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](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:

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:
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:

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

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 menu.

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

![Calendar](image)

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

![RFC Overview](image)

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:

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 went 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

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

* - Determined by your current login domain