# Change Management (Office 365)

## (User Manual)

## By

## CHRONODAT, LLC

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# Introduction

The introduction section of the document describes the scope and objective of Chronodat Change Management (Office 365) Add-in.

# Scope & Objective

Change Management is one of the most important elements in IT Service Management (ITSM), which helps organizations in ensuring that the prevalent processes and procedures are employed when making any changes to IT infrastructure. Every organization needs a thorough understanding of its environment in order to be able to adapt to change whilst fully utilizing and minimizing risks of any changes to the environment. Chronodat Change Management (Office 365) software add-in is the perfect tool to help your organization with in-depth analysis, understanding and assistance in minimizing risk to your IT and non-IT environments.

# Add-in Overview

Chronodat Change Management (Office 365) software employs a strict change process through the provision of on-demand capabilities for the creation, assessment, approval and implementation of environment changes. This includes preset processes and workflows that are all IT Service Management (ITSM) compliant.

Chronodat Change Management (Office 365) software add-in is purpose built for a hitch-free integration of Change Management and Project Management features through On-Premise or Office 365 SharePoint Online. This software stands out for three major reasons: easy configuration, user-friendly interface, and robust features. The results are immediate.

## Features:

- Fully configurable, preset sample email templates as well as integrated workflows for notifying the change proprietor, assignee, approver, and requestor as the case may be.

- Preset Change Categories and Change Sub-Categories that can be configured in accordance with the needs of your organization.

- Our built-in dashboards are color-coded for quick reporting and metrics. They are built to require absolutely no configuration. There is a main Dashboard for all existing change requests as well a dashboard “personal views” for each team member indicating Approved and Rejected requests. The Dashboard provides information on:
  - ✓ The 10 most recent updates to change requests ranked by status;
  - ✓ Pie Chart indicating Active and Closed change requests;
  - ✓ Bar Chart indicating Change Status, ranked according to priority;
  - ✓ Bell Curve Chart that indicates Change Status according to Project;
  - ✓ Grid indicating Change Status according to members it was Assigned;
  - ✓ The 5 most recent updates to Change Requests listed without any ranking

- Absolute and transparent control over change execution through change status updates indicating which are approved, open, in review, in progress or completed.

- A preset Change Prefix for easy identification and management of change requests.

- Fully customizable add-in logo for branding purposes.

- Fully configurable, preset Change Types, such as Emergency, Routine, Expedited, etc. All Change Types are capable of being amended to suit the needs of your organization.

- Predetermined, fully customizable Riske Levels marked using terms like Minor, Major, and Significant

- A quick, powerful search engine capable of easily finding change requests

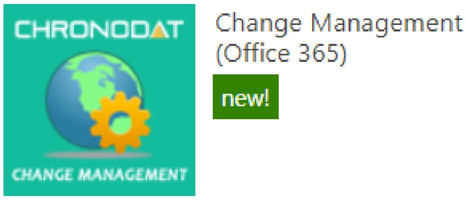
- Export options available into formats such as PDF, CSV, and Excel amongst others.

- Setup provisions for a designated Support Contact for Change Sub-Categories.

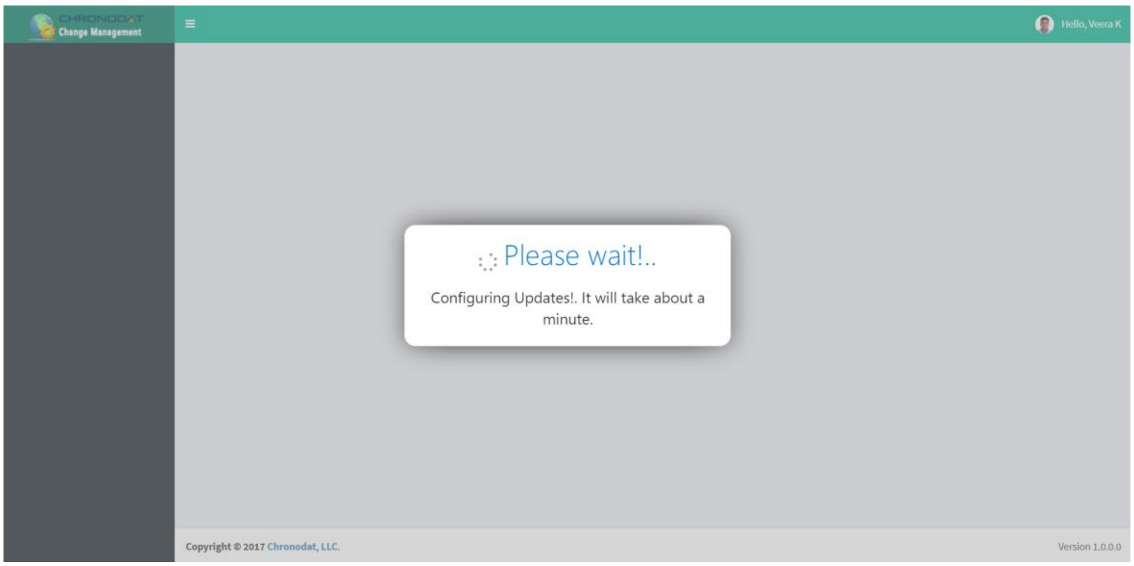
- A repository for storage, upload, sharing and use of Project Team documents

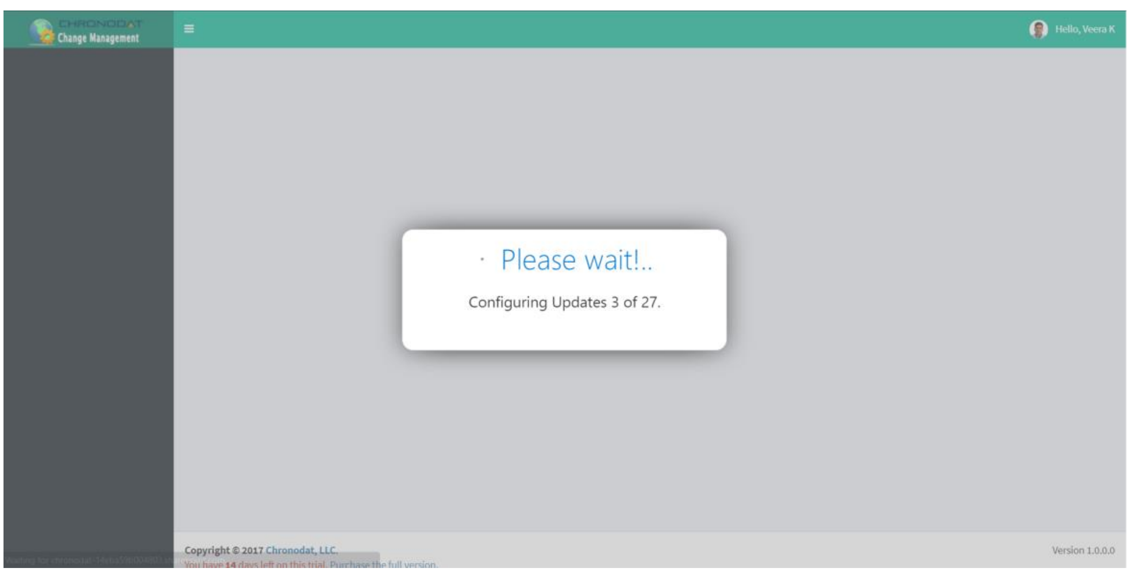
# Configuring Chronodat Change Management (Office 365) Add-in

1. Click **Change Management (Office 365).**

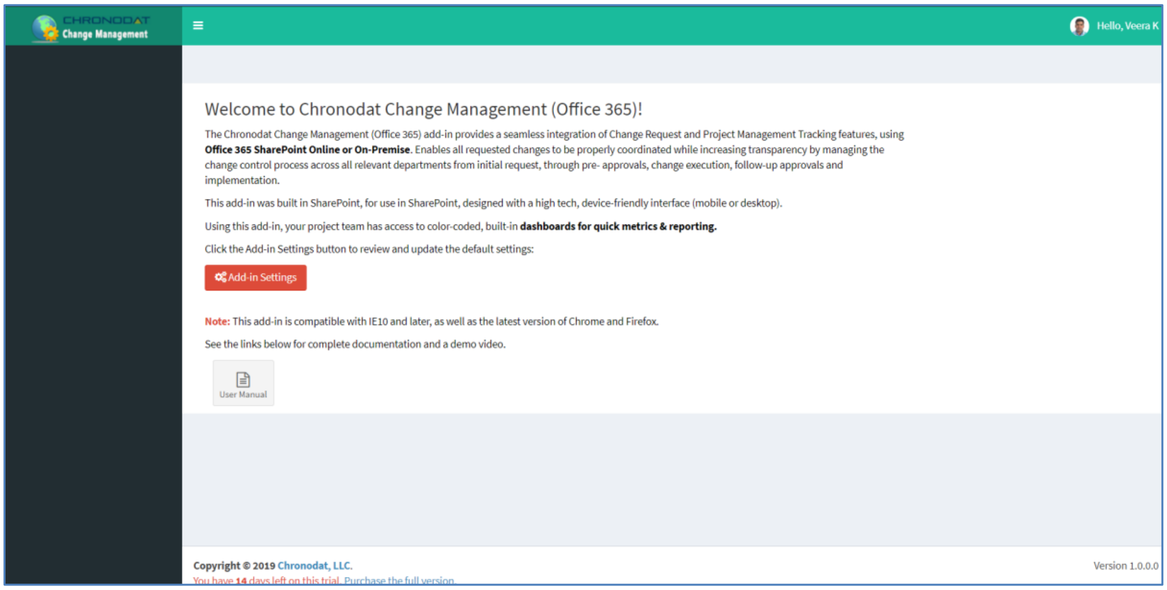



2. On first run, add-in configures default settings. Please wait for about 30 – 60 seconds to complete the installation/configuration.



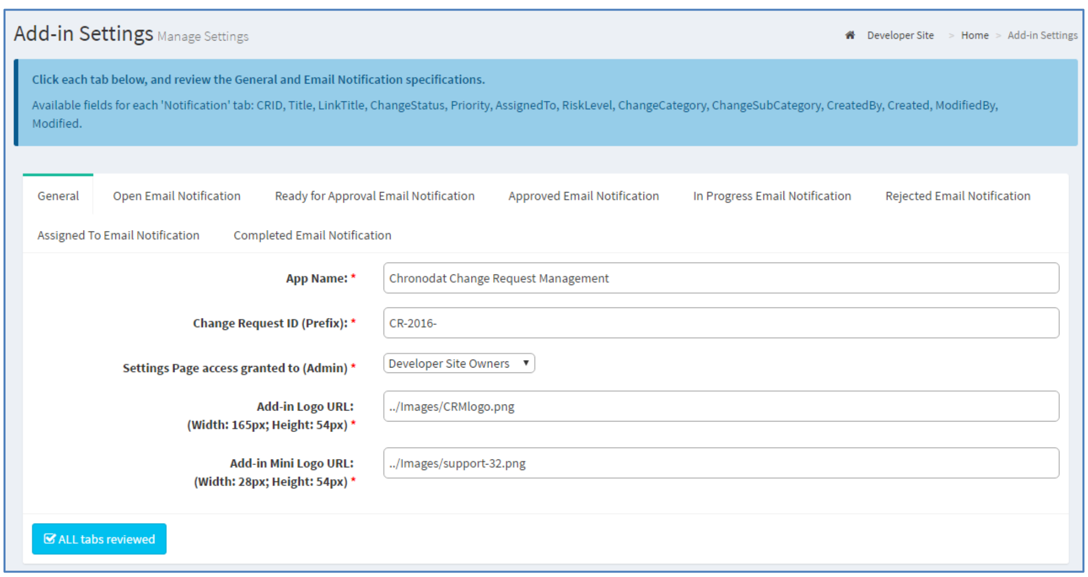



3. Click the red button to review the Add-in Settings.



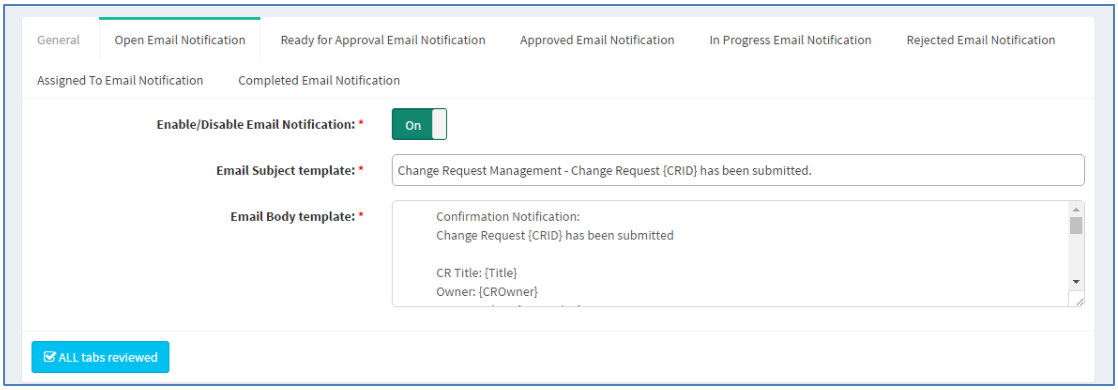

4. On the **General** tab, enter the name you want for your Chronodat Change Management (Office 365)add-in (it will display on screens such as the Dashboard).

   - Select who can access the Settings page.

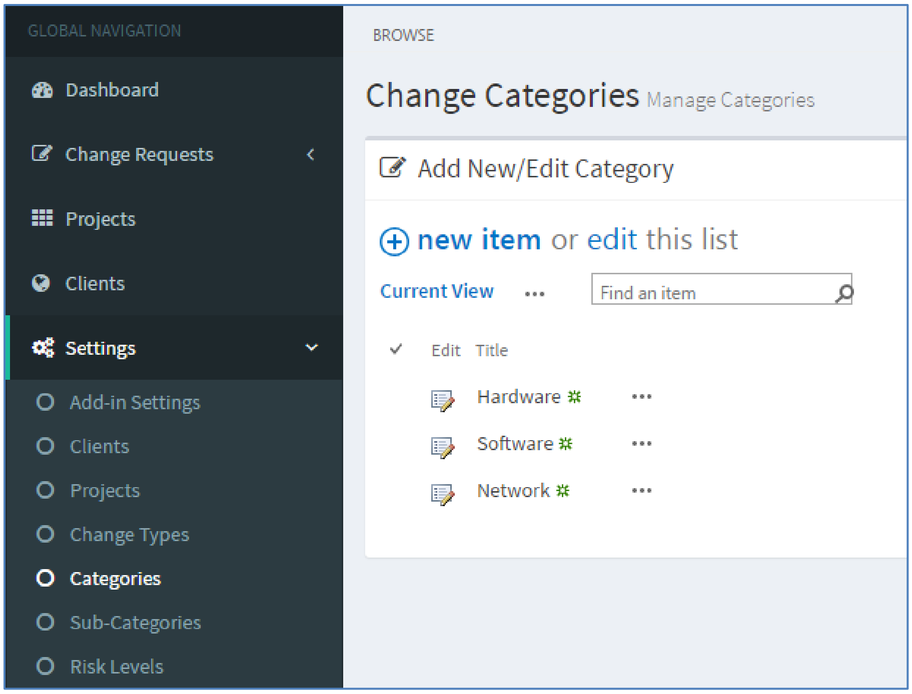



5. Click the next tab in sequence. You may be tempted to press **Save**, but you need to finish reviewing all the other tabs. If you do, however, click **Save**, you can always quickly get back to this screen by clicking **Settings > Add-in Settings**. This tab allows you to configure the email that will be sent to the user after **submitting a Change Request**.
   - If you don't want the user to receive an email, just click **Disable**. If you do want the user to receive an email, leave the default.

- The first field is how the **subject line** will display in the email to the user. You can either change the text, or leave the default.
- Notice how the Subject contains {CRID}. Not only can you use that field, but a host of other fields, which are listed in the blue bar above.
- The next field contains the text in the **body** of the email to the user. Again, use the available fields listed in the blue bar, and configure the text however you like!

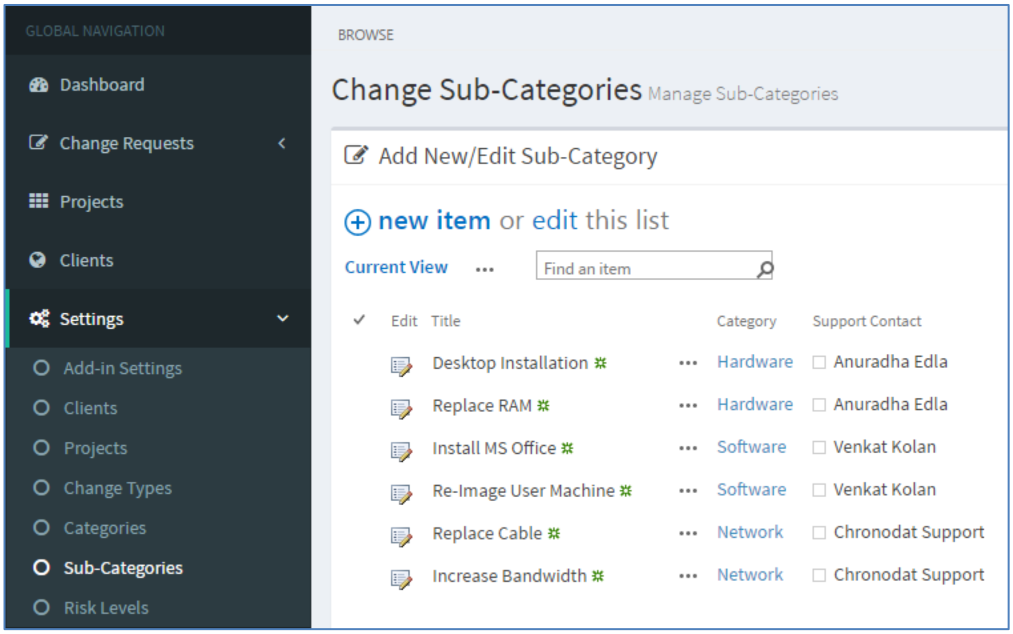



6. When finished, click the next tab in sequence. This tab is very similar, but it's for the email that the user sees when the Change Request has moved to **Ready for Approval**.
   - Again, you can turn it off by clicking **Disable**.
   - Configure the subject line in this field. Remember you can use the available fields in the blue bar above.
   - Configure the body of the email in this field.
7. The rest of the tabs function the same way.
   - This tab is for the email sent when the Change Request has been **Approved**.
   - This tab is for the email sent when the Change Request has been **In Progress**.
   - This tab is for the email sent when the Change Request has been **Rejected**.
   - This tab is for the email sent when the Change Request has been **Completed**.
8. Once you're finished reviewing all the tabs, click the blue button at the bottom. *As mentioned before, you can always go back and make some adjustments if you change your mind! Just click* **Settings > Add-in Settings**.
9. Now Add-in redirects to Dashboard page (Empty Dashboard).
10. Next, you click **Settings > Categories**. This screen is for defining the high-level Categories that your change requests will be listed under. You can add a new Category by clicking **New Item**, or **edit** the Categories that are listed by clicking Edit this list. I'll show you both.
    - **New Item** > I'll enter **Hardware**, then click **Save**.




- I'll now click **Edit this list**.  To make changes, click the ellipses beside an item.  I want **Other/General** to say just **Other**, so I'll click the ellipses beside it, **Edit Item**, remove the unwanted text, **Save**, then click **Stop editing this list**.

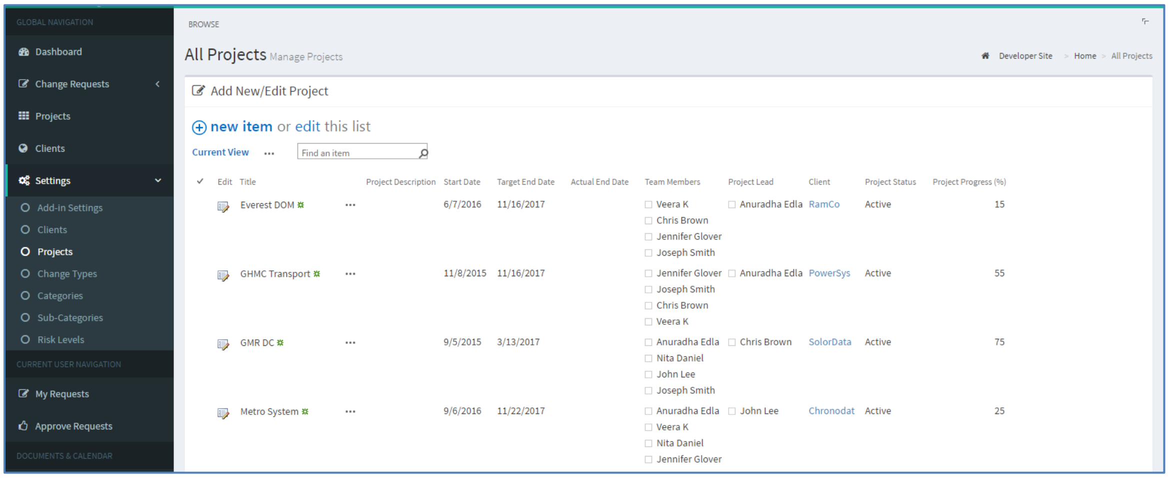
11. Next, you click **Sub-Categories**.  Since we just defined our high-level Categories, now we want to define their Sub-Categories, and designate a Project Support Contact for each.
    - Remember we saw **Hardware, Software**, etc.?  Well, notice how there is **Install Monitor** and **Replace RAM** under **Hardware**.  Install **MS Office**, **Re-Image User Machine** under **Software**.  You get the idea.
    - You make changes the same way – you click **New Item** or **Edit this list**.
    - Beside each item, you need to designate a default **Support Contact** so that anytime an change request is put in under this Category & Sub-Category, it will automatically be assigned to that person, and he or she will receive an email notification (along with the user) when a new change request is submitted.



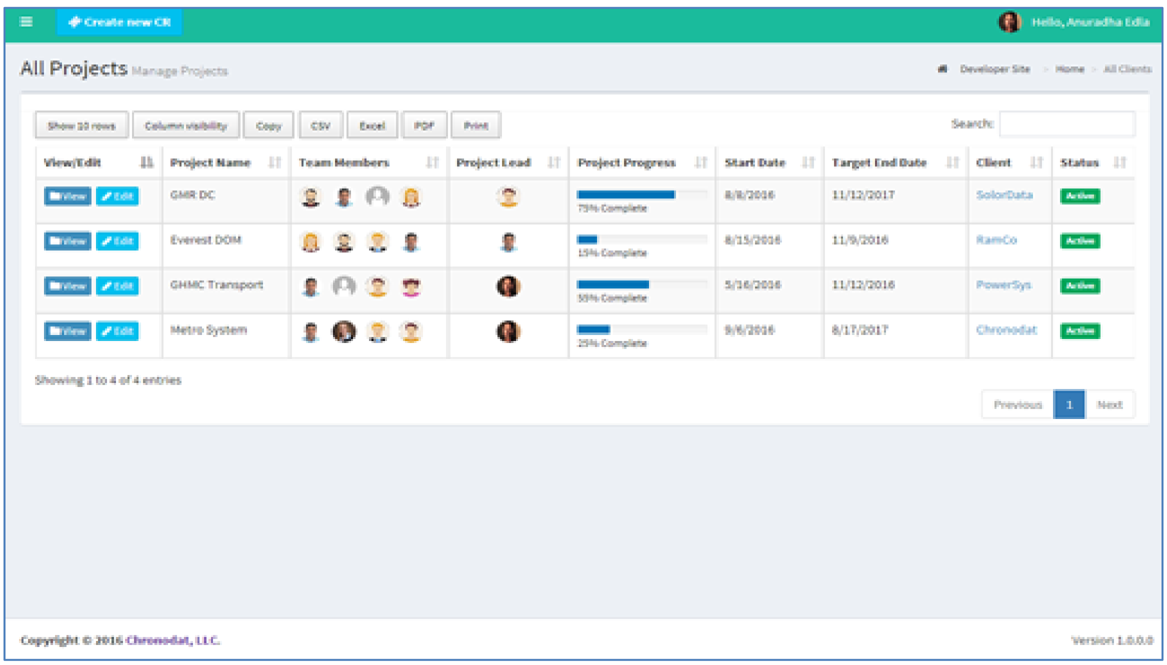

- If your Support Team is already part of a SharePoint group, you can assign that SharePoint group as your Support Team in Change Management (Office 365), which we'll see more about in the **Security** section of this video.
  - I'll go through one example: click the ellipses, **Edit Item**, I'll enter Lee, I'll select **John Lee**, **Save**, then click **Stop editing this list**.
  - You would then continue with the remaining items in the list in the same way.

12. Now that we've defined the Categories, Sub-Categories, and designated Support Contacts, we want to configure the Risk Levels and Change Types, so I'll click **Riske Levels and Change Types** on the left navigation and update accordingly.

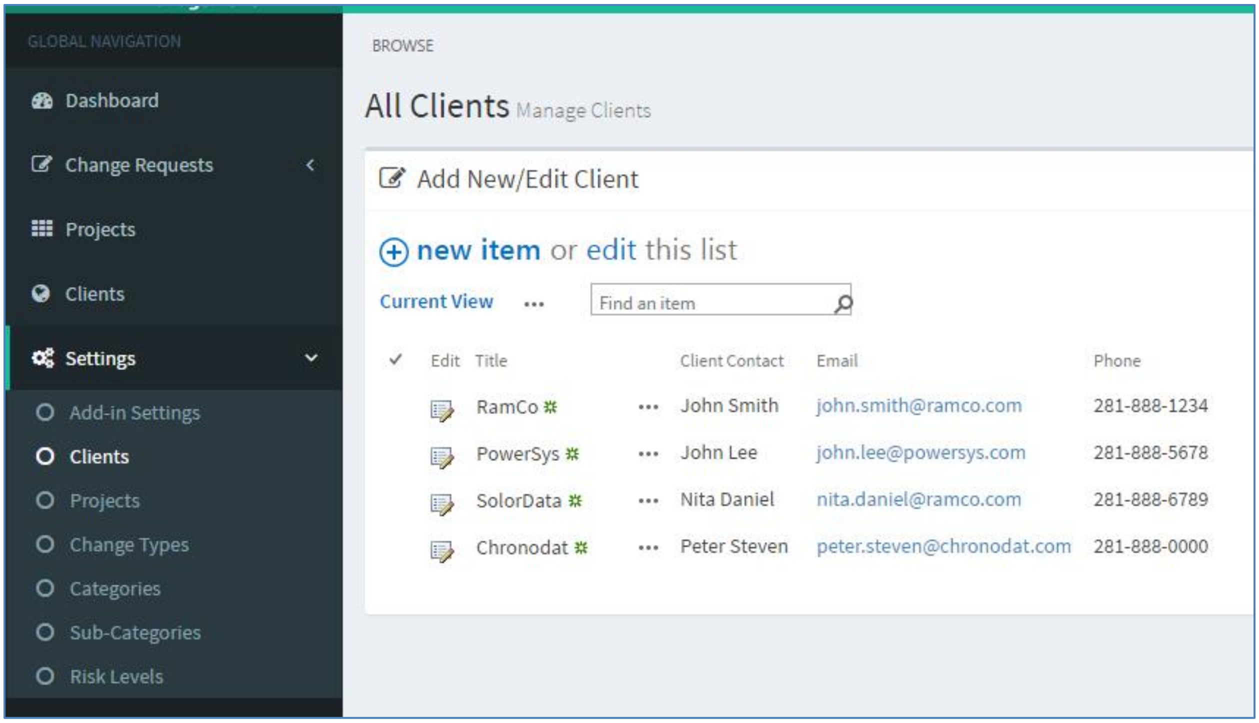
13. Update Projects Information



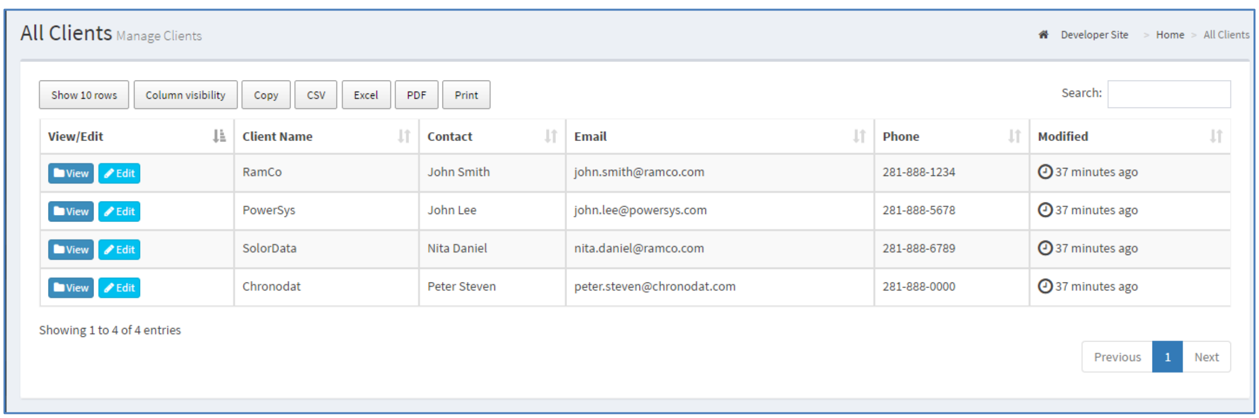
Projects View:



14. Update Clients Information




Clients View:



# Navigation

**General Navigation**

Navigation options are found in the left margin. The arrows function as a toggle, and indicate more menu items below. There are 3 sections: a **Global** section for viewing ALL change requests, a **User** section for viewing your own Change Requests, and a section for **Team Documents** and a **Team Calendar**. We'll be going through each of these items in more detail.

# Navigating to the Dashboard

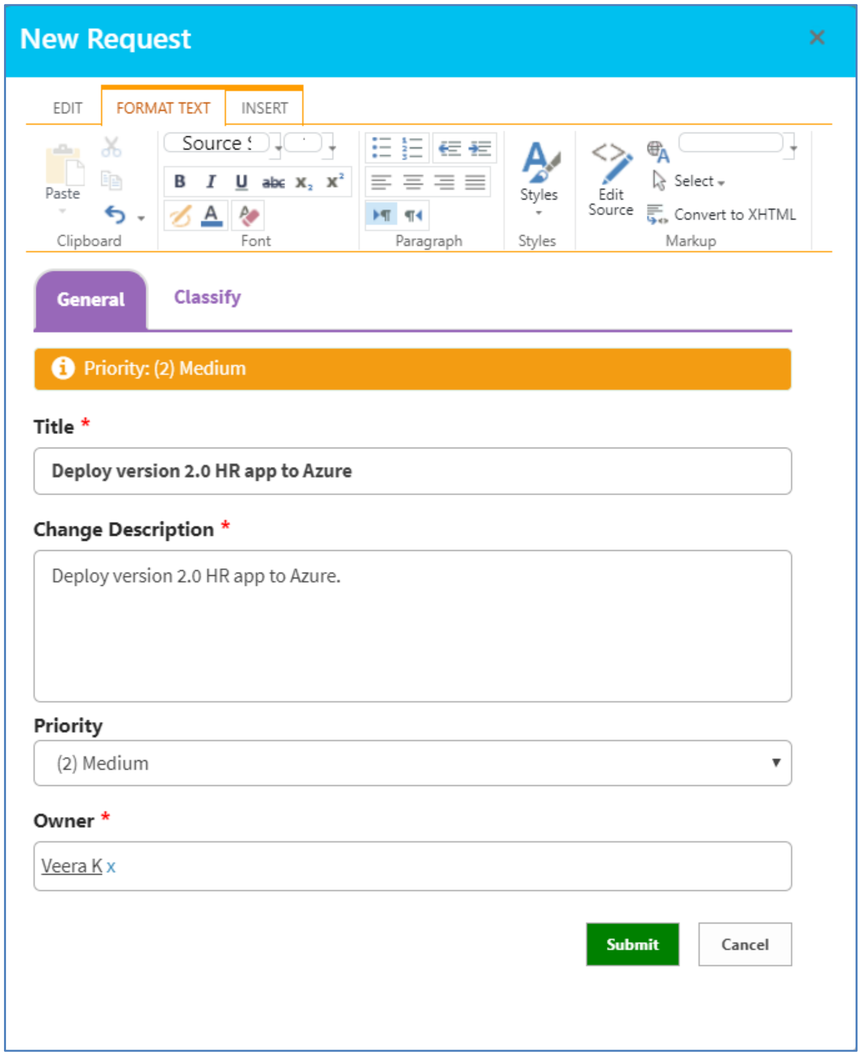
You can click the **Home** (house) icon at the top right, the **Change Management (Office 365)**icon at the top left, or **Dashboard** in the left navigation to go to the Dashboard. All 3 methods take you to the same place.

# Hiding the Left Navigation

You can click the 'bar' icon at the top left (next to **Create New CR**) to hide the left navigation, thus widening the information on the page that is currently displayed.

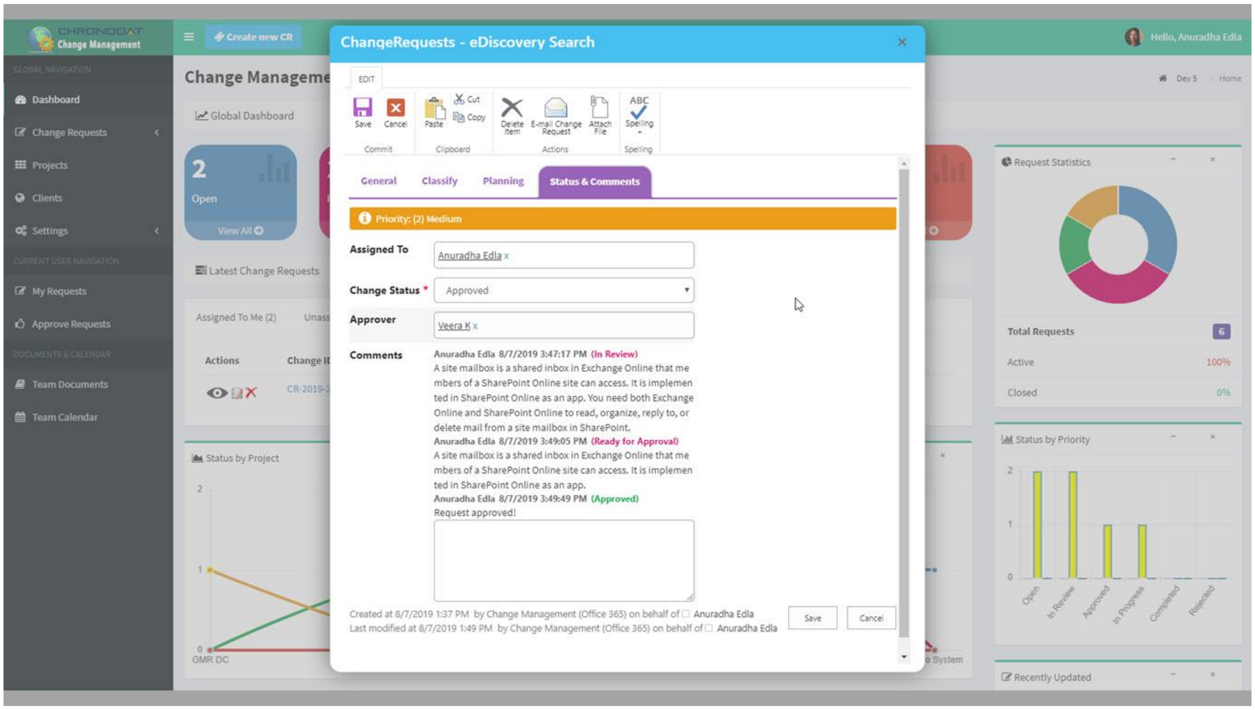
## Creating a New Change Request

Now that we've covered the basic navigation, let's create a Change Request.  Click the **Create New CR** button at the top left.  Complete the fields (required fields are indicated by a red asterisk), then click **Submit**.



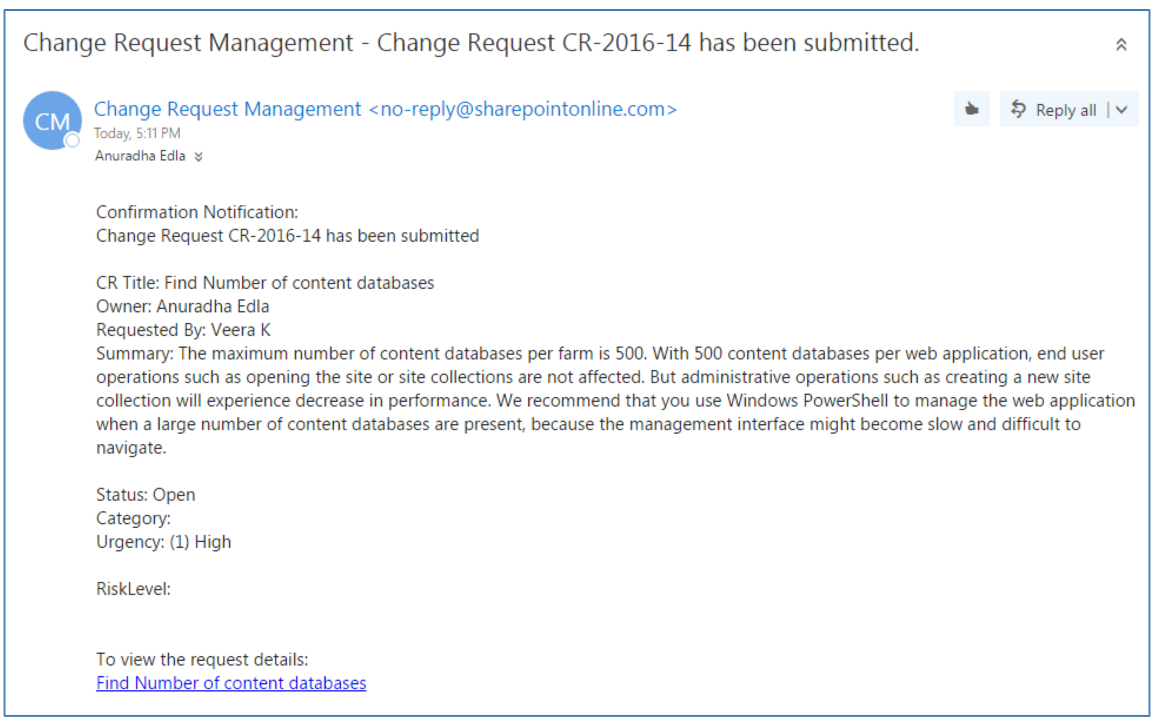

## Assigning a Change Request

- Change Requests are automatically assigned to the team Contact defined in the Sub-Categories list.
- You can, however, *manually* assign a different Support Contact to the Change Request.
- If a Support Contact is not defined, the Change Request will be assigned to the user who creates the Change Request.




Open the Change Request by clicking on the **Change Request ID**. Click **Edit Item**, then enter a Project team member under **Assigned To** (just start typing the first few letters of the last name), then click **Save**.

Change Request Owner and Support Contact receive email notifications.



Change Request Management - Change Request CR-2016-14 has been submitted.

Change Request Management <no-reply@sharepointonline.com>
Today, 5:11 PM
Anuradha Edla

Reply all

Confirmation Notification:
Change Request CR-2016-14 has been submitted

CR Title: Find Number of content databases
Owner: Anuradha Edla
Requested By: Veera K
Summary: The maximum number of content databases per farm is 500. With 500 content databases per web application, end user operations such as opening the site or site collections are not affected. But administrative operations such as creating a new site collection will experience decrease in performance. We recommend that you use Windows PowerShell to manage the web application when a large number of content databases are present, because the management interface might become slow and difficult to navigate.

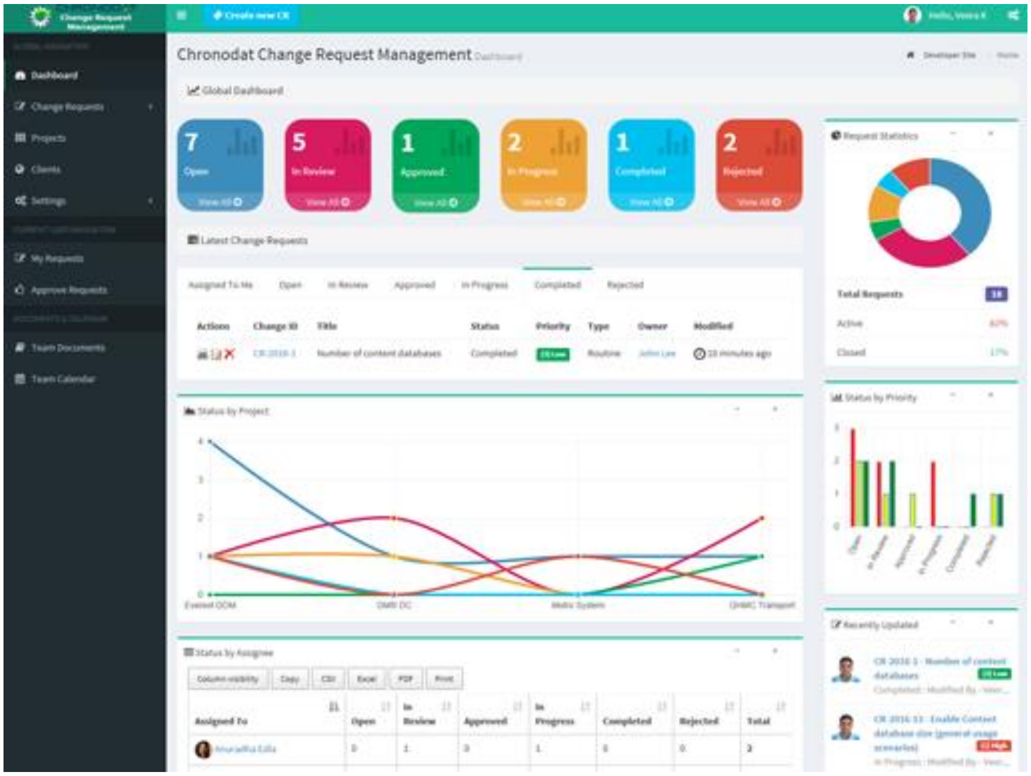
Status: Open
Category:
Urgency: (1) High

RiskLevel:

To view the request details:
[Find Number of content databases]

## Dashboards

We understand the **importance of reporting**, so forget your Excel spreadsheets and the manual work of chasing down unresolved Change Requests.  The Dashboards will give you your reporting statistics.

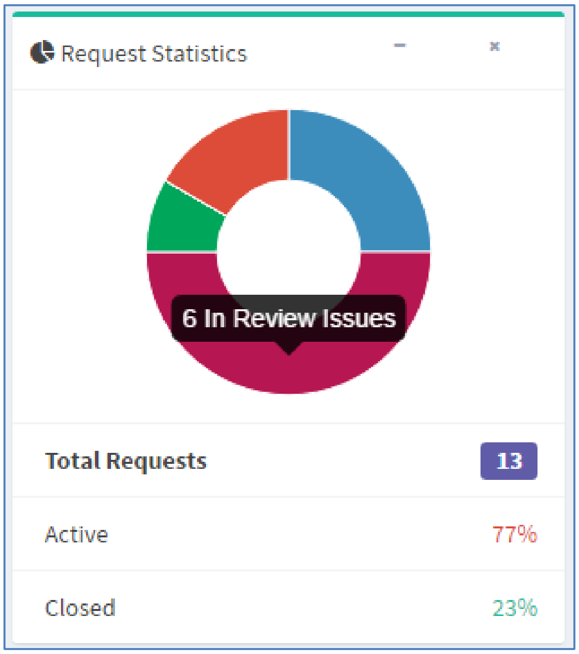



The large boxes on the top match the tabs below it.  Scroll through the tabs to see the respective Change Requests for each Status.  The list contains the latest **10 Change Requests** for each Status.

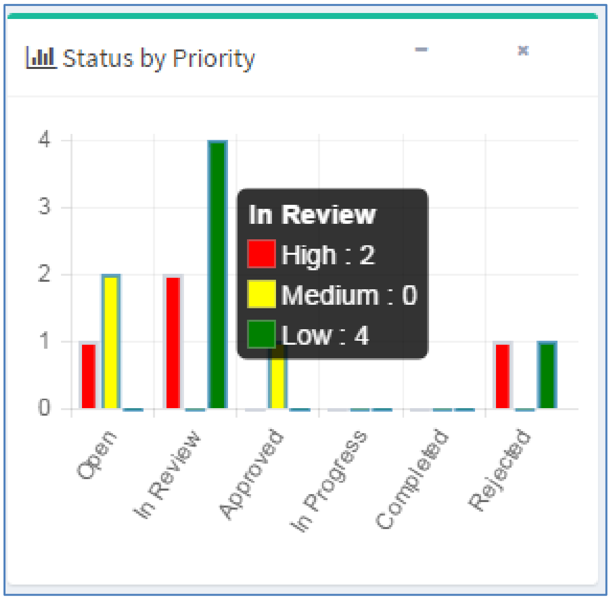
Notice the **pie chart** on the right, which gives you a visual of the **Active vs**. **Closed** Change Requests, and quickly lets you see that there are a lot more Change Requests that are **Active** than **Closed**.

**Active = Open + In Review + Approved + In Progress**

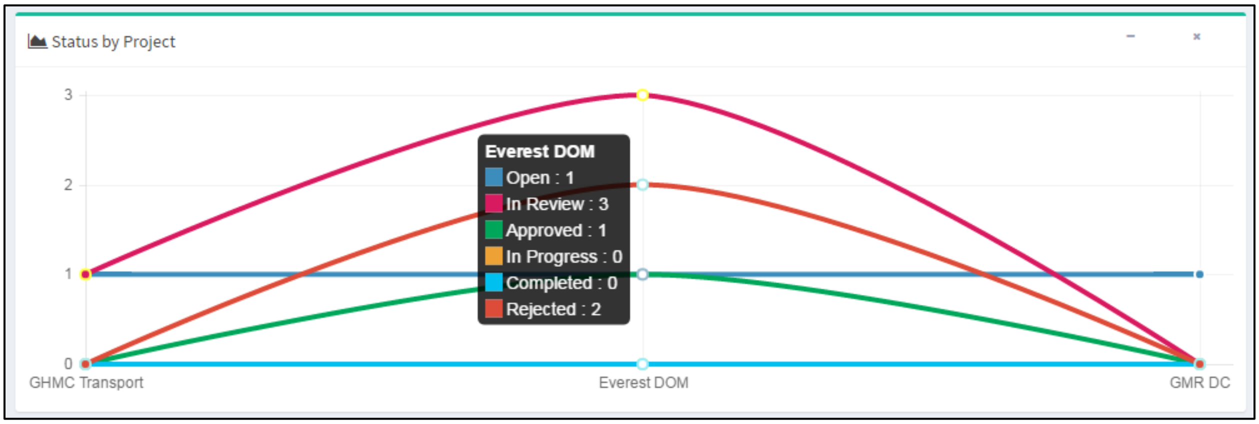
**Closed = Completed + Rejected + Canceled**




The **bar chart** gives you a quick assessment **by Priority** for each Status. Red indicates High, Yellow is Medium, and Green is Low priority. So for the Open status, 4 tickets are **High** priority. For **In Progress**, 3 are Low priority, and so on.



Below the Change Requests is a **bell curve chart**, by **Projects**. Hover over the labels at the bottom to see a popup with more information about them. Focusing on the **Project labels** at the bottom, you will see that the majority of Change Requests have been **Software** Change Requests (if you look on the left, there have been 4 Change Requests), and very few Change Requests have been submitted for **Phones**.




The grid below shows you Change Requests **by Assigned To**. This display quickly lets you know how your staff is doing with regard to the Change Requests assigned to each member. You can quickly assess that **John Lee** has the bulk of the Change Requests assigned to him. This display lets you quickly see who might be overloaded or not have enough work, and you can make any necessary adjustments.

Status by Assignee

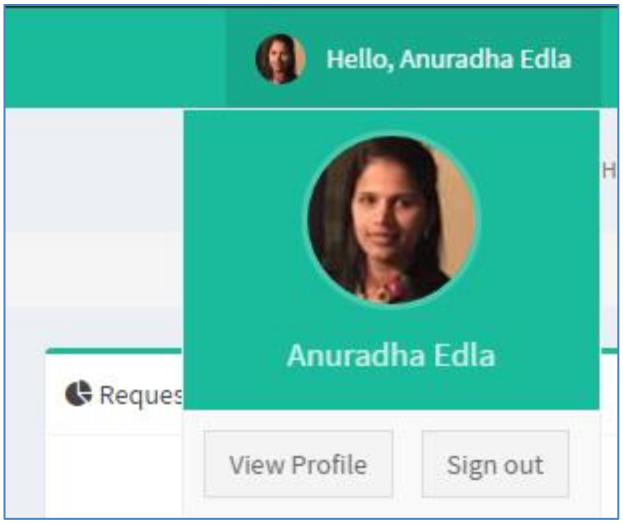
Column visibility | Copy | CSV | Excel | PDF | Print

| Assigned To | Open | In Review | Approved | In Progress | Completed | Rejected | Total |
|---|---|---|---|---|---|---|---|
| Anuradha Edla | 1 | 0 | 0 | 0 | 0 | 0 | **1** |
| Chris Brown | 1 | 2 | 0 | 0 | 0 | 0 | **3** |
| John Lee | 1 | 1 | 1 | 0 | 0 | 1 | **4** |
| Kim Marklund | 0 | 1 | 0 | 0 | 0 | 1 | **2** |
| **Total** | **3** | **4** | **1** | **0** | **0** | **2** | **10** |

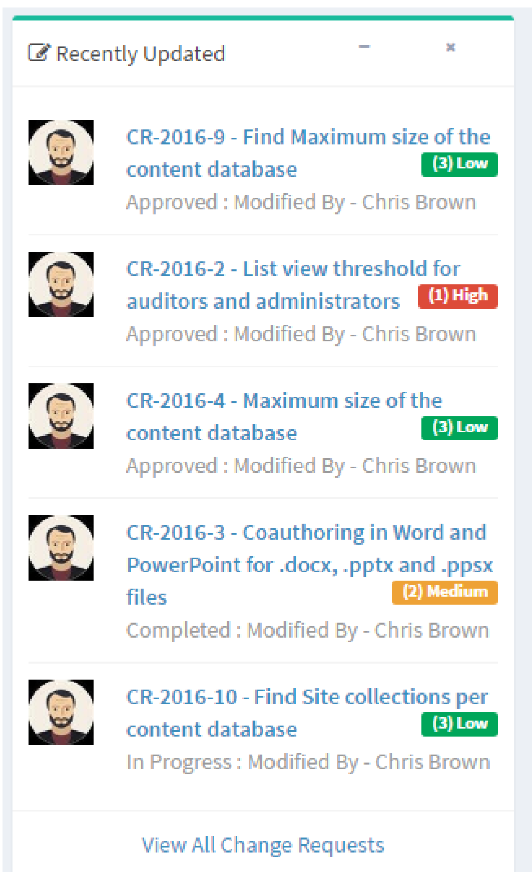
Notice the buttons at the top left. These are for exporting the grid.

- **Copy** copies the table to the Clipboard.
- **CSV** means comma-separated values, and is just the raw, unformatted data
- **Excel** puts the grid in an Excel file, so that you can take advantage of the filtering, and formatting features that Excel provides
- **PDF** exports the grid as a PDF file, and **Print** is for printing the grid

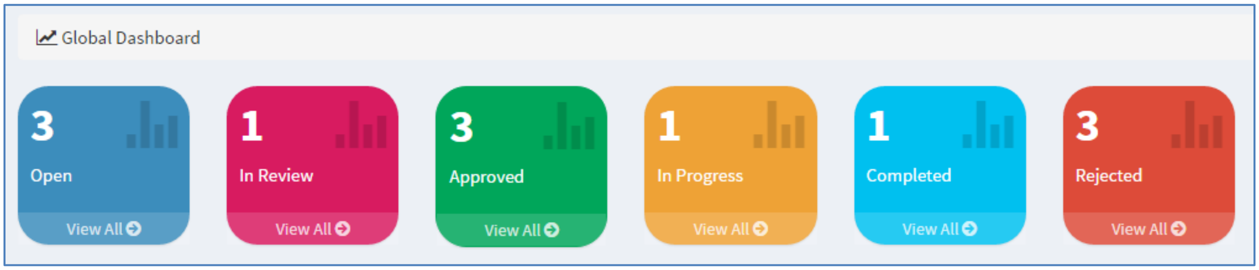
If you want to change your avatar or edit your profile in any way, click on the name, it displays a menu option "View Profile", click on view profile and a SharePoint profile page will display. Click the **Back** button on your browser to return.



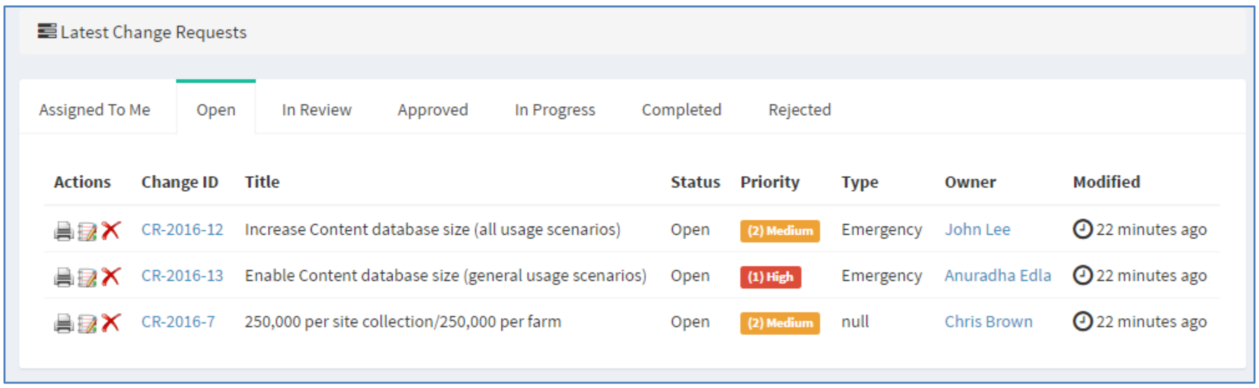

The last area to point out is the **Recently Updated Change Requests** on the right.   These are the 5 most recently updated Change Requests, regardless of Priority or Status.



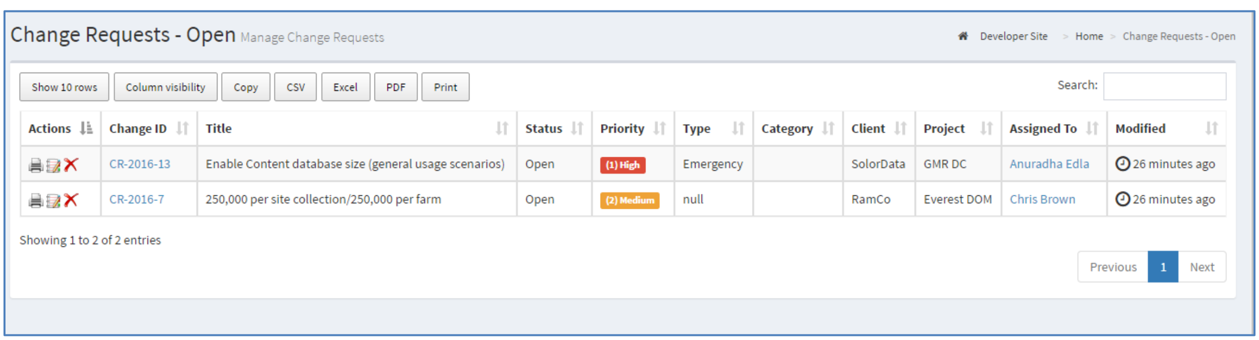
# Global Dashboard




The list of Change Requests in the middle is the latest **10 Change Requests**. If you want to view **ALL Change Requests** under a particular Status, click **View All** below it.




The page that displays shows all Change Requests for this Status in a grid layout, sorted by **Modified Date**. Notice the same **Export** options at the top left that we just saw, which shows the consistency in the add-in. There is also a **Search** box at the top right, plus buttons at the bottom right for paging forward and backward.



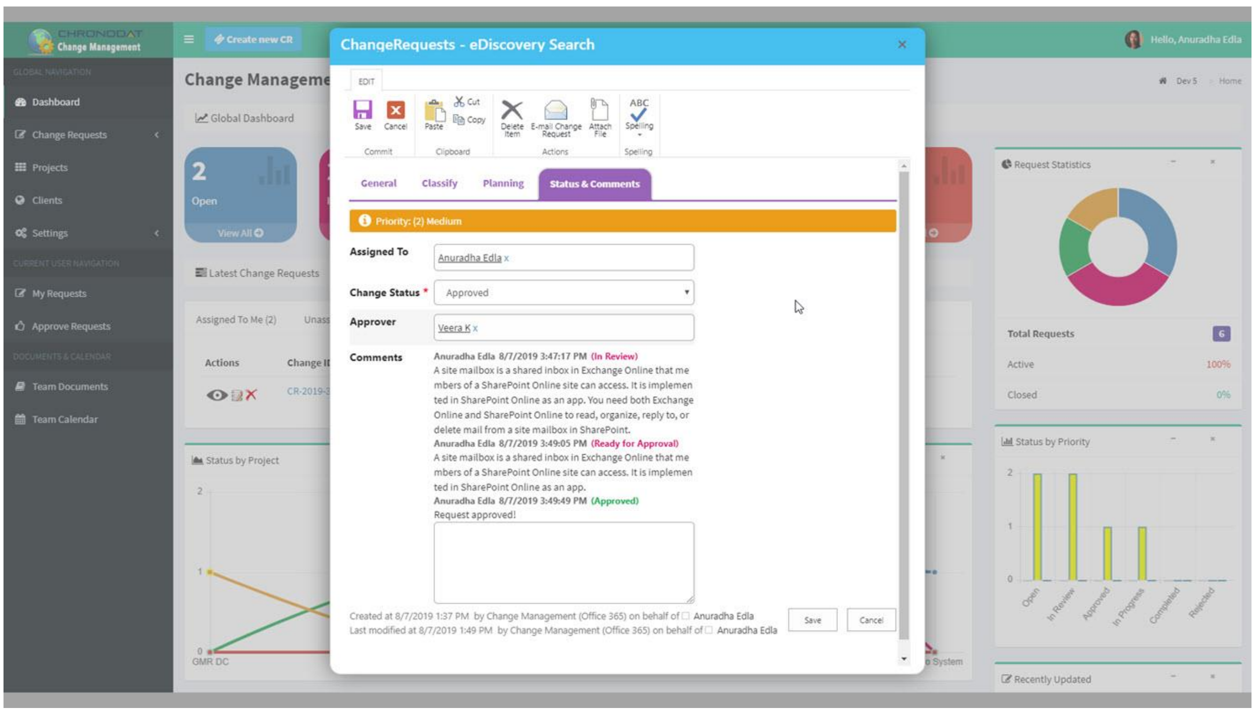

You can change how many rows of data display by clicking the button at the top left. The default is **10**, but you can select **25**, **50**, or **All**.

An **Edit** icon is located to the left of each Change Request, which opens a form for the Change Request, already in **Edit** mode. The **Delete** icon deletes the Change Request, right from this screen.

| Actions | Change ID | Title | Status | Priority | Type |
|---|---|---|---|---|---|
| | CR-2016-13 | Enable Content database size (general usage scenarios) | Open | (1) High | Emergency |
| | CR-2016-7 | 250,000 per site collection/250,000 per farm | Open | (2) Medium | null |

If you click **Change ID**, it takes you to the same form, but you're in **View** mode. You can, however, click **Edit Item** to make a change.

Comments section in the Change Request form keeps track of Change Requests history logs. Support team members can update or delete their own comments.




The column headings are sortable. Just click a heading. For example, let's say we want to sort the grid according to **Category**, so I'll click that heading. You can refine it further by Ascending or Descending order – just click the icon beside the heading.

| Actions | Change ID | Title | Status | Priority | Type | Category | Client | Project | Assigned To | Modified |
|---|---|---|---|---|---|---|---|---|---|---|

There is also a handy **Print** icon next to each line for quick printing of an individual Change Request.

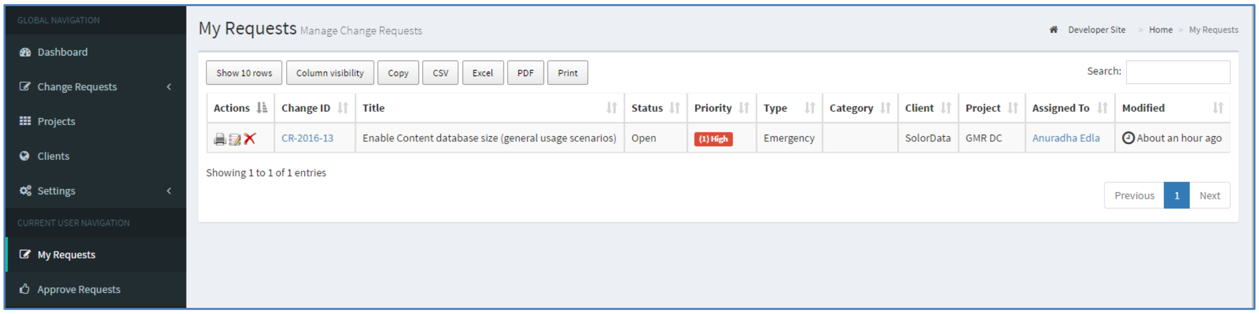
You can search for Change Requests with the Search field at the top right. Enter your search criteria here - just start typing – there is no need to click <**Enter**>. You can search for any text or number, and the Search looks in all columns.


## Approving /Rejecting Change Requests:

Once a Change Request has been changed to a Status of **Ready for Approved**, it can be **Approved** or **Rejected.**

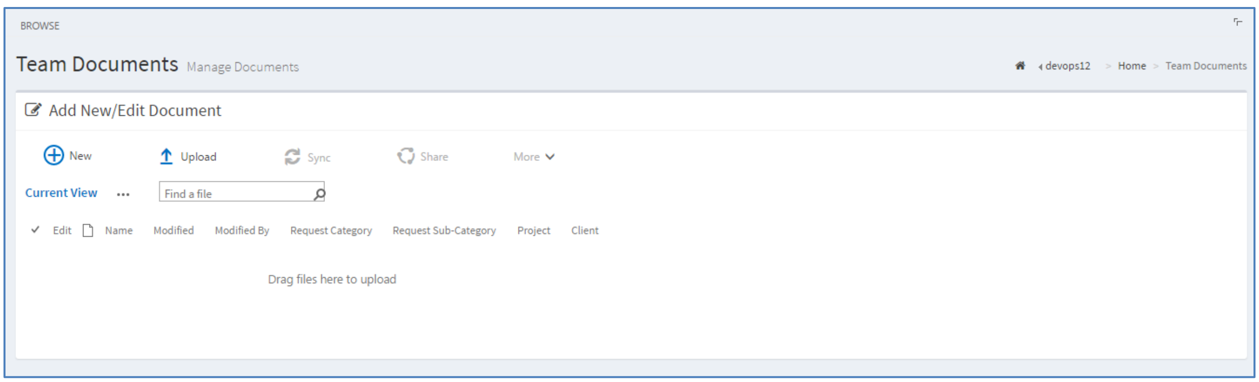
## My Requests

Click **My Requests** to see your own individual requests.




# Document Repository

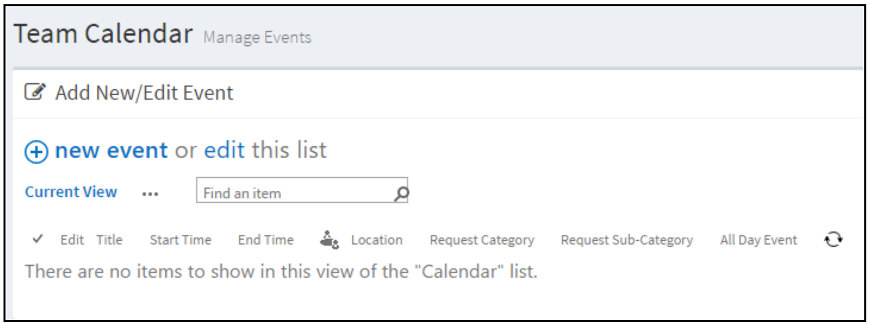
- You can upload & store documents for the Project team to share and use.
- Click **Team Documents**.




- To create a new Word document from where you are right now, click **New**.
- You can upload a document right to this location by using the **Upload** button. Click Choose File, navigation to the file location, click **Open**, and then **OK**. Fill out the fields in the form (required fields are indicated with an asterisk), then click Check In. Now you see your file in the list.
- Instead of clicking **Upload**, you can also drag & drop files from Windows Explorer right onto the page. I'll demonstrate that now: with Windows Explorer open, this is the file I want to upload, so I'll click it, then drag my cursor over the Change Management (Office 365)add-in, then just let go of the mouse. Now you see it in the list. You can see that it's checked out, meaning that it's still in a draft format, and no one else can edit it. If you are ready to check it in, click the ellipses beside it > click it again > **Advanced > Check In**.
- You can create folders, and create or upload documents under them. Just click **New** > **New Folder**.

## Using the Team Calendar

- You can maintain a Team calendar in Chronodat.  Click **Team Calendar**.




- To add an event to the Calendar, click **New event**.
- You could add a Team social event, system outages, freeze periods in your business (for example, no modifications can be made to any business applications during the December holidays), and so on.
- You can also upload a file to be added as an attachment to the event.  You see the attachment only if you click on the event to view it.

You can click **Edit this list** to see a Quick Edit view, for making bulk updates in a spreadsheet-like view.

## Security

The Change Management (Office 365) add-in contains configurable access levels.  Security is maintained by the Chronodat Admin, who can grant access by:

- Creating a **new Security group**
- Using any **existing SharePoint group** in the Parent site
- Creating access for a View-Only user