UTLearn Change Management Process

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Contents

Purpose

The purpose of this document is to outline the process for requesting a change or modification to UTLearn or any processes associated with its use. All requested changes must follow this process and abide by the UTLearn Acceptable Use Standards.

Roles & Responsibilities

- Change Initiator: Individual or department requesting the change
- Change Coordinator: Manage the activities of the change management process, including scheduling, planning, and coordinating all of the phases of the change from initiation through acceptance and delivery
  Note: Some of these responsibilities may also reside with the business owner.
- Business Owner: Decides if the change should move forward from a business process or policy perspective, review financial considerations and impact, and/or escalate to Governance as needed
- Governance: Provide approval for high-impact or high-risk change requests; ultimate veto authority; reprioritize changes; escalate to additional governing bodies as needed

Resources

Activities that will assist change initiators in determining whether or not to submit a change request.

- Define and publish change request criteria, considerations, and approval/evaluation process
- Maintain a list of known issues that can be made available via ServiceNow
- Maintain and publish a change request decision tree
- Maintain a change log to track all activities and tasks.
- Make a subset of information from change log available to a limited population so they can view changes already requested.
- Publish current system maintenance schedule

Change Request Process

Formally Request a Change

Change initiator submits a change request containing all of the required details.

Analyze and Justify Request

Change coordinator works with change initiator to review and develop specific justification for the change and to identify the business and technical impacts and risks to the University.

Categorize and Prioritize Request

Change coordinator and business owner consult with system administrators to assist with categorizing the request and setting a priority based on the impact of the change on the infrastructure, University operations, end user productivity, and budget.

UTLearn governance may reprioritize a change or request feedback from appropriate external governing bodies per the UTLearn Governance Charter. In these situations, other change requests may be reprioritized to reflect the priority overrides.

Review and Approve Request

Business owner reviews and decides (approve/deny/defer) or routes the request to the governance group for review and decision. Change approvals may occur during meetings or via electronic communication. If required, Governance will consult and request review and approval from appropriate external governing bodies per the UTLearn Governance Charter.

Note: If an emergency change is required, the business owner will notify governance immediately to obtain approval to proceed.

Plan and Schedule the Change

System administrators develop technical requirements and scope of the change; change coordinator establishes schedule and notifies stakeholders of the schedule and scope; implement change in pilot environment for change initiator testing. (Regularly scheduled maintenance to be taken to account in scheduling.)

Note: It is critical for the change initiator to understand the scope that will be applied to the change and that any additional scope during testing will impact the schedule. A change may be reprioritized as a result of the planning and scoping process.

Change Implementation and Review

System administrators make change in production environment. Change initiator must test, validate, and accept change.

Note: If modification required or change has unexpected results, the change may need to be backed out or removed if its nature allows it.