

Change Management with SMAX

SMAX, an industry leading ITSM and ESM solution, delivers superior experiences and results to your service desk and allows you to track and resolve issues faster and more easily. This flyer describes how you can handle change management with SMAX.

At a Glance:

- **Standardize and Automate Change Processes:**

Guided workflows and tasks; automation and AI for risk reduction

- **Decrease Change Failures:**

SMAX analytics for affected CIs (configuration items); change calendar with collision detection

- **Optimize Performance with AI-based Recommendations:**

Insights, charts, statistics, and suggestions based on past performance and best practices

OpenText™ Change Management is an IT service management discipline that aims to facilitate expeditious and standardized procedures for handling changes while minimizing potential detrimental impact of these changes. Let's take a closer look at the OpenText™ SMAX approach to change management through the following example.

Describing SMAX Change Management through an Example

In this scenario, an IT service desk agent is assisting a client by working on resolving an

incident regarding the exchange server issue. Affected users are unable to send emails.

It's been determined that a windows patch is required to resolve this incident.

Opening a Change Request

Agent proceeds to open a change request to ensure standardized and prompt handling of this change (windows patch) to the IT infrastructure. Upon opening a change request the relevant data from the incident is copied into a new change record.

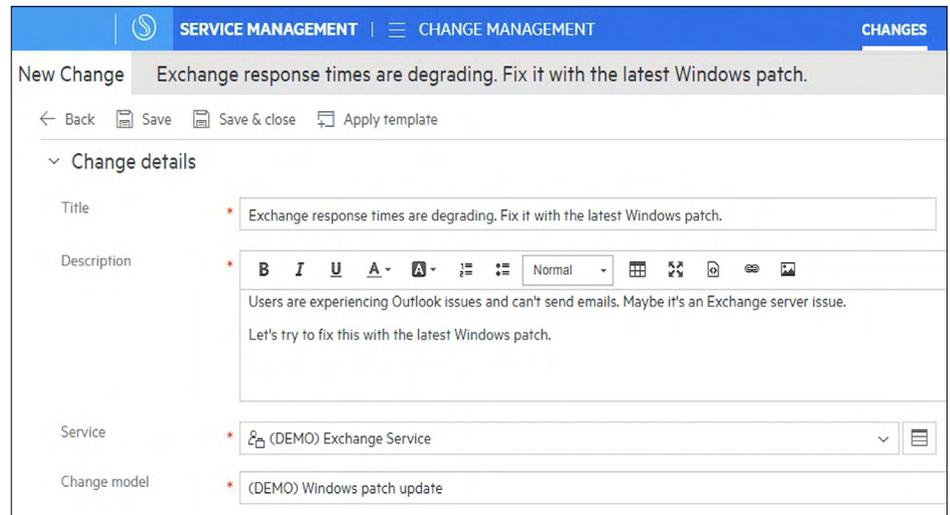


Figure 1. Relevant data from the incident is copied into a new change record

Agent describes the change that is required and selects a pre-defined change model for patch updates that maps to the respective task plan which ensures that appropriate actions are completed in order (e.g., [1] switching to fail over server, [2] shutting down specific applications, [3] applying the windows patch, [4] restarting the application, [5] switching back to the primary server).

Later, we'll see how SMAX change analytics can help determine the effectiveness of each individual task plan.

As a next step, agent continues to populate the change request form and marks it as an emergency change. Depending on the model and circumstance normal or standard change could also be selected, adhering to the ITIL defined procedures.

Selected urgency then reflects in the workflow which is to be followed.

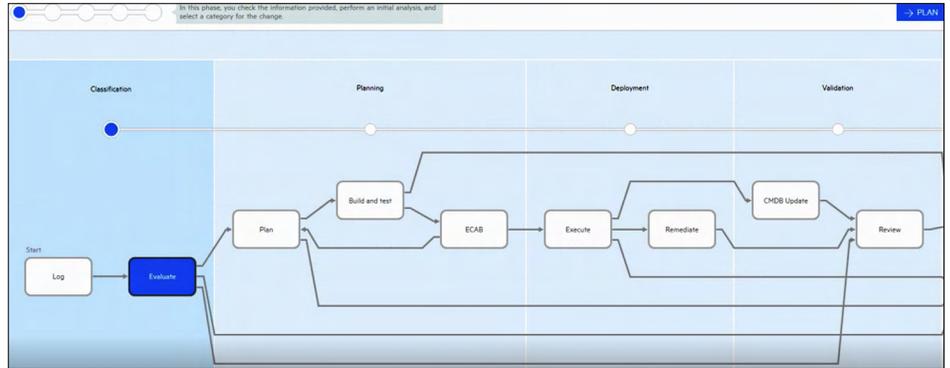


Figure 2. Workflow plan is populated based on the selected urgency and adheres to the ITIL defined processes

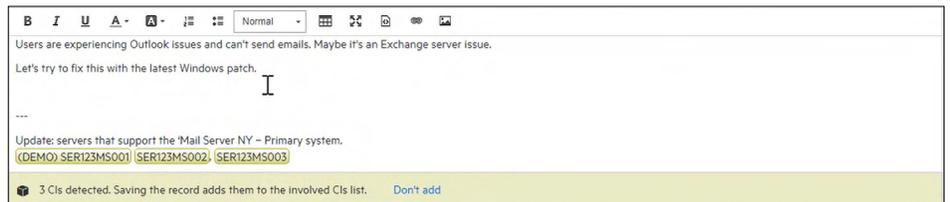


Figure 3. Auto-detection of CIs

Impact Analysis

When the record is updated with the servers that need to be patched, the configuration items (CIs) are automatically detected, and added to the involved CIs tab.

This innovative approach of automatically detecting and documenting CIs ensures both traceability and accuracy of information; reducing manual errors and saving time—by not having to create separate records. Additional CIs can be added manually as well.

Under “affected services” we can view the relationships between CIs in the CMDB and show which CIs could potentially be affected by this change request.

Besides this top-down analysis, SMAX can also display the bottom-up view by selecting “show impact.”

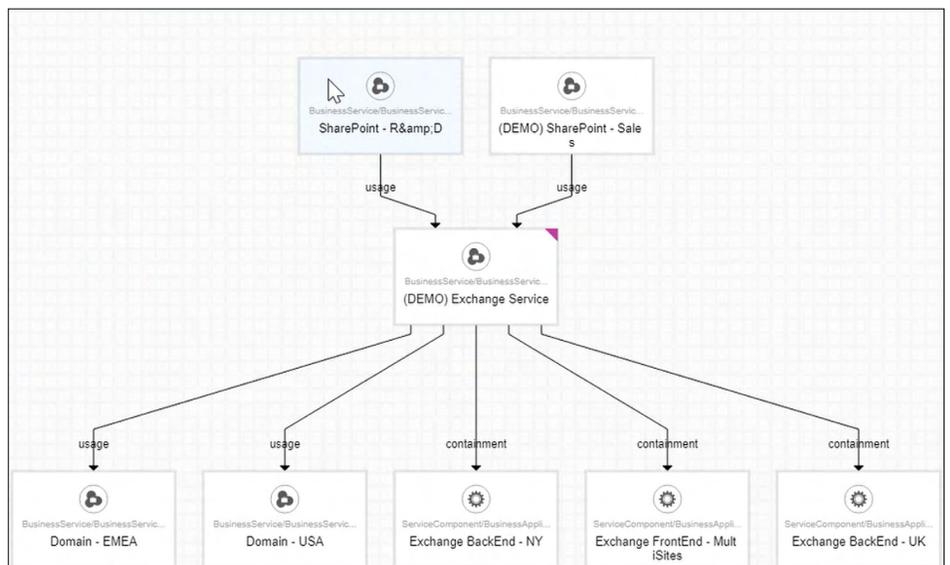


Figure 4. Topology view of the CIs with an option to run impact analysis to prevent undesired affects

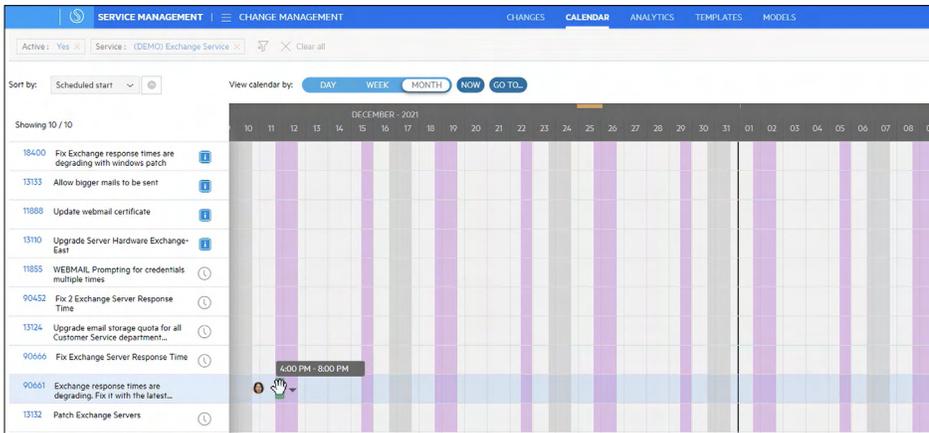


Figure 5. Change calendar

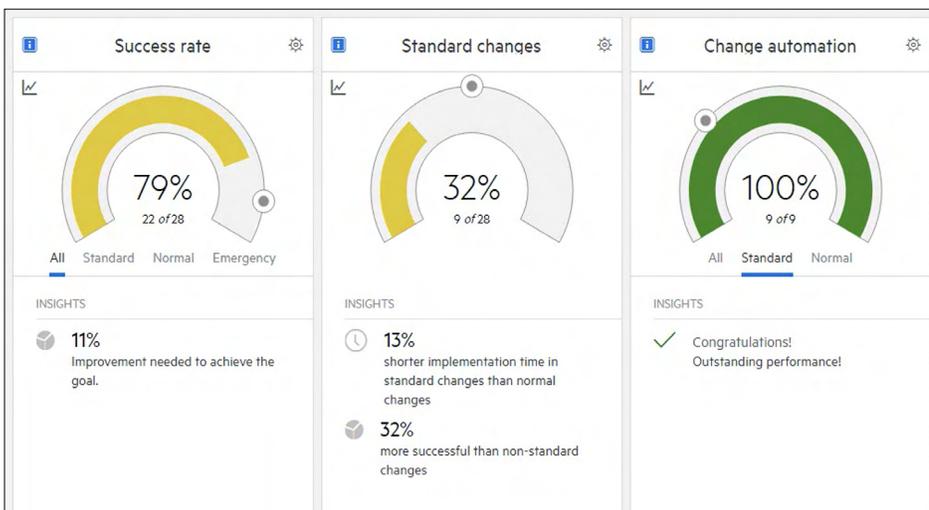


Figure 6. Success rate statistics and insights

Change Calendar

To plan and schedule this change action, SMAX provides an easy-to-use “change calendar”. Here, it’s easy to quickly and effectively manage and modify change schedules, align with agreed maintenance windows, avoid blackout periods, and so on.

SMAX automatically finds the next available time slot. If agents try to move the scheduled change slot outside of a maintenance window the system will give an alert. Change collision detection also disallows conflicting changes to be scheduled at the same time.

Approvals and Ticket Closure

Because “emergency change” was selected, this change also requires an approval from a member of the Emergency Change Advisory Board before it can proceed to the execution phase. As a side note, SMAX also allows users to build custom approval plans and supports the 2-factor authentication.

Now, to complete the process agent makes sure that the steps outlined in the task plan are completed successfully and in the right order, and then reviews and closes the change record.

Change Analytics

Finally, SMAX provides powerful insights into change analytics—to set and track KPIs—which are associated with change management processes. Below is a success rate panel (standard, normal, and emergency success rates can also be viewed separately).

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In addition, SMAX provides a 6-month trend view, an insights section, and suggested action points, which allow you to see the statistics and provide insights into how you can improve specific change models/processes.

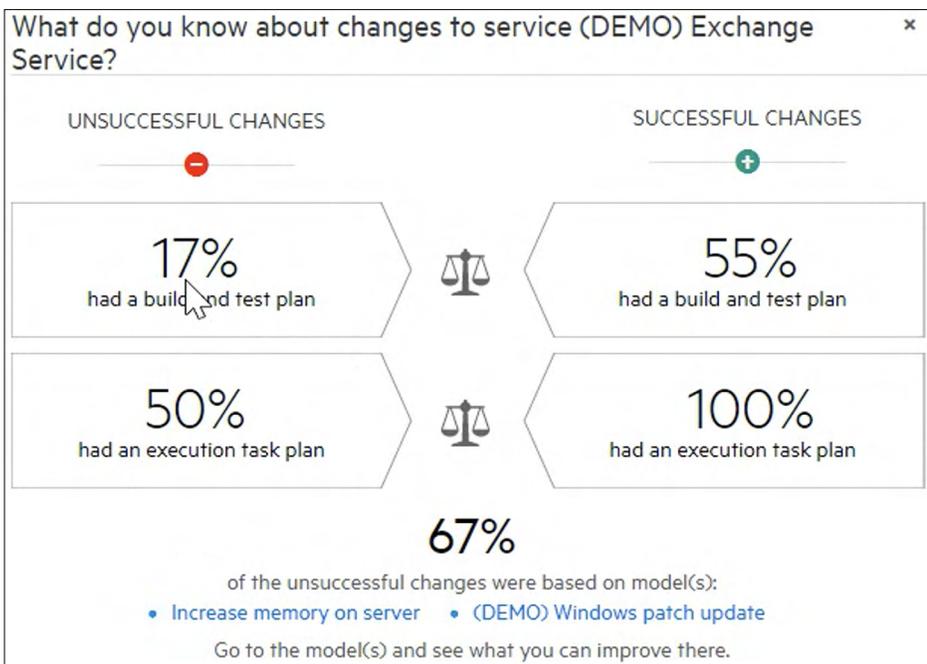


Figure 7. Insights/Recommendations for change model improvements

In this example we can observe that a built-in task plan is beneficial. We can also further analyze the specific change models in more detail to additionally optimize future performance.

Learn more at www.opentext.com/en-us/products/smax-express-saas/overview
www.opentext.com