by the implementation or the rejection of a Change can be documented.

- Documentation
  Appendices and links to documents can be inserted via the Documentation button.
- Budget
  Assumptions as to period and expense for implementing a Change are entered here.
- Links
  The associated config. items or links to RFCs/changes and tickets/problems triggering an RFC, or being affected by the Change, will automatically be stored in the respective tab if an RFC is created in HelpMatics™ ServiceDesk. They can also be entered via the Links menu. By double-clicking the desired entry, you will directly get to the associated document.
  Additionally, the link to one or several release documents will be displayed.

4.3.7 Status process and status definitions

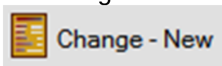


Status	Icon	Action
draft	No icon	Draft without plausibility check and mail notification. When saving, the user can change the status to New. Please note that in this case notifications will be sent and mandatory fields will be checked.
new		Mandatory fields: Category, type, brief description, client, priority, requester and change manager (name, e-mail if Mail Info is active) E-mail to change manager, requester, executor and sponsor if the respective fields are maintained and e-mail info is active.
processing: active		Mandatory fields (in addition to the mandatory fields for New status): all classification fields, end of RFC processing. The schedule will be recalculated if Automatic calculation is enabled. When RFC processing start status is reached: Activation of the first task, or of parallel tasks. The process editors of these tasks will be notified. E-mail (if specified) to change manager and RFC executor.
processing completed		This status will automatically be set when all tasks are completed. E-mail to executor of change and change manager. In case of an RFC/change to incident/problem: e-mail to the mail addresses configured via Administration → Modules → Process Info. These may be freely selected mail addresses as well as mail addresses of the responsible persons/teams and/or process editor of the incident/problem.
authorized / reviewed	✔	E-mail to requester, change manager, sponsor and executor. In case of an RFC/change to incident/problem: e-mail to the mail addresses configured via Administration → Modules → Process Info. These may be freely selected mail addresses as well as mail addresses of the responsible persons/teams and/or process editor of the incident/problem.
closed	✔	Only visible in reporting views. No further processing possible. Will automatically be set if an RFC is turned into a Change.
rejected	✘	Tasks that have not been completed yet are set to closed (system). E-mail to change manager, requester, sponsor, executor.
processing: on hold		Tasks with Work in progress status will be set to On hold. Escalations will be stopped. E-mail to change manager and executor.

The CLOSED status will automatically be set when the RFC is turned into a Change, but may also be manually set from the AUTHORIZED or REJECTED status.

4.4 The Change

4.4.1 Creation

Changes can be created by a change manager on the basis of existing RFCs or change templates, or, directly, without using any template. They are created via the 

button on the action bar. Moreover, authorized persons (problem owners) can create changes in HelpMatics™ ServiceDesk, with tickets or config. items being assigned to them.

Helpdesk staff with [&R_1STLEVEL] role can create Changes based on standard change templates.

Via the 

button, a change can also be created on the basis of a selectable QUICK CHANGE template (Change template for standard or emergency changes with QUICK-CHANGE flag) for quick documentation of a standard or emergency change.

You can, however, shift to the detailed Change window also in the case of Quick Changes.

The Change will automatically be given an ID consisting of creation date and creator’s initials.

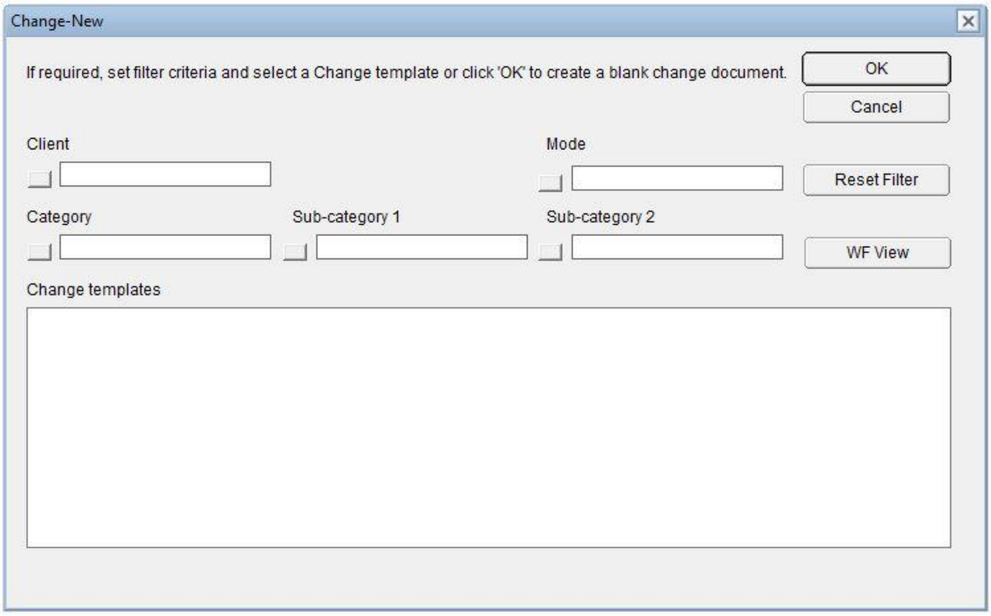


Fig. 7: Change – New dialog window

The list of templates is filtered automatically when a client, a type, or a category is selected. Click the RESET FILTER button to reset the selection again. Use the WF VIEW in a selected template to display a workflow graphics in order to get a better overview of the tasks of the selected template.

4.4.2 Mandatory Fields dialog window

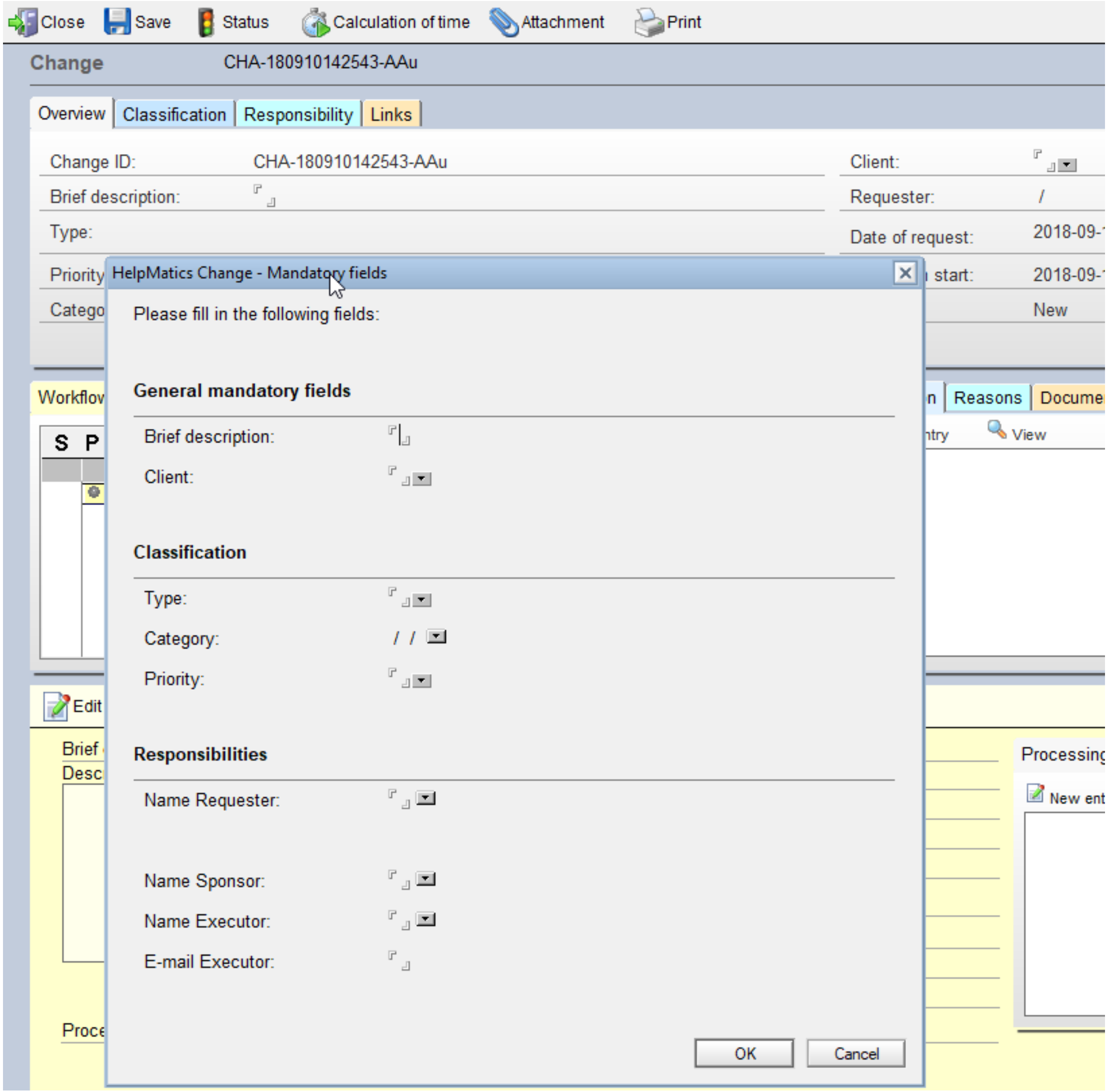


Fig. 8: Mandatory Fields dialog box for Changes

When an RFC is saved, the mandatory fields will be checked, allowing the user to make missing entries in the mandatory fields via a dialog box.

4.4.3 Overview template section

In the OVERVIEW section of the change template, you will find the most important fields at a glance, such as brief description, some classification fields, requester, date of request as well as planned start and end date of the Change. Moreover, you can define the criteria according to which the automatic time calculation for the Change and its associated tasks shall be carried out.

The information described below is available in other tabs and template sections.

The current status as well as the information when it was set and by whom is displayed in the Status tab. The status can be changed by the change manager in the STATUS menu.

4.4.4 Classification template section

See 4.3.4

4.4.5 Responsibility template section

See 4.3.5.

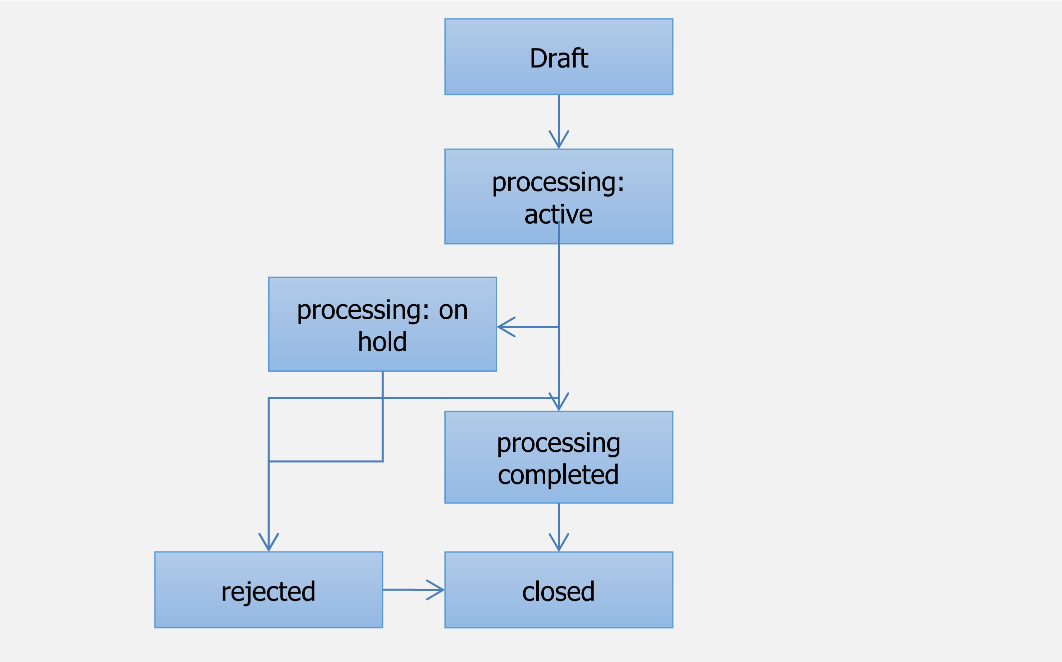
Requester	Who is submitting the Change?
Sponsor	Who will bear the cost of the Change?
Executor	Who will supervise the execution of the individual Tasks? The tasks are usually edited by various persons.
Change Manager	Who has the responsibility for the change?

4.4.6 Template sections for further details

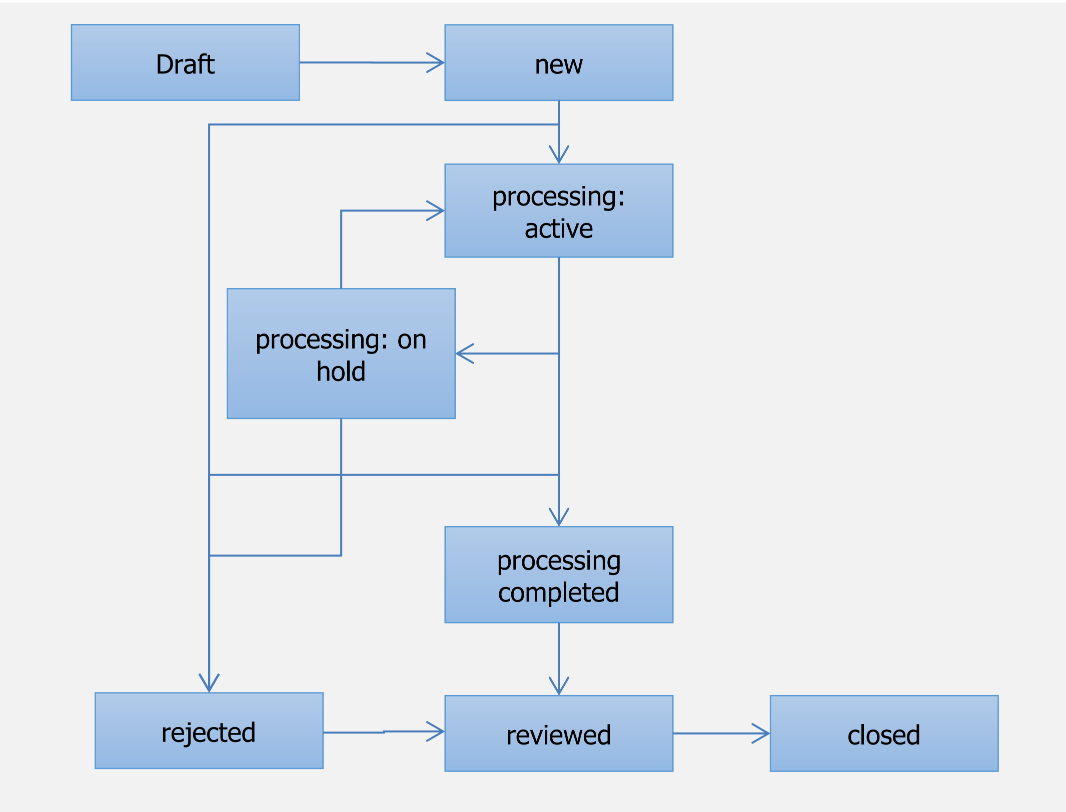
- WORKFLOW
  List of all tasks assigned: Tasks can be selected and displayed in the editing area below.
- SCHEDULING
  Moreover, you can specify the criteria according to which the automatic RFC time calculation and its associated tasks are to be carried out.
- MAIL HISTORY
  All mails sent via the Mail button are displayed. You can send replies from an opened e-mail unless the RFC or change has the status CLOSED.
- HISTORY
  Important changes, such as changes of status, changes in the Classification template section (excl. category) as well as changes regarding the implementation time, are logged.
- DESCRIPTION
  Detailed description of a Change; may include info from the web request.
- REASONS
  Reasons for the necessity of a Change can be entered here. Possible effects caused by the implementation or the rejection of a Change can be documented.
- DOCUMENTATION
  Appendices and links to documents can be inserted via the DOCUMENTATION button.
- BUDGET
  The values for target/actual expense are displayed here. If tasks are assigned, the (target and actual) hours involved fields will automatically be added up from the relevant task fields (when changing to edit mode as well as at night).
- LINKS
  The associated config. items or links to a RFC triggering the change or being affected by the change, links to existing changes and tickets from HelpMatics™ ServiceDesk can be stored in the respective tab. When a Change is created from an RFC or a ticket, links will be inserted automatically or can be inserted via the Links menu. By double-clicking the desired entry, you will directly get to the associated document.
  Additionally, the link to one or several release documents will be displayed.

4.4.7 Status process and status definitions

The following process applies to standard Changes:



The following process applies to normal & emergency Changes:



Status	Icon	Action
Draft	No icon	Draft without plausibility check and mail notification. When saving, the user can change the status to NEW. Please note that in this case notifications will be sent or field checks will be made.
new		Mandatory fields: Category, type, brief description, client, priority, requester and change manager (name, e-mail if MAIL INFO is active) E-mail to change manager, requester, executor and sponsor if the respective fields are maintained and Mail Info is active.
processing: active		Mandatory fields (in addition to the mandatory fields for NEW status): all classification fields, end of execution. The schedule will be recalculated if AUTOMATIC CALCULATION is enabled. When EXECUTION START status is reached: Activation of the first task, or of parallel tasks. The process editors of these tasks will be notified. E-mail to executor of Change.
processing completed		This status will automatically be set when all tasks are completed. E-mail to change manager and executor.
reviewed		E-mail to change manager, sponsor, requester and executor.
closed		This requires the REVIEWED status and, thus, the marking for finally closed/completed. No further processing possible. Only visible in reporting views.
rejected		E-mail to change manager, requester, sponsor, executor. Tasks that have not been completed yet are set to CLOSED (SYSTEM). Only visible in reporting views.
processing: on hold		Active tasks will be deactivated (ON HOLD status). Escalations will be stopped. E-mail to change manager and executor.

From version 7.0 on an internal flag will be set as soon as the RFC gets the REJECTED status.

4.5 Standard Changes

4.5.1 Creating Standard Changes

Users with [R_1STLEVEL] role are authorized to create Standard Changes. To do so, the 1st level agent has to use a standard Change template. Only change managers and problem owners can create Changes without using a template.

In the ServiceDesk module, the RFC – CHANGE button with CHANGE – NEW action is available to authorized users in the RESOURCES – USER, RESOURCES – CONFIG. ITEMS as well as TICKETS – USER and TICKETS – CONFIG. ITEMS views.

The CHANGE – NEW button is available in almost all Change Module views.

A click on CHANGE – NEW opens the Change template selection window. The user selects the appropriate template from the list. If a great number of templates are available, the selection can be restricted via filter criteria. After confirming by clicking OK, the data of the selected template will be transferred into the new Change and a list for selecting the optional tasks will be opened.

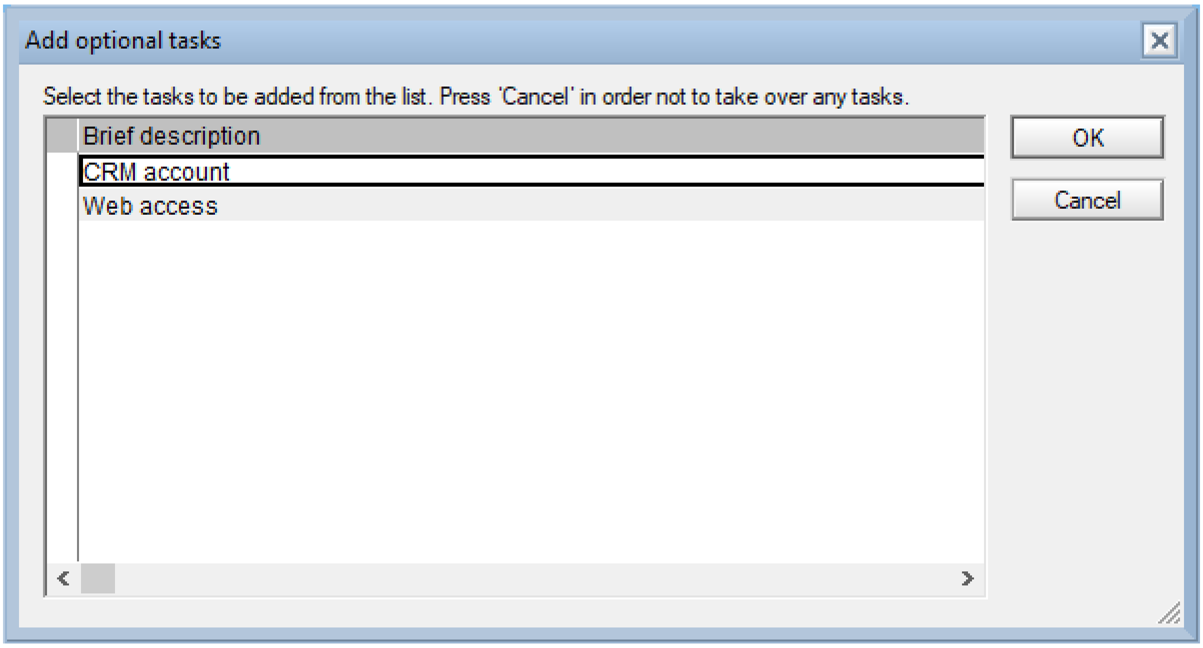


Fig. 9: Selection of optional tasks when creating Standard Changes

Select the tasks you require and confirm by clicking OK. The tasks will be included in the task list (no optional tasks will be included if you click CANCEL):

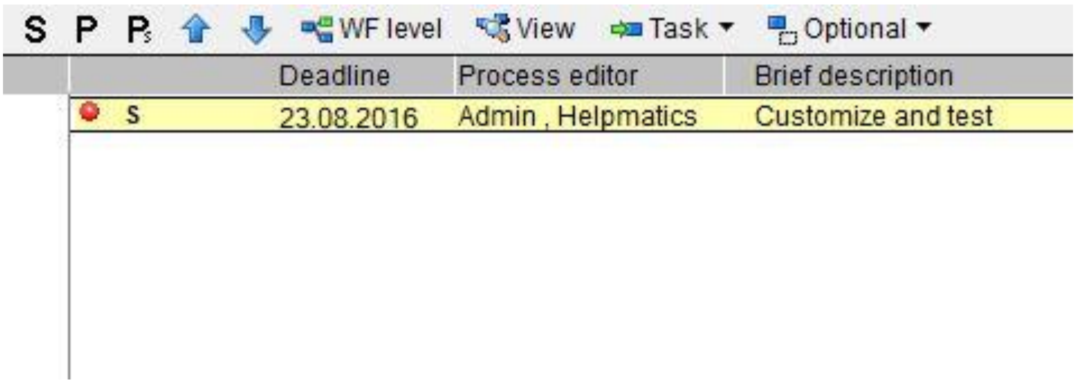


Fig. 10: Task list in the Change window

Via the OPTIONAL button you can make corrections:

- you can add additional optional tasks or
- remove optional tasks you do not require.

Information on dependent tasks: Dependent tasks are configured in the change template and are “attached” to an optional task. When you insert or remove this optional task, the dependent tasks are inserted or removed as well.

Saving allows the Change to be automatically set to PROCESSING: ACTIVE status. This will start the following workflow: The first task or the first parallel tasks will receive the OPEN status and the process editors in charge will be informed via e-mail (the appropriate configuration provided).

When all tasks are completed, the Change will receive the PROCESSING COMPLETED status. This status will automatically be set by a periodical agent.

If the AUTOCLOSE feature is activated in the Change template, the status will automatically be set to CLOSED.

4.5.2 Carrier ticket function

If a Standard Change is created from the RESOURCES – USER or RESOURCES – CONFIG. ITEMS view in HelpMatics™ ServiceDesk, a carrier ticket will be created for this Change – provided that:

- only one document is selected in the resources view (user or config. item document). .
- A carrier ticket template has been stored in the Change template, selected for creating the Change.

Under certain conditions, the carrier ticket will automatically be created in the background when the new, saved Change document is closed. The values for root cause, type, category, request, solution and process editor – if stored – will be transferred from the carrier ticket template. The data of the selected user or config. item will also be transferred into the carrier ticket.

A link to the Change document will be inserted. Correspondingly, a link to the carrier ticket can be found in the LINKS tab of the Change document.

The carrier ticket will be assigned the ON HOLD status. The date of the Change will be set as deadline. If this date is changed, the deadline for the carrier ticket will also change.

When all tasks of the Change have been completed so that the Change receives the PROCESSING COMPLETED status, the status of the carrier ticket will also be set to CLOSED. The deadline will be canceled.

4.6 Calculation of time and expense

4.6.1 Overview

The start and end date of RFC processing can be entered in the RFC. If AUTOMATIC CALCULATION is activated, the schedule will automatically be calculated based on these as well as on task period specifications when the PROCESSING: ACTIVE status has been reached. I.e., the planned start and end dates of the tasks as well as the possible end date of RFC processing will be calculated. This calculation can also be manually started via Calculation of time on the “RFC” action bar. Please note that the PLANNED START and DEADLINE fields can be edited in the task if AUTOMATIC CALCULATION is not active.

Same applies to the Change:

The start and end date of the implementation can be specified in the Change. If AUTOMATIC CALCULATION is activated, the schedule will automatically be calculated based on these as well as on task period specifications when the Processing: ACTIVE STATUS has been reached. I.e., the planned start and end dates of the tasks as well as the possible end date of Change processing will be calculated. This calculation can also be manually started via Calculation of time on the “CHANGE” action bar. Please note that the PLANNED START and DEADLINE fields can be edited in the task if AUTOMATIC CALCULATION is not active.

Fields for specifying the minimum task period and task expense (target) are available in each task. The minimum task period defines the period that is available for task processing and determines the calculation of the planned task deadline (DEADLINE). The target expense (h) defines the estimated duration. It is compared to the actual expense (h) resulting from the times recorded by the process editors (see Time recording on the “TASK” action bar).

In the RFC, fields specifying the implementation period and expense of the future Change task that have to be filled manually are found under BUDGET.

In the Change, among others, the total of expenses of the individual Change tasks will be entered automatically under BUDGET.

4.6.2 Minimum task period: Planned start and end

The planned start of the task and the completion of the task (target) are calculated from the minimum task period, based on the start date of the RFC/Change or on the end date of the previous task (usually the planned end. The actual end date is only used if the planned end date has passed). For the calculation, the specifications for service hours and target working hours (per day) defined for the client (of the RFC/Change) are taken into account. Furthermore, the desired end date of the RFC/Change is taken into account if the FIXED END DATE option has been selected for calculation.

- The minimum task period can be defined in hours or days. The conversion is based on the specified target working hours (per day).
  Example 1: If 7.5 is entered as target working hours, 0.5 days will be converted to 3.75 hours.
  Example 2: A specified period of 15 hours equals two days in the case of target working hours of "7.5".
- The calculation begins at the start date of the RFC with the start of service hours, or, if this start time is in the past, from the time of calculation activation. For subsequent recalculations, the periods of tasks that have already been activated will not be calculated again. The target date of the last activated task will then be the start date for further calculation.
- Week days with specified service hours will enter into the calculation, based on the target working hours (e.g. 7.5 hours per day). Holidays and days without specified service hours (weekend) will be skipped.
- If the FIXED END DATE option has been selected for calculation, the total task period must not exceed the time available between the start and the desired end date of the RFC/Change. In this case, it is suggested that the end date be postponed to the earliest possible date – otherwise, the calculation will be canceled. If the total of task periods is smaller than the time available, the periods for each task will be extended proportionally to the specified task period.
  The end of the last task coincides with the end date of the RFC/Change. If this date is a holiday or a day without service hours, it will be prescheduled to the evening of the preceding workday. Evening here is defined as the end of service hours unless the specified service hours on this day exceed the target working hours: The target working hours will then be added to the start of service to determine "evening".
- If the FIXED TASK PERIOD option has been selected for calculation, postponing the end date of the RFC/Change is suggested when this date has been exceeded.
  In case the end coincides with the start of service hours of a work day, the end will be prescheduled to the evening before. If this date is a holiday or a day without service hours, it will be prescheduled to the evening of the preceding workday. Evening here is defined as the end of service hours unless the specified service hours on this day exceed the target working hours: The target working hours will then be added to the start of service to determine "evening".
- Parallel tasks will be given the same end date (the date of the parallel task with the longest duration).

The new calculation can be started manually via the TIME CALCULATION action on the main action bar. The new calculation starts with the first task that has not been activated yet. When a task is completed, the following tasks will be recalculated automatically.

4.6.3 Task expense: Target and actual

Target expense is specified in hours and minutes. Each process editor can enter his/her actual expense (TIME RECORDING button on the task action bar). It will be totaled in the actual expense of the task.

4.6.4 Budget

The IMPLEMENTATION PERIOD as well as the EXPENSE (ACTUAL) can be specified for the change to be performed under BUDGET in the RFC. These values show the expense estimated for implementing the resulting Change. If the RFC is transferred as a task into a Change, these values will appear in the Change as "task period" and "task expense". In the Change, the total of expenses from the individual Change tasks will automatically be entered into the target and actual fields under Budget.

5 Tasks

5.1 Processing within RFCs/Changes

The assigned tasks are listed in the task area of the RFC/Change. They have been transferred from the RFC or Change template used, or can be manually entered via a button, with the option of using predefined task templates.

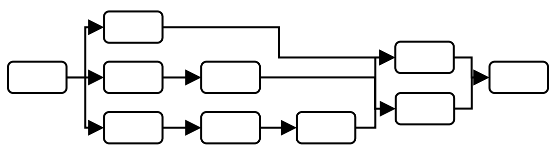
If you use TASK NEW → NEW (EMPTY) or TASK - NEW → FROM TEMPLATE, the new (inactive) task will be inserted directly after the task the cursor is currently pointing to – if the subsequent tasks are still inactive. In all other cases (subsequent tasks no longer inactive or button TASK – NEW → NEW – FROM RFC) it will be added at the end of the list.

The order of the tasks is changed via the arrow buttons on the task list ACTION BAR. The Task list ACTION BAR is only available in the edit mode of the RFC/Change (EDIT button on the RFC/CHANGE action bar).

The S = serial and P = parallel buttons determine whether the selected task is to be executed serially, i.e. after the previous task, or parallel to the previous - already marked as parallel - task in the list. The change of the colored lines from light to dark characterizes parallel tasks, and/or the change to the next workflow level.

Several parallel tasks can be separated again by the START OF WF LEVEL button.

If you use the P button, parallel tasks will become serial ones within the current parallel branch. This action is only possible for tasks already marked as parallel.

Name	Icon	Action
Serial	S	Serializes a task (if it must not be executed simultaneously with other tasks)
Parallel	P	Parallelizes a task (if it must be executed simultaneously, or if two or more tasks have to be completed before starting a new one)
Parallel-Serial	P	Inserts serial sub-tasks within a parallel task. 
Before		Puts a task before another one
After		Puts a task after another one
New WF level	WF level	Inserts a new level in the process workflow (postpones the selected and all parallel tasks by one time level)
View	View	Graphic representation for task duration

New task	Task ... New (empty)	Inserts a new task or adds it at the end of the task list
New task	Task ...New - from template	Inserts a new task to be selected from a predefined list or adds it at the end of the task list
New task	Task ...New - from RFC	Adds a new task based on an authorized RFC at the end of the already existing tasks (only available in Changes)

Remove task	Task ▾ ...delete	Deletes a task from an RFC/Change
Remove task	Task ▾ ... move	A task is assigned to another RFC/Change (only possible for inactive tasks).
Optional tasks	Optional ▾	Subsequently adds or removes optional tasks (only possible for Standard Changes that are not active yet).

The currently selected task will be displayed below the task list in the task edit area. I.e., tasks can be edited directly in the RFC/Change by selecting them from the task list or, independently of the parent RFC/Change, as described in 5.2.

5.2 Editing from task views

Tasks can be opened directly in the PROCESS EDITOR tasks view or under TASKS (MY OWN) → TASKS. The corresponding RFC/Change incl. the selected task will be opened in the lower section.

You shift to the edit mode via the EDIT button on the action bar. Further actions, such as PROCESS EDITOR, MAIL STATUS (only if the task is active), TIME RECORDING (only if the task is active), RETURN WF (see 5.3), are displayed in the edit mode.

The following fields and sections are available:

- Brief description
- Description
- Process editor
  The process editor can be changed in the PROCESS EDITOR menu:
  PROCESS EDITOR: Select process editor from the list
  TEAM: Select process team from a list
  PROCESS EDITOR (MANUALLY, WEB TASK): Enter process editor manually or select process editor from address book - for processing a task in the web. When the SUPERVISOR option is used, the supervisor specified by the requester is entered in requests received via the portal.
  TEAM (INDIVIDUALLY): Create an individual team to which the required members/process editors are assigned from a list
- Attachment
  Attach a file by clicking on the ATTACHMENT button, if required.
- Type
  Select a value from the list.
- Rating
  Select a value from the list.
- Status
  The status can be changed in the STATUS menu.
- Task overview
  Pressing the TASK OVERVIEW button displays all tasks relating to a Change in an overview.
- Min. task period
  Define the planned task period in hours or days.
- Planned start
  Estimated date of task activation
- Deadline
  Estimated date of task completion
- Target/actual expense (h)
  The expense required is indicated in hours
- Comment
  By clicking the NEW ENTRY button, date and name of the person entering the comment will be set automatically. The comment can then be entered below name and date.

- Time recording
  By clicking the TIME RECORDING action in the menu, the actual expense can be entered by process editors.
- History
  Some important changes, such as changes of status, are logged there.
- Mail history
  Mails that are sent via the Mail button are displayed in the MAIL HISTORY tab. You can send replies from an opened e-mail unless the task has the status CLOSED.

5.3 Return WF (Workflow)

Within the individual tasks you can use the return function by pressing the Return WF button.

This reactivates a serial task or several parallel previous tasks. The current task receives the "on hold" status, the activated previous task receives the "work in progress" status. The process editors of the previous tasks can be informed thereof by e-mail.

You can go back only one step in the workflow.

5.4 Cancelation of workflow due to negative rating

If a task with cancelation condition being activated is assigned a negative rating, the Change will be provided with ON HOLD status.

The cancelation condition can be activated/deactivated either in the task template or in the task itself as long as this task is in draft mode (INACTIVE status).

The task leading to the cancellation of the workflow will receive the icon (red minus sign) and the ON HOLD status. A message displayed has to be confirmed with YES. All other tasks (unless inactive) will also receive the ON HOLD status.

A process editor with [&R_CHANGEMNGR] role can set the Change to PROCESSING: ACTIVE again after checking it.

5.5 Status definitions

Status	Icon	Action
inactive		New tasks are inactive at first
open		The status of the first task(s) will be set to OPEN as soon as the RFC or Change status is changed to PROCESSING: ACTIVE. The other tasks will be activated when the previous tasks are completed, or as soon as all parallel previous tasks are completed and, thus, set to OPEN. E-mail to process editor
work in progress		After confirmation, this status will automatically be set when an open task is edited for the first time. This can also be achieved manually by clicking the STATUS → WORK IN PROGRESS button on the task action bar.
closed		The process editor sets this status via the STATUS → CLOSED button on the action bar. If this is the last task, the status of the RFC or Change will be set to PROCESSING COMPLETED (background agent at night). Closed tasks can no longer be edited.
on hold		Tasks will be set to ON HOLD status when the Change gets the Processing: ON HOLD status.
on hold, trigger for cancelation of workflow		A task will receive this icon if it is a trigger for the cancelation of the complete workflow due to the selection of a negative rating.

5.6 Task processing for external process editors

The target is to be able to integrate process editors that

- have not been created as HelpMatics™ process editors
- have no rights in HelpMatics™ Change

In order to do so, assign the task to the respective person via the PROCESS EDITOR action → PROCESS EDITOR (MANUALLY, WEB TASK). A dialog will open for entering the necessary data.

If the SUPERVISOR option is used when changes are created from requests received via the portal, the supervisor specified by the requester is entered in the task.

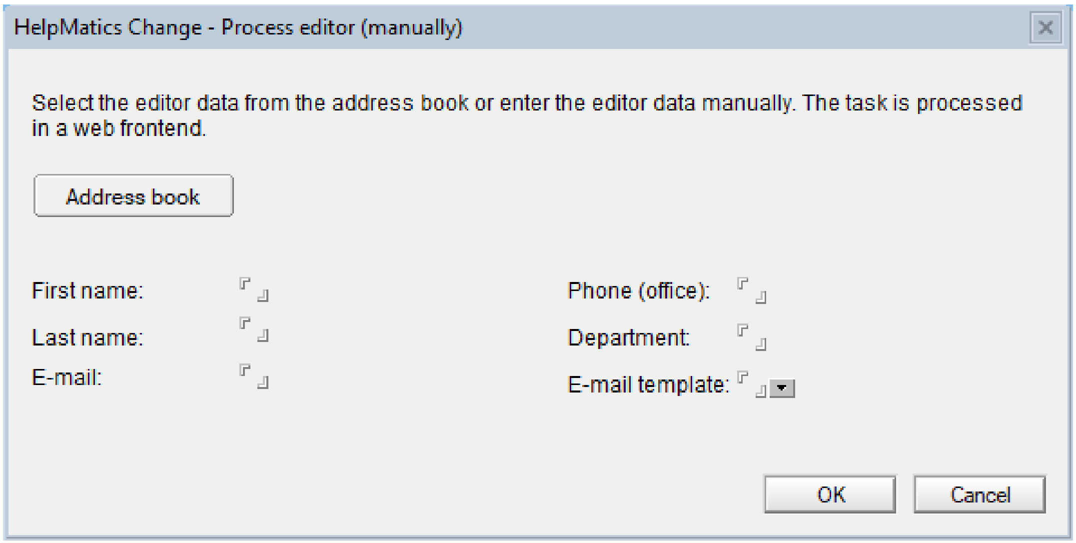


Fig. 11: Assign a task to an external process editor

You can transfer data from the Notes address book or enter the process editor data manually. The process editor will receive an individual web link with the unambiguous UNID of the task via e-mail as soon as the task is active.

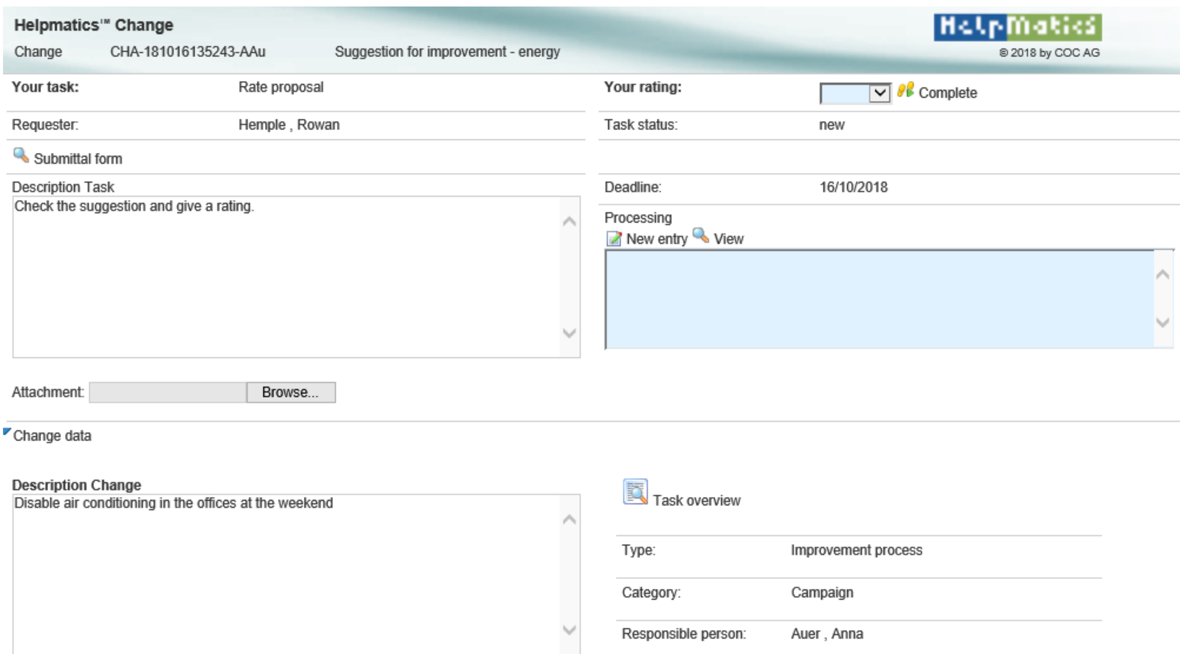


Fig. 12: Web interface for task processing for external process editors

On the web interface, the fields of YOUR RATING, PROCESSING and ATTACHMENT can be edited. Click COMPLETE to finish the task.

Access is controlled by means of groups and roles. For details concerning the configuration refer to the HelpMatics™ Administration manual.

A web task can be visualized in various views via the icon.

5.7 Program execution

Tasks can contain program runs that will be executed automatically or manually.

The configuration is made via the change template.

If the task is configured for automatic execution, the program run is started as defined in the configured interval. If everything runs successfully, the task will be closed and the workflow continued. Only in case of an error, the process editor will be notified via e-mail in order to edit the task manually.

Click the EXECUTE button to start the TASK manually. Log files are displayed in the same tab and can be viewed via the MESSAGES button. If errors occur during program execution, those will also be documented here. As soon as the task is closed, you cannot start the program any longer.

6 Release Management

While Change management concentrates on the management of Changes, Release management focuses on the distribution of planned Changes. Release management should be integrated into Configuration and Change management processes to ensure that Releases and performed Changes are coordinated.

6.1 Creation

Various views are available for Release planning.

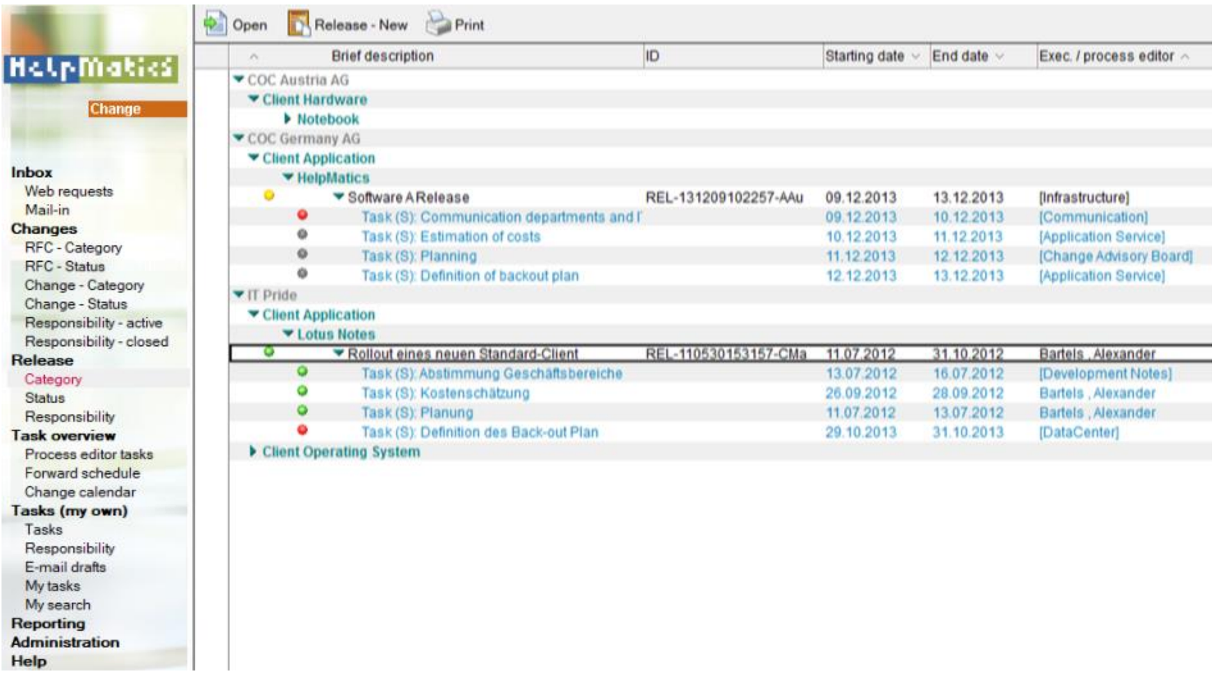


Fig. 13: Release views - Release and corresponding tasks

Change managers can create new Release documents via the RELEASE - NEW button.
Templates will be suggested in a Rapid Recording window.

6.2 Template sections

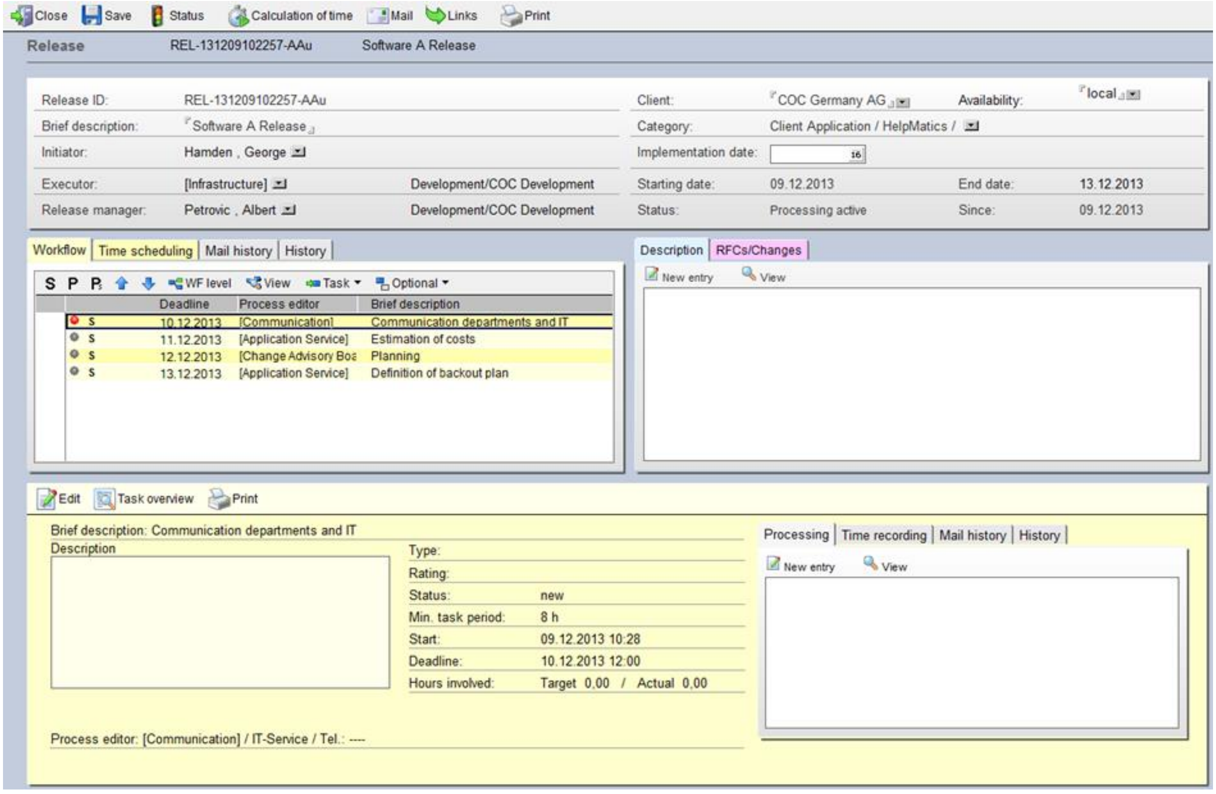


Fig. 14: Release window

In the header section of the Release window you can store data on requester, executor, release manager and client as well as assign categories and define time frames.

Via the Links button, RFCs and/or Changes can be assigned. The link is visible in the Tickets tab of the Release document as well as of the RFC/Change.

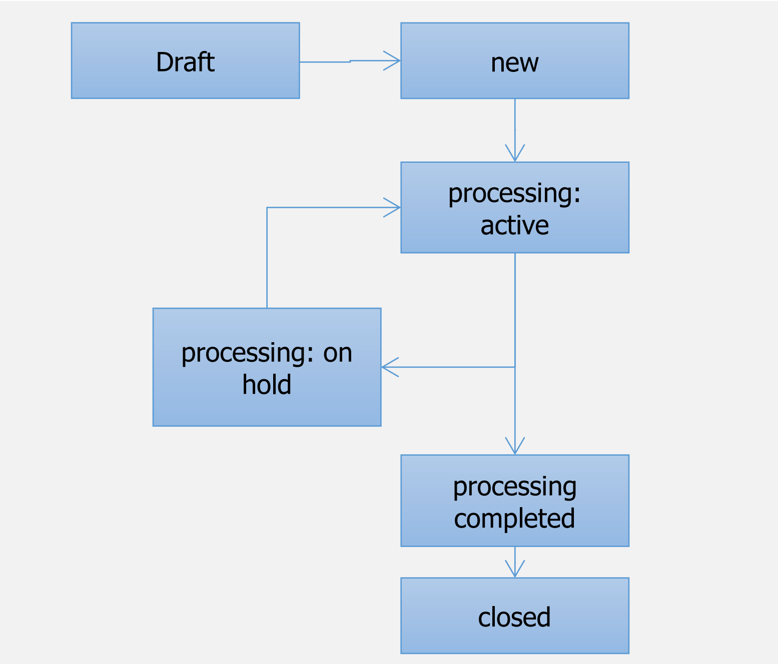
Please note:

RFCs and/or Changes can only be added or deleted via the LINKS button in the Release window. The TICKETS tab in the RFC/Change window only serves to display linked Releases.

Status refresh of a linked RFC/Change may be time delayed.

Like RFCs and Changes, Releases can contain as many tasks as you like.

6.3 Status process and status definitions



Status	Icon	Action
draft	No icon	Draft without plausibility check and mail notification. When saving, the user can change the status to NEW. Please note that in this case notifications will be sent or field checks will be made.
new		Mandatory fields: Category, brief description, client, requester, executor and release manager (name, e-mail), e-mail to requester, executor and release manager.
processing: active		Mandatory fields (in addition to mandatory fields with NEW status): End of execution. The schedule will be recalculated if AUTOMATIC CALCULATION is enabled. When START DATE is reached: Activation of the first task, or of parallel tasks. The process editors of these tasks will be notified.
processing: on hold		Active tasks will be deactivated (ON HOLD status). Escalations will be stopped.
processing completed		This status will automatically be set when all tasks are completed.
closed	✔	Precondition: PROCESSING COMPLETED status. No further processing possible.

7 Reopen function

In the status views, the Reopen button is available to process editors with appropriate rights if an individual document has been selected.

The following changes will be made:

Type	**Status**
RFC	processing completed
Standard Change	processing completed
Normal / Emergency Change	reviewed
Release	processing completed

Time stamp, name and reopen note will be added to the history.

8 Calendar views

Under the TASKS - OVERVIEW menu item, two calendar views are available besides the process editor tasks.

8.1 Forward Schedule of Change

The FORWARD SCHEDULE menu item displays an overview of all active tasks.

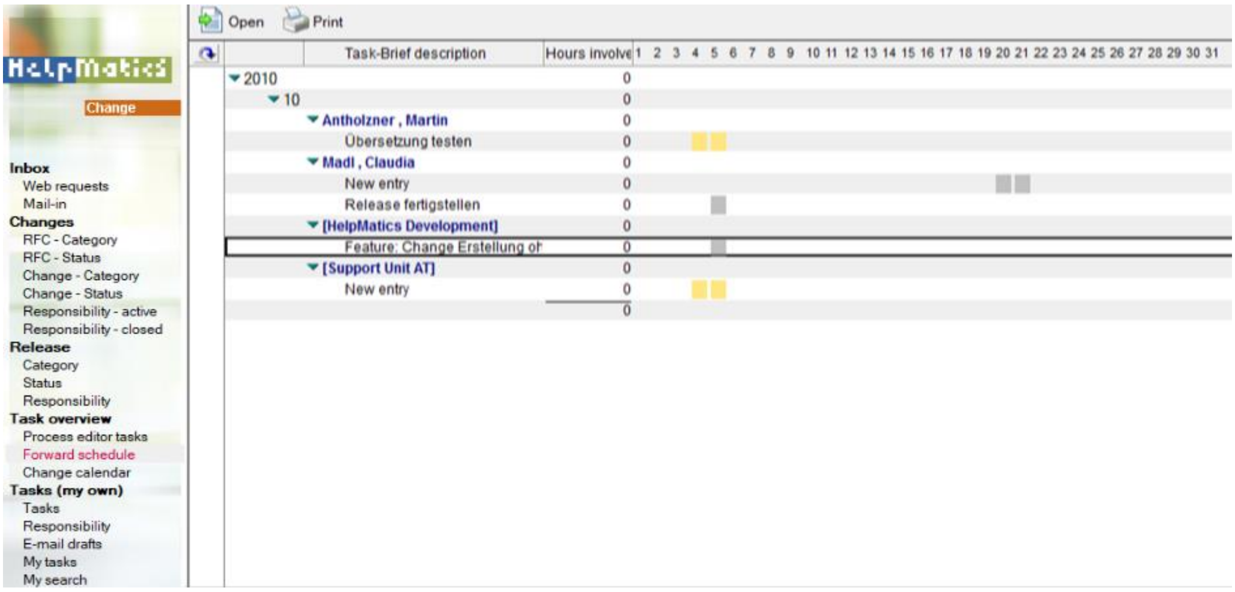


Fig. 15: Overview: Forward Schedule of Change

Categorized according to year – month – process editor (team), the tasks, the task brief description as well as hours involved and duration will be displayed. The color of duration depends on the status of the task.

Only tasks with

- planned (grey)
- open (red)
- work in progress (yellow)
- processing: on hold (violet)

status are displayed.

Basically, the tasks are categorized according to the current process team. If a task has never been assigned to a team before, the process editor will be displayed instead. If a task has been assigned to a process editor from a team, the categorization according to the last selected team will be maintained.

Each month and year is displayed in one category level. In the example below two tasks are displayed for illustrating turns of month and year.

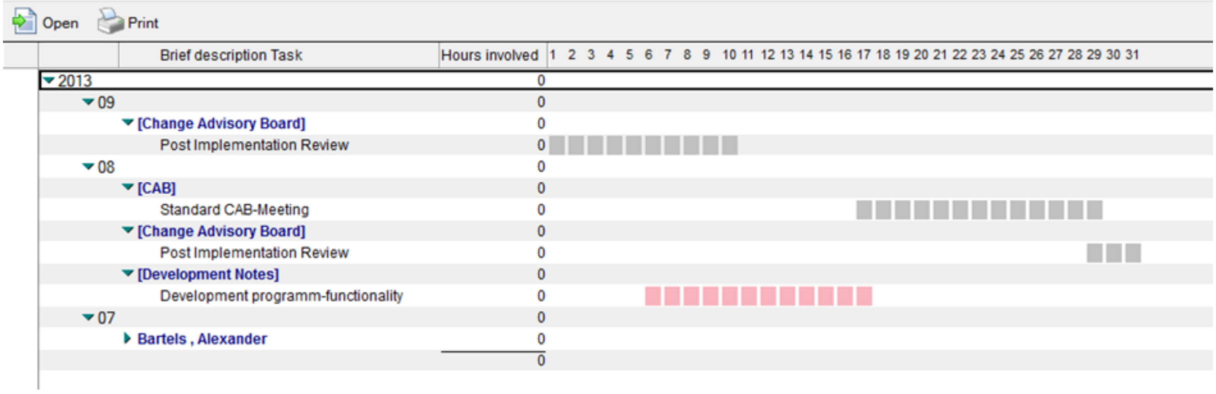


Fig. 16: Tasks with turn of month and year

Task monitoring lasts from 18-12-2009 till 22-02-2010 (grey)
The change battery task lasts from 04-09-2009 till 18-12-2009 (red)

If, for example, only one month is to be considered, the category levels of the remaining months can be collapsed. So, overlappings within a month can be clearly identified.

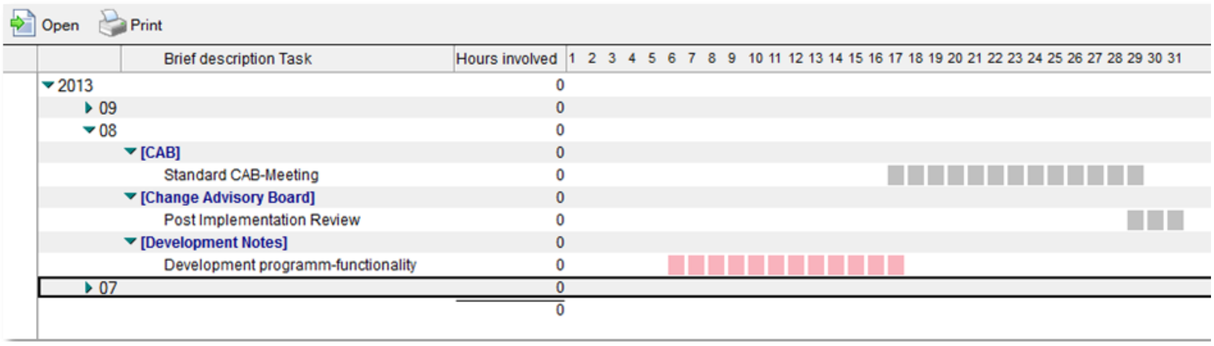


Fig. 17: Monthly view for tasks

8.2 Change calendar

The Change calendar displays RFCs, Changes and Releases in calendar format.

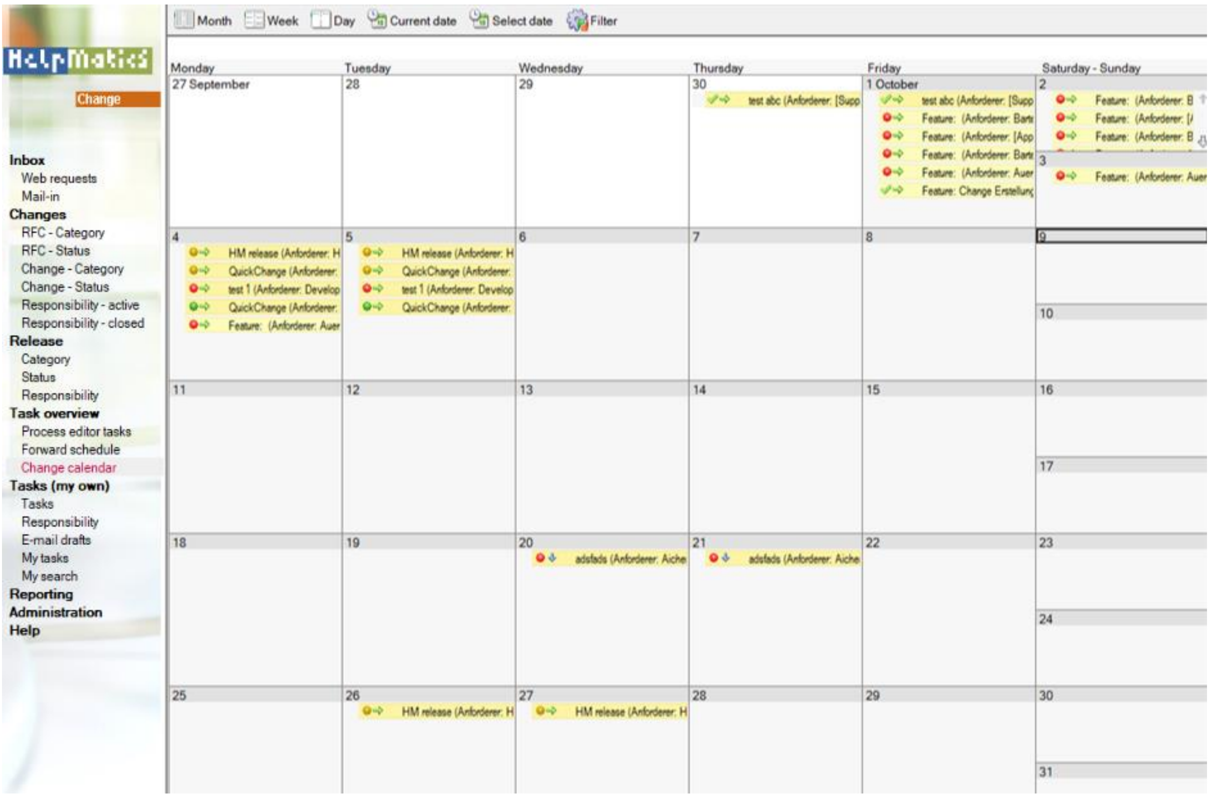
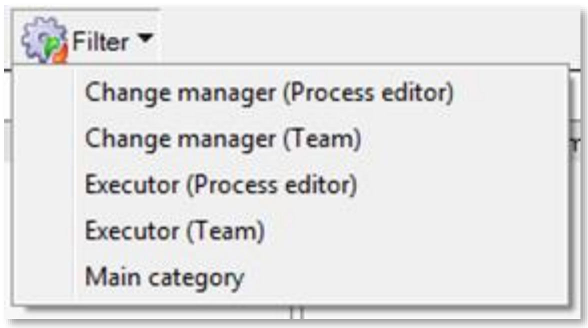


Fig. 18: Change calendar

The calendar can be displayed in months, weeks or days. You navigate on the time axis by using the CURRENT DATE and SELECT DATE buttons.

You can influence the display of the results by means of filters. You can choose between filters concerning persons (change manager or executor) and a filter by main category.



9 Mail features and processes

9.1 Draft mode

E-Mails created for an/a RFC/Change/Release/Task can be saved as draft and later be sent. The drafts categorized according to ticket ID are contained in TASKS (MY OWN) / E-MAIL DRAFTS. A draft can be edited and sent unless the related ticket has been closed.

9.2 Overview of e-mail notifications

The following table informs you in detail about the various situations when e-mails are sent to the persons or teams involved. The Mail Info option to be set in the RFC or Change applies to requesters, reporters, executors, sponsors and change managers.

If the PROCESSING COMPLETED status is skipped, the e-mail notifications configured for this case will be triggered when the AUTHORIZED status (RFC) or REVIEWED status (Change) is assigned.

	Requester / reporter	Executor	Sponsor	Change Manager	Task editor	For RFCs/Changes created from an incident/problem if configured accordingly			Type of sending
						Freely selectable e-mail addresses	Incident/problem process owner	Incident/problem process editor	
Receipt of web request	X			X					automatically
Status: New	X	X	X	X					dialog
Status: Processing: active		X		X					dialog
Status: Processing completed		X		X		X	X	X	automatically
Status Authorized (RFC), Reviewed (Change)	X	X	X	X					dialog
Status rejected	X	X	X	X					dialog
Status: Put on hold		X		X					dialog
Task active: Change process editor					X				automatically
Task activation: - Put on hold - Rejected (closed (system))					X				automatically
Target time of task exceeded				X	X				automatically

Notifications when a task has been assigned, task status has changed and task target time has been exceeded are dependent on the respective settings in the process editor and/or process team document.

Notifications when an RFC/Change has been completed are made according to the administrative settings under MODULES.

10 Rights

Rights in HelpMatics™ Change are role-dependent. For details, refer to the HelpMatics™ Administration manual.

Editing documents requires the process editor role in the administration area and the authorization for the CHANGE module.

The message "You are not authorized to edit this document" means that one of the requirements is missing.

RFCs/Changes can be created by change managers and – in HelpMatics™ ServiceDesk – also by problem owners. The status of an RFC/Change, however, can only be changed by change managers.

Task process editors can change tasks but not RFCs or Changes. The MIN. TASK PERIOD, TARGET EXPENSE (H) fields can be edited by change managers.

If the rights for task processing have been restricted on RFC, Change or Release template level (activation of the Rights in task RESTRICTED checkbox), the task can only be edited if

- the process editor stored in the task is identical with the logged in user
- the logged in user is a member of the process team stored in the task

Via the NEW ENTRY button, comments can be entered in the RESPONSIBILITY template section into the comment fields defined for requesters, sponsors, executors and change managers even without being authorized to edit RFCs/Changes. These comments are marked with time and logged-in user.

11 Attachment

11.1 Some functional advice

- Tasks in the edit area of a Change or RFC template have to be explicitly saved, especially before the RFC/Change document is closed or before positions are changed in the task list. Changes that have not been saved will be abandoned.
- After adding a new task, you have to refresh the task list by clicking F9.
- If the task selected is not displayed in the edit area, you have to shift to a different tab (e.g. Budget) before refreshing with F9.
- Change of status: Saving is necessary for performing the change of status and making changes visible.

11.2 RFC flow chart

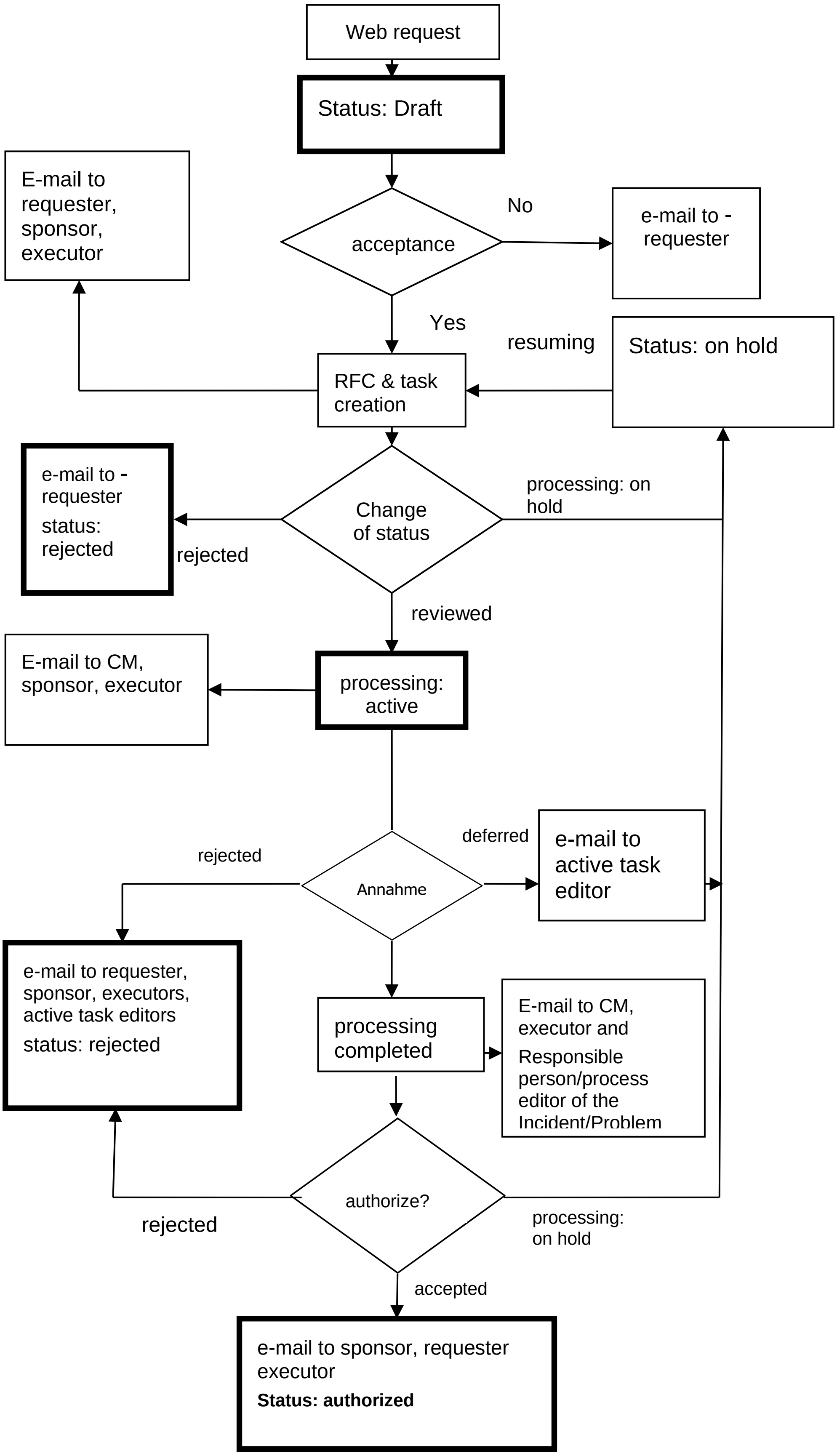


Fig. 19: RFC flow chart

11.3 Change flow chart

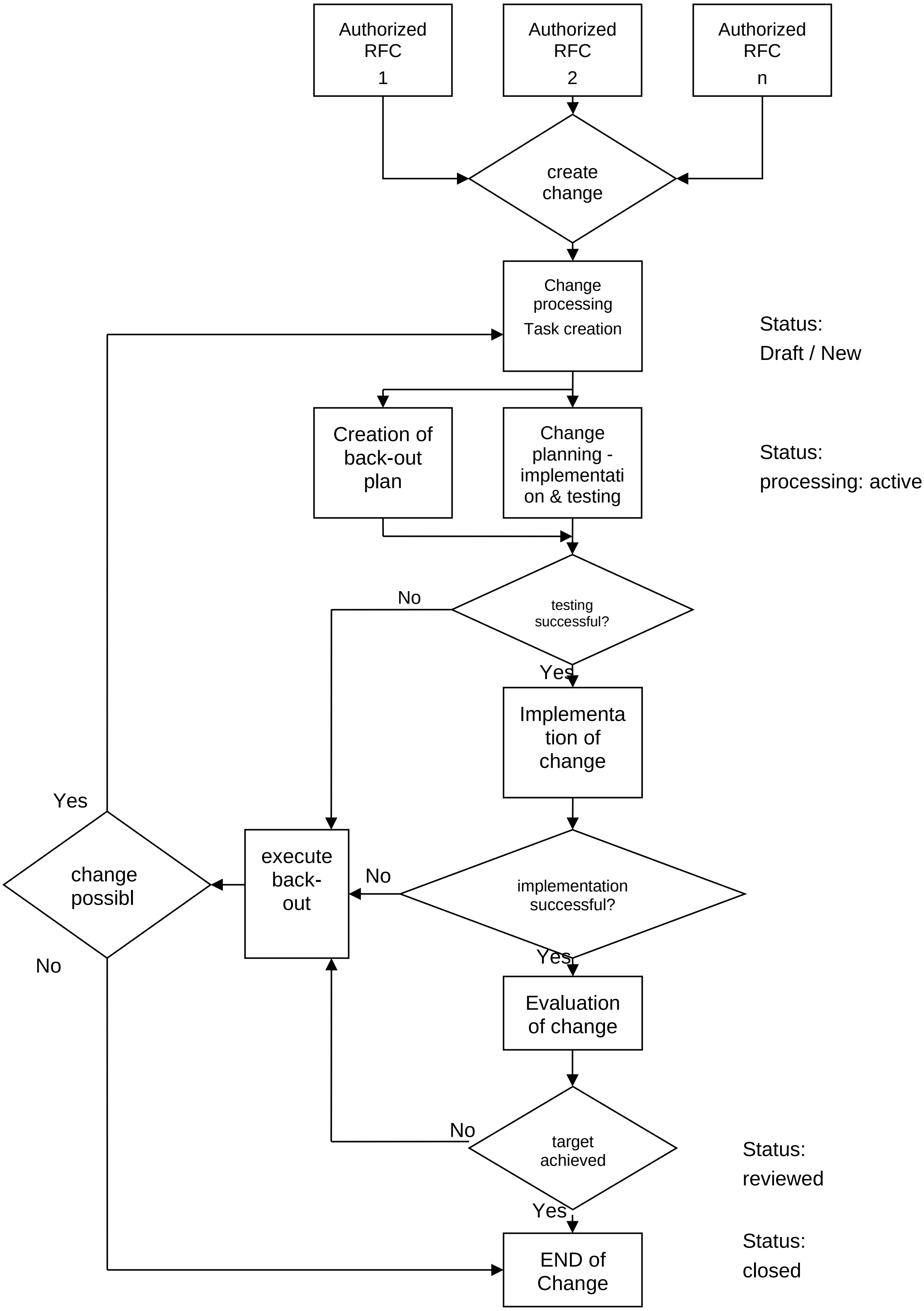


Fig. 20: Change flow chart

11.4 Statuses of an RFC process

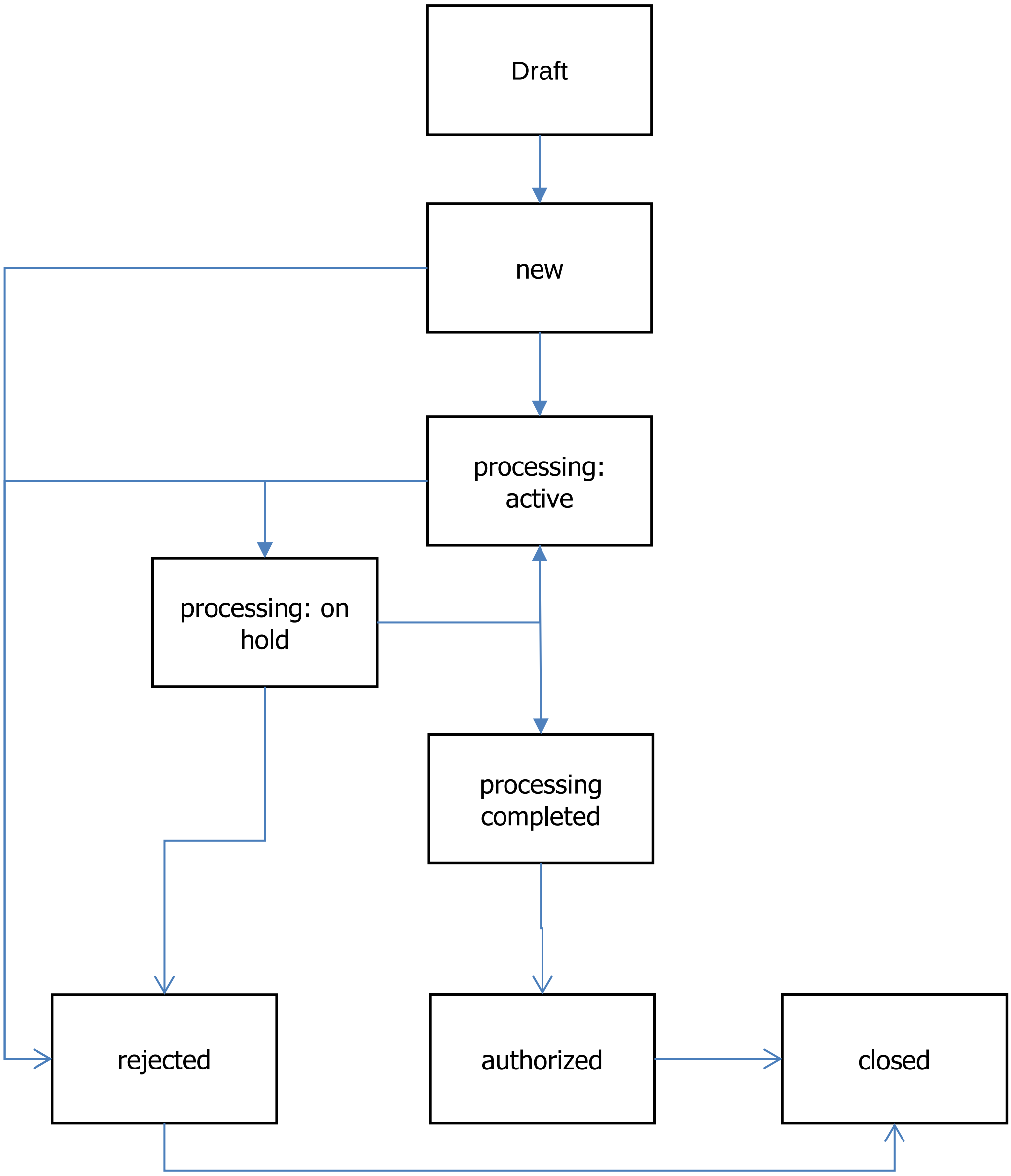


Fig. 21: RFC status flow chart

If an RFC does not contain any tasks, a note will be displayed when the status changes to PROCESSING ACTIVE and the status will be immediately set to PROCESSING COMPLETED.

11.5 Statuses of normal and emergency Change processes

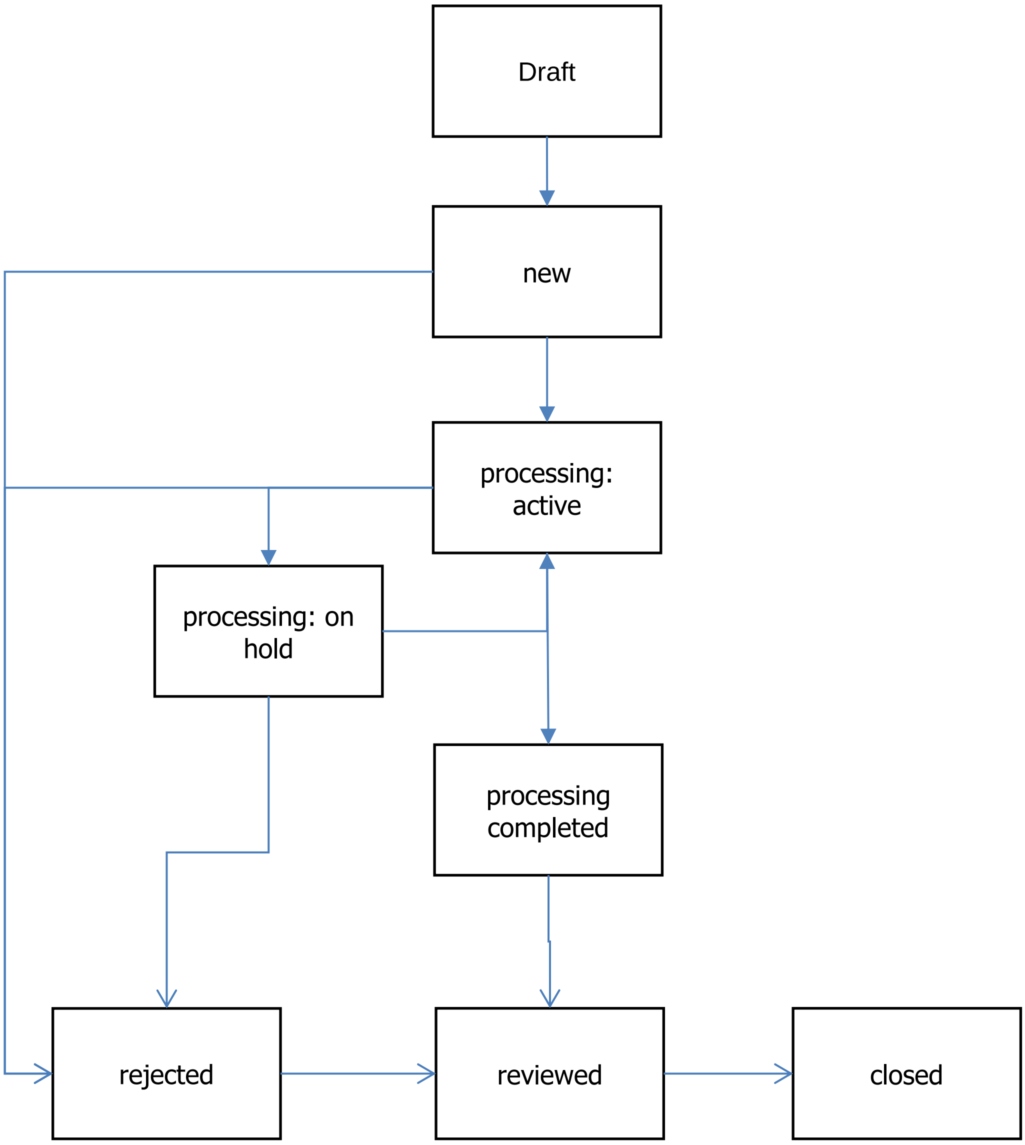


Fig. 22: Normal status / emergency change flow chart

If a Change does not contain any tasks, a note will be displayed when the status changes to PROCESSING ACTIVE and the status will be immediately set to PROCESSING COMPLETED.

11.6 Statuses of a standard Change process

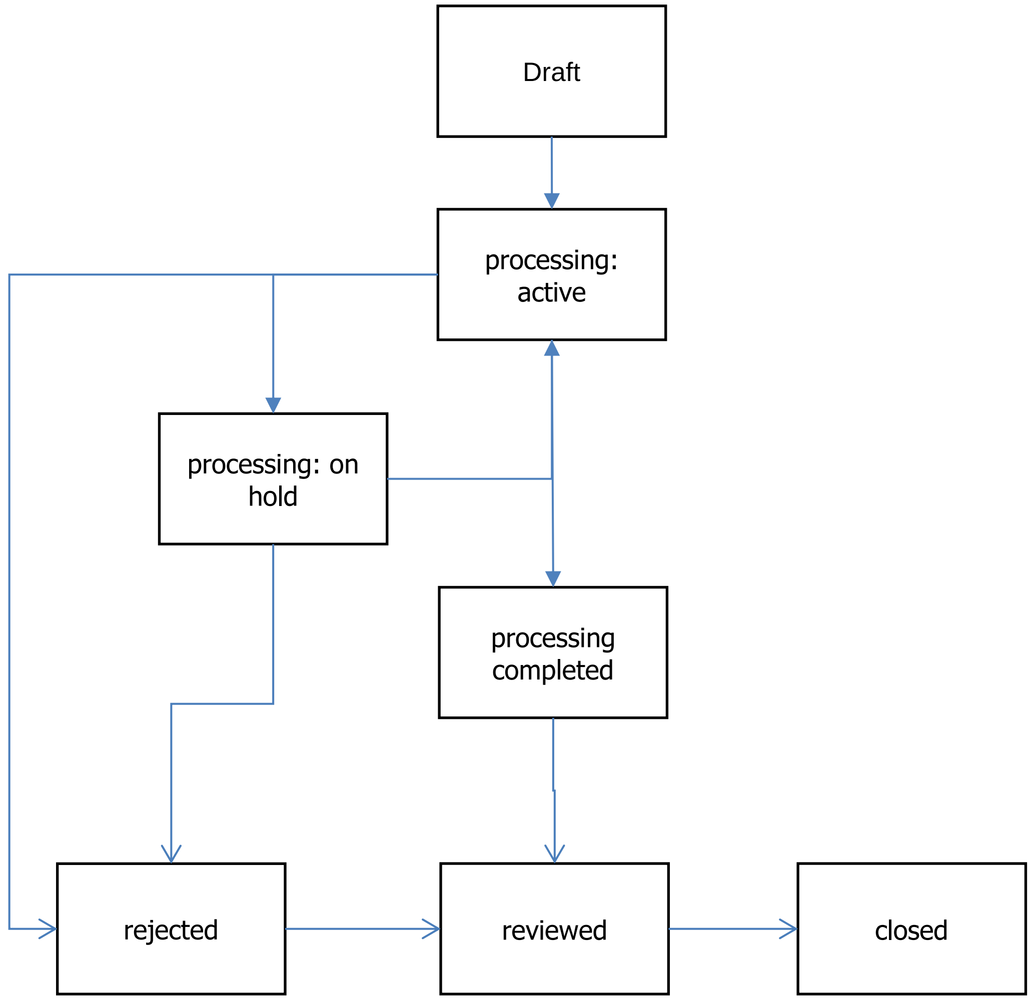


Fig. 23: Standard change status flow chart

If a Change does not contain any tasks, a note will be displayed when the status changes to PROCESSING ACTIVE and the status will be immediately set to PROCESSING COMPLETED.

11.7 Statuses of a Release process

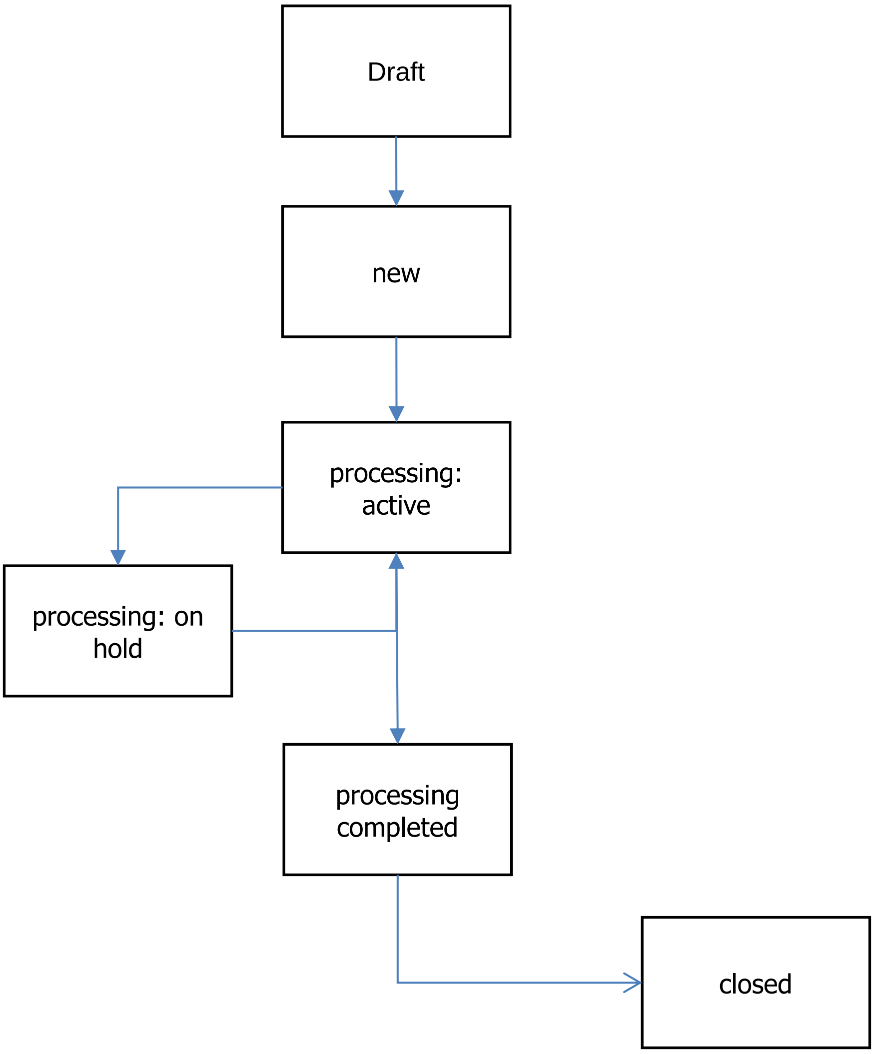


Fig. 24: Release status flow chart

If a Release does not contain any tasks, a note will be displayed when the status changes to PROCESSING ACTIVE and the status will be immediately set to PROCESSING COMPLETED.

12 Imprint

COC AG
Product Management HelpMatics™

Gewerbepark Lindach A 12
84489 Burghausen
Germany

Telephone: +49 (0)8677 / 9747 - 0
fax: +49 (0)8677 / 9747 - 199

E-mail: info@coc-ag.de
Internet: www.helpmatics.com