15 WAYS TO MANAGE IT CHANGES BETTER WITH

SERVICEDESK PLUS

A COLLECTION OF PROVEN SERVICEDESK PLUS BEST PRACTICES

ManageEngine
ServiceDesk Plus

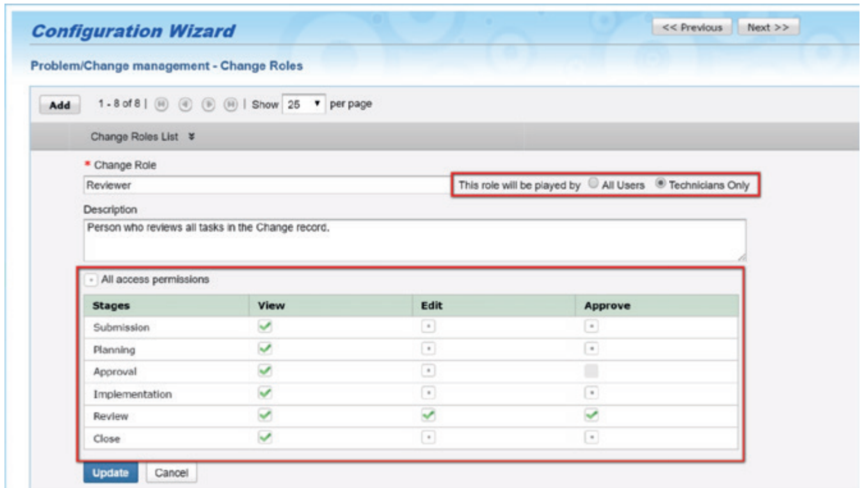
TABLE OF **CONTENTS**

01 How to assign change roles to different stakeholders in a change

Different stakeholders require different levels of access to the change.

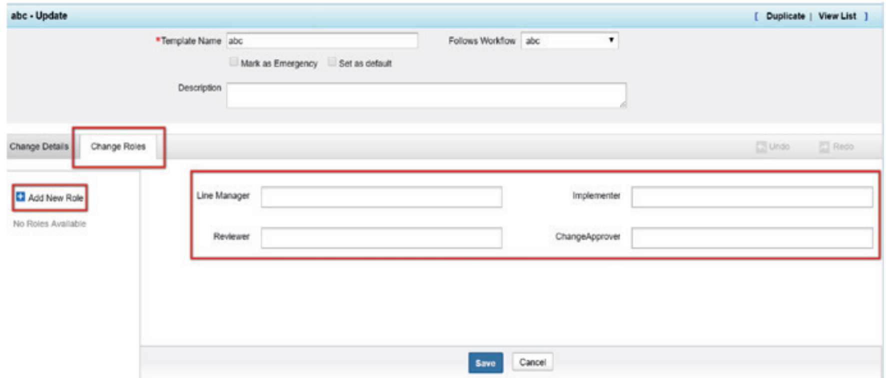
ServiceDesk Plus helps you create and manage IT change roles with detailed access permissions. Change templates help initiate changes quickly with all fi elds pre-fi lled. You can also map a requester (end user) to a change role when it is needed. For example, if a change needs approval from a product manager (s)he can be made the change approver.

(a) To create and manage change roles:
Go to **Admin > Change Roles > Add or Edit Change Role**



After you create roles, you can assign them for specific change types within the change template.

(b) To create change roles and assign them to stakeholders:
Go to **Admin > Change Templates > Click Change Roles > Add New Role**



After you have added new roles, while raising a change using the template, you can assign individuals to them.

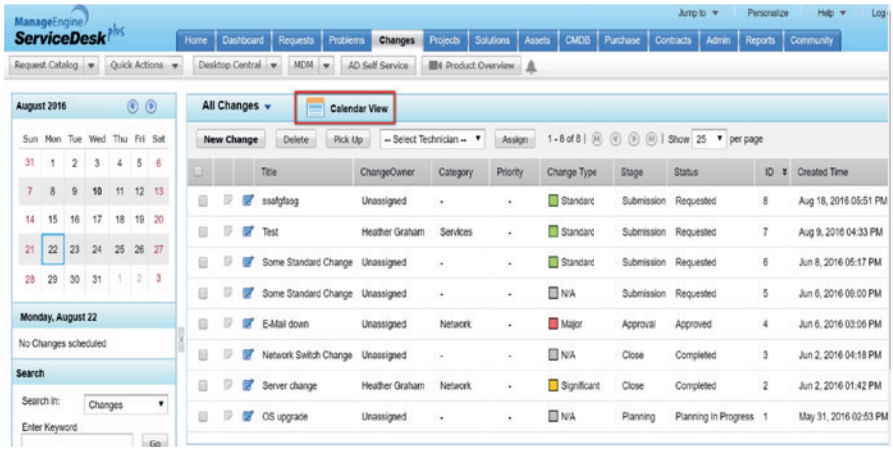
02 How to schedule changes effectively

Sometimes, IT teams deal with multiple changes at once. In such cases, it is important to schedule changes in a way that avoids collisions and downtime.

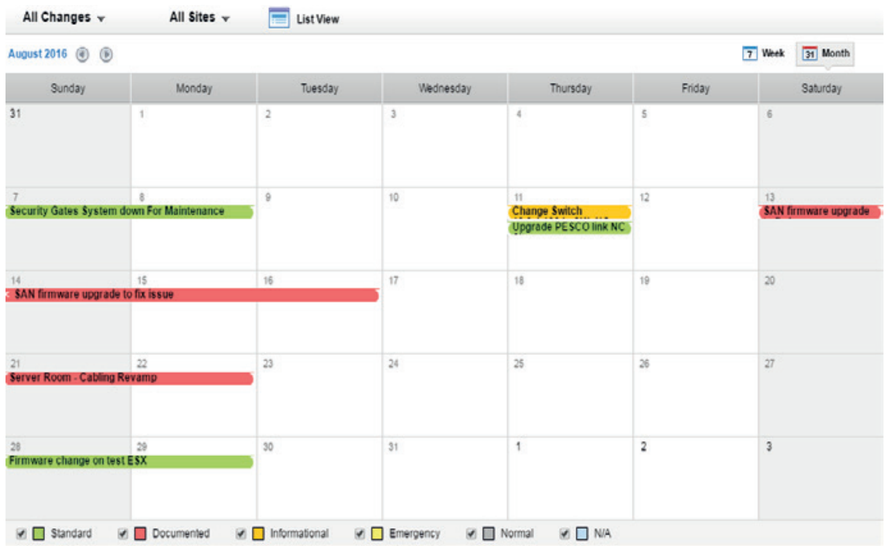
To schedule changes in ServiceDesk Plus, you can use the Change Calendar feature. In this feature, all scheduled changes are color coded per the change type (standard, major, minor, etc) and displayed along with the start and end dates. This forward schedule helps you easily plan for upcoming changes.

To schedule changes:

Go to **Changes > Calendar View**



Once inside the calendar view, you will be able to view the scheduled changes as shown below.

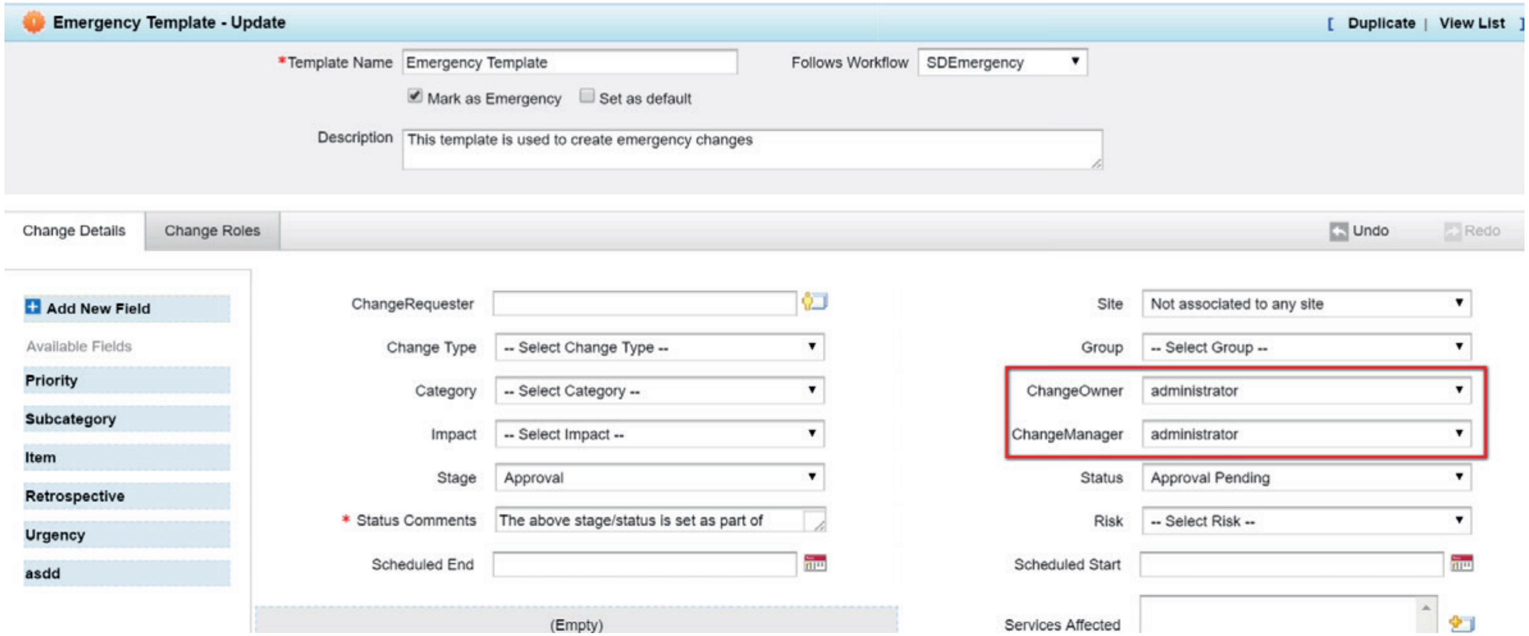


03 How to configure a simple change with minimal notifications and fewer technicians

For a small IT team, assigning all change roles to different people may not be feasible. The team may want to implement the change by using minimum resources.

ServiceDesk Plus enables you to do just that; you can choose the change owner and manager while submitting the request for change and leave the other roles unassigned. This reduces the number of people involved in a change to just two. The change owner submits and implements change while the change manager approves and reviews it. Even though you can assign both these roles to a single technician, have at least two people to maintain a proper approval process.

To assign the change owner and manager roles to the same technician:
Go to **Admin > Change Template > Change Owner/Change Manager**



04 Three simple ways to notify technicians and requestors about a change instantly

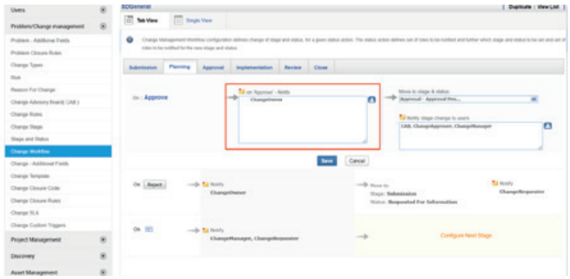
The IT service desk usually interacts with various departments in the organization. To have better visibility and control over change implementations, it is necessary to have open communication channels between technicians, requestors, and other stakeholders.

Using ServiceDesk Plus, technicians can provide updates on ongoing changes to a group, department, or individual in the following three different ways:

Method 1: Configuring notifications from a stage or status module

Follow this method when the change workflow is set and you want to notify the corresponding technician whenever there is a change in stage or status.

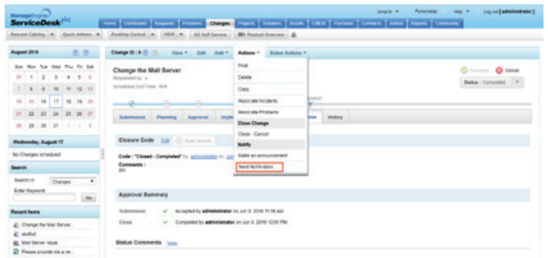
To configure Notifications in ServiceDesk Plus: Go to **Admin > Change workflow > Choose a workflow > Configure Workflow**



Method 2: Sending custom notifications

Apart from standard notifications, you might want to send custom notifications to a group or an individual about changes in schedules, roll out plans, etc.

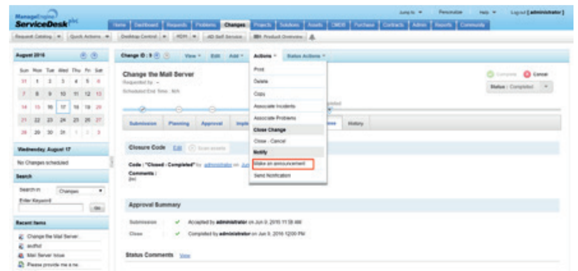
To send notification from the Change Record: Go to **Changes > Change Record > Actions > Send notification**



Method 3: Making organization or department-wide announcements

Using the Make an announcement feature, you can keep end users up to date on scheduled and unscheduled outages due to a change activity. This will help reduce the incoming ticket volume to the help desk because. ServiceDesk Plus allows you to make an announcement right from the Change Record.

To send announcements from the Change Record: Go to **Changes > Change Record > Actions > Make an announcement**

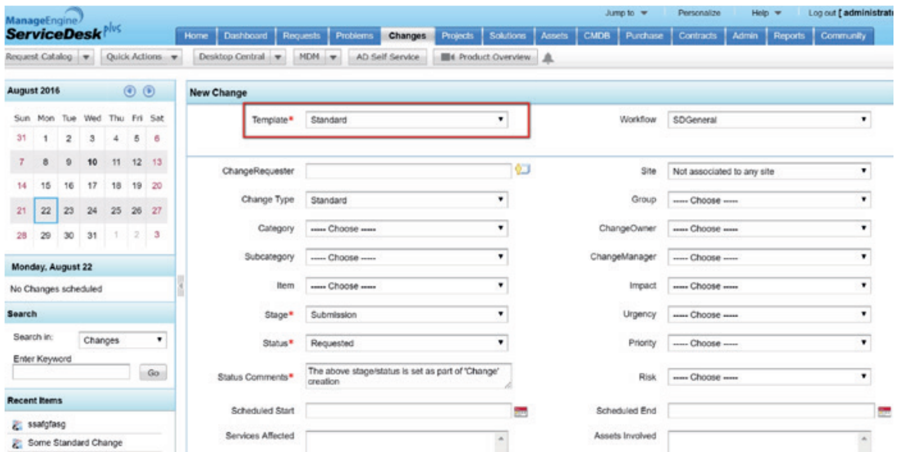


05 How to avoid long approval stages for standard changes

IT teams often implement changes that are low-risk and common. For example, changing a used toner cartridge on a printer is a standard change. Standard changes do not require lengthy planning and approval cycles each time they are implemented.

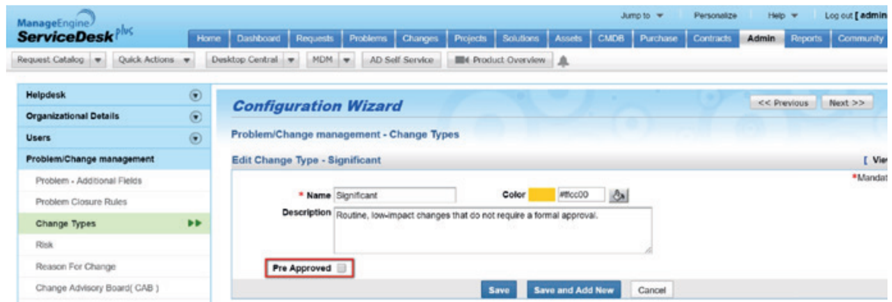
For standard changes in ServiceDesk Plus, you can skip the approval stage by using the preconfigured Standard change type. Under this type, the change goes directly from planning to implementation stage.

(a) To use Standard change type, follow these steps:
Go to **Changes > New Change > Template > Standard**



(b) If you want the standard change to go through the approval stage, you can configure it as:

Go to **Admin > Change Types > Edit Standard** > uncheck **Pre Approved**

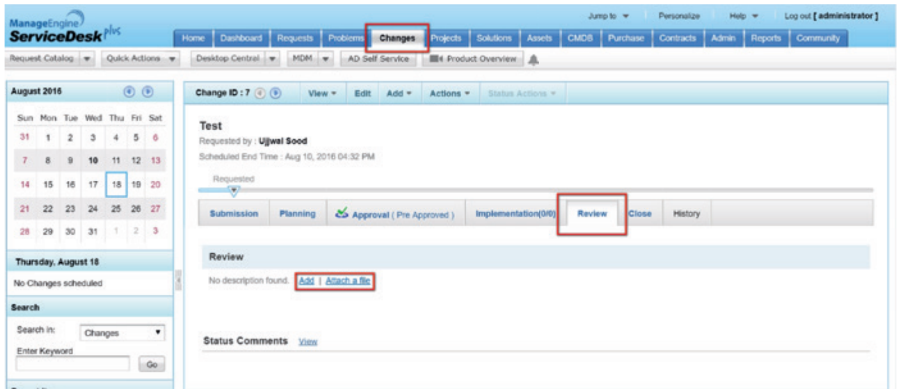


06 How to ensure a post implementation review of changes

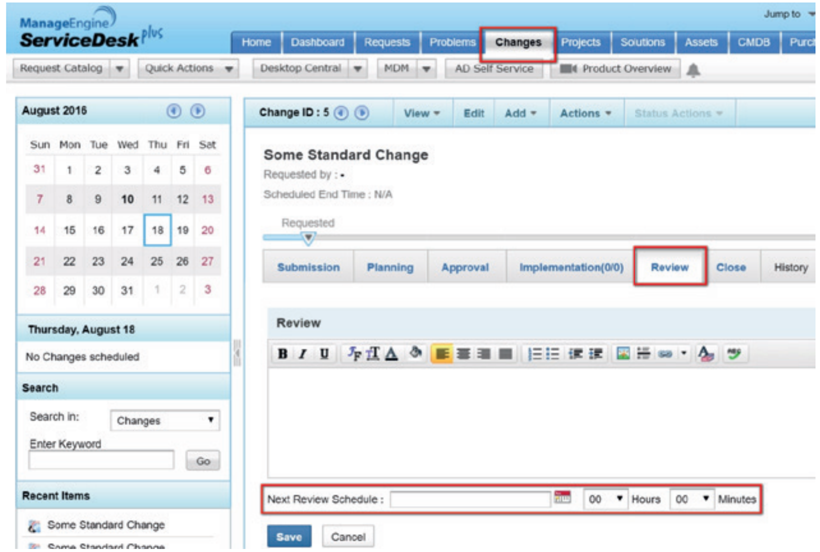
After a change is implemented, you can conduct a review to gauge the efficiency of the implementation and record any observations for continual improvement.

ServiceDesk Plus lets you record a post implementation review either manually or as an attachment. You can also schedule the next review.

(a) To enter the post implementation review:
Go to **Changes > Change Record** Under **Review,**
you can **Add/Attach a file** and **Save**



(b) To set the date and time for the next review:
Go to **Changes > Change Record**
Under **Review**, you can add the **Next Review Schedule** and **Save**

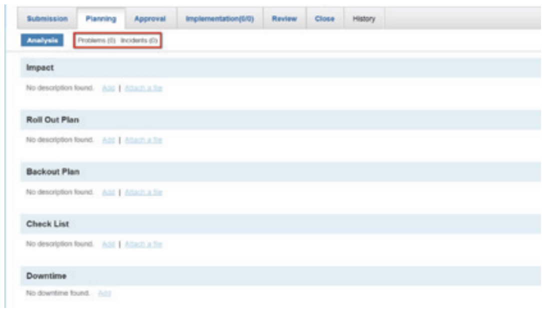


07 How to associate incident(s) to any change

Often, resolving an incident may lead to a change, and implementing a change may cause incidents. In both cases, the IT team must identify and associate the incidents that caused the change and the incidents the change triggered. This helps technicians track related incidents and changes through their life cycle. For example, if a change triggers multiple similar incidents, they can be linked together and associated to the change. Technicians can resolve the incidents faster since they know which change triggered them and all the incidents can be closed together.

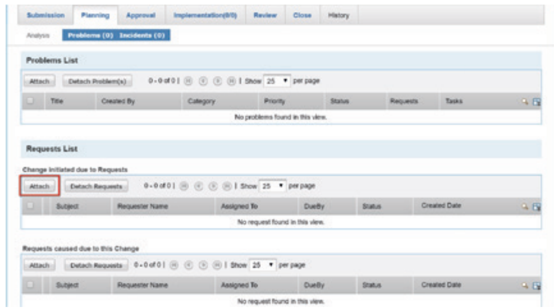
With ServiceDesk Plus, you can associate incidents to change within the Change Record.

To associate incident(s) and change:
Go to **Changes > Change Record**
Under **Planning** you can see the related **Problems () Incidents ()**

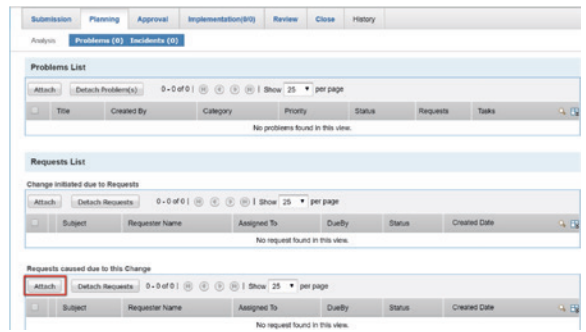


Once you are in the problems and incidents menu of a Change Record, you can associate both- the request(s) that caused the change and the one(s) that were caused by the change.

To associate the incident(s) that caused the change:
Under **Requests List > Change initiated due to Requests > Attach**



To associate the incident(s) that were caused by the change:
Under **Requests List > Requests caused due to this Change > Attach**

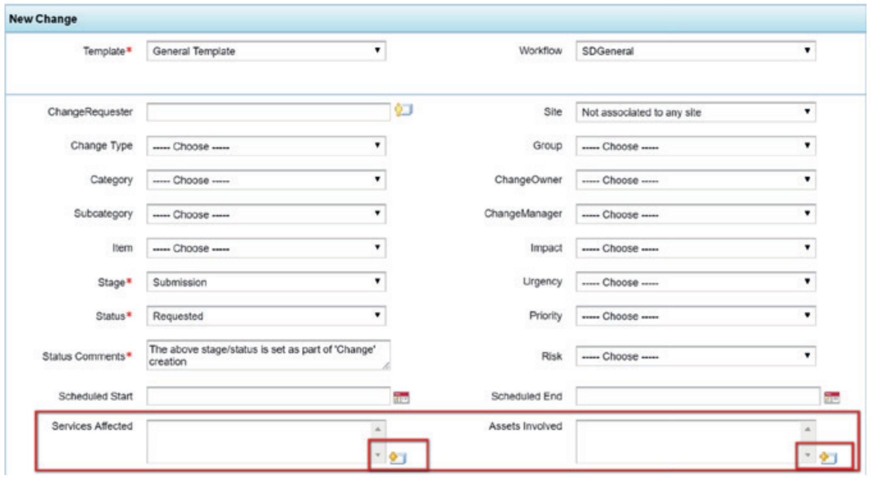


08 How to ensure high visibility of assets and services affected by ongoing changes

Before any change implementation, the IT team must inform all stakeholders about how the change may impact assets and services. This will help teams plan to mitigate any risks during the implementation.

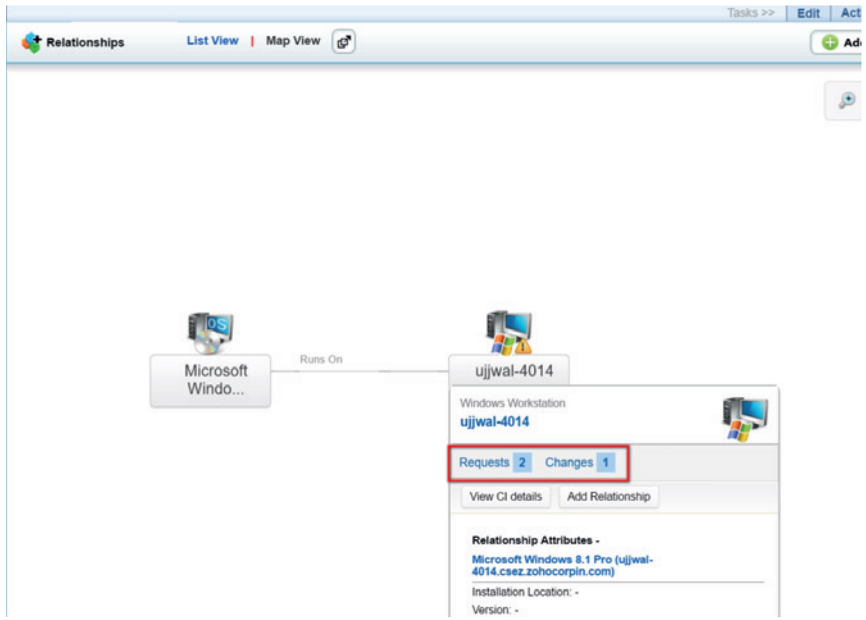
In ServiceDesk Plus, you can specify all affected assets and services in the change request form.

To list all affected assets and services:
Go to **Changes > New Change >** Add **Services Affected / Assets Involved** details



Each time a change request is raised, ServiceDesk Plus lets you view changes and other requests associated with an asset or service from within the CMDB. This will help you understand how a change affects dependent assets and services.

To view changes associated with an asset or service:
Go to **CMDB > Asset or Service > Relationships**

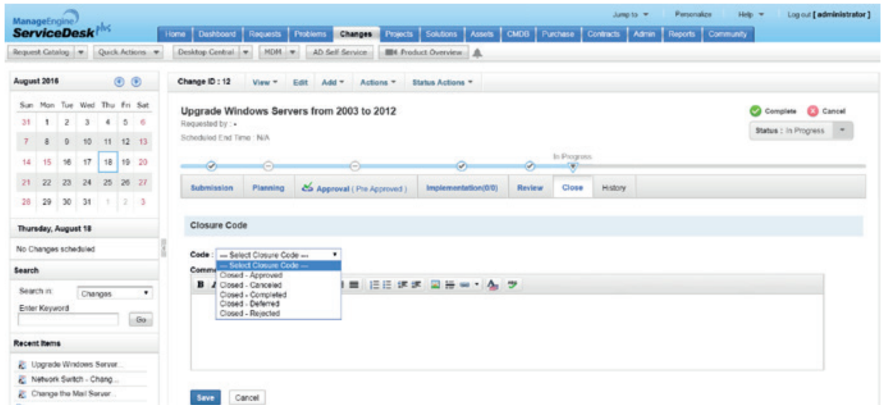


09 How to record the reason for a Change Closure

Not all changes the IT service desk implements are successful. Some may be rolled back, some may be rejected due to non-compliance, etc. Even though this information is recorded in the review stage, it is unavailable during change performance audits.

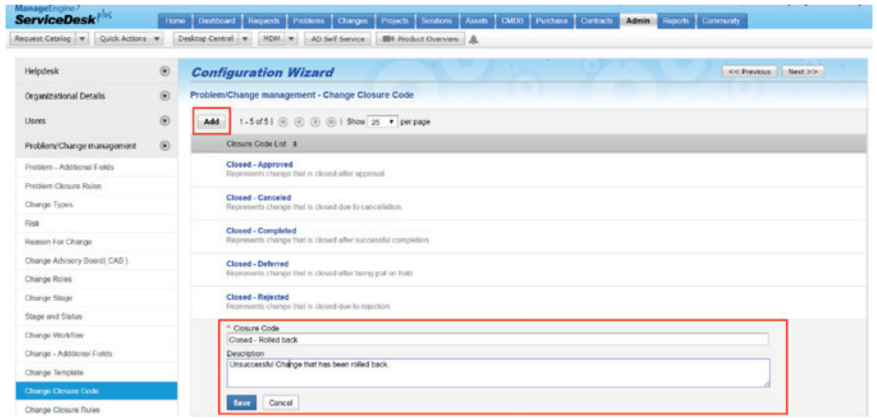
In ServiceDesk Plus, this information can be captured using the Change Closure Code feature. Each time a change is closed, the application automatically prompts the technician to enter the reason for closure.

To capture the reason for a Change Closure:
Go to **Changes > Change Record** Under **Close** stage, enter the **Closure Code**



ServiceDesk Plus comes with predefined closure codes such as **approved, cancelled, completed, deferred,** and **rejected**. You can also create user-defined closure codes. In the example discussed, we could choose the closure code as “rejected”.

To create user-defined closure codes:
Go to **Admin > Change Closure Code > Add**

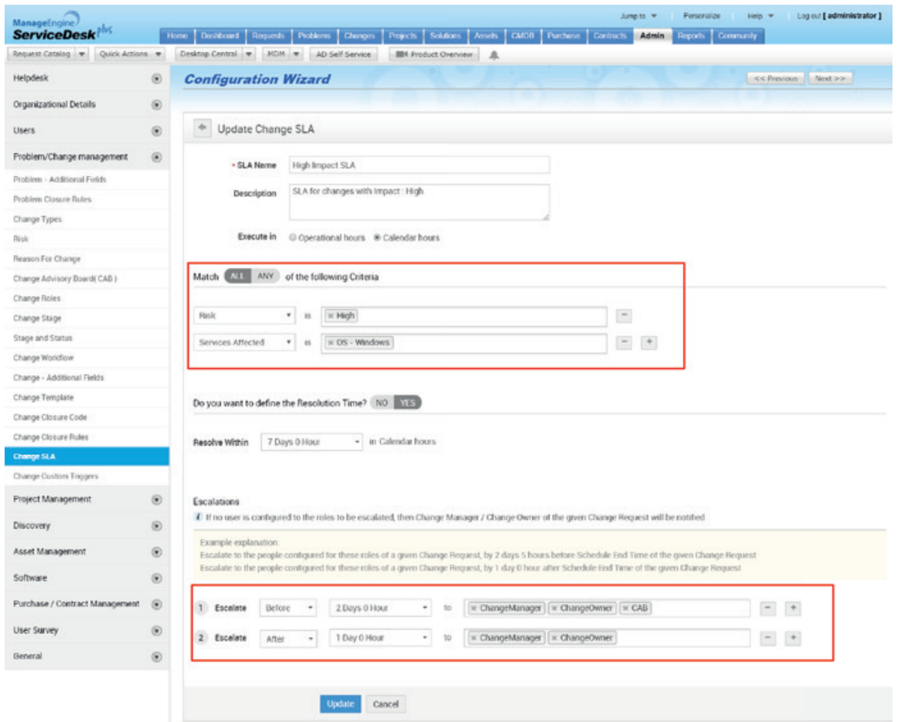


10 How to ensure timely closure of changes using Change SLA

Your IT service desk might have a lot of changes queued per month, so it's imperative to constantly ensure that the changes are progressing based on schedule. SLAs help ensure a smooth change process, escalating at crucial steps when required.

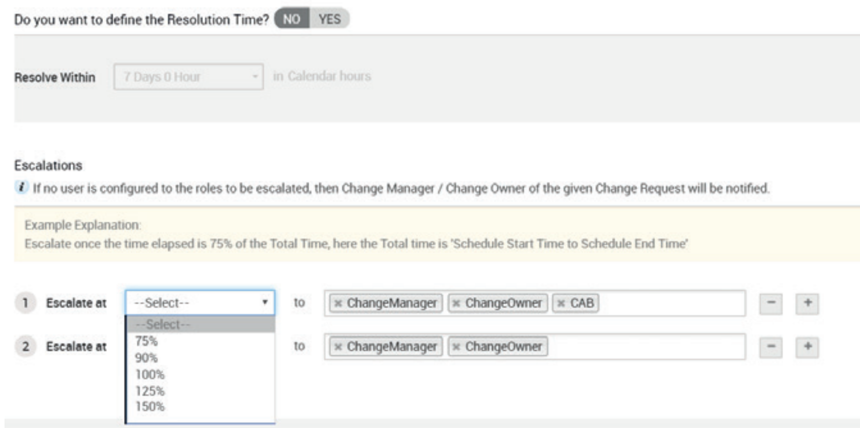
In ServiceDesk Plus, you can do this using Change SLA. Based on predetermined criteria, you can set four levels of escalations.

To define a change SLA:
Go to **Admin > Change SLA > Update** or **Create new SLA**



In this example, the resolution time is set at seven days. On the fifth and the eighth days, an escalation is configured to alert the recipients. This way, the escalations can be proactive as well as reactive.

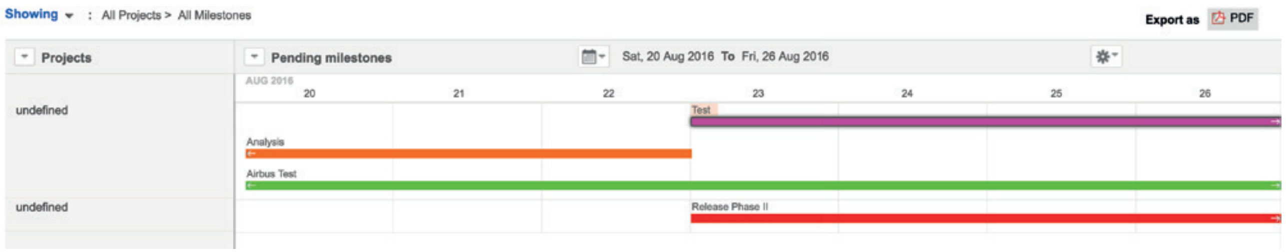
If the resolution time is not specified, you can set escalations based on the progress of the change. This can be done as shown below.



11 How to manage change implementation on a large scale

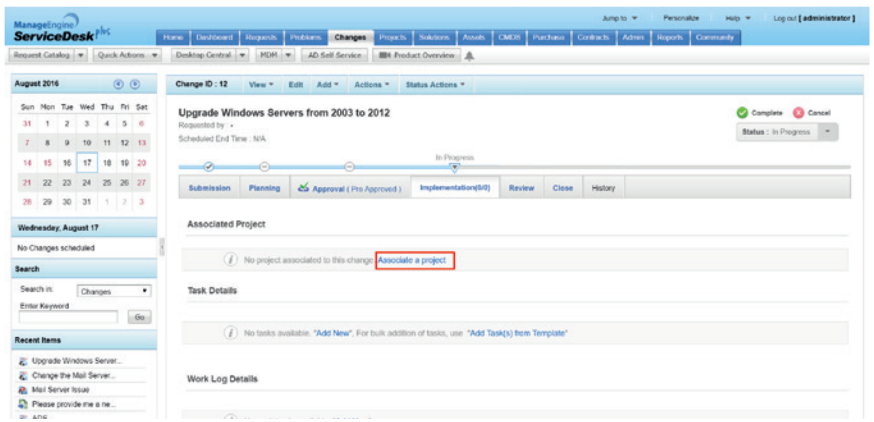
These days, as businesses adopt newer technologies, like an ERP roll out or a hardware refresh, complete overhaul of the IT inventory is fairly common. Such large scale changes are often scheduled over long periods of time to have the least possible business impact.

With the Projects module, you can manage and successfully complete large-scale change implementations by setting goals and milestones, planning the schedule using Gantt charts, and tracking the progress.

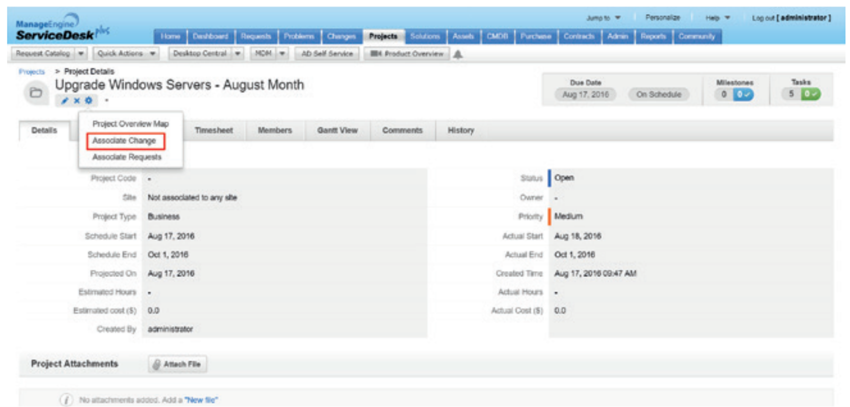


While smaller changes are broken into tasks for implementation, bigger changes are linked to projects. Changes can be linked to projects in two ways:

Method 1: Associate a project from the Change Record:
Go to **Change tab > Change Record > Implementation Stage > Add Project**



Method 2: Associate change from the projects record:
Go to the **Projects > Project Record > Actions > Associate Change**

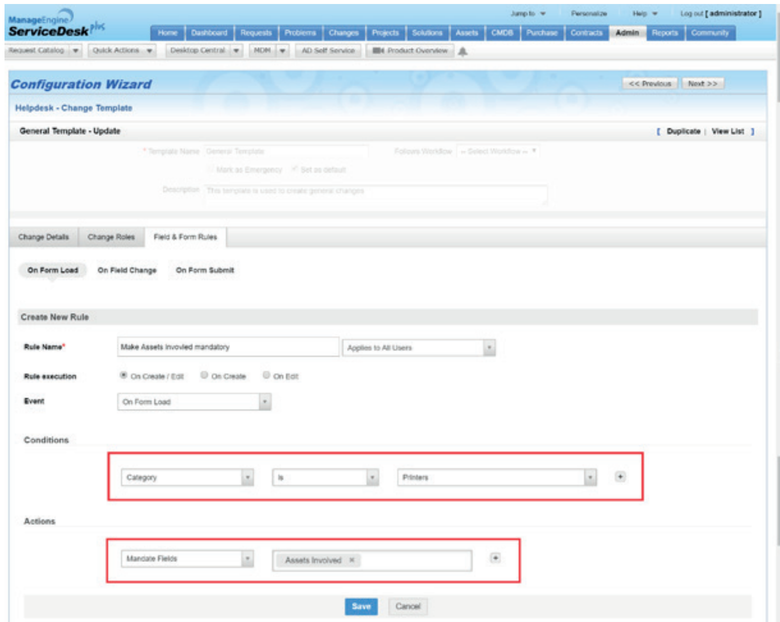


12 A smart way to prevent incomplete RFC submissions (without mandating every field)

Often, when a Request for Change is raised, not all information relevant to that particular change is provided. Mandating all fields is one way to get all the information in one shot, but that can seriously affect the user experience. Moreover, the relevant information varies with change types and therefore all the fields cannot be mandatory. For example, changing a printer would require a list of "assets involved," whereas upgrading a server will need a list of "services affected."

In such cases, ServiceDesk Plus provides an option to build intelligence in the form of using "Field and Form" rules. Using this feature, you can define a condition for which you can enable or disable a field, mandate or non-mandate fields, show or hide fields, and execute a script on a change request form.

To make a field mandatory:
Go to **Admin > Change Template > Field & Form Rules**



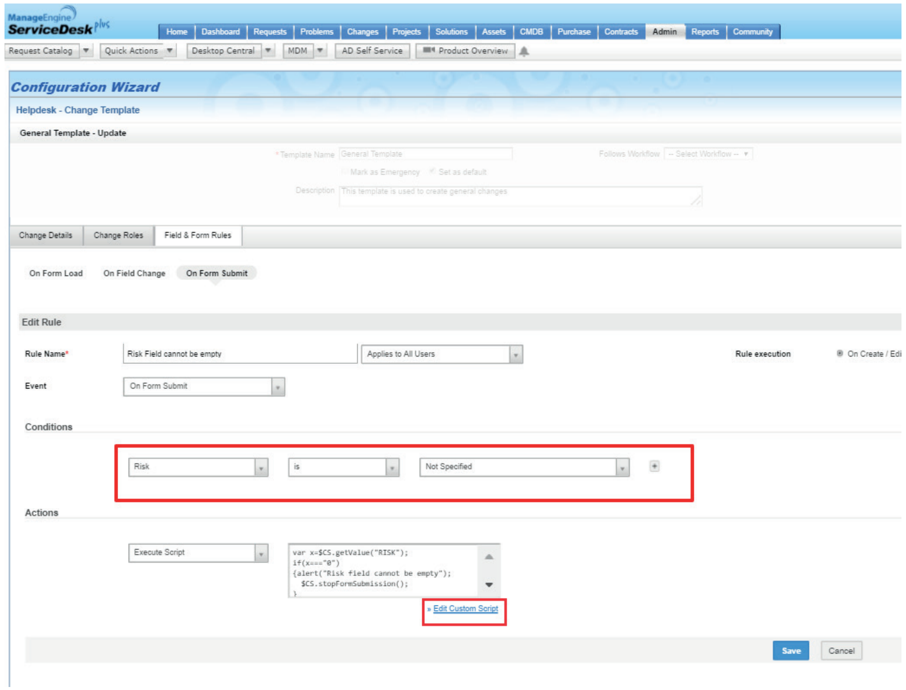
In the screenshot above, we have created an **on Form load** rule that marks the **Assets Involved** mandatory whenever the **"Printers"** is chosen under **Category**. Similarly, you can create rules to be applied when a field is changed or when the form is submitted.

13 How to include risk information in a change

Every change has an important set of parameters that help you identify business criticality, impact, and urgency. So each time a technician raises a change request, it's important to capture these parameters.

In ServiceDesk Plus, we use "Risk" as one of the measures of business criticality. In order to get this information, we can make use of "Field and Form" rules. You can define a rule that prevents form submission unless the risk field is specified.

To include risk information in a change:
Go to **Admin > Change Template > Field & Form Rules**

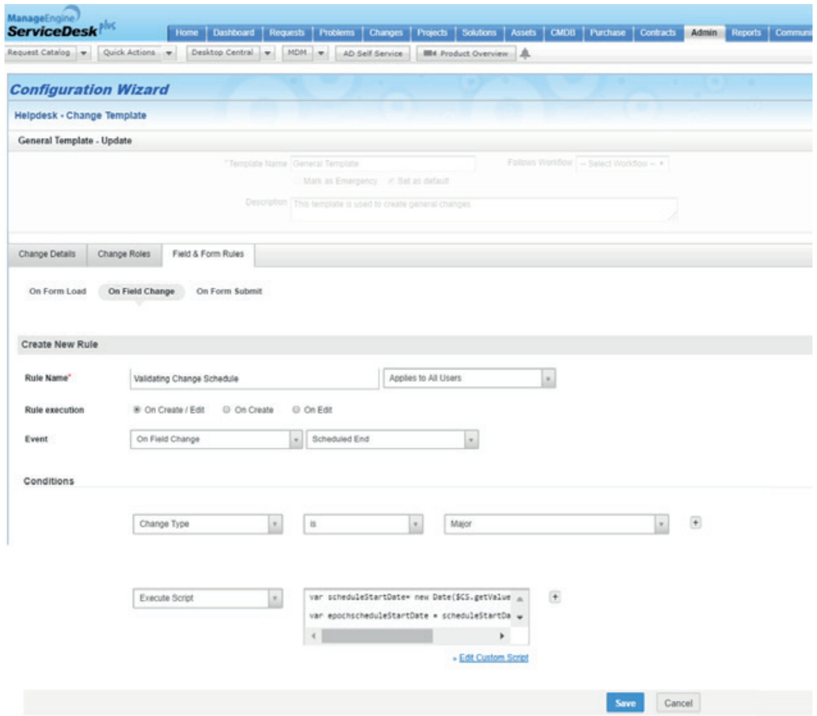


ServiceDesk Plus makes it easy for IT technicians to create custom scripts by providing sample scripts and guidelines. This is available in "Edit Custom Script" as shown above.

14 How to validate the time period for different types of changes while submitting an RFC form

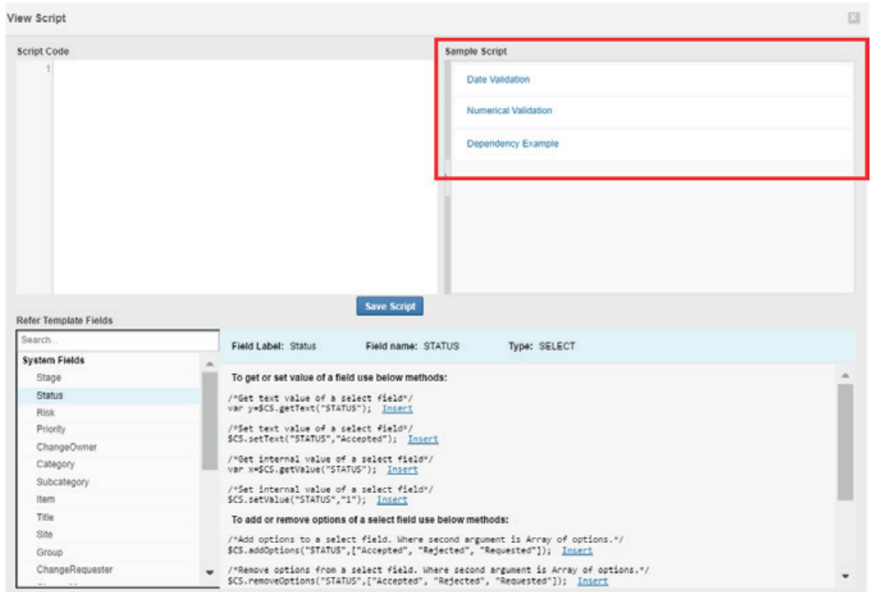
Incomplete RFCs delay change implementations and affect the change success rate. To avoid incomplete or incorrect submission of change requests, ServiceDesk Plus has an option to build intelligence into the RFC form.Using “Field and Form” rules, you can create a dynamic form that validates different fields in the form automatically to help technicians enter the correct details of an RFC, reducing the potential for any manual errors. For example, let’s say that in your organization, a major change should be scheduled for no less than six days. A dynamic form should therefore accept major changes with a change schedule of more than six days only.

To validate the time period for different types of changes while submitting an RFC form:
Go to **Admin > Change Template > Field & Form Rules**



In the above example, when there is a change in “Scheduled End” and when the Change Type is Major, the form executes the script that validates the schedule.

ServiceDesk Plus provides sample scripts that make it easy for your technicians to write custom scripts. To create a custom script:
Go to **Admin > Change Template > Field & Form Rules > Actions > Execute Script > Edit Custom Script**

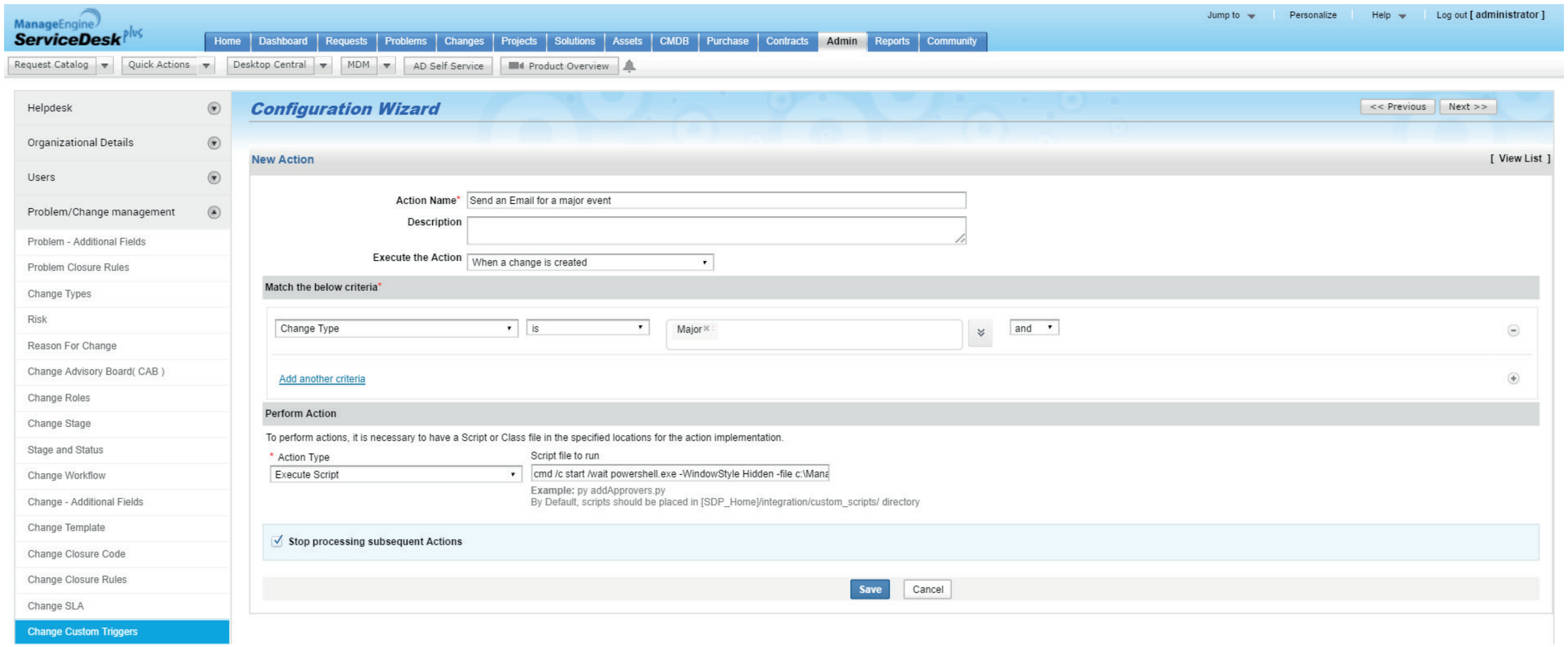


15 How to create custom triggers

Most service desks often operate along with various business applications and tools. As the command center of IT, the service desk application should be able to communicate with these applications, especially when a change is initiated or in progress.

For example, consider a major change that affects a couple of business critical applications. Usually, such critical applications use a monitoring tool like OpManager. So when these applications go down due to a major change, the alarm goes off and the entire network is alerted. By using custom triggers, you can switch off the monitoring tools for the period of change implementation and switch them on again after the implementation, avoiding unnecessary notifications when an approved change is in progress.

In ServiceDesk Plus, you can create custom triggers in response to a change event. To do this,
Go to **Admin > Change Custom Triggers**



ABOUT
SERVICEDESK PLUS

ServiceDesk Plus is a comprehensive help desk software with integrated asset and project management capabilities built on industry recommended ITSM best practices. ServiceDesk Plus is trusted by more than 100,000 organizations, across 185 countries, and is available in 29 different languages. With ServiceDesk Plus, IT organizations can leverage ITSM best practices while unifying their help desk, asset management, and project management activities in a single pane of glass.

ABOUT MANAGEENGINE

ManageEngine is a division of Zoho Corporation with offices worldwide, including the United States, India, Japan, and China. ManageEngine delivers IT management tools that empower IT teams to meet organizational needs for real-time services and support. Worldwide, established, and emerging enterprises - including more than 60 percent of the Fortune 500 - rely on ManageEngine products to ensure the optimal performance of their critical IT infrastructure, including networks, servers, applications, desktops, and more.

100,000
ORGANIZATIONS

750,000
TECHNICIANS

185
COUNTRIES

ManageEngine
ServiceDesk Plus

10 YEARS OF TRANSFORMING IT SERVICE DESKS WORLDWIDE

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