Lab Guide

Managing a CAB Meeting:

Configuring and Using the CAB Workbench

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Lab Goal

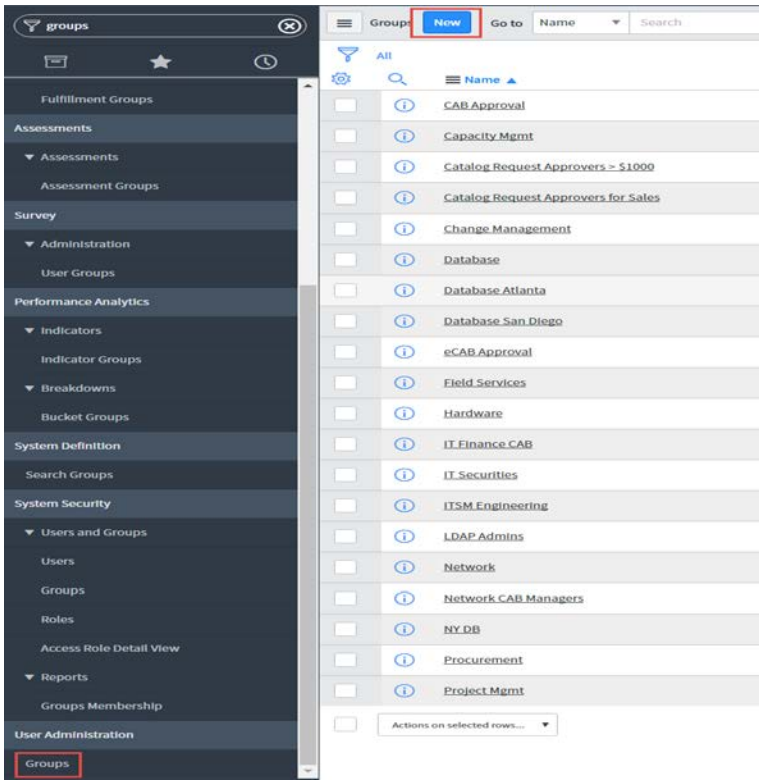
Lab 1.1
Create a CAB Group and Add Users

Using a Group to define CAB Members.

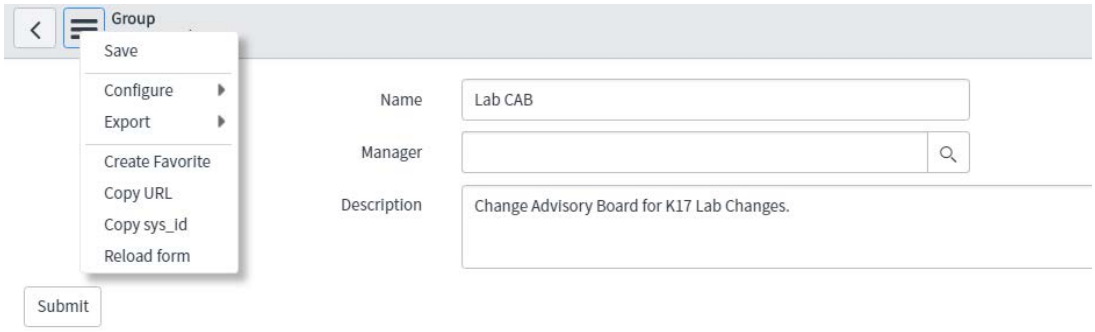
- Create a new group
- Add a role to the new group
- Add users to the new group

Create a Group

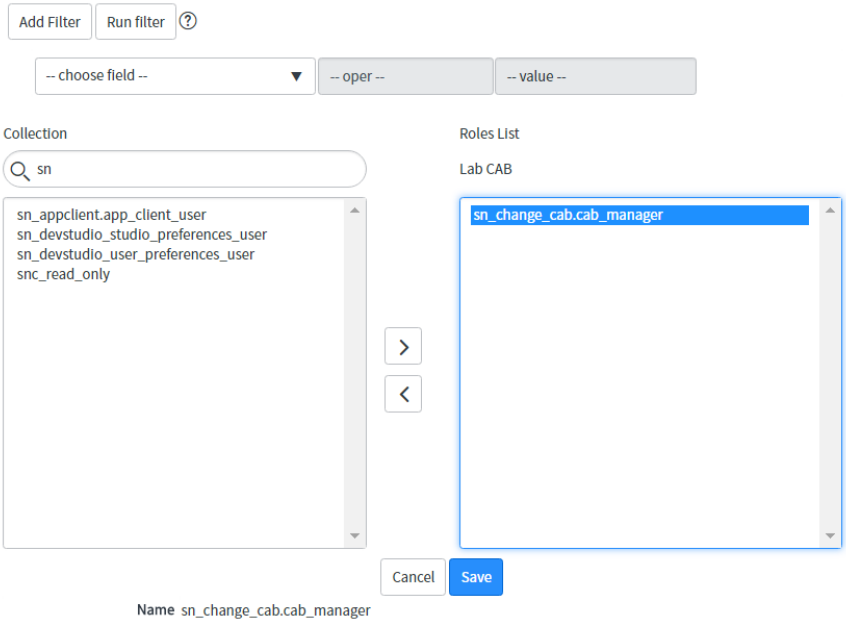
1. Login as Admin.
2. Navigate to User Administration>Groups.
3. Click New.



4. Set the following field values:
   - Name = Lab CAB
   - Description = Change Advisory Board for K17 Lab
5. Right-click on the top bar of the new group and click Save.



6. In the Roles related list, click edit.
7. Add the role sn_change_cab.cab.manager.
8. Click Save.

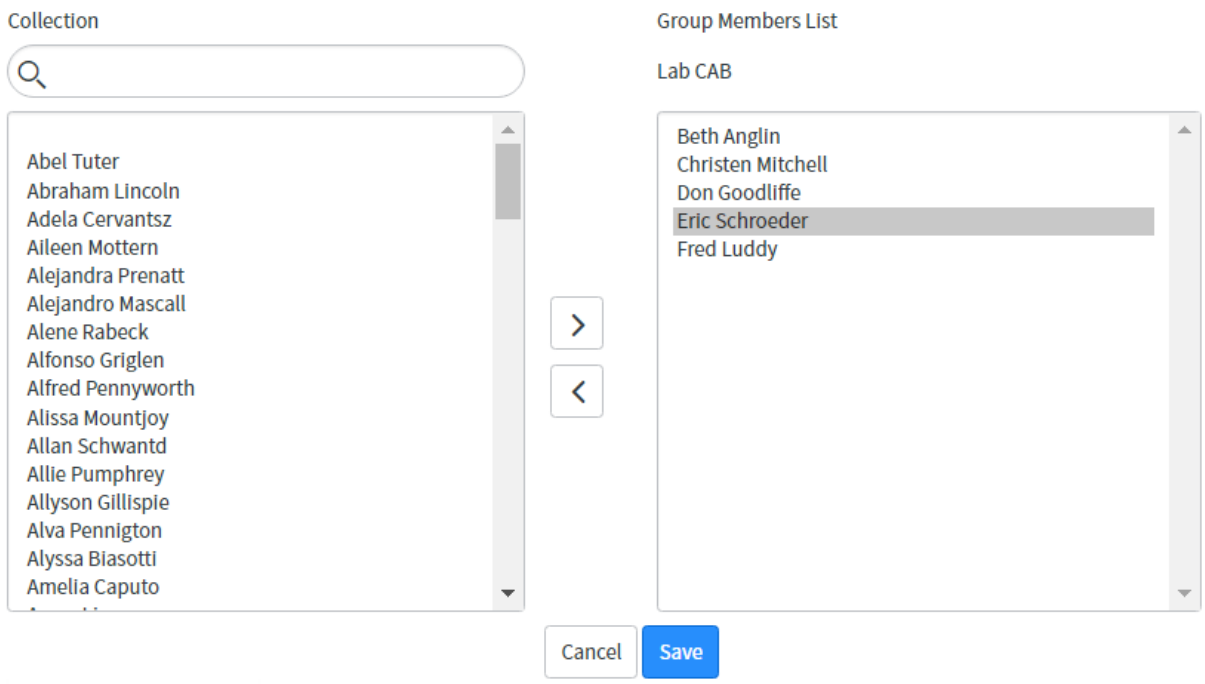


9. On the Group Members related list, click Edit.

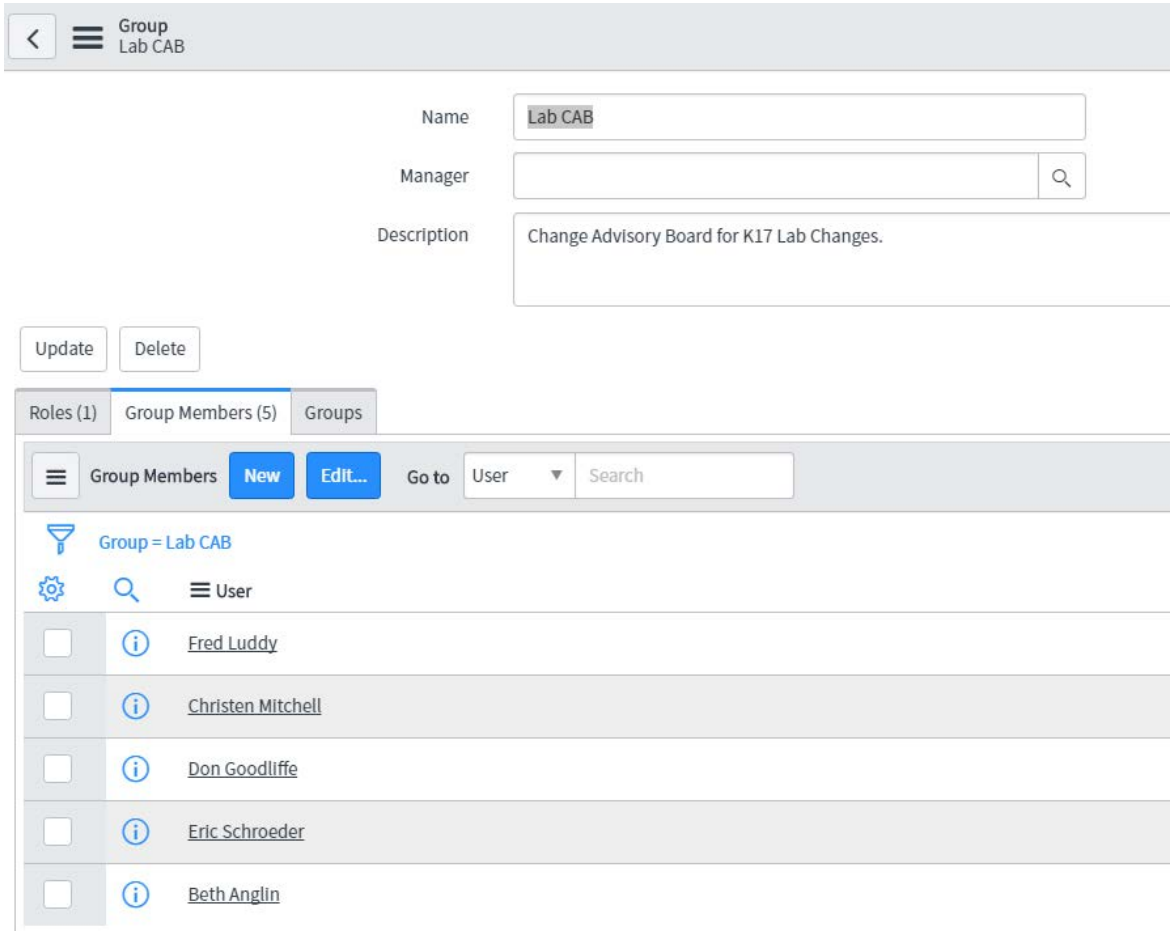
10. Add the following users:

- Eric Schroeder
- Beth Anglin
- Christen Mitchell
- Fred Luddy
- Don Goodlife

11. Click Save.



12. The Lab CAB group will now have one role and five group members.



Lab Goal

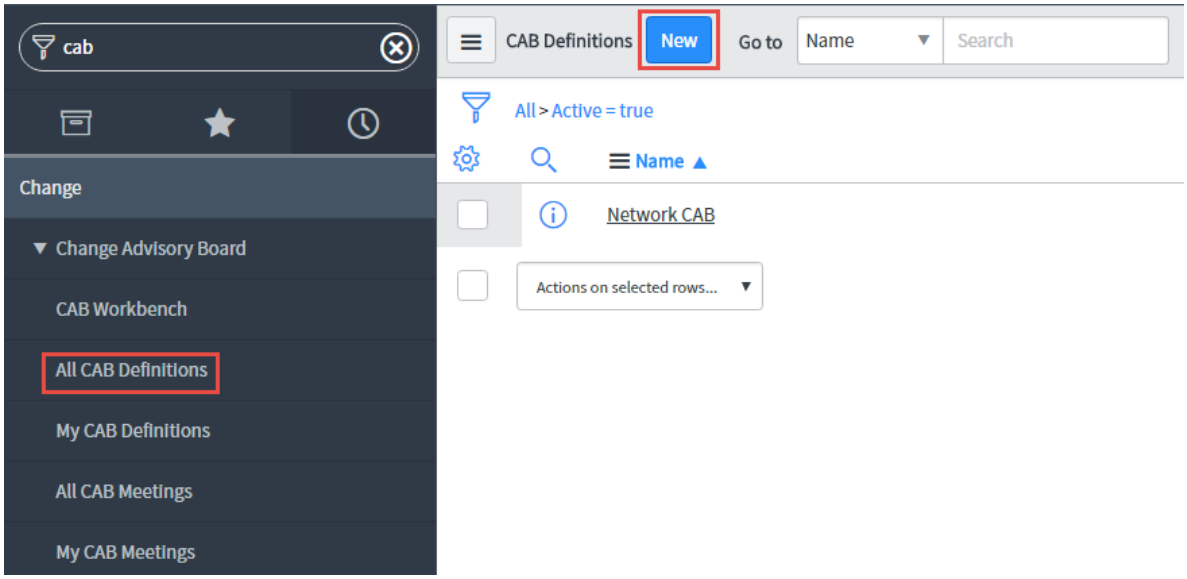
Create a CAB definition and schedule.

- Create a new CAB definition
- Configure the CAB Manager and Members
- Define CAB schedule

Lab 1.2
Define a CAB

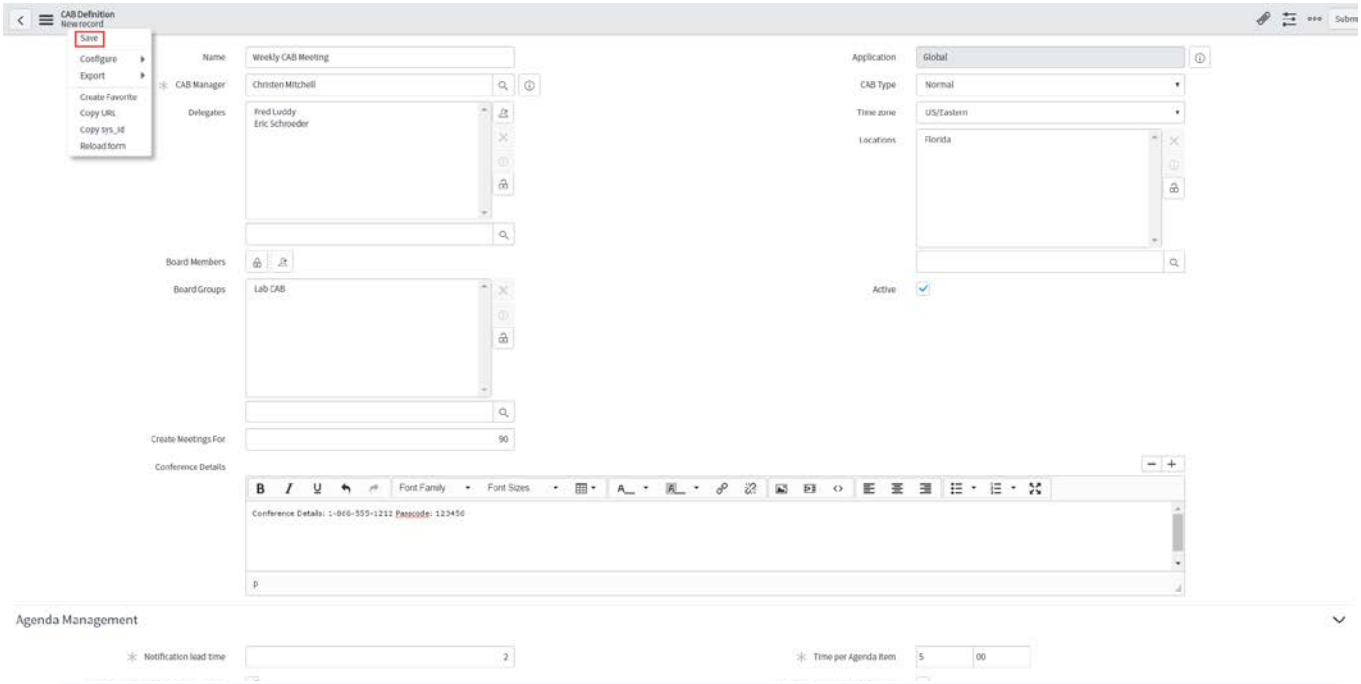
Create a CAB Definition

1. You should still be logged in as Admin.
2. Navigate to Change>Change Advisory Board>All CAB Definitions.
3. Click New.



4. Set the following field values:

- Name: Weekly CAB Meeting
- CAB Manager: Christen Mitchell
- Delegates - Click the lock icon to edit the Delegates list and add: Fred Luddy, Eric Schroeder
- Board Groups: Lab CAB
- Create Meetings for: 90 days
- CAB Type: Normal
- Time zone: US/East
- Locations: Florida
- Conference Details: 1-866-555-1212 Passcode: 123456
- Notification lead time: 2
- Automatically Add Change Requests: True
- Time per Agenda Item: 5 Minutes
- Change Request Additional Conditions: Type – is one of – Normal, Emergency
- Right-click on top bar of new CAB Definition and click Save



Define filter criteria to determine which change requests will be associated with your change meetings

Change Request Addition Conditions

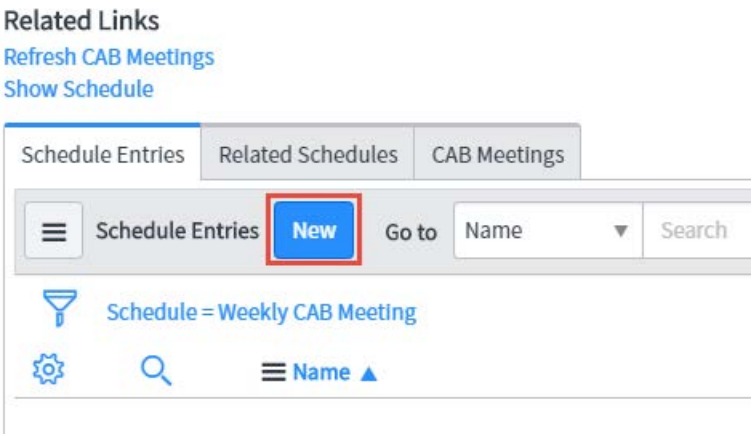
Add Filter Condition | Add "OR" Clause

All of these conditions must be met

Type | is one of | Standard, Normal, Emergency

Add a CAB Schedule

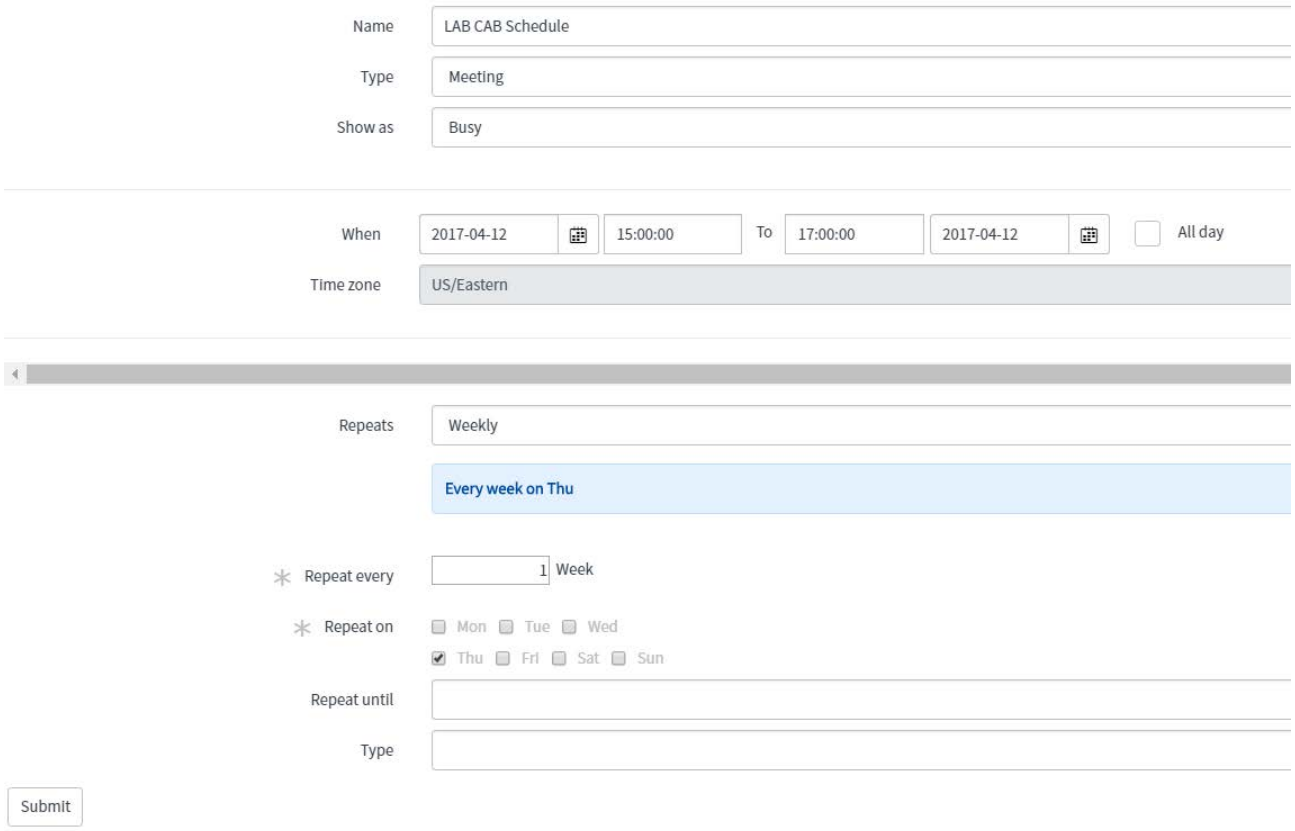
1. On the Schedule Entries related list, click New.



2. Set the following field values:

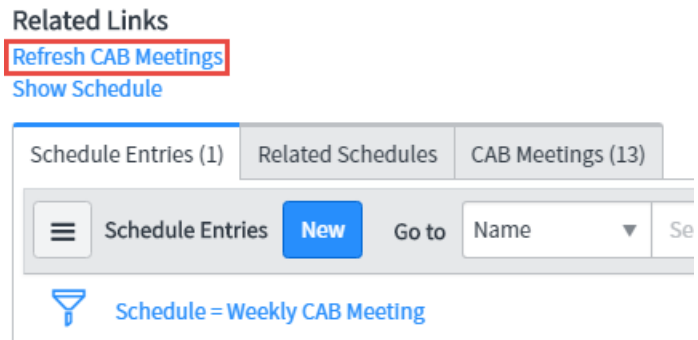
   - Name: Lab CAB Schedule
   - Type: Meeting
   - Show As: Busy
   - When: Today's Date at 15:00:00 -TO- 17:00:00
   - Time Zone: US/Eastern
   - Repeats: Weekly
   - Repeat Every: 1 Week
   - Repeat On: Thursday

3. Click Submit to save this schedule.



4. You will be returned to the CAB Definition form.

5. Click Refresh CAB Meetings, to generate meetings, based on your new schedule.



Lab Goal

Take the steps necessary, to prepare for a successful CAB meeting.

- Update the meeting agenda
- Invite meeting attendees

Lab 2.1
Prepare for a CAB Meeting

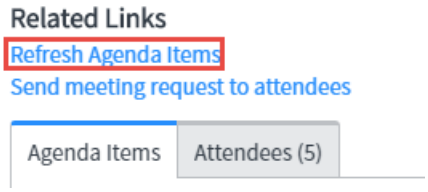
Preparing for a CAB Meeting

1. Login as Christen.Mitchell.
2. Navigate to Change>Change Advisory Board>My CAB Meetings.

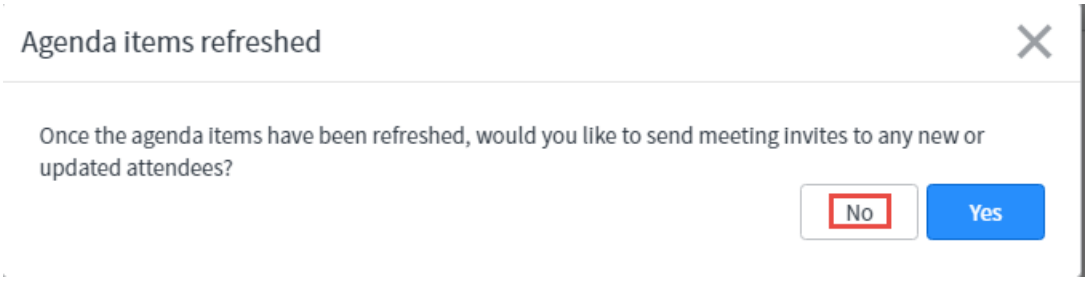


3. Select the Lab CAB meeting scheduled for today.

4. Click link to Refresh Agenda Items.

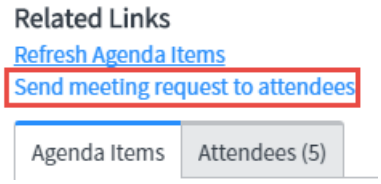


5. When prompted to send invitations, click No.



6. Review Agenda Items and Attendees.

7. Click the link to Send Meeting Request to Attendees.



Lab Goal

Lab 2.2
Run a CAB Meeting

Conduct an end-to-end CAB Meeting.

- Start a CAB Meeting
- Explore the Workbench
- Join the CAB Meeting as a Change Owner/Attendee
- Approve and Reject agenda items
- Complete meeting
- Export a detailed report of your meeting

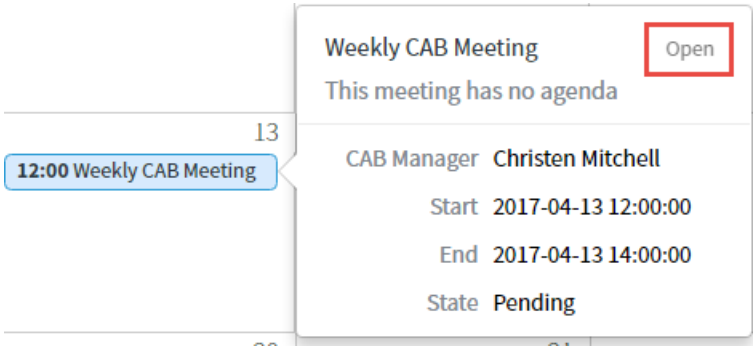
Starting the Meeting

1. You should still be logged in as Christen Mitchell.
2. Navigate to Change>Change Advisory Board>CAB Workbench.

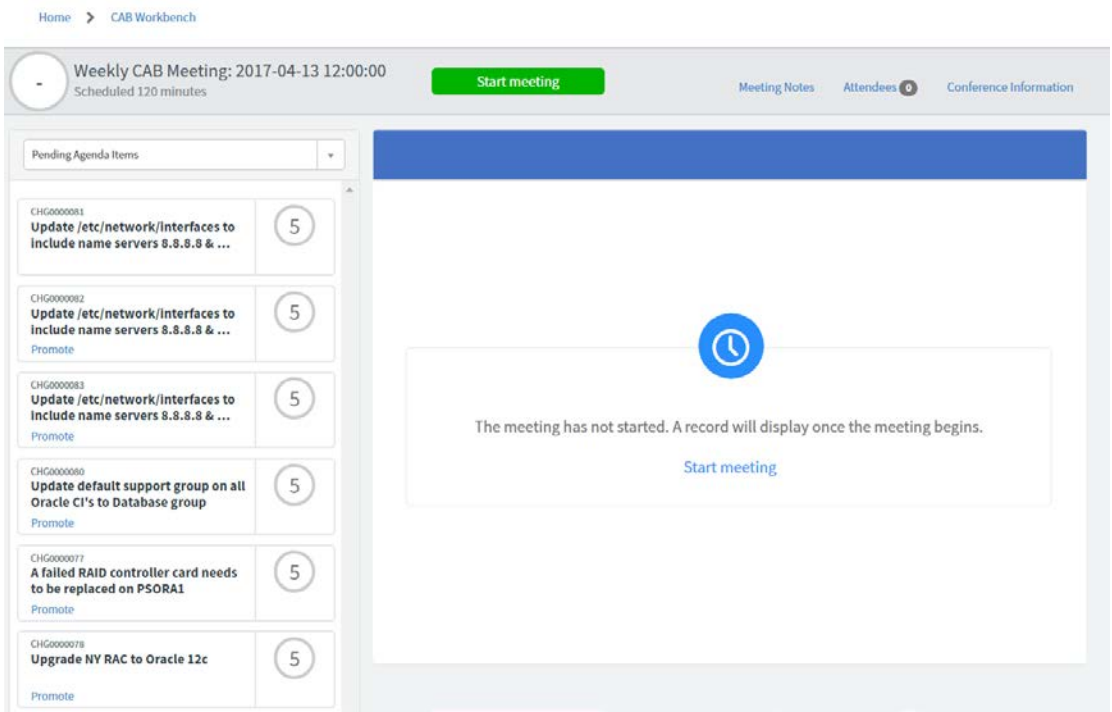


3. From the CAB Workbench Calendar, click on Today's Lab CAB meeting.

4. Click Open.

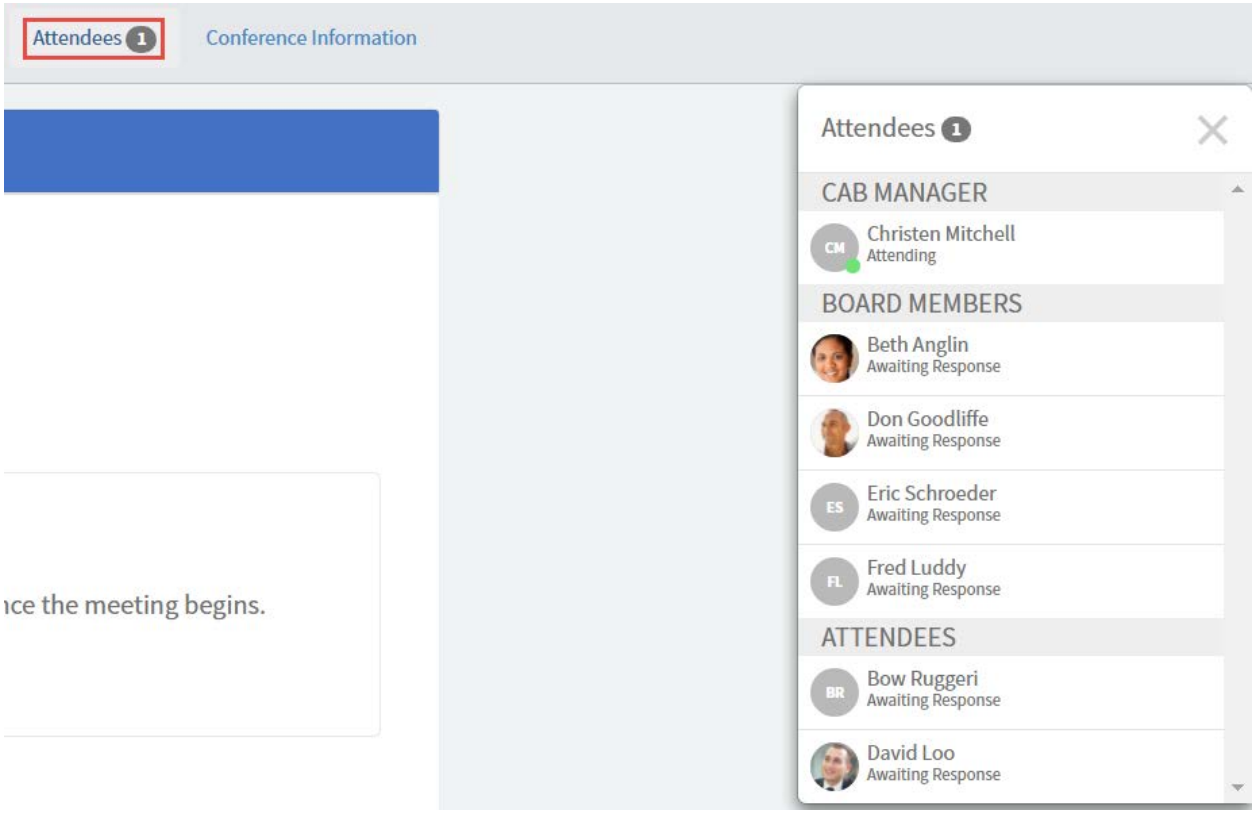


5. Click Start Meeting, at the top of the Meeting Workbench, to begin the CAB meeting.



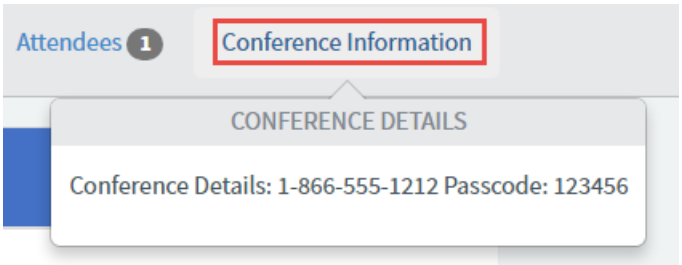
6. Click on Attendees, at the top-right.

    - Observe the list of attendees and board members, as well as their presence indicator, which tells you who has actually joined the meeting.



7. Click Conference Information, at the top-right.

    - Note the Dial-in information appears.



Switch User Personas, Join the CAB Meeting

1. Open a second web browser (e.g., If you are currently using Chrome, you might open Firefox or Safari).

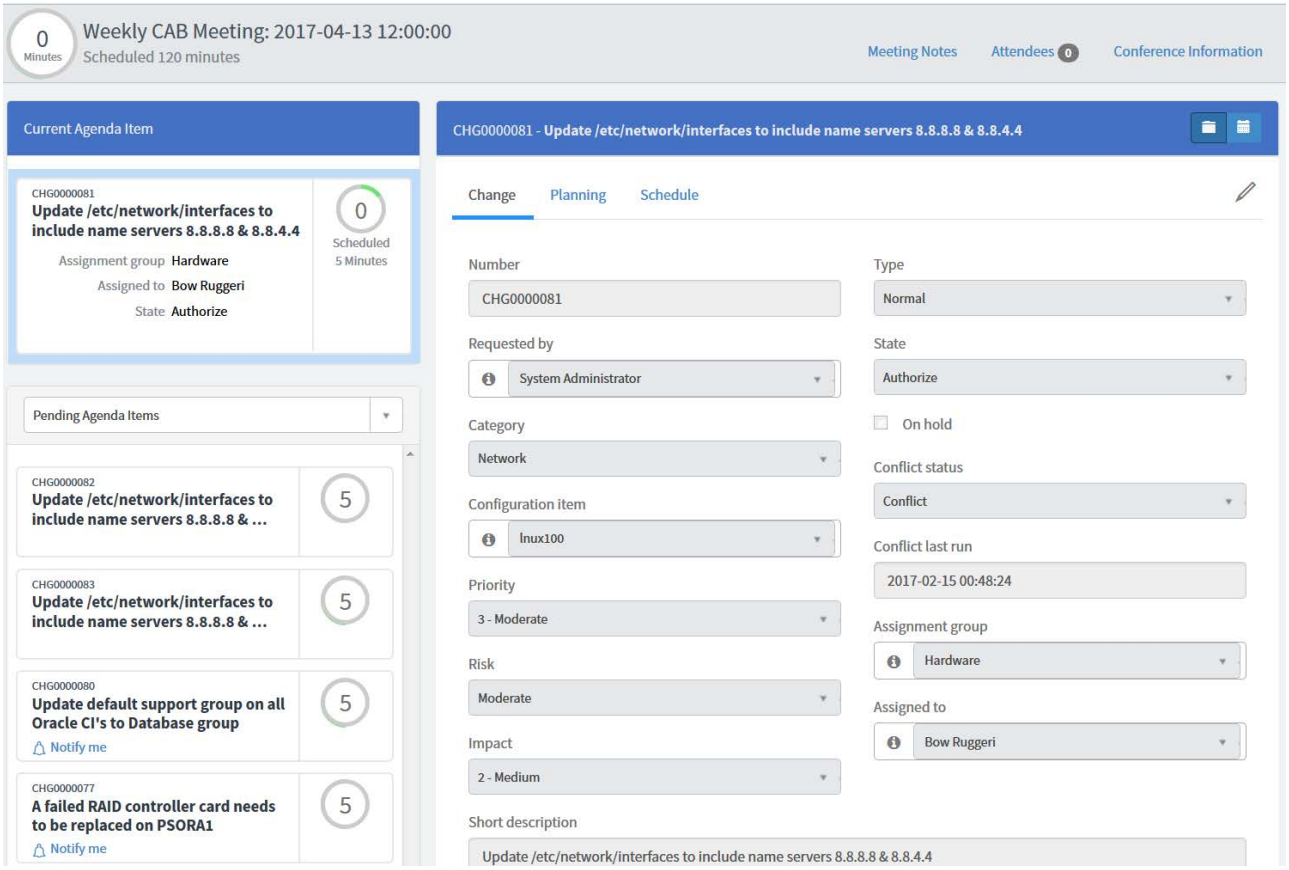
2. Login as David.Loo, who is a CAB Meeting attendee, because he owns one or more Changes on the agenda.

3. Navigate to Change>Change Advisory Board>CAB Workbench.

4. From the CAB Workbench Calendar, click on Today's Lab CAB meeting.

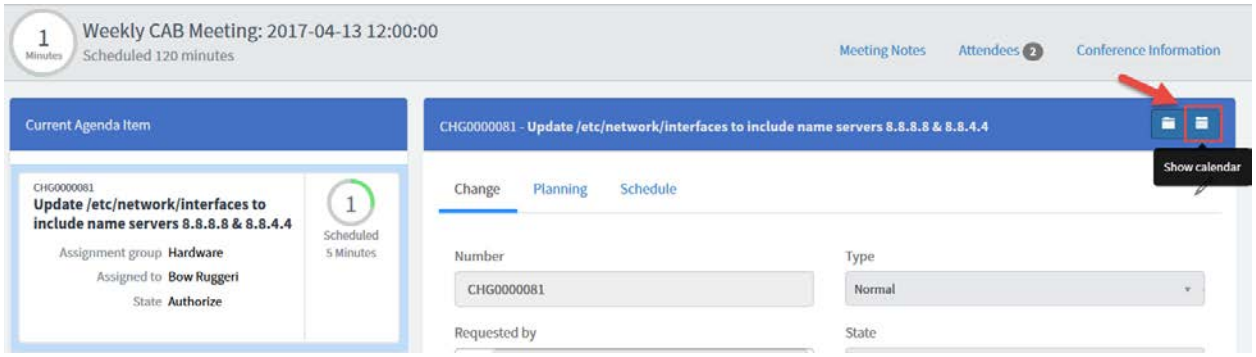
5. Click Open, to join the meeting.

6. In the CAB Meeting Workbench, note that David is automatically viewing the agenda item which is currently up for discussion.

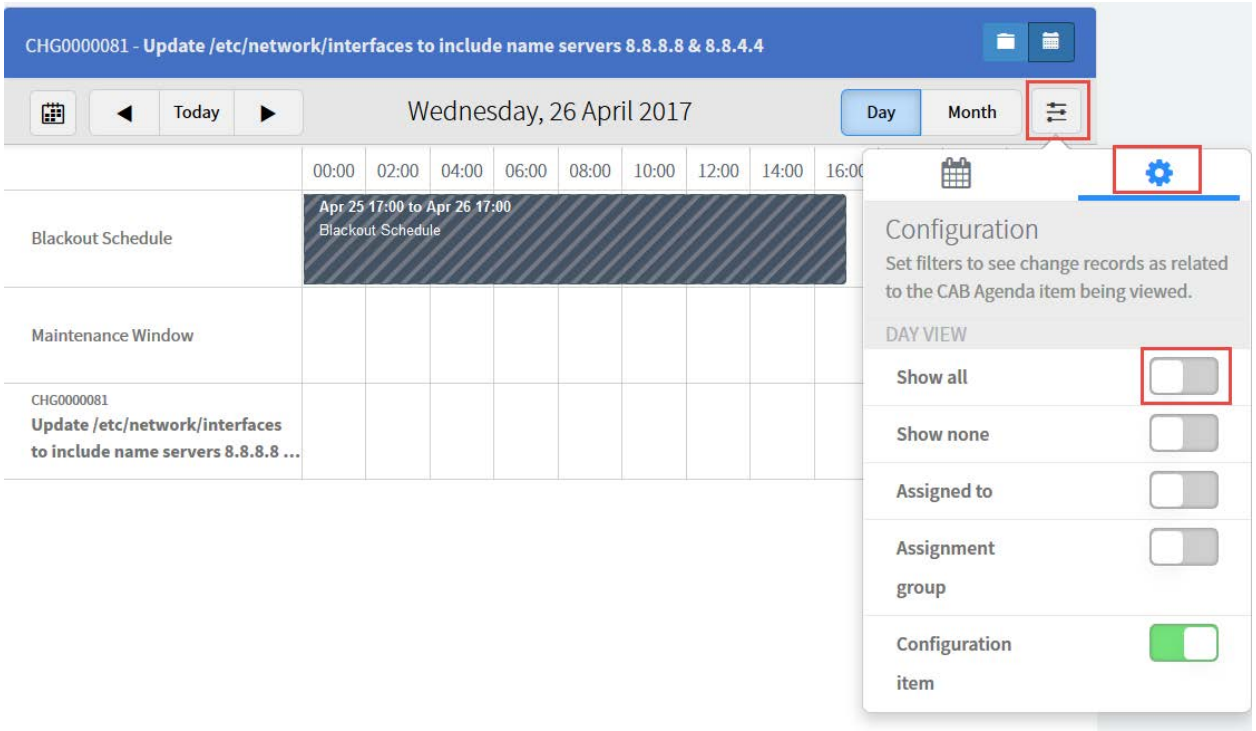


7. Also, note that unlike Christen Mitchell, David Loo does not have an option to Approve or Reject this current agenda item, as he is not a listed approver, for that specific Change Request.

8. Click the Show Calendar button at the top right (blue bar) above the agenda item.



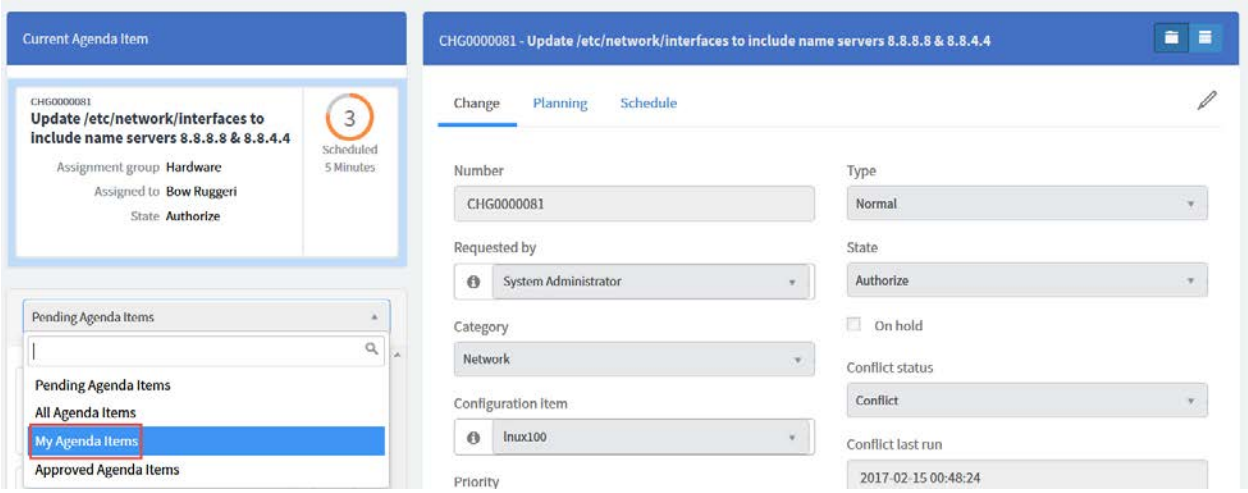
9. Click the Settings button, next to the Day/Month toggle, then click the Gear icon.



10. Select Show All and note that all changes related to the current CAB agenda item being viewed, now appear as part of the calendar view.

11. Toggle back from the calendar view, to the form view.

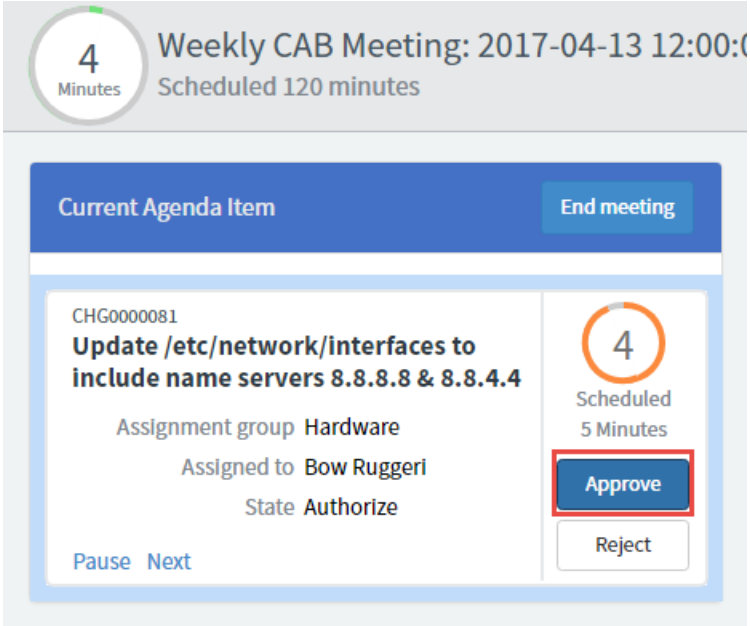
12. Use the Agenda Item drop down, on the left, to view My Agenda Items. This will display only items owned by David.



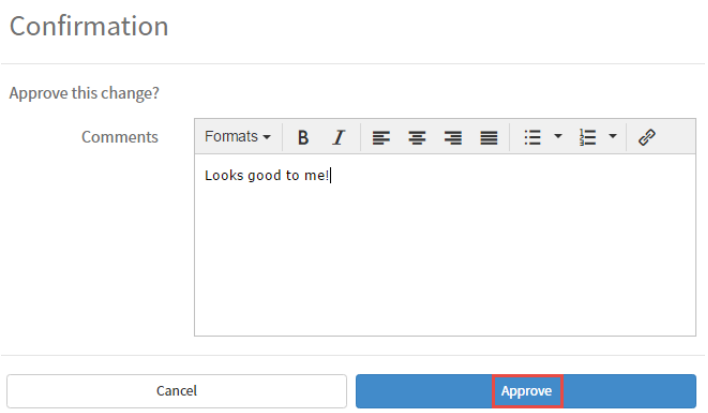
Switch User Personas, Join the CAB Meeting

1. Return to the browser in which you are logged in as Christen Mitchell.
2. Click Approve on the current agenda item.
3. In the popup, add approver comments.

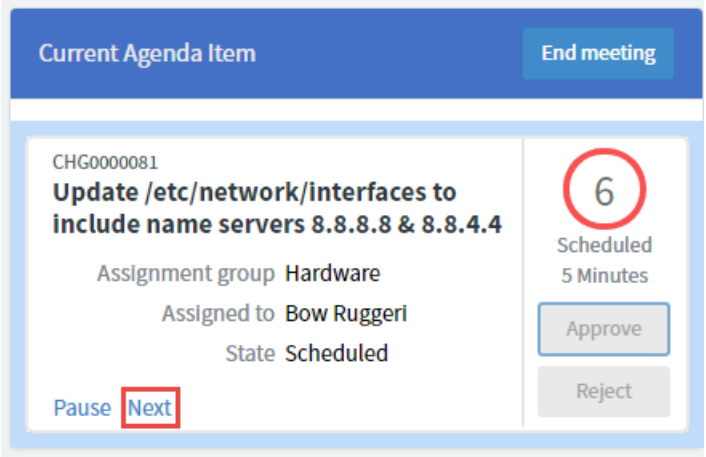
4. Click Approve.



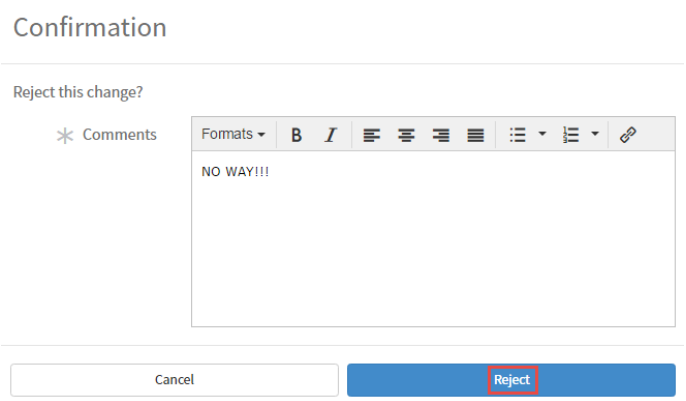
5. Add comments to justify decision.



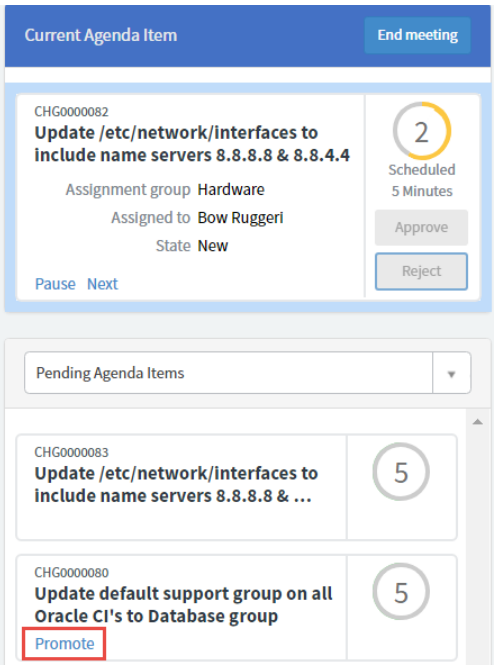
6. Click Next on the agenda item, to move on to the next pending item.



7. Click Reject on the current agenda item.
8. Add Rejection Notes – Notice they are required this time.
9. Click Reject.



10. David Loo has just informed the CAB members, that he must leave the meeting soon. In the list of Pending Agenda Items, Click Promote on CHG0000089 (Owned by David Loo), which will move it to the top of the pending agenda items.



11. Click Next on the agenda item, to move on to the next pending item, which is David's Change.

12. Click Approve on CHG0000089.

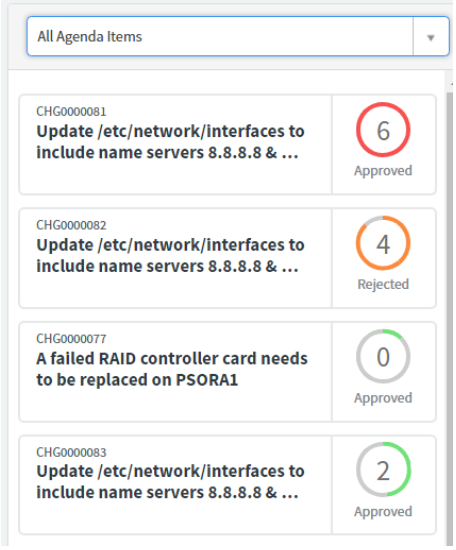
13. In the popup, add approver comments.

14. Click Approve.

15. Repeat the above steps, to approve or reject all remaining pending agenda items.

16. Use the Agenda Item drop down, on the left, to view All Agenda Items.

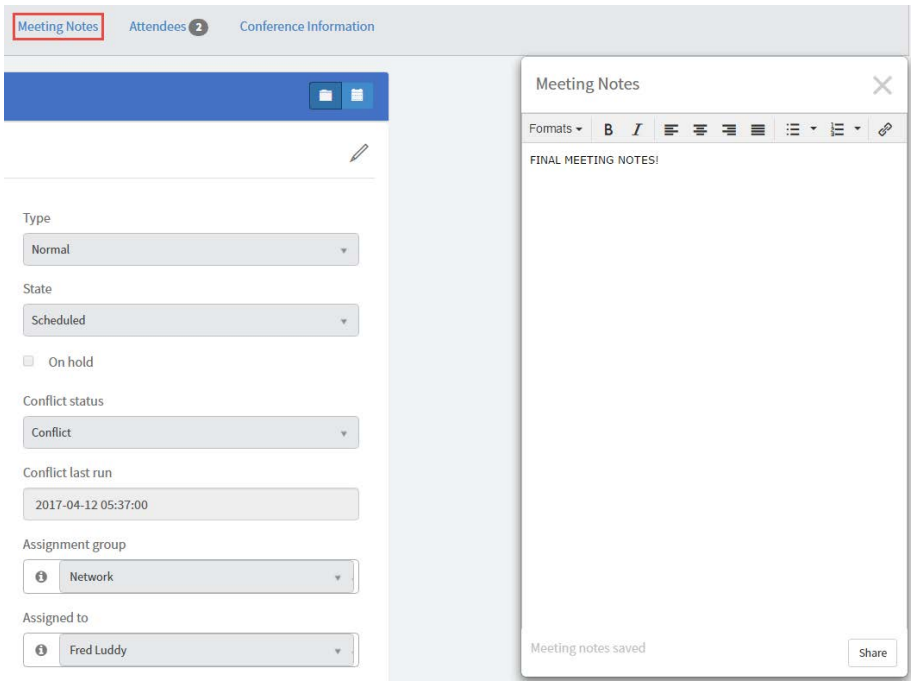
17. Note that the time spent and decision made on every item is displayed within the agenda.



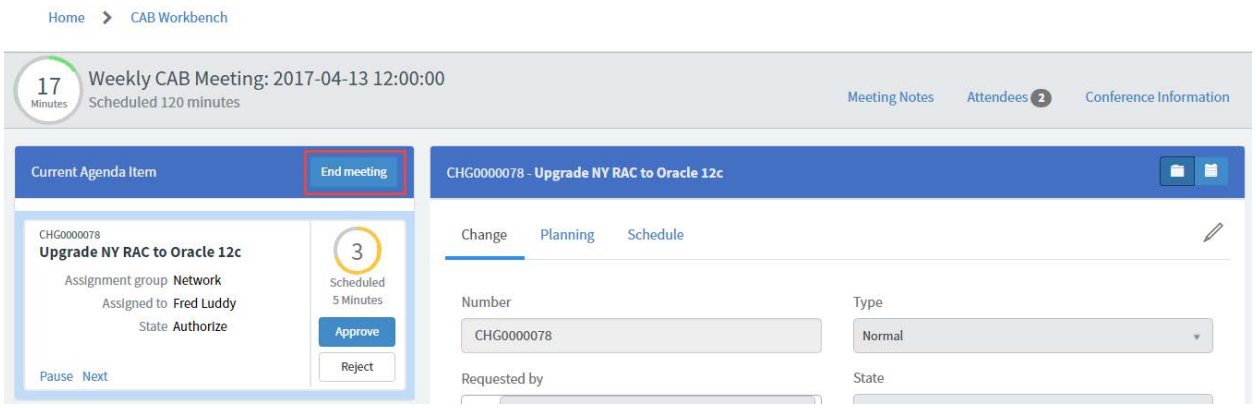
18. Click Meeting Notes at the top-right.

19. Add final meeting notes, with the text box.

20. Click X to close the notes.

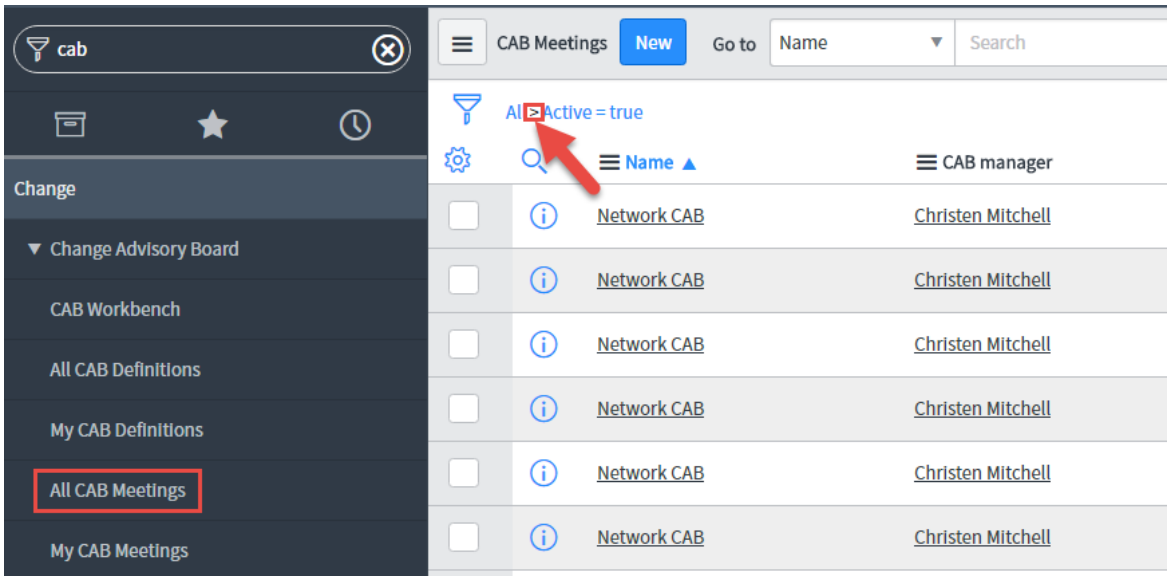


21. Click End Meeting at top-left, to bring the CAB Meeting to a close.



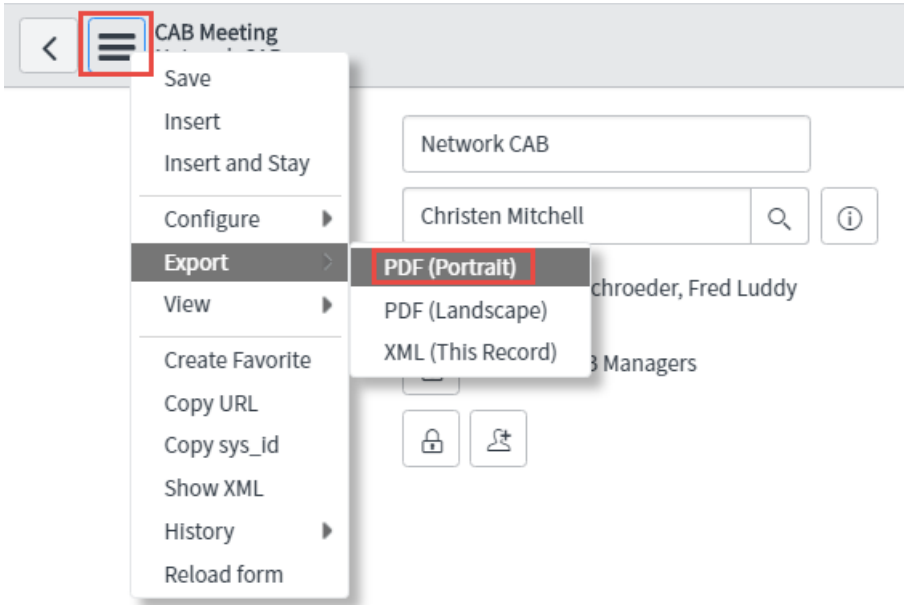
Export a Record of Your CAB Meeting

1. You should still be logged in as Christen Mitchell.
2. Navigate to Change>Change Advisory Board>All CAB Meetings.
3. Click ALL in the breadcrumb, to remove the Active=True filter (so we can see past meetings).



4. Open today's CAB Meeting.
5. Click on the hamburger menu (3 horizontal bars, at top-left).

6. Select Export>PDF(Portrait).



7. Open the resulting PDF file, for a full report on your CAB Meeting.