

Approach

Change is
required to
support the
business

Change
introduces
Risk

CM
manages
this risk

Iterative

How much due
dilligence is
done before
raising a CR?



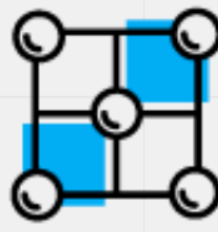
STANDARD

- Straightforward
- Frequent
- Documentation needed
- No authorization by CAB needed



NORMAL

- Important
- Full review
- Requires CAB authorization



MAJOR

- High risk
- Detailed report
- Requires CAB & management authorization



EMERGENCY

- Urgent
- Resolves incident
- High risk of failure
- Flexible pool of approvers

Change Type

Normal Change

Not a Change

Open a port to a DEV server for a user

Allow users to access development servers

Deploy a new CRM System

Standard Change

DNS Record Change

Impacting individual

Programming updates/release for AV control system (single system)

Standard Changes: Pre-authorized, low-risk Changes that follow a well-known procedure.
(Standard Operating Procedure)

Citrix Image Update

SCCM server patching Update

Reboot a standalone server

Change business hours for phone closet

Compare weekly business operations for AV hardware (checked, not checked)

Software License installation/update

Apprentice software patching creation/update

Patch Operating System for transactions server

Adding/removing connections for open/standalone

Rewiring/reconfiguring of single AV system

Create CPU Quarterly Changes

Desktop S/W upgrade

Software GPO creation/update

SCCM OS server patching Update

Medium Change

IT Manager Approval

Quarterly security patch

Add a new server to production

Decommission a Server

Create SharePoint sandbox (prod)

Update Citrix

Reboot a series of servers

Reboot a SQL Server

Rewiring/reconfiguring of multiple AV systems

Evergreen / upgrade?

Patch OS for interdependent servers

Change network switch

Add a new DHCP Scope

Install Banner Upgrade

Upgrade the UPS in DC1

Replace a dead Network Switch

Rebooting a down server

Emergency Changes: Changes that must be implemented immediately, for example to resolve a Major Incident

Major Change

CAB Approval

Normal Changes: All other Changes that are not Standard Changes nor Emergency Changes

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Stakeholders / Approvers



Risk Assessment



Risk Type	Small	Med	Large
Number of Users affected	1-3	3-10	10+
Critical System (ESSSE) Outage	None	5 min	2 hour
Timing	After Hours		Business Hours
Number of critical services affected	Simple one critical system affected		Multiple critical systems
Confidence	We do this all the time		This is new and unknown
Ability to rollback	Quick (minutes)	Manual (Hours/Days)	Not possible
Lead time	6 months	3 months	< 1 month

use this

Pre-Approved/Standard Change

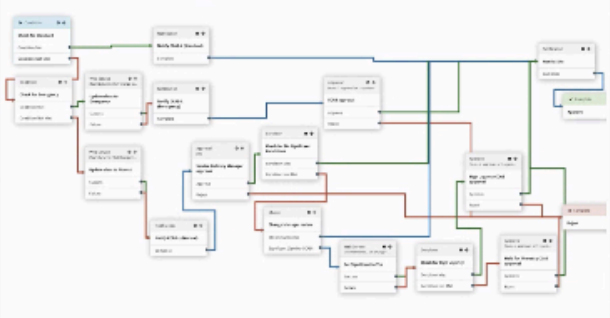
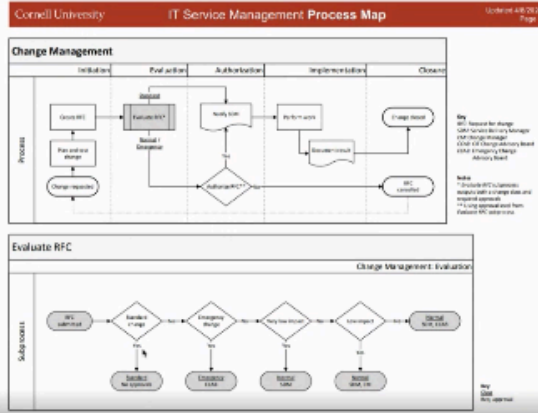
For a change ticket to be categorized as a pre-approved change, the following requirements are mandatory:

1. The change has been successfully completed, on time and on budget, at least three times in the last year, by the same team.
2. The change is on a predefined list of pre-approved changes.
3. A backout plan exists and has previously been reviewed to be effective (i.e. a pre-approved backout plan).
4. An implementation plan exists and has previously been reviewed to be effective (i.e. a pre-approved implementation plan).
5. The change timeline is less than 24 hours.

If a proposed change does not meet all these criteria, the ticket cannot be classified as a pre-approved change.

IT will create a list of changes that are pre-approved to be on the list of pre-approved changes. The list will be reviewed every quarter and new candidates for the list will be considered. The net benefit is that time will be saved in acquiring approval for changes without adding risk to the technology environment.

Sample Processes

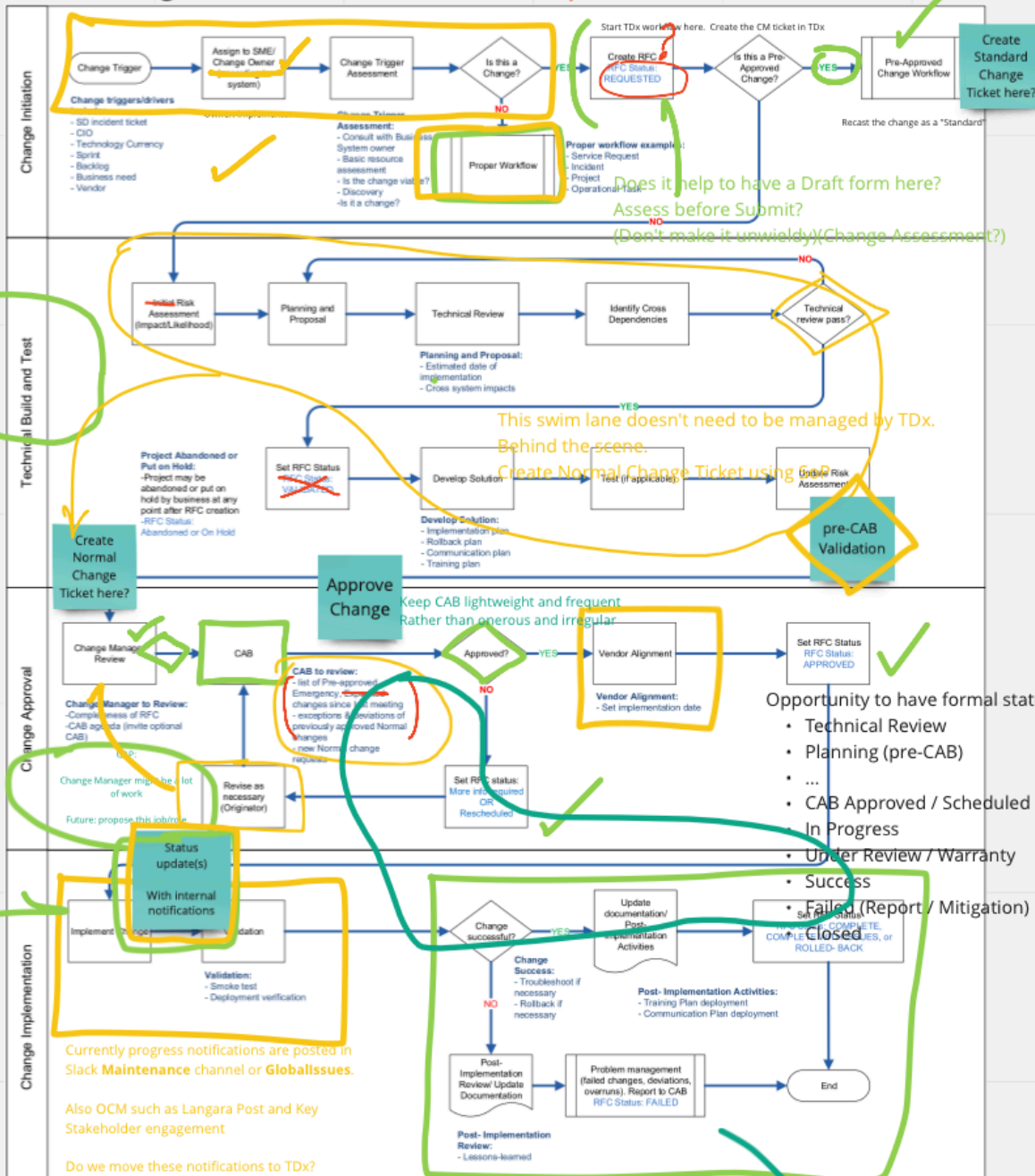


Camosun

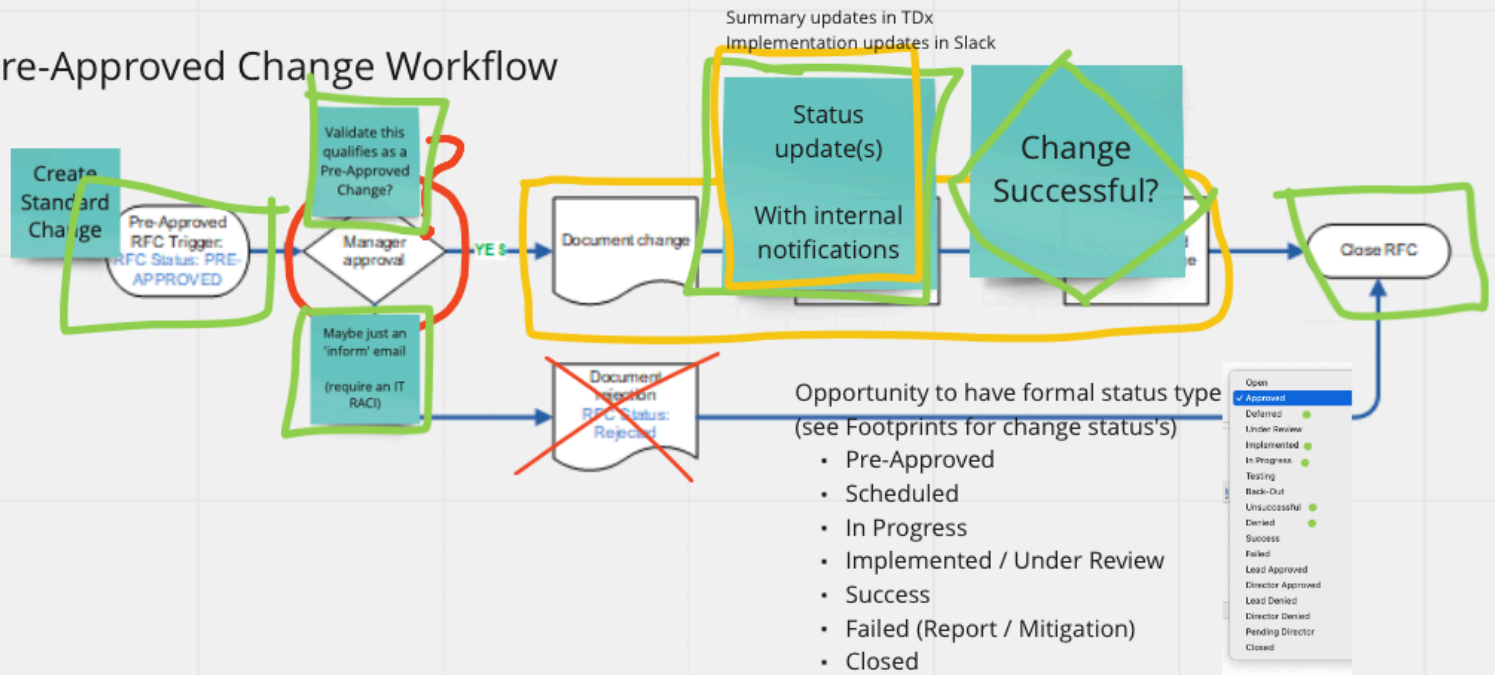


Normal Change Workflow

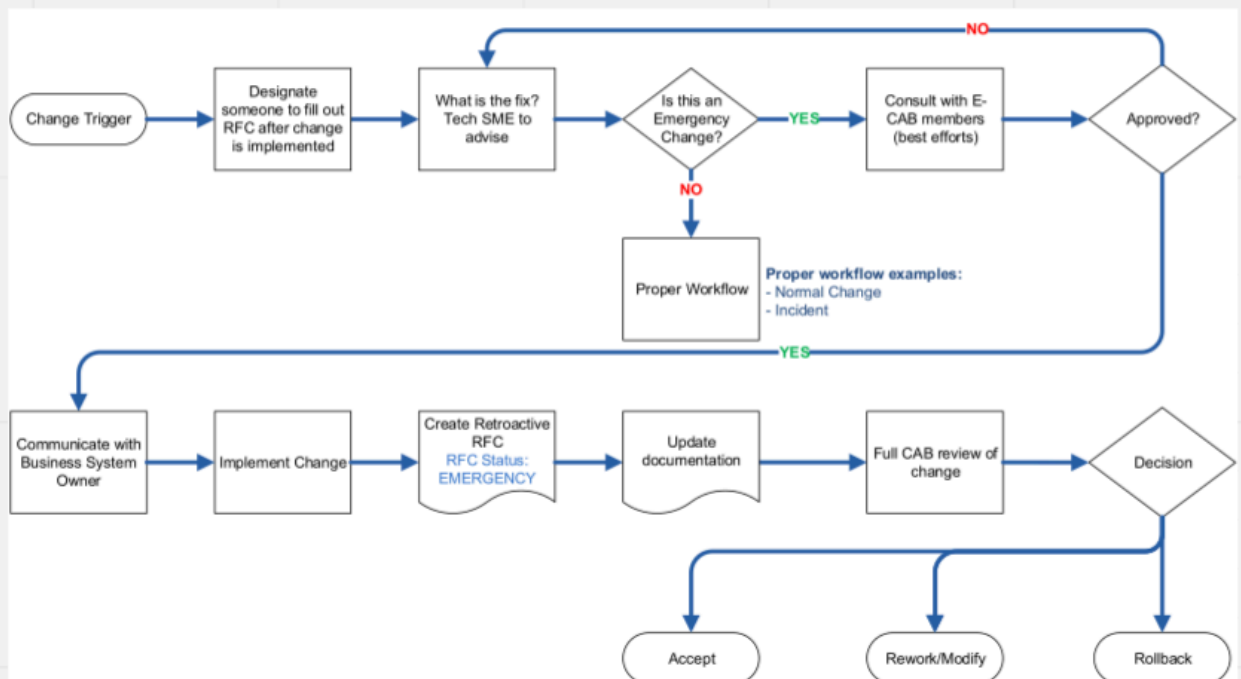
Likely TDx bit in Green
Langara SOP in Orange
Out of Scope in Red



Pre-Approved Change Workflow



Emergency Change Workflow



Form(s) Contents:

- On Draft Request:
 - Change Name/Description
 - Change Implementor/SME identified
 - Change Owner/Authority/Sponsor (assumes Risk)
 - Change Trigger
 - (optional) Link to the Change/Trigger Assessment
 - (Risk pre-Assessment)
 - Q: Initial (proposed by SME): Change Type
 - Standard
 - Picklist of pre-approved changes?
 - Based on previous change (link) "Same as ... change request 1234"
 - Supporting questions
 - Skips to Change Implementation
 - Normal
 - Continues on to (Normal) 'Technical Build and Test' below
 - (emergency)(urgency?)
 - Proposed Implementation Date(s)
 - Constraints
 - Timing (urgency, dates, etc.)
 - Dependencies
 - SME
- (Normal) Detailed Change Proposal
 - Background/Need (summary)
 - Link to Technical Review
 - Q: passed technical review (checkbox? approval?)
 - Priority - default to FIFO
 - Link to Change Plan
 - Link to Change Test
 - Updated Risk Assessment (link? in TDx)
 - Updated Timing (e.g. maint/outage date)
- CAB Approval
 - Q: Pre-approval by Change Manager
 - Q: CAB Approved?

Document (eventually a KBA?):

- For each Field
 - Description,
 - Definition/Purpose,
 - Help text and samples