

# IT Change Management (User manual)



By

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## Welcome to IT change Management add-in

IT Change Management is a systematic approach to manage all organizational changes scheduled in an organization for the upcoming events. The purpose is to ensure that no unnecessary changes are made, all changes are documented, that services are not unnecessarily disrupted and resources are used efficiently.

IT Change Management is a tool which provides feature to add an event i.e. deployment, outage and maintenance. User will be notified when an event will create. User has dashboard to see that how many events are lined up. This module helps to maintain all the records of the project deployment, outage and if any maintenance is required on a particular project.

This add-in offers an easy curve to the organization with a quick setup process and user friendly environment. IT Change Management helps to maintain all the information at one place which is useful to track the organizational undergoing events.

The module includes :-


- Dashboard
- User Roles
- Users
- Systems
- Status
- Projects
- Outage Types
- Events




**Administration**

- Dashboard** >
- User Roles
- Users
- Systems
- Status
- Projects
- Outage Types
- Help


### Dashboard



Roles



Users



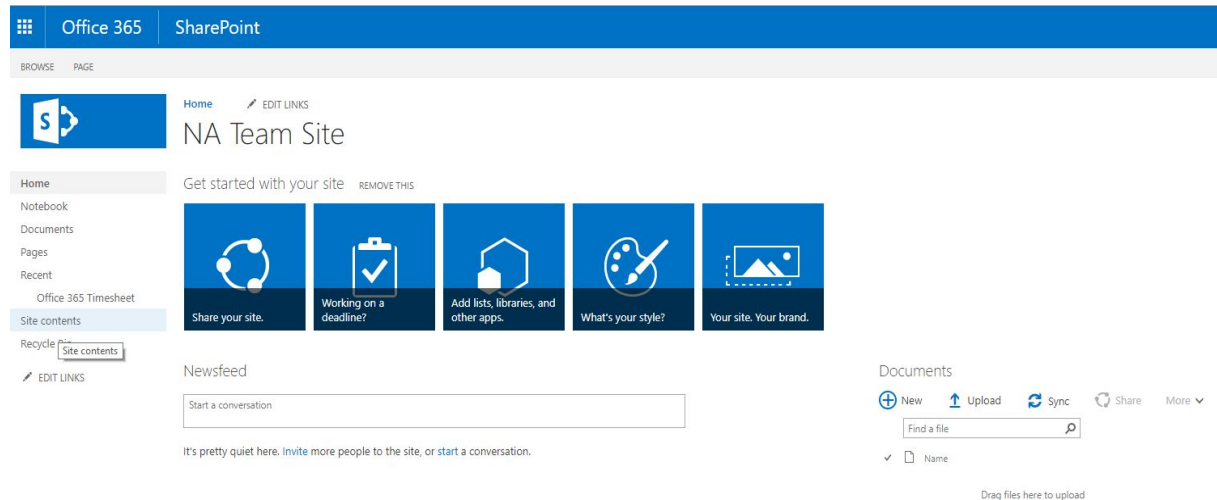
Projects

With the help of this add-in the organization can have every data of the project deployed or sent or in maintenance phase. It can also maintain the project outage details.

All the details will be viewed to all the users roles, but authorities to access the entire add-in will vary according to the roles defined by the administrator to the particular user.

### Logging On

Once the user is logged in to the Office 365 environment and if add-in is already installed, it can be opened as shown below:



- Go on site content.
- On clicking on site content, it will show all the installed add-ins.
- Start the add-in by clicking on it.
- Depending on the logged-in user, the add-in will open Administrator, System engineer or User portal.
- Logging in for the first time to the add-in will always open the Administrator portal.

## IT Change Management

### ● Dashboard

Dashboard page will show three tiles from where user can navigate to different pages such as :-

- Roles
- Users
- Projects

Once the events are been created from system engineers, then on dashboard most recent 5 entries of all control types like deployment, outages, maintenance will be displayed. There are options to print/export each section as well as all control type in same report.

Below are the points that will help the users to access the site flawlessly.

- Control type heading that is “Deployment, Outage Types and Maintenance” will be redirected to their details pages.
- “Print |Excel” option, is provided where user can print or export the three events type details in one document.
- User can navigate from dashboard to “Users, Systems, Projects, Servers and

Outage Types” pages easily by the use of the left navigation links.



| Administration |   |
|----------------|---|
| Dashboard      | > |
| User Roles     |   |
| Users          |   |
| Systems        |   |
| Status         |   |
| Projects       |   |
| Outage Types   |   |
| Help           |   |

### Dashboard



- **User Roles**

In this add-in the roles are already pre-define. Administration will have the authority to assign the defined roles to the users. Basically there are three roles as shown below :-

- Administrator
- System Engineer
- Users



| Administration |   | User Roles  |               |
|----------------|---|---|---------------|
| Dashboard      |   | Dashboard >   | User Roles    |
| User Roles     | > | Show   10   entries <span style="float: right;">Search: <input type="text"/></span> |               |
| Users          |   | <b>User Role</b>  | <b>Active</b> |
| Systems        |   | Administrator   | Yes           |
| Status         |   | System Engineer   | Yes           |
| Projects       |   | User  | Yes           |
| Outage Types   |   | Showing 1 to 3 of 3 entries   |               |
| Help           |   |   |               |

The access to the account for User will be different from that of Administrator and so as that of System Engineer i.e the authority and the functionality of all the

account will vary according to the account role's the user is assigned to.

Below are the authorities given for the defined user roles in the system.

- **Administrator**
  - Add new Users
  - Add new Systems
  - Add new Projects
  - Add new Servers
  - Add new Outage Types
- **System Engineer**
  - View User Roles
  - View Users
  - View Projects
  - Create new Events
- **User**
  - View Events
  - View Projects

- **Users**

Administrator have the rights to create new “Users”.To create new “User” from admin account user can navigate to the “Users” link from left navigation and the form will be displayed.



The screenshot displays the 'Users' management page in the IT Change Management system. On the left is a navigation menu with options like Administration, Dashboard, User Roles, Users, Systems, Status, Projects, Outage Types, and Help. The main content area is titled 'Users' and contains a form for adding a new user. The form fields include 'User Name', 'Role Name' (a dropdown menu), 'Email', and an 'Active' checkbox. Below the form is a table listing existing users with columns for User, Role Name, Email ID, Active status, Edit, and Delete. The table shows four entries: Rajesh Lohar (Administrator), Employee (User), Manager (System Engineer), and Aakash Raiput (System Engineer). At the bottom, it indicates 'Showing 1 to 4 of 4 entries'.

| User          | Role Name       | Email ID                                       | Active | Edit | Delete |
|---------------|-----------------|--|--------|------|--------|
| Rajesh Lohar  | Administrator   | rajesh.lohar@ignatiussoftware.onmicrosoft.com  | Yes    |      |        |
| Employee      | User            | Employee_IG@ignatiussoftware.onmicrosoft.com   | Yes    |      |        |
| Manager       | System Engineer | Manager@ignatiussoftware.onmicrosoft.com       | Yes    |      |        |
| Aakash Raiput | System Engineer | aakash.raiput@ignatiussoftware.onmicrosoft.com | Yes    |      |        |

Here you have to follow below steps to create new user:-

- Select “User Role”
- Enter “User Name” and click on “People” icon to fetch the associated Email ID
- Select the checkbox if needed.
- Click on save button
- The User will be created successfully.
- User can edit and delete the created User.

You can view all the created users in the below generated list.

## ● Systems

Administrator have the rights to create new “System”. To create new “System” from admin account user can navigate to the “Systems” link from left navigation and the form will be displayed.

The screenshot shows the IT Change Management interface. On the left is a navigation menu with 'Administration' selected, containing links for Dashboard, User Roles, Users, Systems (highlighted), Status, Projects, Outage Types, and Help. The main content area is titled 'Systems' and contains a form with fields for System Name, Location, and Description, an Active checkbox, and Clear, Save, and Cancel buttons. Below the form is a table listing existing systems.

| System Name | Location | Description | Active | Edit | Delete |
|-------------|----------|-------------|--------|------|--------|
| PuneDev1    | Pune     |             | Yes    |      |        |
| PuneDev2    | Pune     |             | Yes    |      |        |
| IndDev1     | Indore   |             | Yes    |      |        |

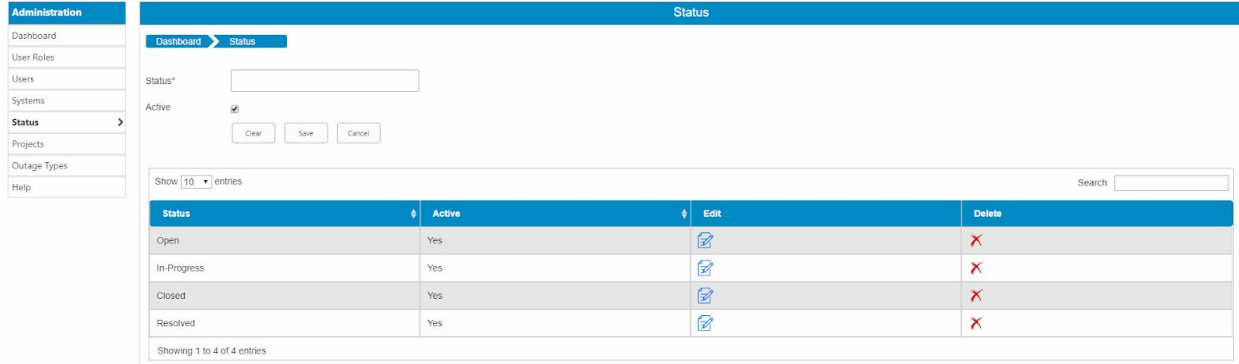
- Enter “System Name”
- Enter “Location”
- Enter “Description”
- Select “Active” checkbox if needed.
- Click on save button
- The “Systems” will be created successfully.
- User can edit and delete the created System.









You can view all the created Systems in the below generated list.

## ● Status

Administrator have the rights to create new “Status”. To create new “Status” from admin account user can navigate to the “Status” link from left navigation and the form will be displayed.





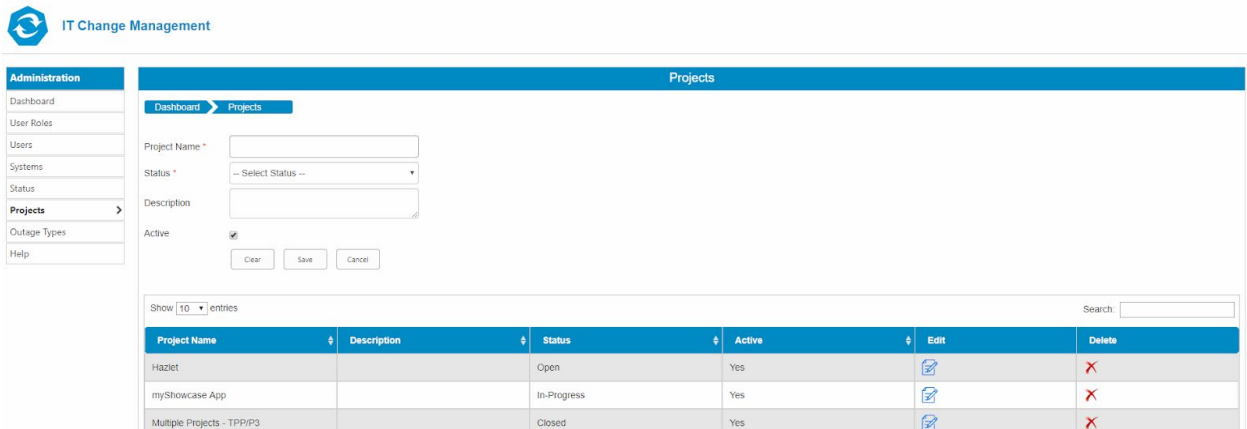
| Status      | Active | Edit  | Delete  |
|-------------|--------|---|---|
| Open        | Yes    |  |  |
| In-Progress | Yes    |  |  |
| Closed      | Yes    |  |  |
| Resolved    | Yes    |  |  |







- Enter “Status”
- Select “Active” checkbox if needed.
- Click on save button
- The “Status” will be created successfully.
- User can edit and delete the created Status.

You can view all the created Status in the below generated list.

## ● Projects

Administrator have the rights to create new “Project”. To create new “Project” from admin account user can navigate to the “Projects” link from left navigation and the form will be displayed.



| Project Name               | Description | Status      | Active | Edit  | Delete  |
|----------------------------|-------------|-------------|--------|---|---|
| Hazlet                     |             | Open        | Yes    |  |  |
| myShowcase App             |             | In-Progress | Yes    |  |  |
| Multiple Projects - TPP/P3 |             | Closed      | Yes    |  |  |

- Enter “Project Name”
- Enter “Status”
- Enter “Description”
- Select “Active” checkbox if needed.
- Click on save button
- The “Project” will be created successfully.
- User can edit and delete the created Project.

You can view all the created Projects in the below generated list.

- **Outage Types**

Administrator have the rights to create new “Outage Type”.To create new “Outage Type” from admin account user can navigate to the “Outage Types” link from left navigation and the form will be displayed.

The screenshot shows the 'IT Change Management' interface. On the left is a navigation menu with 'Outage Types' selected. The main area is titled 'Outage Types' and contains a form with fields for 'Outage Type Name \*', 'Description', and an 'Active' checkbox. Below the form is a table with one entry: 'Planned' with 'Active' status 'Yes'. The table has columns for 'Outage Type', 'Description', 'Active', 'Edit', and 'Delete'.

| Outage Type | Description | Active | Edit | Delete |
|-------------|-------------|--------|------|--------|
| Planned     |             | Yes    |      |        |

- Enter “Outage Type”
- Enter “Description”
- Select “Active” checkbox if needed.
- Click on save button
- The “Server” will be created successfully.
- User can edit and delete the created Outage Type.

You can view all the created Servers in the below generated list.

- **Events**

Events can only be created by System Engineer and once created all the other users can only view the generated record.User can fill the form for any event type.

The screenshot shows the 'IT Change Management' interface for 'Events'. The left navigation menu has 'System Engineer' selected and 'Events' highlighted. The main area is titled 'Events' and contains a form with dropdown menus for 'Event Type\*' and 'System\*', and a text input for 'System Version'.

User will view change according to the “Event Type” option selected from the dropdown. Mainly three option are present for event type.

- Deployment
- Outages
- Maintenance

Refer below points and screens.

- **Deployment Event**

Here in deployment view there are various options that will help you to add data regarding the deployment of the project.



## IT Change Management

| System Engineer |   |
|-----------------|---|
| Dashboard       |   |
| User Roles      |   |
| Users           |   |
| Projects        |   |
| <b>Events</b>   | > |
| Help            |   |

| IT Change Management       |                                     |
|----------------------------|-------------------------------------|
| Dashboard > Events         |                                     |
| Event Type*                | Deployment                          |
| System*                    | -- Select System --                 |
| System Version             |                                     |
| Deployment Tied To Project | <input checked="" type="checkbox"/> |
| Project*                   | -- Select Project --                |
| Deployment Date*           |                                     |
| Technical Report           |                                     |
| Rollback Location          |                                     |
| App Version                |                                     |
| Attachment                 | <input type="text"/> Browse...      |
| Updated By*                | Manager                             |
| Active                     | <input checked="" type="checkbox"/> |
| Clear Save Cancel          |                                     |

- Select the Event type as “Deployment”.
- Select “System” from the system dropdown which contains IT project list.
- Now set the “System Version”.
- Select “Deployment Tied To Project” check box if needed.
- Select “Project” from the project dropdown.
- Select the “Deployment Date”.
- Enter the “Technical Report” in the list box.
- Enter “RollBack Location” in the textbox.
- Enter “App Version” in the textbox.
- User can upload document from browser button.
- Select “Active” checkbox if want to keep the Event active.
- “Update by” will have name of the creating user.
- Last click on save to add the entered details.
- User can edit and delete the created event.

As the details get added in the system the entries will get visible on the dashboard of all users.

- **Outage Event**

Here in outage view there are various options that will help you to add data regarding the outage of the project.



### System Engineer

- Dashboard
- User Roles
- Users
- Projects
- Events**
- Help

### Dashboard

### Events

Event Type\*

System\*

System Version

Windows Update\*

Maintenance Date\*

Configuration Change

Comment

Attachment

Updated By\*

Active

- Select the Event type as “Outage”.
- Select “System” from the system dropdown which contains IT project list.
- Now set the “System Version”.
- Select “Outage Type” from the dropdown.
- Enter the “Incident” in the textbox.
- Enter “Resolution” in the textbox.
- Check the “Planned Downtime” checkbox is needed.
- Select “Start and End Date”
- User can upload document from browser button.
- Select “Active” checkbox if want to keep the Event active.
- “Update by” will have name of the creating user.
- Last click on save to add the entered details.

- User can edit and delete the created event.

As the details get added in the system the entries will get visible on the dashboard of all users.

- **Maintenance Event**

Here in outage view there are various options that will help you to add data regarding the outage of the project.



## IT Change Management

| System Engineer |             |
|-----------------|-------------|
| Dashboard       |             |
| User Roles      |             |
| Users           |             |
| Projects        |             |
| <b>Events</b>   | <b>&gt;</b> |
| Help            |             |

| Dashboard > Events   |                                     |
|--|-------------------------------------|
| Event Type*  | Maintenance                         |
| System*  | -- Select System --                 |
| System Version   |                                     |
| Windows Update*  |                                     |
| Maintenance Date*  |                                     |
| Configuration Changes  |                                     |
| Comment  |                                     |
| Attachment   | <input type="text"/> Browse...      |
| Updated By*  | Manager                             |
| Active   | <input checked="" type="checkbox"/> |
| <input type="button" value="Clear"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> |                                     |

- Select the “Event Type” as “Maintenance”.
- Select “System” from the system dropdown which contains IT project list.
- Now set the “System Version”.
- Enter “Windows Update” in the textbox.

- Select the “Maintenance Date”.
- Enter the changes and the comments in the list box of “Configuration changes” and “Comment”.
- User can upload document from upload button.
- “Update by” will have name of the creating user.
- Last click on save to add the entered details.
- User can edit and delete the created event.

As the details get added in the system the entries will get visible on the dashboard of all users.

- **Help**

Help page give a brief description about the tool and link to “User Manual” which is helpful to get details and working of the IT Change Management add-in.

For any queries regarding the add-in user can contact on the support provided by Ignatiuz team on “[support@ignatiuz.com](mailto:support@ignatiuz.com)”.



IT Change Management

| Administration | Help  |
|----------------|---|
| Dashboard      | <p><b>IT Change Management</b> (SharePoint Add-ins) is a system used to add events related to Deployment, Outage and Maintenance. Here are some smart features of IT Change Management (SharePoint Add-ins) out of many.</p> <ul style="list-style-type: none"> <li>• Role based access</li> <li>• Role based Dashboard view and permissions</li> <li>• Performance monitoring</li> </ul> <p><b>User Guide</b></p> <p>Process of IT Change Management SharePoint Add-ins</p> <ul style="list-style-type: none"> <li>• Admin have read,write and view permissions for all masters pages</li> <li>• System Engineer have read, write and view permissions for Events only</li> <li>• User has only view permission of events and projects</li> <li>• E-Mail notification will be sent to users on creation of user with their roles by admin</li> <li>• E-Mail notification will be sent to all users when event is created.</li> </ul> <p>IT Change Management SharePoint Add-ins Workflow Diagram</p> <pre> graph LR     Admin[Admin] -- Creates --&gt; User     Admin -- Creates --&gt; UR[User role]     Admin -- Creates --&gt; Server     Admin -- Creates --&gt; System     Admin -- Creates --&gt; Project     SE[System engineer] -- Creates --&gt; Event     User --&gt; N1[User receives notification on creation]     Event --&gt; N2[All users will receive notification]     N1 --&gt; UVP[User can view events, projects]     N2 --&gt; UVP   </pre> |
| User Roles     |   |
| Users          |   |
| Systems        |   |
| Status         |   |
| Projects       |   |
| Outage Types   |   |
| <b>Help</b> >  |   |