Creatio Academy

Changes and releases

Manage changes and releases

Version 8.0

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PRODUCTS: SERVICE ENTERPRISE

Creatio implements the "Change management" ITSM process in the [*Changes*] and [*Releases*] sections.

Use the Changes section to register all changes emerging from the IT infrastructure and affecting the provided services. You can also classify the changes by source or goal, track changes implementation, and define the final information about actual working hours.

Use the [*Releases*] section to plan the implementation of changes to your IT infrastructure.

Plan changes

In Creatio, you register changes to resolve the problems identified as part of the problem management process. When making changes in the IT infrastructure, it is vital to adequately estimate all possible risks. Making a change to an item in the infrastructure may affect the availability of other configuration items and services.

Relationships and interdependencies between services and configuration items form a common service model, which enables analyzing possible consequences of changes to any of the IT infrastructure components.

To plan the changes to the IT infrastructure, add a record to the [*Changes*] section:

1. Open the [*Changes*] section → click [*New change*].
2. Populate the change page:

Subject	Brief description of the change. This is a required field.
Description	A detailed description of the change.
Status	Current status of the change. For example, "New" or "In progress". This is a required field.
Priority	The relative importance of the current change. For example, “Low,” “Medium,” “Critical,” etc.
Number	The number of the change. Creatio automatically generates numbers in accordance with a specified pattern. Use the “Change number mask” (ChangeCodeMask) system setting to customize the automatic numbering of the changes. This is a non-editable required field.
Owner	The name of the employee responsible for change implementation.
Assigned team	A group of employees responsible for change implementation. The field lookup contains the list of administration objects: users and user groups. You can customize user groups as the elements of the organizational structure in the [*System users*] section.

3. On the [*Classification*] tab, populate information about the classification feature of the change.

Goal	The goal of the change. For example, "Innovations and improvements" or "Adjustments."
Category	Change category. For example, "Standard" or "Emergency."
Release	That will include the change.
Source	The origin of the change. For example, select "Customer" if you register the change based on a customer case or select "Legislation" if the change assumes regulated corrections.
Author	The user who registered the current change.
Reported on	Date and time when the change was registered. The field is non-editable and is populated automatically with the current date and time.

4. On the [*Configuration items*] detail, specify the list of configuration items connected to the change. This detail displays information from the [*Configuration items*] section. To connect a configuration item to the change, populate the [*Change*] detail on the [*History*] tab of the corresponding configuration page. Click + and select the needed configuration items.
5. On the [*Services*] detail, specify the services connected to the current change. This detail displays information from the [*Services*] section. To connect a service to a change, populate the [*Changes*] detail on the [*History*] tab of the corresponding service page. Click + and select the needed services.
6. On the [*Cases*] detail, specify the cases that are the source for the current change from the [*Cases*] section. To connect a case to a change, fill in the [*Change*] field on the [*Resolution*] tab of a case page. Click + and the needed cases.
7. On the [*Problems*] detail, specify the problems that are used as a source for the current change from the [*Problems*] section. To connect a problem to a change, populate the [*Change*] field on the [*Resolution*] tab of the problem page. Click + and select the needed problems.
   a. To remove a problem from the list, click the needed record in the detail list → right click ⋮ → select the [*Delete*] option.
8. On the [*Execution*] tab, populate summary information about the change.

Due date	The planned date of change completion.
Estimated working time (hours)	Planned time required for the change completion.
Parent change	The change that includes the current change. For example, the "Server upgrade" change may include subordinate "OS upgrade" and "Memory boost" changes.

9. On the [*Activities*] detail, populate the tasks that are connected to the current change. This detail displays

information from the [*Activities*] section. To connect an activity to a change, populate the [*Change*] field on the [*Connected to*] field group of the activity page.

10. On the [*Email*] tab, display the emails connected to the current change. To do this, populate the [*Change*] field on the [*Connected to*] detail of the email page.
11. Click [*Save*].

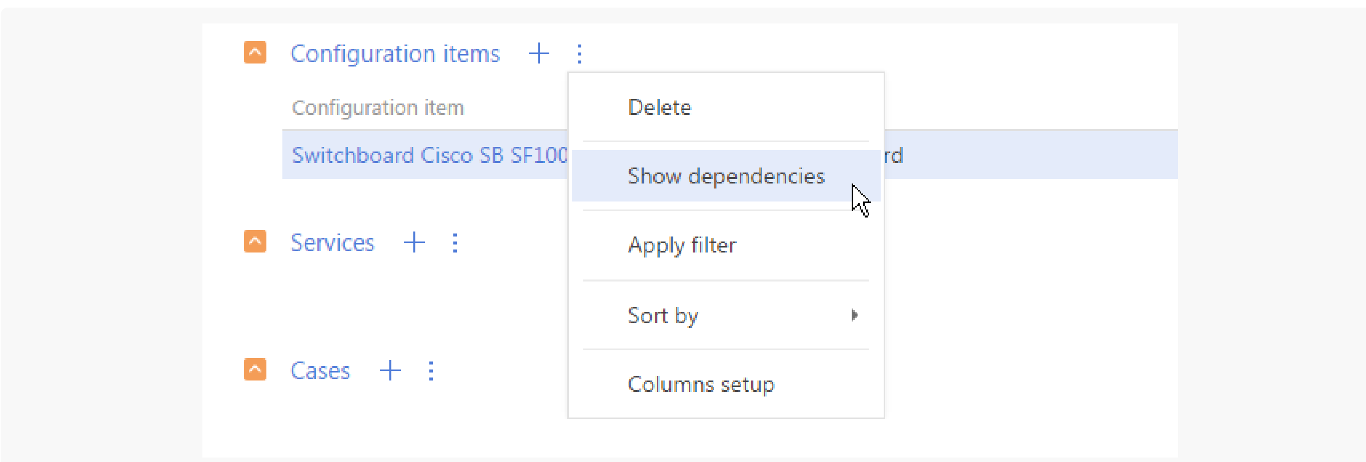
    As a result, a new change record with the connected configuration items, services, and problems will be created in the section list.

Determine the scope of a change

Use the [*Display dependencies*] action on a service or configuration item page to view the IT infrastructure items that may be affected by the change:

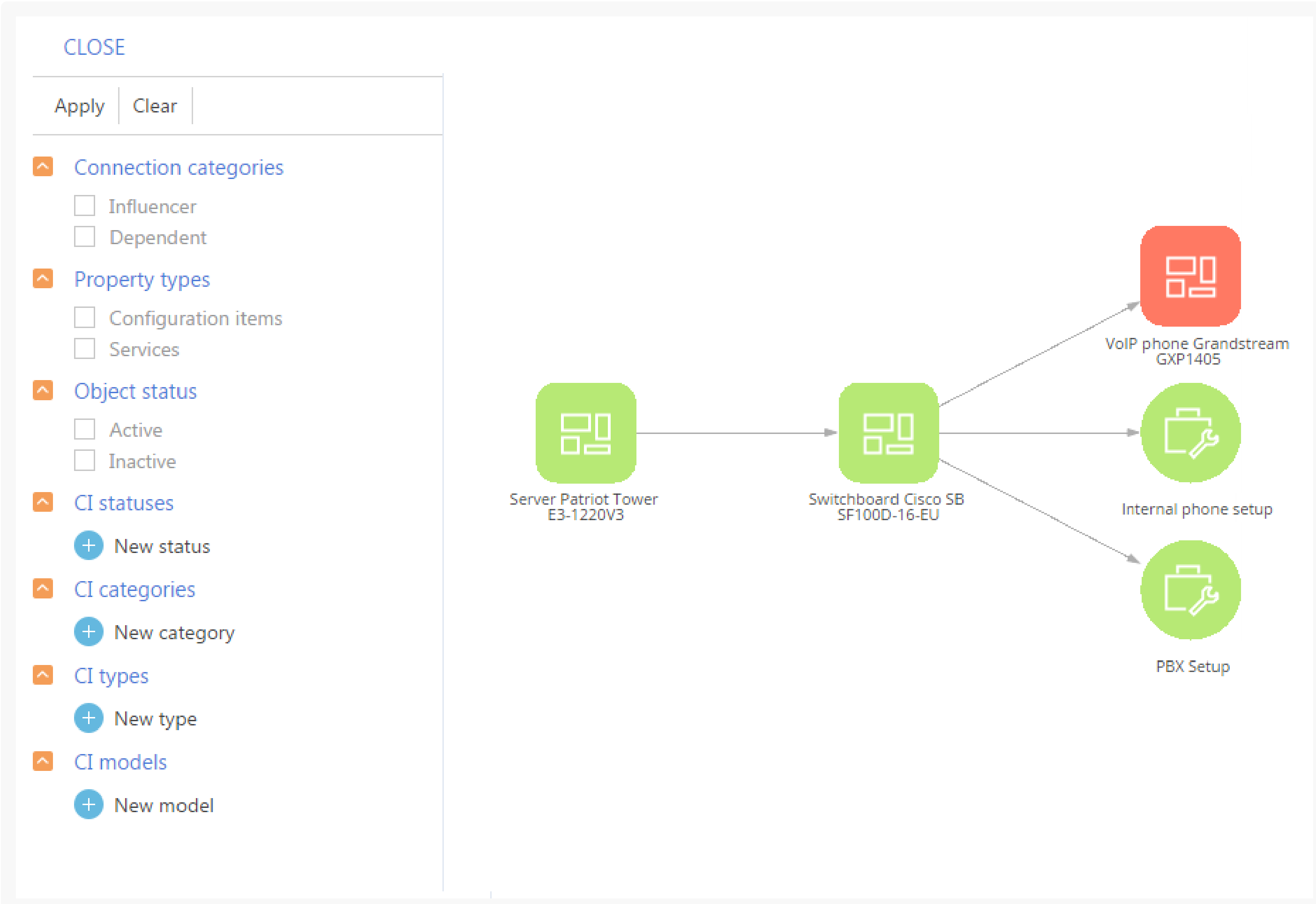
1. Go to the [*Changes*] section and open the needed record.
2. Select the configuration item or service in the corresponding detail on the [*Classification*] tab.
3. Select the [*Show dependencies*] action from the menu of the corresponding detail (Fig. 1).

Fig. 1 Displaying dependencies for a configuration item of a change record



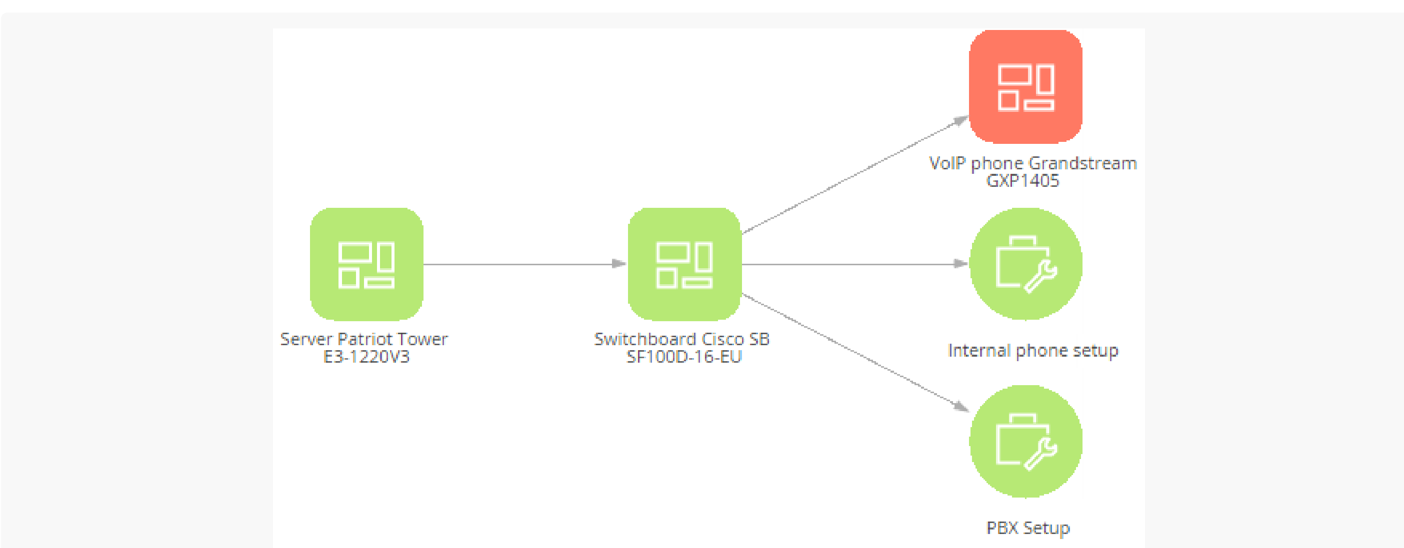
The service model diagram will open displaying the dependency connections for the configuration item or service (Fig. 2).

Fig. 2 Service model connections view for changes



The diagram displays all incoming and outgoing dependencies of the selected configuration item or service. The item at the center of the diagram represents the current configuration item or service. The influencer services and configuration items are to the left, the depending ones are to the right. For example, the diagram (Fig. 3) shows that the switchboard depends on the server, while the “PBX setup” and “Internal phone number setup” services depend on the switchboard.

Fig. 3 Configuration item connections example



In this case, when planning a change to the switchboard configuration item, you can easily see which depending services (i.e. “PBX setup” and “Internal phone number setup”) and configuration items (i.e. “IP phone”) may be affected.

Note. Learn more about working with the connection diagram in the “Use service model for case management” article.

Release changes

Use the [*Releases*] section to manage the updates of products and configuration items, organize the list of new versions (“releases”), monitor the release dates, and manage the list of implemented changes.

To register a new release:

1. Open the [*Releases*] section and click [*New release*].
2. Populate additional information about the release on the release page that opens:

Number	The number of the release. Creatio automatically generates numbers in accordance with a specified pattern. Use the "Release number mask" (ReleaseCodeMask) system setting to customize the automatic numbering of releases. This is a non-editable field.
Title	Name of the release.
Description	Short description of the release. The list of all requests fulfilled in the current release.
Status	Current status of the release, for example, “Planned”, “Development” or “Released”.
Priority	Comparative importance of the release.
Type	Type of the release, for example, “Major”, “Minor” or “Emergency fixes“.

3. On the [*Release profile*] tab, add information about CIs and services involved in the current release:
4. On the [*Configuration items*] detail specify the configuration items that are either updated within the release or connected to it. The detail displays information from the [*Configuration items*] section. The information about releases connected to the CI is displayed on the configuration item page, on the [*Releases*] detail of the [*History*] tab. Click + and select the needed configuration items.
   a. To remove a CI from the detail, click the needed record in the detail list → right click ⋮ → select the [*Delete*] option.
5. On the [*Services*] detail, specify the services that are either updated as part of the release or connected to it. This detail displays information from the [*Services*] section. The information about releases connected to the service is displayed on the service page, on the [*Releases*] detail of the [*History*] tab. Click + and select the needed services.
6. On the [*Team*] detail, specify the list of contacts and accounts that are involved in the release on certain stages.

Stage	Release stage, for example, “Development“ or “Testing“.
Assignee / Assigned team	One or several employees that are involved in the release. The field lookup contains the list of administration objects: system users and user groups.

7. On the [*Planning and implementation*] tab, add information about the scheduled release date, the estimated working time and the team.

Scheduled release date	Estimated date of the release.
Estimated working time (hours)	Working time pre-required to complete the release.

8. On the [*Scheduling*] detail, add all scheduled release stages:

<table>
<tr><td>Stage</td><td>Release stage, for example, “Development“ or “Testing“.</td></tr>
<tr><td>Start</td><td rowspan="2">Planned date and time for the release stage.</td></tr>
<tr><td>End</td></tr>
</table>

9. On the [*Activities*] detail, create a list of tasks for the release implementation.
10. On the [*Changes*] detail, specify the list of changes that were the basis of the release. The detail displays information from the [*Changes*] section. To connect a change to the release, populate the [*Release*] field of the change page.
11. Click [*Save*].

    As a result, a new release record with the connected Creatio objects will be added to the section list.