NEWCASTLE UNIVERSITY IT SERVICE
NU SERVICE ANALYST HOW-TO GUIDE:
CREATE A NEW CHANGE RECORD

CONTENTS

Service Management Office

DOCUMENT CONTROL

Document name:	Analyst Guide – How to create a new Change Record
Department/function:	Service Delivery
Effective from:	Jan 2022
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VERSION HISTORY

Version	Date	Author	Change
0.1	06/01/2022	Aidan Fay	Created

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CREATING A NORMAL CHANGE. (MINOR, SIGNIFICANT AND MAJOR)

Notes

- All times are entered in the 24hr clock format
- When refreshing the Change window please use the icon within NUService:

- If the button you require is not appearing on the menu bar then you will find the option by clicking the arrow at the right of the bar:

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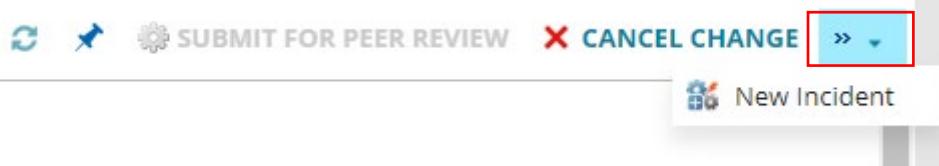
PROCEDURE

Normal changes can be created as minor, significant and major. The risk assessment determines the change level.

1. CREATE A NEW NORMAL CHANGE RECORD

First, open the Change workspace.

Then, select the NEW CHANGE button
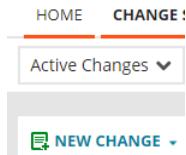
The new change window will open with you as the change owner, and the status set to draft. The type of change will be Normal.
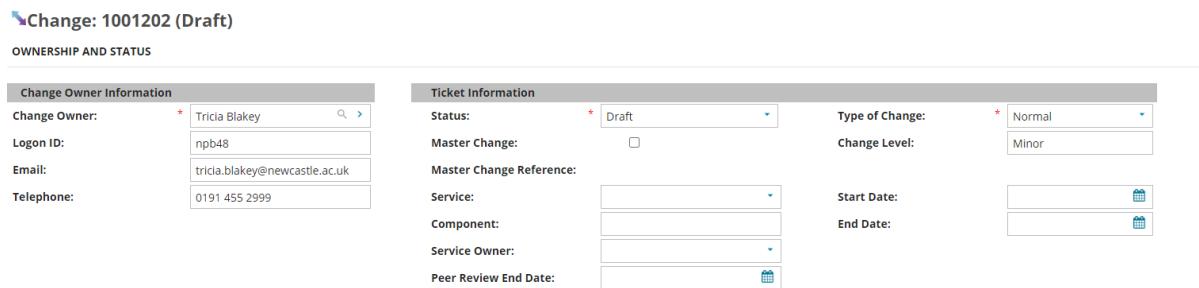
Save the change

Enter a change summary under the Details Tab

Enter the change details under the Details Tab.

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2. COMPLETE THE CHANGE INFORMATION

Complete the change information tab; you must complete all fields. Where a field is not required, enter NA

Implementation Plan

None | **B** *I* U | »

if you

Scope of Change

None | **B** *I* U | »

like pina colda

Communications Plan

None | **B** *I* U | »

and getting

Remediation Backout plan

None | **B** *I* U | »

caught in the

Reason for Change

None | **B** *I* U | »

rain, and your

Risk and Impact

None | **B** *I* U | »

not into health

Test Plan

None | **B** *I* U | »

food and

Additional Notes

None | **B** *I* U | »

have half a brain

Consultation

None | **B** *I* U | »

onions, orges are like onions

Success Acceptance

None | **B** *I* U | »

they have layers.

Training Plan

None | **B** *I* U | »

how about a nice parfait?

3. COMPLETE THE CHANGE ASSESSMENT

Go to the Change Assessment tab.

Select the entries on questions 1-5 to set the risk level.

Risk level: Low (1 of 100)

Q1. Scope of Change
- ● One Component
- ○ Multiple Components
- ○ One Service
- ○ Multiple Service / Infrastructure

Q2. Impact of Failure
- ● Relatively low, easily recoverable
- ○ Limited disruption or outage
- ○ Considerable service disruption or outage
- ○ Severe service disruption or outage

Q3. Likelihood of Failure
- ● No Risk
- ○ Risk understood and mitigated; high confidence
- ○ Risk understood but not mitigated; medium confidence
- ○ Risk not understood; low confidence

Q4. Service Criticality
- ● None
- ○ Low
- ○ Medium
- ○ High

Q5. Does this change require any business application enhancement or redesign?
- ● No Downtime

The change level is automatically updated on the ticket information to Minor

Ticket Information			
Status:	* Draft	**Type of Change:**	* Normal
Master Change:	☐	**Change Level:**	Minor

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4. SET PEER REVIEW END DATE

You can set a peer review end date for a future date only.

Ticket Information		
Status:	*	Draft ▼
Master Change:		☐
Master Change Reference:		
Service:		IT Service Management Syste ▼
Component:		
Service Owner:		▼
Peer Review End Date:		27/05/2021 00:00 📅

Save the change

← LIST VIEW   📑 NEW CHANGE ▾   ⬇ SAVE   ⟳ REFRESH

↖ **Change: 1001202 (Draft)**

5. ADD A SERVICE

Under ticket information, select a service from the 'SERVICE ' drop dpwn menu.

Ticket Information		
Status:	*	Draft ▼
Master Change:		☐
Master Change Reference:		
Service:		IT Service Management Syste ▼

6. MY ANALYST ITEMS

The new change should be list in your dashboard under my items.

Go to Home

NU Service	➕	💬	**HOME**	**ANALYST ITEM**	**INCIDENT**

HOME   CHANGE SAVED SEARCH: MY CHANGES ✕

Resolver Team Analyst Dashboard ▾   🔁 C ⬜
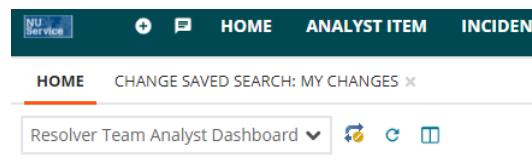
Locate the new change under my analyst items

MY ANALYST ITEMS (34)

Created On	ParentType	Ticket Reference	Name	Subject	Priority	Status	OwnerTeam	Owner
20/05/2021 10:04	Change	1001207	Tricia Blakey…	progress to …	3	Draft	SMO	npb48

Locate the change under my teams active items

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SUBMIT A CHANGE FOR PEER REVIEW

Once a Change has been created to assign to peer review, select the "SUBMIT FOR PEER REVIEW" button:

  C   📌   ⚙ SUBMIT FOR PEER REVIEW   ✖ CANCEL CHANGE   🖥 NEW INCIDENT

You will then be prompted to enter a Peer Review End Date:

Enter...

Please enter the date
that Peer Review
should end on: *

06/01/2022 00:00   📅

                    OK   Cancel
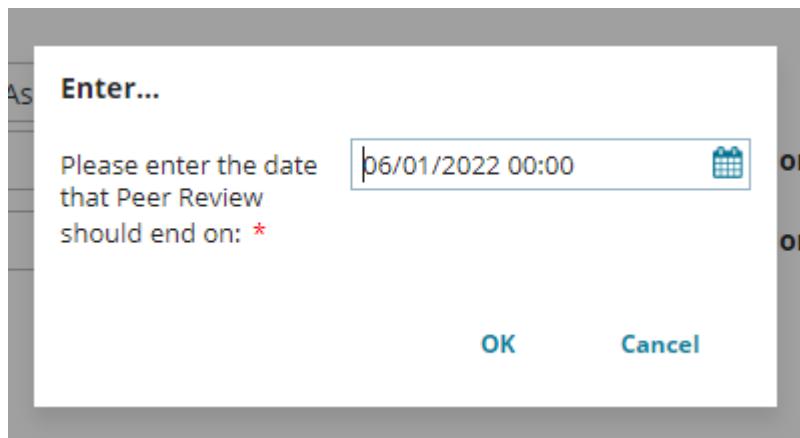
Enter the date and click OK.

The Option to add "Peer Review Comments" is now available in the tabs at the bottom of the page:

CHANGE ASSESSMENT   PEER REVIEWERS (0)   **PEER REVIEW COMMENTS (0)**   TASK (0)   AUDIT DETAILS   SERVICE (1)   INCIDENT (0)

To end Peer Review select the "END PEER REVIEW BUTTON":

  C   📌   🖊 AMEND CHANGE DETAIL   ⚙ END PEER REVIEW   ✖ CANCEL CHANGE   🖥 NEW INCIDENT

The Change is now ready to be submitted.

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SUBMIT A SIGNIFICANT OR MAJOR CHANGE FOR APPROVAL

Significant and Major changes must be submitted for approval to the Change Manager in preparation for CAB.

Minor changes can progress through pending peer review or move directly to record outcome.

First locate a significant or major change in the Pending Submission For Approval Status

Enter a start and end date for the change; this adds the record to the change calendar.

Then select the Submit for change manager review for Approval button.

The change status updates to Change Manager Review

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RETRACT A CHANGE FROM CHANGE MANAGER REVIEW OR FROM CAB

To retract a change from "Change Manager Review" select "WITHDRAW FROM CAB" from the top menu:

You will then be prompted for a reason for withdrawing the change, enter the relevant details and click OK:

Enter...

Enter reason for
withdrawing change:
*

Issue with supplier, need to add further information and reconsider date of
change.

OK   Cancel

The Change is now back in the Status of "Pending Submission for Approval"

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