

**Chronodat Change Request
Management (Plus) Add-in**

User Manual

CHRONODAT, LLC

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CHRONODAT

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Introduction

The introduction section of the document describes the scope and objective of Office 365 Chronodat Change Request Management (Plus) 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 Request Management (Plus) 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 Request Management (Plus) 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.

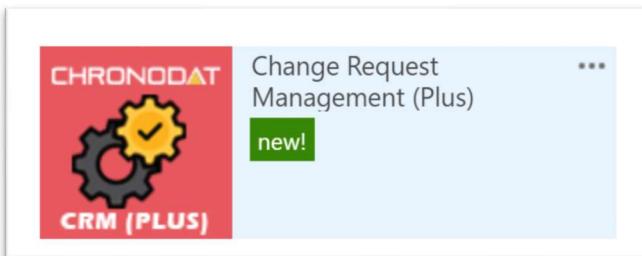
Chronodat Change Request Management (Plus) Software add-in is purpose built for a hitch-free integration of Change Management and Project Management features through On-Premise or Office 365 SharePoint Online. This software stands out for three major reasons: easy configuration, user-friendly interface, 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.
- Multi-lingual support to localize labels.
- Set Global health site alerts to keep your organization aware of service outages or other key infrastructure events.
- 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 Risk 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
- A Team Calendar for tracking project team events as well as client and project meetings etc.

Configuring Chronodat Change Request Management (Plus) Add-in

1. Click Change Request Management (Plus).



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

Welcome to Change Request Management!

The Change Request Management add-in provides a seamless integration of Service Desk features, using **Office 365 SharePoint Online or On-Premise**. The benefits of the add-in are immediate, due to the robust features and user-friendly interfaces it provides.

The primary objective of the Change Request Management add-in is to **create a Service Desk request, and track it to its end ChangeType**. For example, opening a request and assigning it to a Service Desk team member to be worked, working on it, resolving it, then closing it. If your team is Scrum- or Agile-based, the design of the Service Desk add-in will be very familiar to you.

This add-in was built in SharePoint, for use in SharePoint, designed with a **high tech, device-friendly interface (mobile or desktop)**. Both the Support team AND end users can submit new requests.

Using this add-in, your Support team has access to color-coded, built-in **dashboards for quick metrics & reporting**. Dashboards in the form of pie charts, bar charts, bell curve charts & grids let everyone see all requests by Status, Priority, Category, Support Rep/Technician, or Most Recent, to quickly assess the current and overdue Support requests.

A **personal dashboard** in the same format is available for each Team member to see his or her own requests.

Click the **Add-in Settings** button to review and update the default settings:

Add-in Settings

Note: This add-in is compatible with IE10 and later, as well as the latest version of Chrome and Firefox.

See the links below for complete documentation and a demo video.

User Manual Demo Video

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

CREATE NEW REQUEST

GLOBAL NAVIGATION

Dashboard Change Requests

Alert: Change Request Management Add-In Installed Successfully!

Global Dashboard Manage Requests

- Select who can access the Settings page.

Add-in Settings Manage settings

Click each tab below, and review the General and Email Notification specifications.

Available fields for each "Notification" tab:

RequestID, Title, LinkTitle, RequestStatus, Priority, AssignedTo, ChangeType, RequestCategory, RequestSubCategory, CreatedBy, Created, ModifiedBy, Modified

General Open Email Notification Ready for Approval Email Notification Approved Email Notification In Progress Email Notification Rejected Email Notification Assigned To Email Notification

Completed Email Notification

App Name: Change Request Management

Ticket ID (Prefix): IT-SERVICE-2017-

Dashboard access granted to: Developer Site Owners

Name of Support Manager: Anuradha Edla

Service Desk Email (Mailbox): Chronodat Support

Show/Hide Status by Category Chart: On

Show/Hide Status By Priority Chart: On

Show/Hide Request Statistics Chart: On

- 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!

General Open Email Notification Ready for Approval Email Notification Approved Email Notification In Progress Email Notification Rejected Email Notification

Assigned To Email Notification Completed Email Notification

Enable/Disable Email Notification: On

Email Subject template: Change Request Management - Change Request [CRID] has been submitted.

Email Body template:

Confirmation Notification:
Change Request [CRID] has been submitted

CR Title: [Title]
Owner: [CROwner]

ALL tabs reviewed

- 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.
6. 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**.
7. 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.*
8. Now Add-in redirects to Dashboard page (Empty Dashboard).
9. 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**.

The screenshot shows the 'Change Request Management' application interface. On the left, there's a dark sidebar with a navigation menu:

- Dashboard**
- Change Requests** (selected)
- Clients**
- Projects**
- Settings** (selected)
- Add-in Settings**
- Categories** (selected)
- Sub-Categories**
- Change Types**
- Request Status**
- Tags**
- Alerts**
- Subscription**
- Change Labels**

The main content area is titled 'Request Categories' with the sub-titler 'Manage Categories'. It includes a section for 'Add New/Edit Category' with a 'new item' button and a search bar. Below is a table listing categories:

Category	Action
Hardware	...
Software	...
Account Administration	...
Phones	...
New Employee	...
Data Management	...
Other/General	...

- 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**.
10. 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.

Request Category	Support Contact	Approver(s)
Hardware	Joseph Smith Anuradha Edla Veera K Rishi Chitumula	
Hardware	Aaradhy Kolan Veera K	

- If your Support Team is already part of a SharePoint group, you can assign that SharePoint group as your Support Team in Change Request Management (Plus), 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.
11. 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.

12. Update Projects Information

The screenshot shows a list of four projects:

- Everest DOM**: Start Date 6/7/2016, End Date 11/16/2017, Team Members (Veera K, Anuradha Edla, Chris Brown, Jennifer Glover, Joseph Smith), Lead (Veera K), Client (RamCo), Status (Active), Progress (15%).
- GHMC Transport**: Start Date 11/8/2015, End Date 11/16/2017, Team Members (Veera K, Anuradha Edla, Chris Brown, Jennifer Glover, Joseph Smith), Lead (Anuradha Edla), Client (PowerSys), Status (Active), Progress (55%).
- GMR DC**: Start Date 9/5/2015, End Date 3/13/2017, Team Members (Veera K, Anuradha Edla, Chris Brown, Nita Daniel, John Lee, Joseph Smith), Lead (Anuradha Edla), Client (SolarData), Status (Active), Progress (75%).
- Metro System**: Start Date 9/6/2016, End Date 11/22/2017, Team Members (Veera K, Anuradha Edla, Nita Daniel, Jennifer Glover), Lead (Anuradha Edla), Client (Chronodat), Status (Active), Progress (25%).

Projects View:

	Project Name	Team Members	Project Lead	Project Progress	Start Date	Target End Date	Client	Status
View Edit	GMR DC			<div style="width: 75%;">75% Complete</div>	8/8/2016	11/12/2017	SolarData	Active
View Edit	Everest DOM			<div style="width: 10%;">10% Complete</div>	8/15/2016	11/9/2016	RamCo	Active
View Edit	GHMC Transport			<div style="width: 30%;">30% Complete</div>	5/16/2016	11/12/2016	PowerSys	Active
View Edit	Metro System			<div style="width: 25%;">25% Complete</div>	9/6/2016	8/17/2017	Chronodat	Active

Showing 1 to 4 of 4 entries

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13. Update Clients Information

All Clients Manage Clients

View/Edit	Client Name	Contact	Email	Phone	Modified
View Edit	RamCo	John Smith	john.smith@ramco.com	281-888-1234	Yesterday at 9:27 PM
View Edit	PowerSys	John Lee	john.lee@powersys.com	281-888-5678	Yesterday at 9:27 PM
View Edit	SolorData	Nita Daniel	nita.daniel@ramco.com	281-888-6789	Yesterday at 9:27 PM
View Edit	Chronodat	Peter Steven	peter.steven@chronodat.com	281-888-0000	Yesterday at 9:27 PM

Showing 1 to 4 of 4 entries

Clients View:

All Clients Manage Clients

View/Edit	Client Name	Contact	Email	Phone	Modified
View Edit	RamCo	John Smith	john.smith@ramco.com	281-888-1234	37 minutes ago
View Edit	PowerSys	John Lee	john.lee@powersys.com	281-888-5678	37 minutes ago
View Edit	SolorData	Nita Daniel	nita.daniel@ramco.com	281-888-6789	37 minutes ago
View Edit	Chronodat	Peter Steven	peter.steven@chronodat.com	281-888-0000	37 minutes ago

Showing 1 to 4 of 4 entries

Navigation

General Navigation

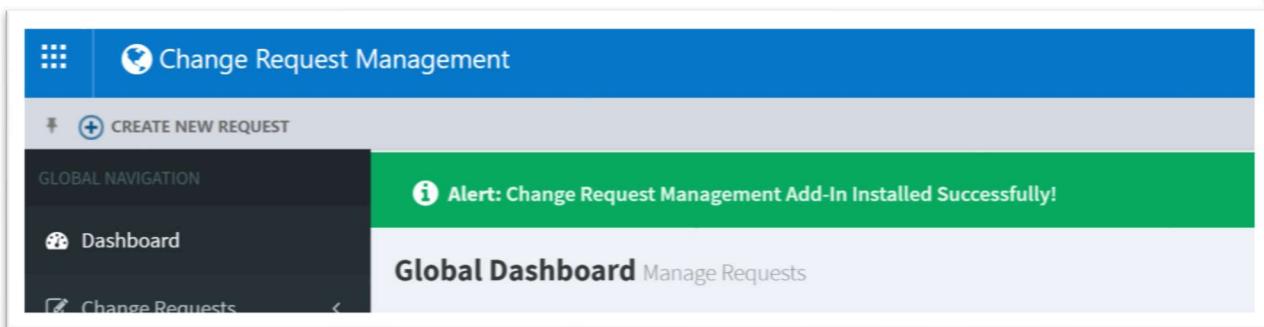
Navigation options are found in the left margin. The arrows function as a toggle, and indicate more menu items below. There are 3 sections: a **Global** section for viewing ALL change requests, a **User** section for viewing your own Change Requests, and a section for **Team Documents** and a **Team 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 Request Management (Plus)** 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 'pin' 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**.

The screenshot shows the 'New Change Request' form. On the left, there's a sidebar with 'GLOBAL NAVIGATION' containing 'Dashboard', 'Change Requests', 'Clients', 'Projects', 'Settings', 'CURRENT USER NAVIGATION' with 'My Requests' and 'Approve Requests', and 'DOCUMENTS & CALENDAR' with 'Support Documents' and 'Team Calendar'. The main area has a title 'New Change Request' and two sections: 'Request Details' and 'Request Properties'. In 'Request Details', there are fields for 'Request Title*' (with placeholder 'Enter Request Title'), 'Request Description*' (with a rich text editor and placeholder 'Enter Request Description'), 'CC Email*' (placeholder 'Enter CC Email'), and 'Tags' (placeholder 'Select Tags'). In 'Request Properties', required fields are marked with a red asterisk: 'Priority*' (dropdown with '(3) Medium'), 'Change Type*' (dropdown with 'Select'), 'Request Category*' (dropdown with 'Select'), 'Sub-Category*' (dropdown with 'Select'), 'Change Owner*' (dropdown with 'Anuradha Edla'), 'Client' (dropdown with 'Select'), 'Project' (dropdown with 'Select'), and 'Attachments' (button 'Choose Files' with placeholder 'No file chosen'). At the bottom right are 'Submit' and 'Cancel' buttons.

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

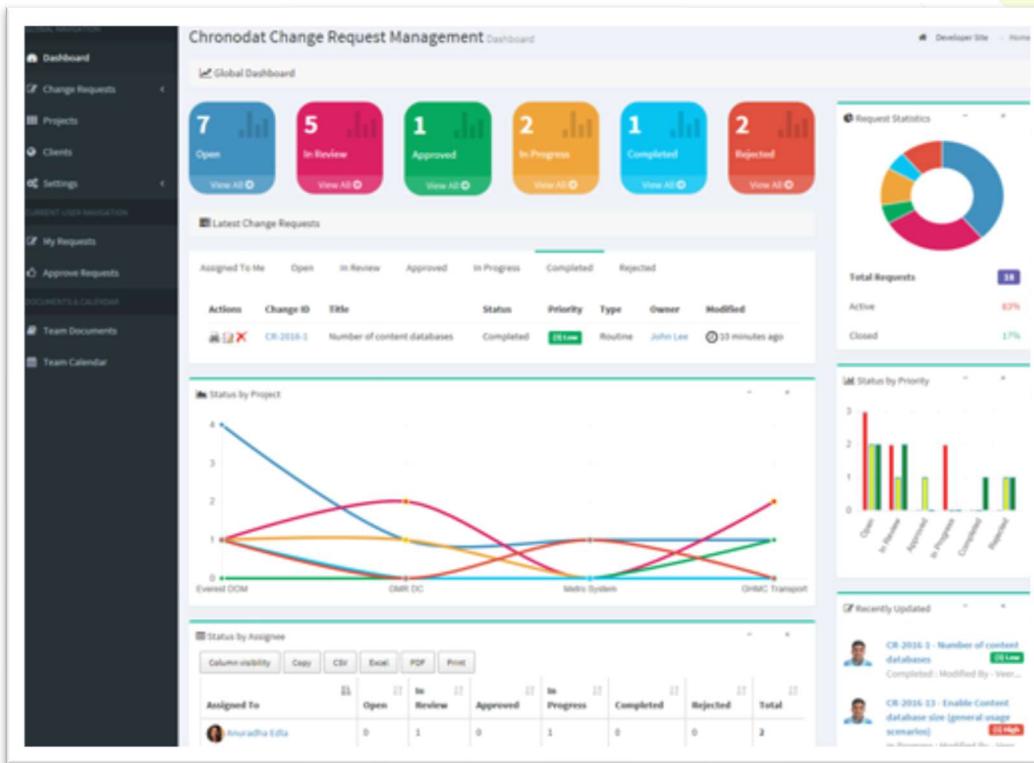
RiskLevel:

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.

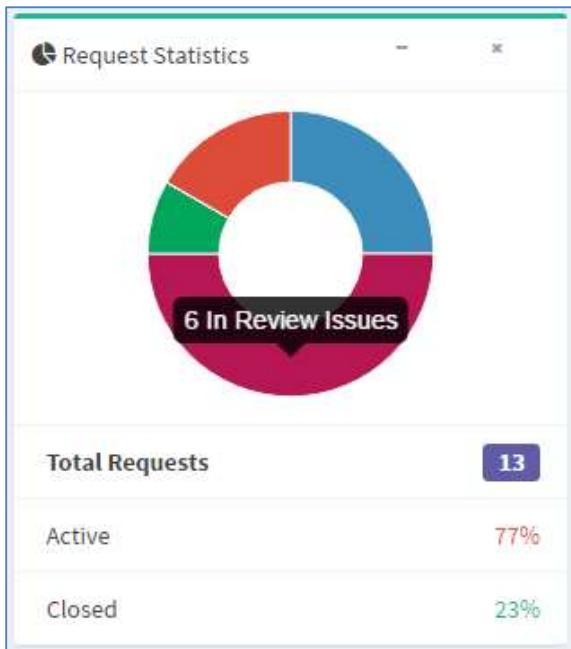


The large boxes on the top match the tabs below it. Scroll through the tabs to see the respective Change Requests for each Status. The list contains the latest **10 Change Requests** for each Status.

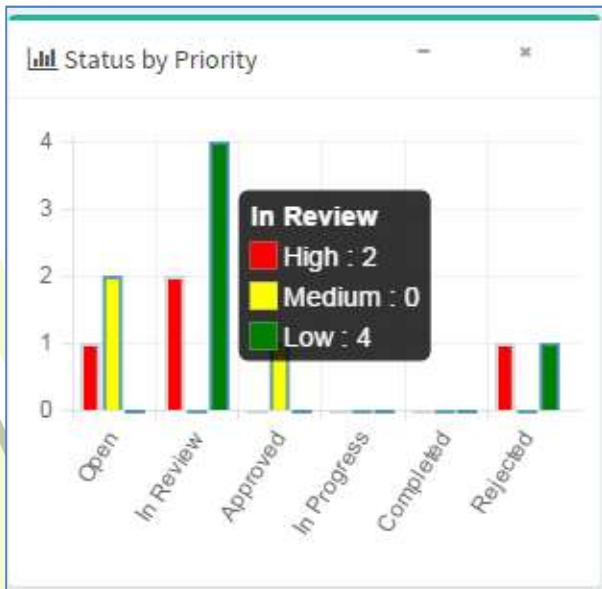
Notice the **pie chart** on the right, which gives you a visual of the **Active vs. Closed** Change Requests, and quickly lets you see that there are a lot more Change Requests that are **Active** than **Closed**.

Active = Open + In Review + Approved + In Progress

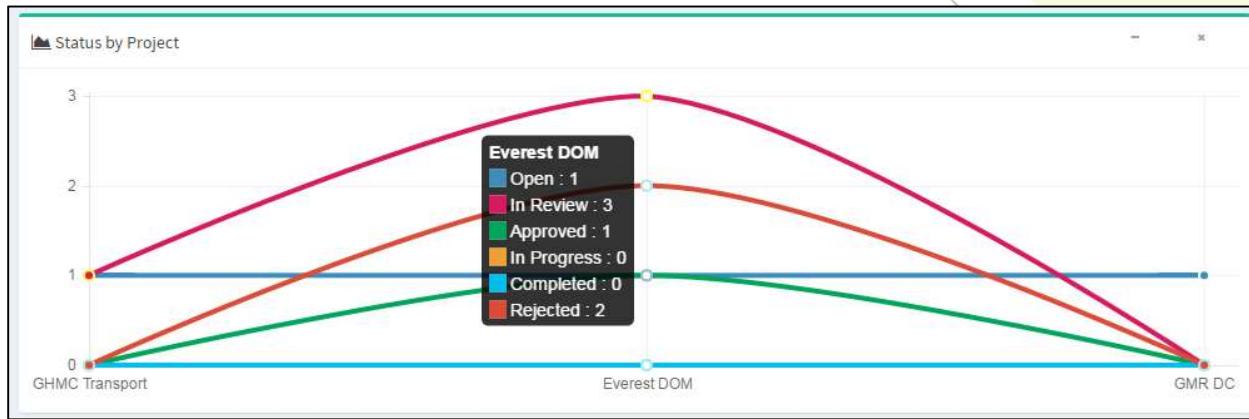
Closed = Completed + Rejected + Canceled



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**.



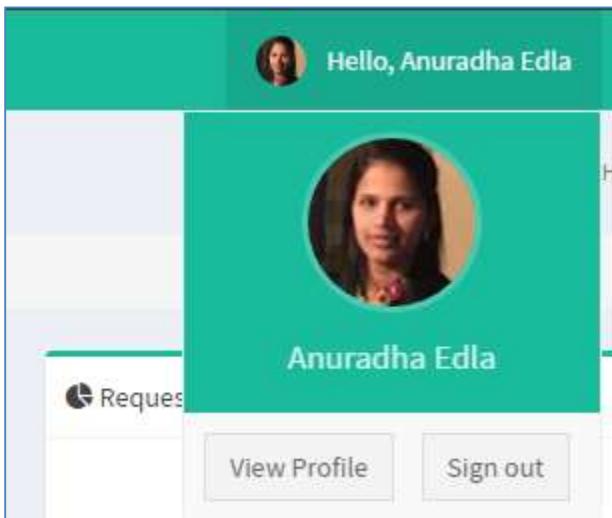
The grid below shows you Change Requests by **Assigned To**. This display quickly lets you know how your staff is doing with regard to the Change Requests assigned to each member. You can quickly assess that **John Lee** has the bulk of the Change Requests assigned to him. This display lets you quickly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

Status by Assignee		Open	In Review	Approved	In Progress	Completed	Rejected	Total
Assigned To								
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

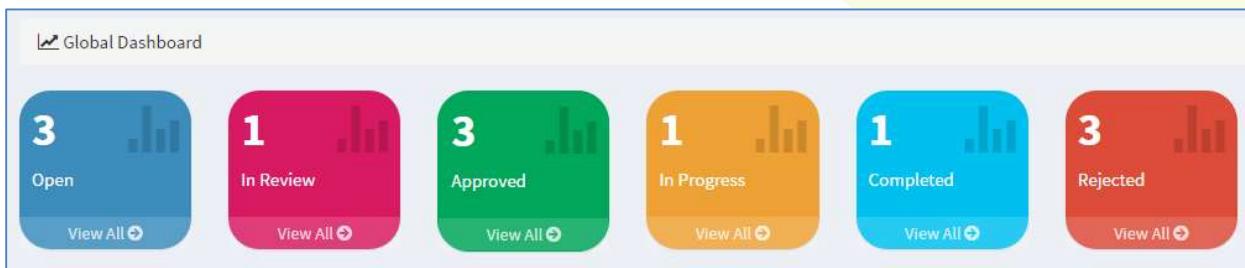
If you want to change your avatar or edit your profile in any way, click on the name, it displays a menu option “View Profile”, click on view profile and a SharePoint profile page will display. Click the **Back** button on your browser to return.



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.

A screenshot of a list titled "Recently Updated". It shows five change requests, each with a small profile picture of a man with a beard, the request ID, the title, its priority level in a colored box, and the status. The requests are: 1. CR-2016-9 - Find Maximum size of the content database (3 Low) - Approved: Modified By - Chris Brown. 2. CR-2016-2 - List view threshold for auditors and administrators (1 High) - Approved: Modified By - Chris Brown. 3. CR-2016-4 - Maximum size of the content database (3 Low) - Approved: Modified By - Chris Brown. 4. CR-2016-3 - Coauthoring in Word and PowerPoint for .docx, .pptx and .ppsx files (2 Medium) - Completed: Modified By - Chris Brown. 5. CR-2016-10 - Find Site collections per content database (3 Low) - In Progress: Modified By - Chris Brown. At the bottom of the list is a link "View All Change Requests".

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.

Latest Change Requests

Assigned To Me	Open	In Review	Approved	In Progress	Completed	Rejected	
Actions	Change ID	Title	Status	Priority	Type	Owner	Modified
	CR-2016-12	Increase Content database size (all usage scenarios)	Open	(2) Medium	Emergency	John Lee	⌚ 22 minutes ago
	CR-2016-13	Enable Content database size (general usage scenarios)	Open	(1) High	Emergency	Anuradha Edla	⌚ 22 minutes ago
	CR-2016-7	250,000 per site collection/250,000 per farm	Open	(2) Medium	null	Chris Brown	⌚ 22 minutes ago

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.

Change Requests - Open [Manage Change Requests](#)

Developer Site > Home > Change Requests - Open

Show 10 rows	Column visibility	Copy	CSV	Excel	PDF	Print	Search:			
Actions	Change ID	Title	Status	Priority	Type	Category	Client	Project	Assigned To	Modified
	CR-2016-13	Enable Content database size (general usage scenarios)	Open	(1) High	Emergency		SolorData	GMR DC	Anuradha Edla	⌚ 26 minutes ago
	CR-2016-7	250,000 per site collection/250,000 per farm	Open	(2) Medium	null		RamCo	Everest DOM	Chris Brown	⌚ 26 minutes ago

Showing 1 to 2 of 2 entries

Previous 1 Next

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.

The screenshot shows the 'Edit Change Request' page for request # IT-SERVICE-2017-2. The main content area is divided into several sections:

- Request Details:** Contains fields for Request Title (Replace HR Server RAM) and Request Description (a detailed text box about server roles).
- Classify:** Includes dropdowns for Change Type (Major), Priority (Medium), Change Owner (Anuradha Edla), Request Category (Hardware), Sub-Category (Replace RAM), Client (Chronodat), Project (Metro System), Cost Code (Enter Cost Code), Hours / Story Points (Enter Contact No), and Tags (CRM).
- Planning:** Contains Impact Level (Minor) and Impact (Impact) fields, each with a rich text editor.
- Update/Comments:** A large text area for logging comments, with a placeholder 'Enter Comment'.

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.

Search:	<input type="text"/>
---------	----------------------

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.

The screenshot shows a 'My Requests' page titled 'Manage Change Requests'. On the left is a sidebar with 'Dashboard', 'Change Requests' (selected), 'Projects', 'Clients', 'Settings', 'CURRENT USER NAVIGATION', 'My Requests' (selected), and 'Approve Requests'. The main area has a table with columns: Actions, Change ID, Title, Status, Priority, Type, Category, Client, Project, Assigned To, and Modified. One entry is listed: CR-2016-13, 'Enable Content database size (general usage scenarios)', Open, High Priority, Emergency Type, SolorData Category, GMR DC Client, Anuradha Edla Assigned To, and 'About an hour ago' Modified. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom are 'Previous' and 'Next' buttons.

Document Repository

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

The screenshot shows a 'Team Documents' page titled 'Manage Documents'. It has a 'BROWSE' header and a 'Add New/Edit Document' form. The form includes 'New' (button), 'Upload' (button), 'Sync' (button), 'Share' (button), and 'More' (dropdown). Below the form are buttons for 'Current View' and 'Find a file'. A search bar is also present. At the bottom, there are filter buttons for 'Edit', 'Name', 'Modified', 'Modified By', 'Request Category', 'Request Sub-Category', 'Project', and 'Client'. A placeholder text 'Drag files here to upload' is shown below the filters.

- 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 Request Management (Plus) 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 Request Management (Plus) 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