ChangeRegister.com

User's Guide

Version 1.0

Introduction

Welcome to ChangeRegister.com! This guide will assist you in getting the most out of this application and the Change Management Process.

ChangeRegister.com is designed to be efficient and user-friendly; upon completion of this document you will be able to use all of the major components smoothly and effectively.

In this guide...

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The Basics

Getting Started

This section will outline the basic functions of ChangeRegister.com and help familiarize you with the application. To get started, direct your web browser to: https://www.changeregister.com

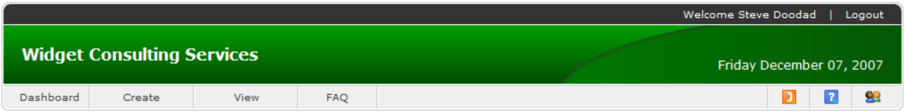
Note: This website has been designed and tested to run on Microsoft Internet Explorer 6.0 or higher. Other browsers may also work without issue, however Internet Explorer is recommended for the best experience.

Enter your e-mail address and password at the *Login* screen and click **Go**. If you have forgotten your password, click the '**Forgot your password?**' link and follow the on-screen instructions to have a new password immediately emailed to you.

Note: While using the application, your session will time-out after 20 minutes of inactivity and you will be returned to the *Login* screen again.

The Navigation Bar

The *Navigation Bar* is displayed at the top of every page to provide useful information, such as the date and company/client name, as well as shortcuts to the main components of the application.



Dashboard	Central console containing shortcuts, change request summaries and useful information
Create	Create and submit your change request
View	Search, display, review and approve submitted changes
Admin	Console for managing users and configuration data (Managers only)
FAQ	View answers for commonly asked questions and get information for further assistance

The *Navigation Bar* also allows you to manage your profile and log out of the application.

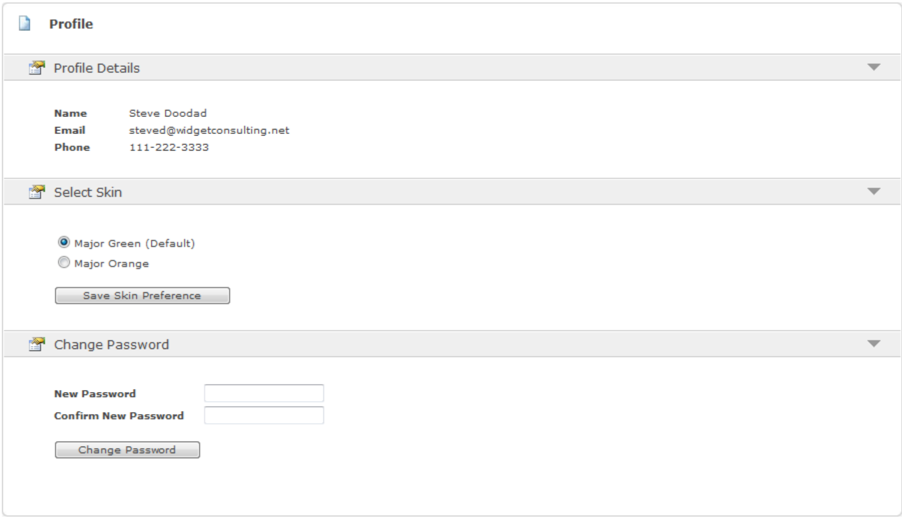
The Dashboard

Once you have logged in, the *Dashboard* will be displayed. The *Dashboard* is the central console for the application. Each panel on the dashboard is designed to assist you in the Change Management Process.

Request Summary	This panel displays the 5 most recent changes submitted, approved and completed for your company
Change Management Process	An informational panel that visually describes the change management process from start to finish
Recently Submitted Changes (RSS Feed)	Displays the latest changes that have been submitted to the application. Click the **RSS** button at the bottom to view the full feed
Site Administration	Contains shortcuts to the primary administration tasks (panel visible to Managers only)
Help	An informational pane containing a link to this document as well as explaining the context sensitive help

Managing Your Profile

You can change you password or the skin of the application quickly and easily by clicking the **Profile** icon ( ) on the Navigation Bar.

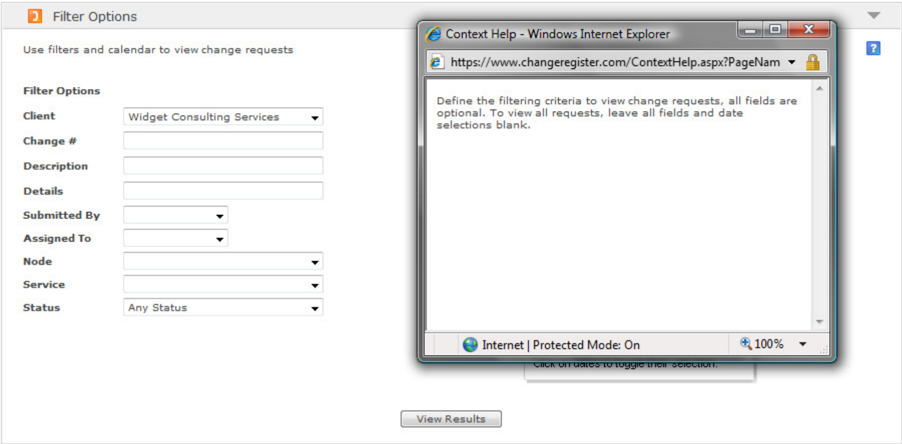


Profile Details	Displays your configured name, e-mail address and phone number. To update this information you must contact your Application Manager (Administrator)
Select Skin	Allows you to choose a preferred skin. Click **Save Skin Preference** once selected
Change Password	Allows you to change your password. All passwords are case-sensitive. Be sure to click **Change Password** to save your new password

Context Sensitive Help

Throughout ChangeRegister.com, context-sensitive help is available to assist you to submit complete and accurate change information, as well as to make the most of the advanced search and filtering features.

Look for the **Help** icon (?) if you are unsure about a particular field or function. A *Context Help* Window will appear displaying further information pertaining to the field or function in question.



Getting Further Assistance

This User's Guide is intended to give a thorough overview of the functions and features available in the application. ChangeRegister.com was designed to be efficient and user-friendly; upon completion of this document you will be able to use all of the major components smoothly and effectively. If you do encounter errors, or have any process related questions, please use the resources in the following list to get further assistance.

FAQ	The *Frequently Asked Questions* section answers most of the common queries regarding the application and is available on every page from the *Navigation Bar*. Please review this section prior to contacting the remaining assistance options in this list.
Application Manager	Your Application Manager (or, 'Administrator') is responsible for the overall configuration and operation of the application you're using. Any functionality, configuration or process questions should be directed to them in the first instance.

Technical Support	If you experience any technical issues or errors while using the application, please forward as much information as possible to the following address: support@changeregister.com Be sure to include your name, e-mail address and company. Also include any error numbers or messages you received. The more information you provide, the faster we will be able to resolve the issue for you.

Create

Overview

The first step in the Change Management Process is to identify the change required. A 'change' is defined as any modification to a device, application, service or process within an IT environment. A change may or may not be service impacting (requiring an 'outage') and can affect production, test or training environments. IT Change Management is not typically applied to development projects.

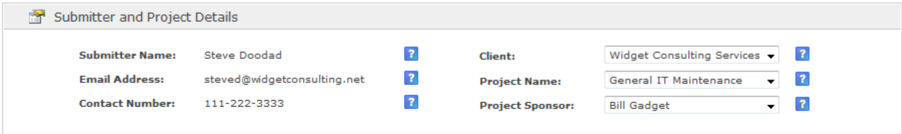
Once a change requirement has been defined, it needs to be created and submitted into the *Change Register*. This section describes the process of creating a Change Request and submitting it for approval.

From anywhere in the ChangeRegister.com application, click the **Create** link on the *Navigation Bar* to get started.

Selecting the Submitter and Project Details

You will need to classify your Change Request to ensure it is assigned to the correct client, project and project sponsor. This will ensure prompt and accurate approval of the change by your Manager or Approval Authority. It will also assist in the reporting and notification features built into the application.

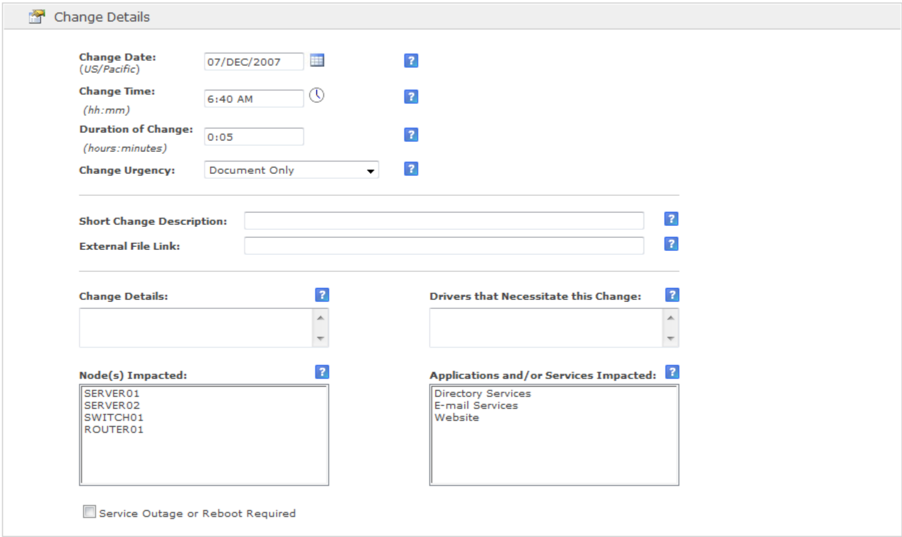
You will notice part of the *Submitter and Project Details* section is already pre-populated with your information. All other fields in this section are required.



Client	Dependant upon your user role, you will be able to select the client (or business unit) or any sub-client that the change will be assigned to
Project Name	Select the specific project (or business process) that the change is related to. This list is configurable by your Application Manager who is able to add items to this list as required
Project Sponsor	When you select the Project name, the default Project Sponsor is automatically populated. This selection can be modified as required.

Defining the Change Details

The most important part of creating a change request is to ensure thorough and complete *Change Details* are submitted. The *Change Details* define when a change will be and how long it will last, what services and applications will be affected, as well as the urgency of the change. It also provides comprehensive information detailing what exactly will be changed and how, and whether the change will be service impacting (such as requiring a 'reboot'). It also defines the reasons why – the drivers of the change.



Change Date *	The date on which the change will be implemented, click the calendar icon ( ) to graphically select the date or enter in manually (*DD/MMM/YYYY*)
Change Time *	The time the change will be implemented (local time, the application is time zone aware), click the clock icon ( ) to graphically select the time or enter the time in 12-hour format (*HH:MM* AM/PM*)*
Duration of Change *	The expected or estimated duration for the change implementation to be completed
Change Urgency *	The importance of the change. The urgency level is normally defined via corporate policy or service-level agreement (SLA)
Short Change Description *	A brief, but concise, description of the change. This description is used throughout the application for summary information (Request Summary, RSS Feed, etc)
External File Link	Custom field to provide a link to external documentation supporting the change
Change Details *	A detailed outline of the change being implemented, including all implementation, test and back-out plans. This is also a good place to include any other procedures and associated risks
Drivers that Necessitate the Change	Detail the reason for the requested change and any risks of not implementing the change
Node(s) Impacted	Select all nodes or groups of nodes that will be affected by the change. Use CTRL or SHIFT to select multiple items. This list is configurable by your Application Manager

Applications and/or Services Impacted	Select all services or applications that will be affected by the change. Use CTRL or SHIFT to select multiple items. This list is configurable by your Application Manager
Service Outage or Reboot Required	Select this box if the change will require a service outage or reboot of any of the affected nodes. Service impacting changes may require further approval from the business

* - *Indicates a required field*

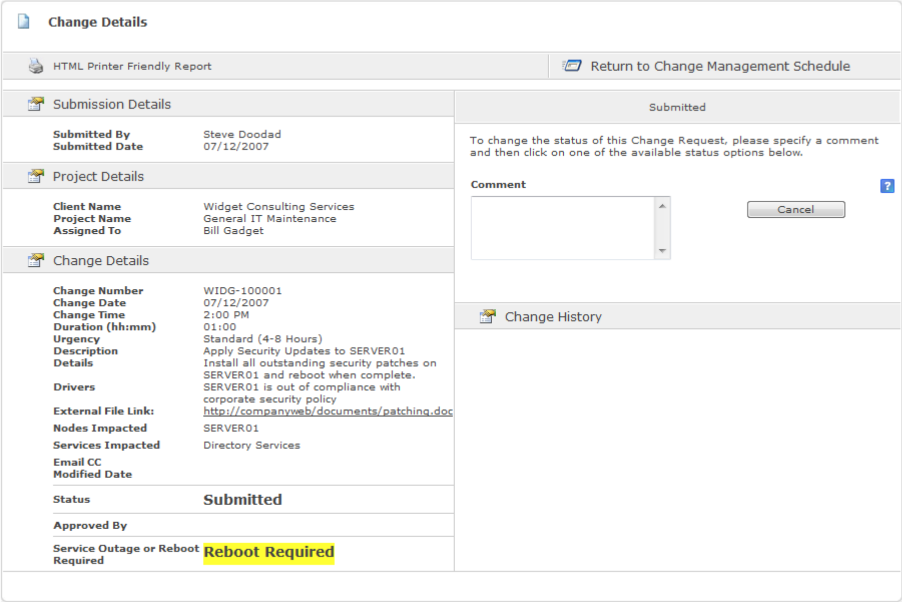
Selecting Notification Options

The final part of creating a change request is to define any additional notification options. By default, you and the selected *Project Sponsor* will receive an e-mail notification summarizing the change details. Optionally, you can specify one or more additional e-mail recipients in the field provided (use commas to separate each address).

Submitting the Change Request

Once all the fields on the Change Register page have been completed, click the **Submit Change Request** button to complete the request.

You will be redirected to the *Change Details* page which displays all the information you have just submitted. The change request (submission) process is now complete.



View

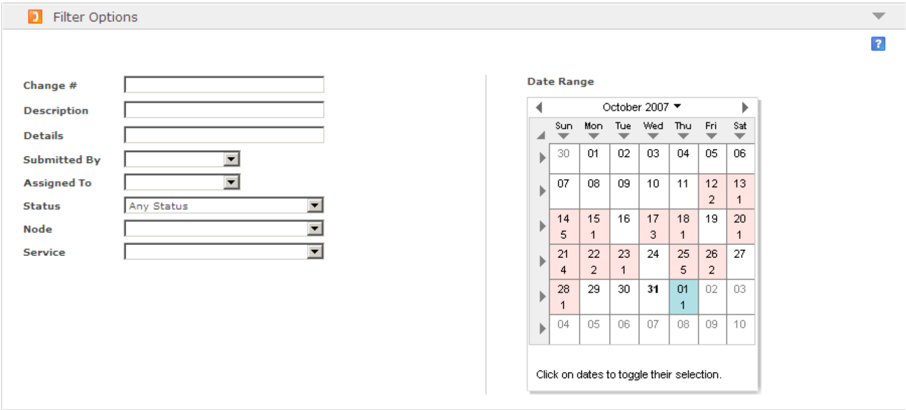
Overview

After a change request has been submitted, you may wish to review the details, or you may choose to view other changes submitted to the ChangeRegister.com website. This functionality is provided by the *Change Schedule*, which is a central component to the Change Management process. ChangeRegister.com provides powerful search and filtering features to display the change schedule to suit your requirements.

From anywhere in the ChangeRegister.com application, click the **View** link on the *Navigation Bar* to view the *Change Schedule*. The following information describes all the features available on the Change Schedule page.

Filter Options

The Filter Options section allows you to narrow down the changes displayed on the Change Schedule by date, status, change number or any other attribute contained in the change details.



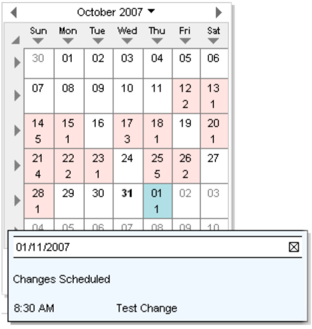
Filter Options

The following filter options are available to refine your search and display only the desired changes on the Change Schedule.

Change #	Keyword search for a change number
Description	Keyword search of the description field
Details	Keyword search of the change details field
Submitted By	Displays changes for the selected user
Assigned To	Displays changes for the selected owner
Status	Displays changes for the selected status
Node	Displays changes impacting a selected node
Service	Displays changes impacting a selected service or application

Date Range

The *Date Range* tool enables flexible filtering of dates to be displayed on the Change Schedule. It also provides a summary of the changes on each specific day. Below each date indicator is the number of changes scheduled for that specific day. Hover the mouse over any date to display a summary of these changes.



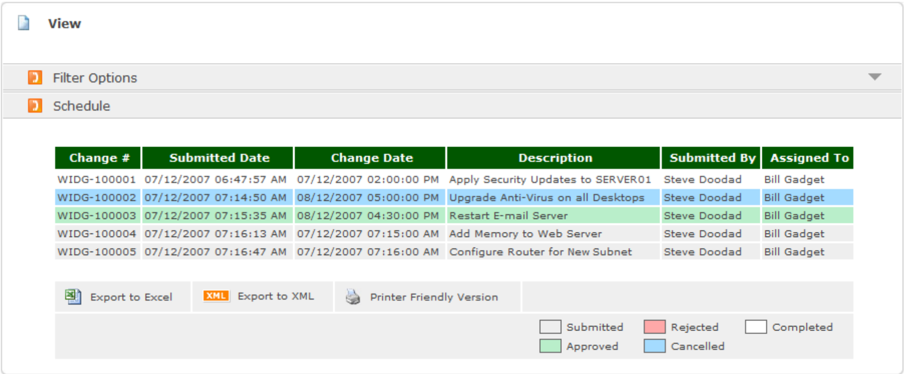
To select a date (or multiple dates), simply click on the desired date(s). The date background will change to indicate the selection. The following information details the features of the *Date Range* tool.

14 5	Date in current month with changes scheduled	16	Date with no changes scheduled
01	Change scheduled for previous or upcoming months	17 3	Date has been selected for filtering
▶	Click to select an entire row (entire week)	▼	Click to select an entire column (every matching day)
◢	Click to select all (entire month)	SHIFT	Hold and click to expand the selection to date clicked

All *Filter Options* are optional. Clicking **View Results** without setting any filter options will display all changes that have been submitted to the application.

Schedule

Once you have selected your filtering options, click the **View Results** button to display the results.



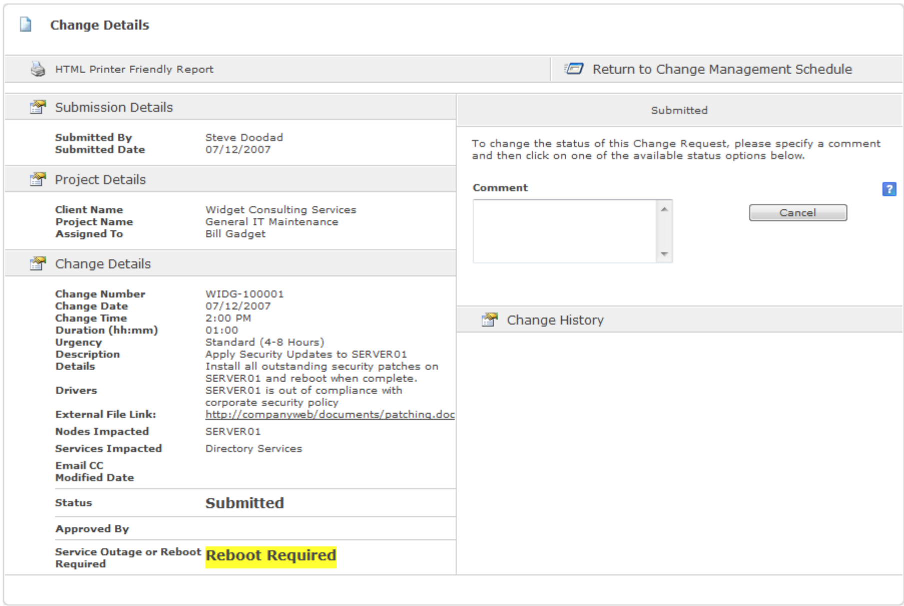
The results will be displayed on a color-coded grid to indicate the current status of the change. The following options are available:

Click on any Change	View the change details and approve, reject, cancel or add comments to the change
Export to Excel	Export the results to Microsoft Excel for further processing
Export to XML	Export the results for import into any other XML compatible system
Printer Friendly Version	Display the results in a printer friendly format

You can update the Change Schedule at any time by modifying the filtering options. Click the ▼ icon to expand Filter Options and modify as required, select **View Results** to update the Change Schedule.

Change Details

When you select a change from the Change Schedule, you will be taken to the Change Details page displaying the full details of the Change Request. You can also access the Change Details directly from the *RSS Feed* or the *Request Summary* panel on the *Dashboard*.



The following Change Details are displayed:

Submission Details	Submitter name and date submitted
Project Details	Assigned client, project and project sponsor
Change Details	All details pertaining to the requested change, including the current change status
Change Status	Color coded change status is displayed towards the top-right of the page. Coding match those on the Change Schedule.

Change History	Status history of the change request and associated comments

The following actions are available:

HTML Printer Friendly Report	Opens a new window with printer friendly formatting of all the Change Details
Modify Change Status	Dependant on user rights and current change status, the following options are available: • Cancel • Complete • Approve • Reject A comments field is available to add additional information pertaining to the modified status
Return to Change Management Schedule	Return to the Change Schedule to view another change

Approve

Overview

The next stage of the Change Management Process is to review and approve the submitted changes. A change and all its supporting documentation needs to be thoroughly reviewed by your Change Advisory Board (CAB) or Approval Authority. Following the review, a decision will be made to approve or reject each submitted change request.

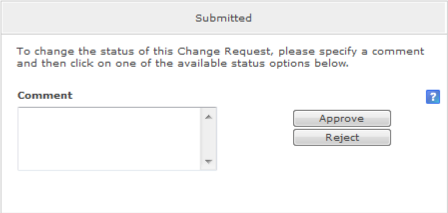
The review and approval procedure is a business process that involves a designated person (Approval Authority) or group of people (CAB) who decides whether the requested change will be implemented. This decision is achieved by evaluating the change's risks, impacts and benefits to the business and its IT services.

Approve or Reject

Once the decision has been made to approve or reject a change request, a user with Approver rights must log into ChangeRegister.com and modify the change status appropriately.

Using the *Change Schedule*, locate the change request and view the *Change Details*. Users with Approver rights will have the following actions available to them:

- Approve
- Reject



It is recommended to always include a comment prior to modifying the change status, this will inform the submitter of the reasons for the status change and any additional details required for tracking purposes.

When the change has been approved or rejected an e-mail is immediately sent regarding the status change to the submitter and project sponsor as well as any additional e-mail addresses included in the Email CC field of the Change Details.

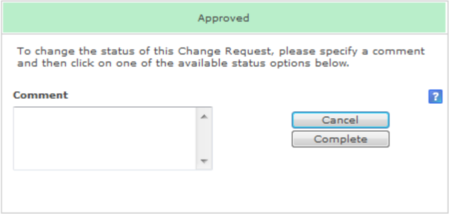
The approval status can always be updated until it is marked as complete. Further review may deem a change approved instead of rejected, and vice-versa. Previously cancelled changes can also be reactivated by changing their status to Approved. These status updates involve the same process described above.

Complete

Overview

The final stage of the Change Management Process is to implement the change and mark the change request as Complete. Once a change request is approved, an e-mail notification will be sent notifying you of its status change. The change can then be implemented according to the details defined within the change request. When the implementation is complete and the success of the change has been verified, the change request needs to be marked as complete in the ChangeRegister.com application.

Using the *Change Schedule*, locate the change request and view the *Change Details*. You will have the following actions available to you: Complete or Cancel.



Complete the Change

Enter all pertinent information regarding the change implementation into the Comment field. It is important to be as detailed as possible for tracking purposes; this includes all issues and errors, any undocumented procedures and the overall success of the implementation.

Click Complete to mark the change as completed in the application, a notification of the status change will be sent to all relevant users.

Cancelling a Change

At any point throughout the Change Management Process, up until it is marked as completed or rejected, a change can be cancelled. Numerous factors could deem a change not required, such as duplicate submissions or changing requirements. It is recommended to detail the reasons for cancelling a change in the Comment field.

Click Cancel to mark the change as cancelled in the application, a notification of the status change will be sent to all relevant users.

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