Change Management Form Process

Definition of Change Management Form
A Change Management Form is used when any data/security need to be changed/updated in the Banner Production database/environment in the LCTCS System. The user requesting the change must fill out a Change Management form. This form will go through an approval process before any updates are made.

Types of Changes (example):
1. Security classes and form changes
2. Cognos Report changes
3. Oracle/SQL Database changes
4. LCTCS Website Changes

Where is the Change Management Form located
The Change Management form can be obtained from LoLA http://lola.lctcs.edu/ under the Banner Security Forms section. The Change Management form is an electronic form via Dynamic Forms.

Change Management Form Approver’s Responsibility

1. Approver’s must meet with Change Management Committee if the change is a major change. The committee will decide if the change will occur and when and how it will be done. There are two types of change request, major and minor.

   **Minor change**
   1. Add a form to a security class
   2. Create a new security class
   3. Create/Modify a Cognos report

   **Major change - Need to go through Change Management Committee**
   1. Insert thousands of rows of student data in table in Oracle/SQL
   2. Delete thousands of rows of data in table in Oracle/SQL database
   3. Update/Delete HR payroll information in Oracle/SQL database

2. Recurring major change request may require the committee to reach out to the school to find out what their business process is and what procedures are they doing, to determine where they are going wrong.
How to fill out a Change Management Form

**Requester**

1. Click on **Change Management Form**, under the **Banner Security Forms** section on LoLA. Login into Dynamic Forms using your LoLA login and password.

2. Fill in all information. Required fields have a red asterisk next to them. Click on **Next** when complete.
3. If a user has to exit out of the form for any reason before they finish filling it out, they can just click on **Save Progress**. This will allow them to come back and finish filling out the form, instead of starting all over again. Click **Next**.

4. This next page is for the approver and the processor, so click **Next**.
5. This page is for the requester to select the person that will approve this form. This depends on what type of request it is. Below are the LCTCS people and which request type they approve.

1. Student/Cognos – Amber Gazave
2. Student AR/FinAid/Cognos – Mary Deville
3. HR/Cognos – Suzette Meiske
4. Finance/Cognos – Shannon Sedberry
5. IR-Cognos – Sheila Duplechain
6. Other-Cognos – Charles Teamer
8. Other - Security/Website - Galen Gautreaux
9. Other - Eric Setz

6. Select the LCTCS person that will approve this form then click on Next.

7. Sign the form by typing in your first and last name.
8. The user has three options:
   a. View PDF & Logout
   b. View PDF & Do Not Logout
   c. Logout

9. If the user does not need to do any of the three options they can just click on the X to exit.

10. This form will now be emailed to the person that you selected as the approver. Once the form has been approved, the approver will then select who will process the form. The form will then be routed via email to the processor. Once the processor processes the form and sign their name, the person who filled out the form will receive an email stating that the form has been processed.
**Approver**

1. Once the approver receives the email, click on the link *click here*. The user will need to login using their LoLA login credentials.

   Please click on the link below to make a decision on this Change Management Request Form.

   [click here]

2. The form will open up for review. The approver can type in notes for the processor if it is necessary and then click on *Next*. 

   [Next]
Louisiana Community and Technical College System
CHANGE MANAGEMENT ACCESS REQUEST FORM

College: BPCC - Bossier Parish Community College  
New Request:  Modify Request:  Delete Request:

Requestor Information
First Name: Joe  Last Name: Doe
E-mail Address: joedoe@ctcs.edu  Department: Student Services
Phone Number: (225) 394-8484

Request Information
Request Title: Add Form to Class
Desired Completion Data: 10/11/2013
Description: Add form S08STDIN to security class STU_ADMINS_ADMIN as maintenance.

Approver Notes to Processor

Save Progress  Next
3. This is where the approver makes a decision about the form. If they need to type in comments to the requester they can in the comments to requester box. Click **Next**.
4. The approver will select the person that will process the form. Click on **Next**.

![Select the person that will process this form.](image)

**NOTE**: Contact information is in the form *Description: Last Name, First Name*

-- Please select --

![Previous Next](image)

5. Please sign the form by typing in your first and last name. The form will be sent via email to the processor.

![Electronic signature](image)

**Electronic signature**

Please read the Disclosure / Consent before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the “Sign Electronically” button to save your information and submit your electronic signature.

Vonita          Norman

[Sign Electronically](image)

![Previous](image)
Processor

1. Once the processor receives the email, click on the link **click here** to view the form. They will need to login using their LoLA login credentials.

   **If this form has been approved by the LCTCS Approver, click on the link below to process.**

   LCTCS Approver Decision (Approve)

   LCTCS Approver Notes to Processor: this is a test

   **click here**

2. The form will open up for review.
3. **Click on Next.** The next page will allow the processor to type notes in for themselves and/or type comments to the requester if necessary. **Click Next.**
4. Sign the form by typing in your first and last name.

Electronic signature

Please read the Disclosure / Consent before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the “Sign Electronically” button to save your information and submit your electronic signature.

Vonita Norman

Sign Electronically

5. The requester will receive an email stating that the form has been processed.

The LCTCS Processor (Vonita Norman) has processed the Change Management Request Form - Add form to Class

Comments to Requester: This is a test
**Status/History**

1. A user can always go to **Status/History** under the **Banner Security Forms Section** on LoLA to see pending/draft forms and forms history. See below for a definition of each. The user must use their LoLA username and password to login.

2. **Pending/Draft Forms**
   a. Pending forms - forms that are waiting on your signature
   b. Draft Forms - while filling out a form you clicked on **Save Progress**. This always allows the user to go back and finish filling out a form.

3. **Forms History** - All forms that you have signed that are complete.
Pending / Draft Forms

The lists below represent all your draft and pending forms. These include:

- Forms you completed, but were rejected by another party
- Forms you have saved as "draft"
- Forms you need to complete
- Forms requiring the signature of a co-signer

The forms are sorted by date with the most resent at the top. To view a printable form via Adobe Acrobat, click the PDF symbol to the left of the form name. To view the form as a web page, click the HTML link.

Rejected Forms:

There are no rejected forms.

Drafts:

There are no draft forms saved.

Forms you need to complete:

<table>
<thead>
<tr>
<th>PDF</th>
<th>HTML</th>
<th>Form Name</th>
<th>Form Started By</th>
<th>Date Signature Requested</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>![icon]</td>
<td>![icon]</td>
<td>Change Management Request Form</td>
<td>Vonita Norman</td>
<td>10/3/2013 10:09:45 AM</td>
<td>Complete Form</td>
</tr>
<tr>
<td>![icon]</td>
<td>![icon]</td>
<td>Change Management Request Form</td>
<td>Vonita Norman</td>
<td>10/3/2013 10:09:45 AM</td>
<td>Complete Form</td>
</tr>
</tbody>
</table>

Forms requiring the signature of a co-signer:

- Click the Co-Signers icon to send a reminder to the Co-signer or make Co-signer updates.

<table>
<thead>
<tr>
<th>PDF</th>
<th>HTML</th>
<th>Co-Signers</th>
<th>Form Name</th>
<th>Form Started By</th>
<th>Date Signature Requested</th>
</tr>
</thead>
</table>