IT Change management Cheat Sheet

by meeraqt (meeraqt) via cheatography.com/20937/cs/3790/

Change Type

#**Standard Changes** are approved by the team leader. There is no lead time for standard changes. There is no requirement to wait for Change Management Approval

#**Minor Changes** are to be submitted at least 3 working days before implementation date. Must receive final Change Management Approval prior to the start time of the Change window.

#**Significant Changes** to be submitted by 15:00 hrs Monday for that week's CAB Meeting. Change can only proceed after the change has been presented and approved in the CAB meeting

#**Major Changes** requires a minimum 30 days prior to implementation.

Change Plan Check list

Short Description - Summary details about the change plan
Description -
>> Change Details
>> Reason for the change
>> Business Approval(if any)
>> Service affected by the change (Configuration item/s)
>> Consequences if the change is not implemented
>> Benefits
>> Implementer contact details
>> Third party Contact details
>> Post Change testers contact details
Implementation plan

Change Plan Check list (cont)

>> Clear configuration change instruction
>> Communication plan and methods
>> Change specific Stakeholder details
Pre implementation plan
>> Include the test logs
>> Attach the testers sign off
Change Window
>> Define the change window

Change Category Lead Time

The minimum lead times for raising changes are as follows:
Standard
Changes are approved by the team leader. There is no lead time for standard changes.
Minor
At least 3 working days
Significant
Changes should be submitted by 15:00 Hrs. Monday for that week's CAB Meeting
Major
Minimum 30 days prior to implementation.

Approval Workflow

Minor - Technical Peer Review -> Team Leader Approval -> Change manager

Approval Workflow (cont)

Significant - Technical Peer review -> Team Leader Approval -> Change Manager -> CAB approval
Major - Technical Peer Review -> Team Leader Approval -> Change Manager -> Senior Management -> CAB Approval

Change Matrix Calculator

#**Emergency** - Break-fix changes to restore disrupted services. If not implemented immediately customer productivity is severely impacted.

#**Urgent**: Required within 1 working day if the change is not implemented, business productivity is significantly impaired. May be a requirement to meet operational, financial, legal, and statutory or government requirements. Urgent Changes require Department Manager approval to justify the urgency.

#**High**: Required within the next 5 working days if the change is not implemented, business productivity will be impaired.

#**Medium**: Required within the next 10 working days No current effect on business productivity or impact on the customer but possible future impact if change is not carried

#**Low**: Can wait 2 weeks or more No impact on customer service, financial, security or legal requirements; or currently a sufficient workaround exists or release is pending

Post Change Review

All changes must be reviewed for their success against the following criteria: #Objectives/-expectations were met
#No unexpected, undesirable side-effects
#Resources used to implement the change were as planned
#User requirements have been met.
A formal PCR will be conducted for changes which meet one of the following criteria:
#Failed changes or backed out changes
#Changes which cause incidents
#Major changes
PCR requested by SAI Global IT Management.
The PCR meeting is scheduled and chaired by the Change Manager.
Corrective actions are derived from this meeting and the Change Manager is responsible for follow up of the actions.

Closure

Closure - All change request to be closed with the appropriate closure code within 24 hours after the scheduled change window.

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Closure (cont)

#Failed Change - Post Change Review form must be completed for every failed change requests. If a change either caused an incident and is immediately identified as such or later problem management conducts an analysis and identifies the root cause then the related change record needs to have its appropriate status or outcome , changed to "failed" and a decision made as to how to best proceed

Scope of the Change Management

In Scope

Any addition, deletion or amendment to hardware, software or infrastructure within the
Production Environment.

• Include UAT or DEV environments that may impact Production

• Changes to business applications as agreed between Change Management and the Divisions

• New network appliances and servers installed on the production network for testing and piloting purposes

• Emergency break fix changes

• Changes made to DR systems

Scope of the Change Management (cont)

• Commissioning/decommissioning of Severs and Network appliance's in non-production environments.

Out of Scope

This Policy does not apply to:

• Changes made by a third party to equipment/applications within their network or control (services provided by external vendors)

• Changes made to individual desktops

• Application and OS changes made to non-production environments e.g. Test and Development environments.

• Service Request changes supported by 1st level support and Desktop Support

Unauthorised Change

Any addition, deletion or amendment to hardware, software or infrastructure within the SAI Global production environment that does not have Change
Management approval will be classified as an unauthorized change.
In the event of an unauthorized change:

Unauthorised Change (cont)

The change implementer will be asked to present the facts of the change to the Change Manager and his/her Team Leader/Manager.
Where appropriate, disciplinary action may be undertaken by SAI Global Management in consideration of the circumstances and magnitude of the change. In extreme cases such actions may result in termination of employment.

CAB

The CAB meets every **Wednesday at 14:00 AEST/AEDT** to review and approve Significant and Major changes.
All changes should be submitted by **15:00 Hrs on Monday** for that week's CAB presentation.

CAB (cont)

The Change Manager circulates a CAB agenda to all CAB members at **10:00 am every Tuesday**. CAB members are expected to review all changes on the agenda prior to attending the meeting and raise any major issues before the meeting. This enables the Change Manager and Change Initiator to address any extra detail required before the meeting so that the change does not have to wait a further week for authorization.
The Change Initiator or Requester needs to present the change to the CAB.
Changes that do not have representation at the CAB meeting will be put on hold and will be reviewed only at the next CAB meeting unless a valid reason is provided. In such an event an Emergency Change Advisory Board (ECAB) will be convened to review and approve the change.
All changes presented at the CAB must have a risk assessment done which should be a part of the CAB Agenda.
The risk assessment will be done by the Change Manager in consultation with the necessary stakeholders.

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Change Management Escalation Matrix

Primary Contact : **Kalai Meeran - 0467 493 931**

Secondary Contact : **Namal Perara - 0459 037 930**

Emergency Change

The Emergency Change Advisory Board (ECAB) reviews and approves Significant Emergency changes. The ECAB will be convened by the Change Manager at his/her discretion. The makeup of the ECAB and the approval process depends upon the change being reviewed. Approval may be obtained through the following,
A formal ECAB meeting
The Change Manager meeting with all relevant stake holders and obtaining approval
The Change Manager calling all the relevant stakeholders to obtain approval.
An ECAB may consists of
IT&T Senior Managers
IT&T Technical Team Leader-s/Managers
Change Manager

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