IC CHANGE WEB APPLICATION

OVERVIEW

1. This application will work with all browsers now.
   The current URL: https://trutto.mc.vanderbilt.edu/change/
   The old web page will re-direct you to the new page.
   There will be a message reminding you to use your VUNET ID / and VUNET IDID PASSWORD.

2. The primary menu screen will have the same look but based on the level of access you have to the system, you may only have some or a combination of options based on your access level as one of the six user types.

3. The six types of users are: ITS ADMIN, ITS USER, IC ADMIN, IC USER, ALL ADMIN & ALL USER.

This overview will give a high-level explanation of the options available.
CHANGE MANAGEMENT TOOLS:
Under this heading, the options allow you to…
ADD CHANGE – Submit a new change to the calendar for approval (see figure below)
SEARCH CHANGE – Search the change calendar database for historical information. (Search screen is similar to figure below.)

CHANGE CALENDAR – Presents the changes that are scheduled and changes that are submitted as MarkersM in a calendar format. You can narrow your display by selecting the viewing filter.
STAFF MANAGEMENT (Administration):
Under this heading, the options allow you to:

ADD STAFF MEMBER - - Allows you to add staff to the database. (See figure below, others are similar.)
SEARCH STAFF MEMBER – Allows searching for a specific staff member to review the entry.
ADD NEW SUPPORT GROUP – Allows entry of a new workgroup.
MODIFY EXISTING SUPPORT GROUP – Allows editing of the workgroup details.

MAIL DISTRIBUTION LISTS:
ADD NEW LIST - - Allows new distribution list to be created for Change Notification e-mails.
VIEW LIST – Allows you to view WHO is a member of WHICH distribution e-mail list.
IC MEETING MINUTES:
ADD MEETING MINUTES – Allows minutes of IC meetings to be uploaded into a searchable data base.
SEARCH MEETING MINUTES – Allows searching of meeting minutes by specified parameters.

NOTE: there is no link to get back to the main IC CHANGE APPLICATION page here, use your browsers BACK button to return to main menu.

SOLVE RECORD ARCHIVE:
SEARCH SOLVE RECORDS – This allows searching the database for historical information that was entered prior to March, 14 2003 in the previous problem tracking tool known as ‘Solve’.
SERVICE DESK BACK-UP SYSTEM:

ADD A BACK-UP SERVICE CALL – This is used when the actual Service Desk application is unavailable. This will function as long as server TRUTTO remains available and accessible. Records entered here will be mass imported to Service Desk once it becomes available.

SEARCH A BACK-UP SERVICE CALL - - This is used to search the Back-Up Service Call data base before it gets imported to the Service Desk application.
IC CHANGE WEB APPLICATION
DETAILS FOR ADDING A CHANGE

When selecting ADD A CHANGE from the main menu, use your mouse and drop down box to select the values. **Be sure to select the appropriate HLQ (High Level Qualifier).** Not selecting an HLQ will give you a PAGE CAN NOT BE DISPLAYED error if you try to broadcast the notice out via the email notification at the bottom of the page. Remember CATEGORY TOP events will appear on both the ITS (University) and and IC (Hospital) calendars.

**Change Requestor** – The person responsible or contact name for the change.

**Support Group** - This value will be defaulted to whichever group the Requestor is set to in the database.

**Reason Code** – Select the appropriate value for the reason the change is created.

**Environment** - Select the environment that the change is to occur in.

**Locale** – This selection list pull down will be based on the value selected under Environment.

**Type** – This is the type of change that is being entered, Application Software, System Software, Hardware, Information Only.

**Item** - When filling in the Item field, designated only for the ‘object’ you intend to be changing, enter the name only of the item and no other descriptive verbs or adjectives. The reason for this is because you or Change Management may wish to send out the automated emails later and the system concatenates the Item and Reason Code fields to make up the subject line of the email. The Change Calendar also does the same concatenation and we want it to display correctly.

**Category/Impact** – This is one of the most critical values to assign. It should be based on the impact to the end user community and/or risk factor.

**Category TOP** - Major Impact, Widespread Visibility, High Risk of Failure
* If the change fails, the users perceive there will be a major impact on their area of responsibility.
* The change will be visible to most users.
* This is the first time this change or a similar change has been made.
* The change is difficult or impossible to back out.
* The change is extremely difficult to install.
* The change involves a lengthy install time.
* **Lead Time**
  - Normal Lead Time - 7 days (21 days preferred)
* Examples of Category TOP Change Requests are:
  - MVS Upgrade
  - Major hardware installation, e.g. new mainframe, new ancillary system.
  - WizOrder upgrade (may also be category 2, depending on degree of difficulty.)
  - New network connection to HUB (LAN, printer, router, etc.)
  - LAN network operating system upgrade.
  - Token ring card changes to network.

**Category HIGH** - Noticeable Impact, High Visibility, Significant Risk
* The change is perceived by the users as significant.
* The change will be visible to a large number of users.
* There is a significant possibility that the change may not work.
* A significant effort will be required to back out the change.
* **Lead Time**
  - Normal Lead Time - 7 days (14 days preferred)
* Examples of Category HIGH Change Requests are:
  - SWS rollout
  - New printer installation
- Addition of new satellite site (workstations, printers, cabling, etc.)
- Major MVS subsystem upgrade (CICS, DB2)
- Reconfiguring network components in order to change network structure
- Major OEM software upgrade (many new features, changes)
- Major application system upgrade (may also be category 1)
- Ancillary system upgrade / major maintenance
- Wizorder upgrade (may also be category 1, depending on degree of difficulty)
- SWS / Desktop upgrade
- Email change - Post Office

**Category MEDIUM - Minor Impact, Limited Visibility, High Probability of Success**
* The change will have only minor impact on services provided if problems occur.
* The change is visible only to a small group of users.
* The change will have no impact on patient care and no impact on real time patient care decision support.
* There is a high probability the change will work and will have no unanticipated impact on other parts of the production environment.
* A similar change has been implemented successfully and recently.
* Moderate effort is required to back out the change.

* Lead Time
  - Normal Lead Time – 48 hours (in Business Days)

* Examples of Category MEDIUM Change Requests are:
  - Moving printers
  - Changing profiles
  - Changing IP addresses
  - Minor reconfiguration of network components
  - Additional devices on departmental LAN segments
  - Application software changes (MS Word, Excel)
  - Memory upgrades to servers or PC’s
  - Minor JCL changes
  - Routine system / application / operations software customization
  - Printer / terminal installs
  - Minor Ops/MVS rule addition with minimal system impact

**Category LOW - Low Impact, Low Visibility, Low Risk**
* The change will have only minimal or no impact on services provided if problems occur.
* The change is visible only to a few users.
* The change will have no impact on patient care and no impact on real time patient care decision support.
* The change is familiar or common to those who will implement it.
* The change is reliable and known to work.
* The change is easy to back out if problems occur.

* Lead Time
  - Normal Lead Time – 24 hours (in Business Days)

* Examples of Category 4 Change Requests are:
  - Addition or changes to report distribution
  - Minor schedule adjustment in OPC-Scheduler

If the change falls outside the LEAD TIMES outlined above, the change must be marked as an EMERGENCY CHANGE.

**START DATE/END DATE – START TIME/END TIME** – These values will outline the date and time that the Change will begin and the time it will be completed.

**Detailed Description** – This is a free form text field that you will complete using laymen’s terms to describe the event to the novice user. Remember that this field is included in emails sent to distribution list recipients who are less technical.

**Areas Affected** – This is a free form text field that you will complete using laymen’s terms to describe to the novice user what the impact of your change will encompass. Such as applications that will be unavailable or floors/units/buildings that will be affected by the change. This field is also included in the emails sent to various distribution lists to recipients who are less technical.

**Back Out Plan** - Here is where you outline what will need to be done should the change need to be removed from the environment. In this description, you must include an estimated back out time.
Once you add a change to the database with the Submit button, you will be taken immediately to the next page to either:

**Modify** the change you just added. (*VERY IMPORTANT – as soon as you are taken to that next page, there’s a warning that reads “DO NOT REFRESH! Change Record # XX has been added to the Change Control Database! Please see your confirmation information below.” If you refresh it, then you automatically enter a duplicate change. See item B. below for an explanation of this). Either click the Back button, go to another page, or use the submit button to modify, to bypass this refresh function. Most people send out an email from that page and then continue on to other screens.

or **Create a duplicate change** of the one you just added. (To do this, click on the Refresh button and a duplicate change will be created with another record number. You may create as many as you like). If you create a duplicate change record accidentally, contact Change Management, and provide the Change Record number(s) that need to be deleted.

Remember to assign the appropriate category to your change! Just because you entered an event in the calendar that does not mean it is an approved event. Therefore, ALL category TOP, HIGH & MEDIUM events will appear with a MARKER flag that can only be approved and removed by a Change Management representative.

Category LOW (lowest impact changes) or any category EMERGENCY changes will bypass the marker requirements as outlined above. Category LOW and EMERGENCY change will automatically appear on the calendar without the marker flag status for this particular event.

Notification for Category TOP & HIGH should always be sent to the CHANGE MANAGEMENT distribution list only. These events MUST be checked against the other calendar items that are already scheduled for impacts and possible conflicts. Category MEDIUM & LOW changes plus EMERGENCY CHANGES can be sent to the group lists at the bottom after you enter the change record. If you do this, please check the YES NOTIFIED box in the upper right corner of the form.
IC CHANGE WEB APPLICATION
DETAILS FOR I.C. MEETING MINUTES

Users must be either part of the IC HLQ group or members of both the IC HLQ & the ITS HLQ groups. ITS HLQ only members will NOT have access to this option.

When selecting the ADD MEETING MINUTES option under the IC MEETING MINUTES heading the following screen appears.

![Meeting Minutes Screen]

Your options here are to either VIEW all the meetings, SEARCH all the meetings or ADD new meeting minutes to the database. Selecting the ADD NEW MEETING option takes you to a screen where you select the type of meeting minutes.

![New Meeting Entry Screen]

Select the meeting type then click on the CREATE NEW MEETING ENTRY box.
Under Meeting Details, select the Standing Meeting type, then in the free form box enter the focus of the meeting. Focus is not a required field. Select from the pull down menus: the meeting DATE, START/END TIMES and the Meetings Location. After you complete these details, click on SAVE & NEXT to select the meeting invitees.

You can select the INVITEES by selecting them from any of the list heading selections based on the role they perform for the institution. The list will display under the heading SELECTED INVITEES.

After you have selected all the INVITEES, click on SAVE & NEXT and the AGENDA page is displayed.
The AGENDA PAGE has no required fields. If there was no agenda created, select NEXT to bypass this screen to go to the next screen where you will import the INVITEES list as the meetings ATTENDEES. Import the names by clicking on the IMPORT INVITEES LIST option. Click on SAVE & NEXT.

NOTE: You cannot bypass the INVITEE selection screen then try selecting the ATTENDEES from this screen. The Meeting Minutes application is not set up to work that way.
On the next screen, there is a freeform text box where you can either type in the meeting minutes or copy and paste them from a text document. Click on SAVE & NEXT.

This brings up the final screen from which a printed version of the meeting minutes can be generated. Clicking on the Workgroup Attendance Report will format the data into a printer friendly document.