

Change Management System – User Guide for CAB Members

(Revision Date: 1/23/2014)

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I. Introduction

The purpose of Change Management at the Connecticut State Colleges and Universities (ConnSCU) Board of Regents (BOR) System Office is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes associated with Information Technology (IT) services offered to the ConnSCU institutions.

The system that manages the Change Management process is FootPrints. We have used the FootPrints Change Management module to customize a workspace, called BOR Change Management that is designed to track, manage, control, and automate the change process. It is a rule-based system with a complete approval and voting process to automate the stages of approval. This ensures that the appropriate changes are communicated, reviewed, approved by the defined Change Advisory Board, and adopted in a timely manner. With the BOR Change Management workspace, we have a centralized repository for tracking and managing all changes from beginning to end. With the information kept and stored in one location, we can more easily view the complete history for every change made.

This document provides the Change Advisory Board (CAB) members with instructions on how to log into the Change Management (CM) System in FootPrints and access all of the proposed, approved and implemented RFCs. The BOR Change Management workspace contains the RFCs. This document and all CM documents can be found on the [CM website](#).

II. Logging into the Change Management System

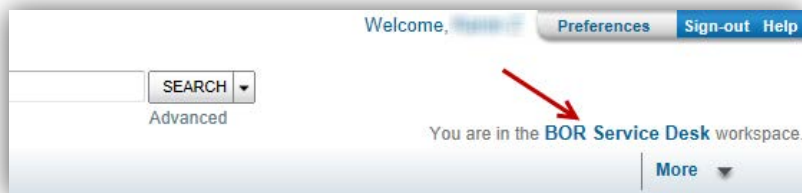
Follow these steps to access the Change Management System. You will be logging into the **BOR Change Management** workspace in the Footprints system:

1. Launch a browser and go to <http://servicedesk.ct.edu>
2. At the login screen, enter your normal network logon credentials. **You do need to include your AD domain.** Please refer to Appendix A for more details.

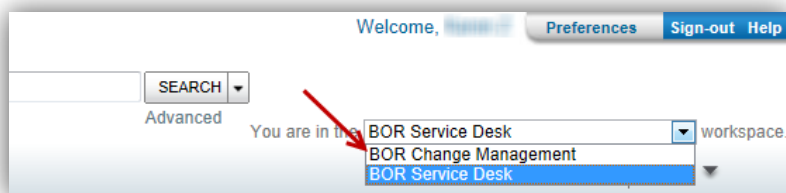


3. You will then be at the Home screen.

If you already use the FootPrints system for other workspaces, you will be in your primary workspace and will need to change to the **BOR Change Management** workspace by clicking the current workspace name (upper right hand corner):



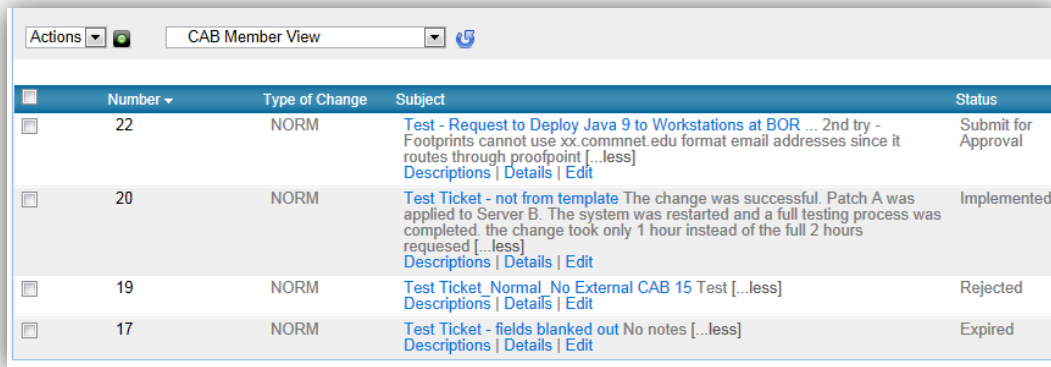
Then select **BOR Change Management** from the list of available workspaces:



If you don't use the Footprints system for other workspaces, you will automatically be in the **BOR Change Management** workspace.

III. Using the BOR Change Management Workspace

Once in the BOR Change Management workspace, you can view and access all RFCs:



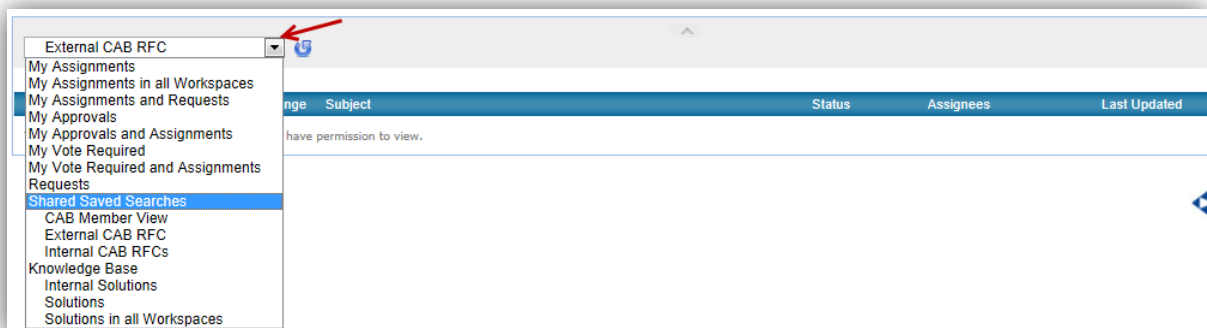
Number	Type of Change	Subject	Status
22	NORM	Test - Request to Deploy Java 9 to Workstations at BOR ... 2nd try - Footprints cannot use xx.comnet.edu format email addresses since it routes through proofpoint [...less] Descriptions Details Edit	Submit for Approval
20	NORM	Test Ticket - not from template The change was successful. Patch A was applied to Server B. The system was restarted and a full testing process was completed. the change took only 1 hour instead of the full 2 hours requested [...less] Descriptions Details Edit	Implemented
19	NORM	Test Ticket_Normal_No External CAB 15 Test [...less] Descriptions Details Edit	Rejected
17	NORM	Test Ticket - fields blanked out No notes [...less] Descriptions Details Edit	Expired

A. Search Views

As a CAB member you will be able to view RFCs with the following statuses:

- Submitted for Approval
- Approved
- Implemented
- Rejected
- Withdrawn
- Backed Out
- Expired

To change the list of RFCs displayed, change your search view by selecting one of the pre-defined views from the view drop-down menu (middle of the page):



CAB Member View: View RFCs with all available statuses

Internal CAB RFC: View RFCs that only impact the BOR System Office

External CAB RFC: View RFCs that impact one or more ConnSCU institutions

B. Accessing an RFC

You can access and view an RFC from the workspace in a number of ways.

- 1) If you know the unique number of the RFC, you can type it into the Search bar (located at the top of the page) and click SEARCH to open that RFC in the Detail view:

101 ▼
Advanced

- 2) In the displayed RFC list, click “Details” shown under the RFC title to open that RFC in Detail view. The “Descriptions” link shown under the RFC title will open the Working Notes of that RFC:

Test Ticket_Normal_Yes_External CAB 4 Test [...less]
[Descriptions](#) | [Details](#)

Once an RFC is open in Detail view, each tab on the left expands to display different fields of the RFC:

The screenshot displays the 'RFC 23 in BOR Change Management' detail view. The left sidebar has a red arrow pointing to the 'Contact Information' tab. The main content area shows the following fields:

- Subject:** ***TEST RFC*** MIS / Extend Current-Student Status
- Type of Change:** Normal
- Status:** Rejected
- Assignee:** The External CAB, The Internal CAB
- Implementation Date/Time:** 01/10/2014
- Institutions Affected:** All CCC's
- Description of Change:** Modify Banner-to-MIS logic such that admitted students (lacking course registration) retain "active" NetID status until end of add/drop period (rather than the current logic that retains active NetID status just for several days beyond admission).
- Objectives/Benefits:** This will allow such students to maintain a NetID that is clearly associated with the admitting college for purpose of application authentication during the add/drop period. Existing logic results in such student NetIDs losing specific college association within a few days of admission.
- Implementation Plan:** Execute slight modification to Oracle view that controls population of "current" students in Banner-to-MIS interface.
- Expected Impact:** Low
- Describe Impact:** No interruption. Within a couple hours of modification, some inactive NetIDs will become active, automatically moving to Student OU.

Left menu contact tabs:

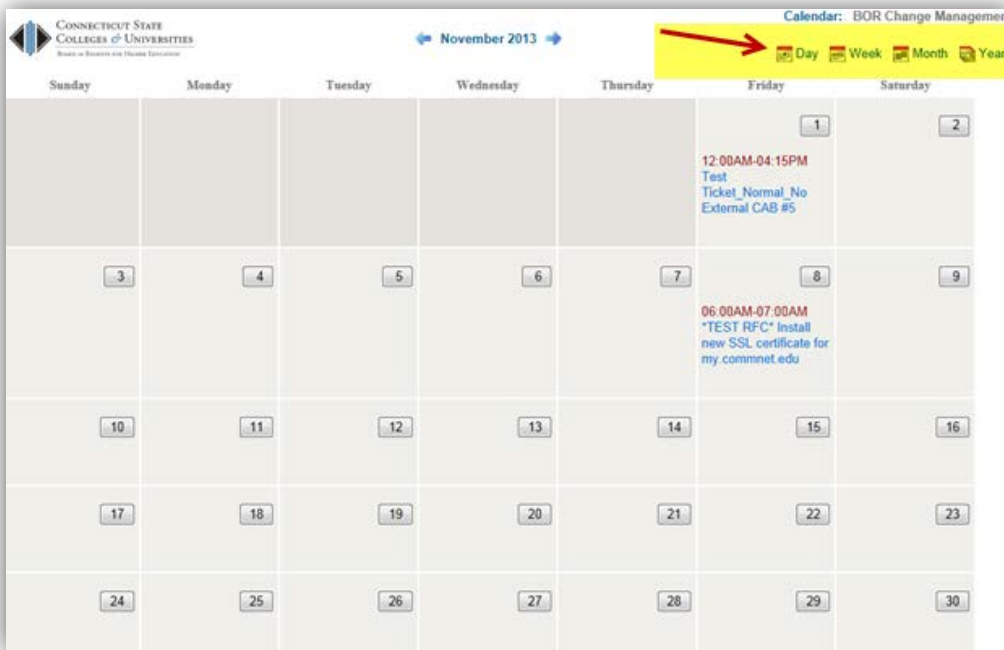
- **Contact Information** – Displays the Submitter’s information
- **RFC Information** – Contains the following required fields: Description of Change, Objective/Benefits, Implementation Plan, Impact, Backout Risk and Plan, Implementation Date and Institutions impacted.
- **Working Notes** – Information that the Submitter will add as the RFC progresses. This should include details on why an RFC was backed out, withdrawn, notes from implementation, etc.
- **Attachments** –Any attachments the Submitter has included.
- **Assignees** –The current Assignees to the RFC. CAB member teams are assigned to each RFC once it is submitted for approval.
- **History** – View the RFC’s history. When and what changes were made.

C. Workspace Calendar

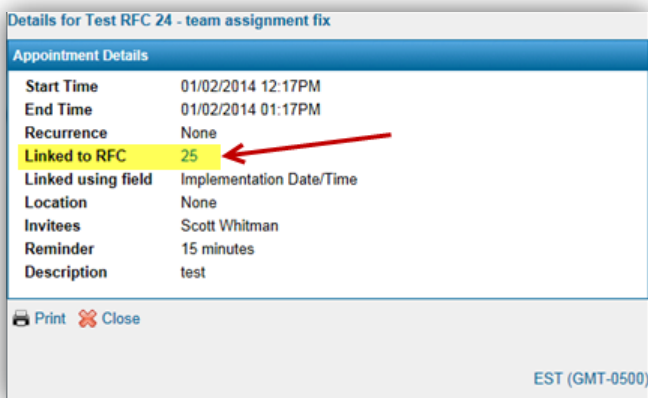
The workspace calendar will show the schedule of changes, including changes that are not yet approved, but have a tentative scheduling date. Click “Workspace Calendar” from the men



The calendar can be viewed by Day, Week, Month or Yearly format:



Clicking an RFC title from the calendar will give you a brief overview of the RFC:



Clicking on the RFC number next to “Linked to RFC” will show you the Details view of the RFC. If you get an error when you click the RFC link because you do not have access to the RFC, it is an indication that the RFC has not been submitted for approval to the appropriate CAB and the date listed on the calendar should be considered tentative.

IV. Accessing an RFC via the RFC Link in “Voting Has Started” Email

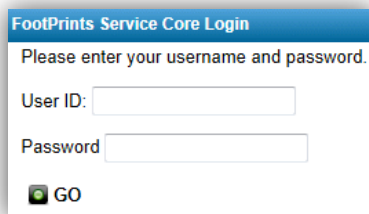
In addition to logging into the CM System and accessing RFCs from the BOR Change Management workspace, an RFC can also be viewed by clicking on the RFC link from the email received when voting on an RFC begins. When the RFC’s submitter submits the RFC for approval, an email is sent to CAB members with the details of the RFC and a link to the RFC at the bottom of the message:

For full details you can follow this [RFC link](#)
Access to the Change Management Workspace is required

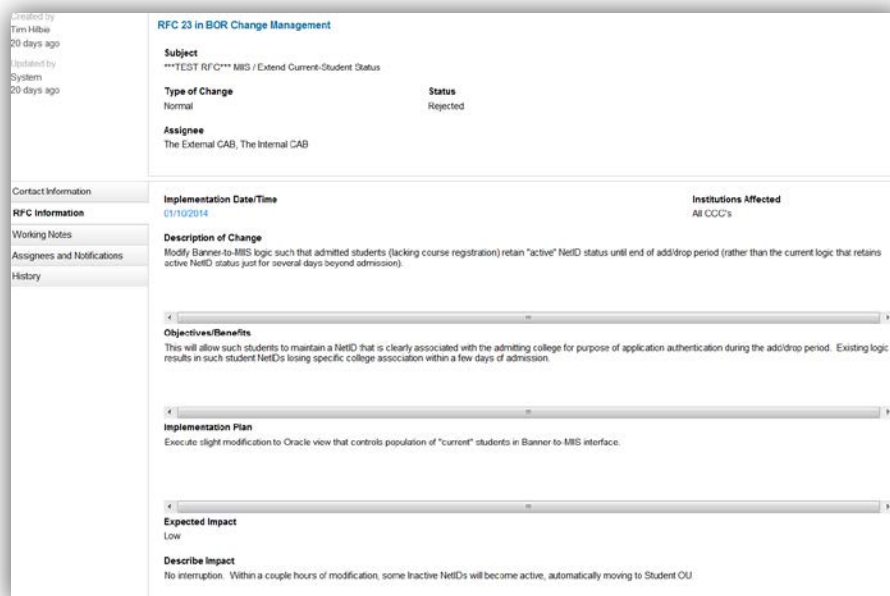
The RFC link will provide direct access to view the RFC in greater detail. This is only for accessing that particular RFC in Detail view. It does not provide full access to the BOR Change Management workspace, you will need to log into the CM System as described earlier in this document to fully access the BOR Change Management workspace.

To access an RFC from the email sent when voting has started:

1. Click on the RFC link in the email you received.
2. At the login screen, enter your normal network logon credentials. **You do need to include your AD domain.** Please refer to Appendix A for more details.



3. A separate window will open in your browser with a details view of the RFC. You will be able to see the Submitter’s contact information, additional details, attachments (if included), working notes and the history of the RFC.



4. When you are finished viewing the RFC, you can close this window.

Appendix A – User Name / User ID Format by Institution

Institution	User Name / User ID
Asnuntuck Community College	<BannerID>@acc.commnet.edu
Board of Regents System Office*	<BannerID>@so.commnet.edu <Name>@csuso.csu.ct.edu
Capital Community College	<BannerID>@ccc.commnet.edu
Central Connecticut State University	<Name>@ccsu.edu
Charter Oak State College	<Name>@ctdlc.org
Eastern Connecticut State University	<Name>@my.easternct.edu
Gateway Community College	<BannerID>@gwcc.commnet.edu
Housatonic Community College	<BannerID>@hcc.commnet.edu
Manchester Community College	<BannerID>@mcc.commnet.edu
Middlesex Community College	<BannerID>@mxcc.commnet.edu
Naugatuck Valley Community College	<BannerID>@nvcc.commnet.edu
Northwestern Community College	<BannerID>@nwcc.commnet.edu
Norwalk Community College	<BannerID>@ncc.commnet.edu
Quinebaug Valley Community College	<BannerID>@qvcc.commnet.edu
Southern Connecticut State University	<Name>@scsu.southernct.edu
Three Rivers Community College	<BannerID>@trcc.commnet.edu
Tunxis Community College	<BannerID>txcc.commnet.edu
Western Connecticut State University	<Name>@wcsu.local

* - Determined by your current login domain