IT Change Management
(User manual)

By

For further information, visit us at www.ignatiuz.com
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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 notify 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 maintains 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

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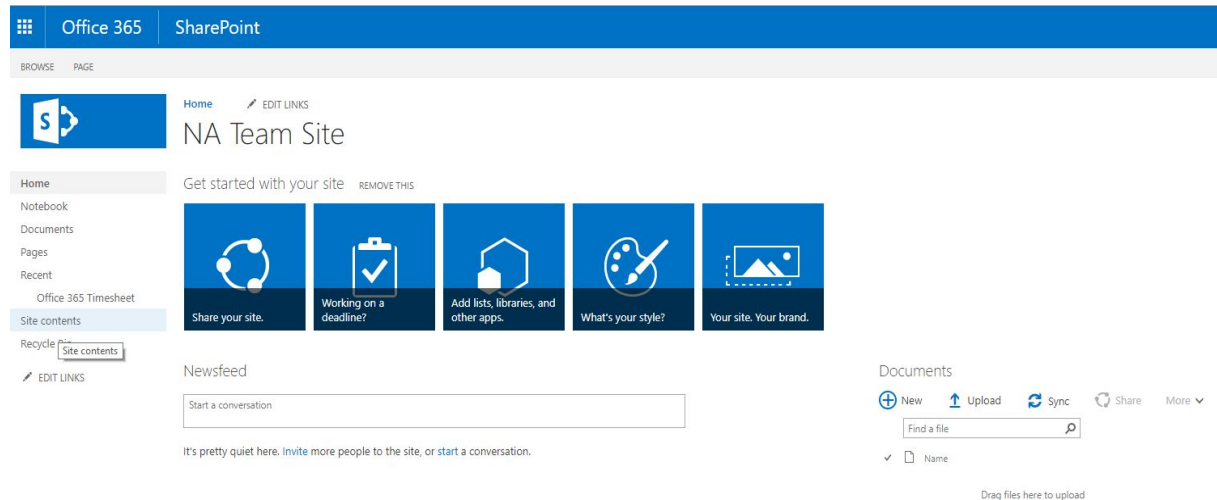
- Go on site content.
- On clicking on site content, it will show all the installed add-ins.
- Start the add-in by clicking on it.
- Depending on the logged-in user, the add-in will open Administrator, System engineer or User portal.
- Logging in for the first time to the add-in will always open the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

- ## 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

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.

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.

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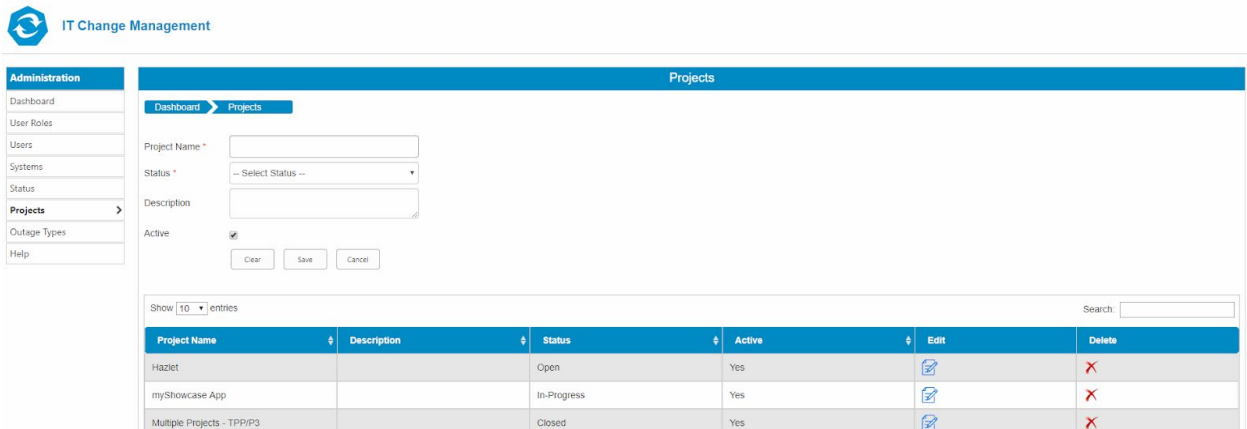
- Enter "Status"
- Select "Active" checkbox if needed.
- Click on save button
- The "Status" will be created successfully.
- User can edit and delete the created Status.

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.

- 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.

- 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.

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.

- ● 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.

- 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.

- ● 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".