

Change Management routine

Concept

Change Management is routinely used to alter hardware, programs and networks in Volvo IT's computer environments.

The words **CHANGE** and **CHANGE REQUEST** (shortened to **CR**) are used.

Change processing is directed and controlled by a **Change Manager** in the Production Quality group at a **Volvo IT Local GOT**.

The routine is based upon **WebCR** as the Case management tool being used. It initially covers only changes made in the **Infrastructure** parts of the Operation handled by Local GOT.

Objectives

There are several reasons to use Change Management. The most important are:

- Planning of actions which affect or can affect stipulated quality or customer's use of the computer system as a whole.
- Coordination of actions which are likely to affect each other
- Simplify fault finding and correction.
- Spread information about changes in our environment.

Scope of Change Management

Which changes will be handled by Change Management?

The answer is not so easy. We carry out changes all the time in our computer equipment.

Not everything needs to be handled by Change Management!

Questions to ask yourself when you are wondering whether to write a CR:

- * Have the probable consequences of likely (and unlikely) faults been calculated ?
- * Is it **OUT OF THE QUESTION** that anything else will be affected ?
- * Is this type of change new (not routine) ?
- * When will the change take effect ?
- * How and when will possible undesirable effects be discovered ?
- * How wide-spread is the knowledge of how to back out of changes ?
- * Will associated changes be necessary ?
- * Who is concerned and will benefit from information about that this CR is being done.

Of course even a little mistake, e.g. a missing comma in JCL or parameter description, can be devastating. But if it is a routine change, normal logging should be enough.

Even areas which indirectly affect computer equipment should be covered by a CR:

- * All activities in and affecting the building, and which can affect the Computer Center and computer availability.
- * All cables which connect computer equipment.
- * VCT, new release telephone exchanges. Connection of LIM (line interface module).
- * Major changes/start of customer system. (for information and planning)
- * Customer activity e.g. extra opening hours during holidays.
- * Close-down/dismantling announcements.
- * **CHANGE** as a medium for information about changes.
- * Changes affecting the standard **CLASS** environment.

Exceptions

The following are not included in the Change Management routine:

- * Activities in pure test environments which can not affect other environments.
- * Emergency operations to solve a problem. In these situations a SCOPUS-record will be registered.
- * Work with network products in operation, (or not in operation) concerning an individual customer where work is carried out together with the customer (e.g. line change, line connect, printer install).

The life of a Change Request and Terminology used (in the management tool WebCR).

A decided CHANGE always shall be initiated by a CHANGE REQUEST. The request is made through registering a CHANGE-REQUEST record in the WebCR data base. This is done by the **Requester**, a person at a 1st-level Back Office group.

The normal way of handling such a record in WebCR is:

1. Change registration

- the case text shall include the reason of the Change and complete instructions to carry it out.
- under **Description text** affected environments and components (hardware, software) shall be pointed out.

The **Requester** is the WebCR user that is creating the CR.

The **Requester** is always the responsible for the change.

The **Requester** is responsible for the information spreading to users and helpdesks.

2. Change acceptance

The **Change Manager** either regrets the Change, re-assigning it to the original creator or accepts it by change the state of the CR to *open*. Responsible to carry it out is then the **Effectuator**.

The **Effectuator** is named in the CR by the Requester and is sent a copy of the CR when the CR is created.

CR taking place outside scheduled maintenance windows needs a "go ahead" by Technical Support Manager.

It is then to be regarded as **scheduled** in the plan for approved changes.

3. Change realization

After the **Effectuator** have carried out a Change, he has to add information to the CR if there was any additional or changed action according to the given instruction, this shall then be specified in the case text, as well as any unexpected result (warning message etc).

4. Change closing

The responsible for the Change then during the first normal working day after the change shall carefully **check** it up, read any additional information that the effectuator can have added, before defining the case as *closed*, thus accepting the work being done.

Asking for Change Request

- Permission for changes shall, without exception be requested by a CHANGE-REQUEST record. Handwritten notes etc. are not accepted.
- CHANGE-REQUEST must be registered in good time so that the Q/WEEKLY-meeting has time to deal with them.
CR for the weekend needs to be planed at Tuesdays at 10:00.
CR registered after Tuesdays at 10:00 will have severe problems to get planed by the Request Manager.
CR registered after Thursday at 10:00 will not be taken up for planning the same weekend..
- Changes which are not carried out by the operators shall be reported immediately by the employee responsible to the Change Manager.

Special situations

When special situations apply, e.g. 13W-statistics show a result which does not meet our target ("red figures") then more stringent routines can be introduced for the environments involved. This is taken up in the Q/WEEKLY-meeting.

In this situation attendance for certain responsible employees is compulsory at the Q/WEEKLY- and/or weekend planning meeting. The Change Manager will give notice of this.

Decisions

1. Normally a request for a CHANGE is dealt with at a Q/WEEKLY- and weekend planning meeting.
2. Emergency changes during office hours when a meeting has no time to deal with a problem are carried out by the Change Manager and at least one operations manager. Consultation takes place between the most appropriate operations Managers depending on the type of CHANGE.
3. At other times the shift leader can decide after consultation with the Change Manager and/or Operations Manager.

Decision making

Different departments/groups at Volvo IT and also suppliers, can affect decisions at the meetings.

Certain CHANGE REQUESTS need a written go-ahead from the customer/s before approval can be given.

A decision to carry out activity which affects or can affect a customer demands that the following questions are answered positively:

Question 1: Will HELPDESK be supplied with special support during the necessary time after implementation ?

The Helpdesk Manager is responsible for this decision.

Question 2: Has the customer/s been informed about Changes in an appropriate way (e.g. Intranet, Memo) ?

The Helpdesk Manager is responsible for this decision.

Question 3: Is the necessary documentation drawn up to ensure continuity of operations ?

Question 4: Has this action been tested?

If any of these questions are answered in the negative, the basic rule is that the activity should be postponed.

Timing of changes

Our endeavour is not to carry out Changes during times which can disturb customers work and generally this means day time on line time (Mon - Sun).

Maintenance occurs during those times which are shown at the Intranet under page "HELP".

Computer center responsible

Local Operation and Support has total responsibility for activities in the plan for planned changes. For activities which are not in this plan no responsibility is taken.

Normally function testing and back outs are carried out in the maintenance window.

The person who is responsible (or back-up people) must be accessible the day (-s) after the change has been carried out.

Decision meetings

Regular meetings should be held in order to decide and inform about changes that has been asked for.
Meeting time points structure for **Local/GOT** :

Q/WEEKLY-meeting:

Every Tuesday 10.00 hrs. in room 11-02

This meeting is open to all who want to attend.

Every CR made for the actual period (eg. Week) must have an supporter at the meeting who is redy to deal with questions made by the meeting.

Decisions made by the meeting will be implemented.

WEEKEND plan.meeting: Every Friday 13.00 hrs. in room 11-02

This meeting sattles the final changelist for the upcomming weekends maintenance window.

Decisions made by the meeting will be implemented.

Preparation meetings

Various teams should hold preparation meetings in order to sort out activities and make preliminary decisions about planning.

Examples: SW-meeting, HW-meeting, network-group meeting.

Change Manager Local GOT.

INCIDENTRUTIN

Utfärdare: Jan Ahlberg 8201
Fastställt: Jörgen Annlöv 8200

Ordinarie problemhantering och eskalering kompletteras med Incidentrutin nedan om problem ej bedöms lösbart inom 2 timmar och berör

- En större användargrupp - Viktig verksamhet för kund - VIT riskerar "starkt missnöjd kund"

Dagtid = Vardagar 07.00-18.00 Övrig tid = Natt 18.00-07.00 samt Helg/Röd dag

ÅTGÄRDESKALERING VID INCIDENT

1. Skiftledare alt. problemlösare ansvarar för eskalering till närmast berörd teknikgruppchef eller stf, som blir problemkoordinator. Denne skall driva ärendet och vid behov bemannar problemkoordinatören en incidentgrupp*
Prioritet enligt Visits sätts till 4.

2. Högst 2 timmar efter incident inträffat, eller så snart incidenten bedöms bli minst så långvarig: **Prio sätts till 3.**
Dagtid: Problemkoordinatören eskalerar till driftchef eller dennes stf som blir eller utser problemkoordinator.
Bemannar vid behov en Task Force**
Övrig tid: Problemkoordinatören avgör ev. eskalering.

3. Högst 6 timmar efter incident inträffat, eller så snart incidenten bedöms bli minst så långvarig: **Prio sätts till 2.**
Dagtid: Driftchef eskalerar ev. åtgärd enligt haveriplan.
Övrig tid: Problemkoordinatören avgör eskalering av ärendet beroende på händelse och tidpunkt på dygnet.

4. Normal drift efter incident

Dagtid: Problemkoordinator avgör ev. uppstart av analysgrupp.
Övrig tid: Ärendet avvaktar påföljande veckodag.

Tänk på

- Brandförsvars- och polisärenden rapporteras till Volvos bevakning. För fastighetsärende tillkallas fastighetsansvariga.
- Incidentaktiviteter får prioritet, efter avstämning med ansvarig chef.
- Bedöm tidigt vilka, som kan bli inblandade och förvarna dem.

- Vid incidenter som medför att kund måste utföra något före uppstart, är problemkoordinator ansvarig för att kontakt etableras med berörda.
- Konferensrum, kan med omedelbar verkan övertas av incidentansvarig.
- Loggning av tider och åtgärder sker från första stund.

INFORMATIONSESKALERING VID INCIDENT

Lägg omgående ut info på Help.volvo.se och Infoservice line
Dagtid: Eskalera till informationsansvarig och Problem Manager eller Support Manager.
Informationsspridning enligt instruktioner.
Övrig tid: Kontakta berörda helpdeskar.

Dagtid: Informationsansvarig följer etablerade informationsrutiner och medverkar i eventuell Task Force.
Övrig tid: Problemkoordinatören informerar driftchef påföljande dag kl 07.00, om problem kvarstår från natt.

Dagtid: Information eventuellt enligt haveriplan
Övrig tid: Problemkoordinatören följer informationsrutinen

Dagtid: Problem Manager skriver en incident rapport.
Info.ans ansvarar för kundinformation inom 24 tim.
Övrig tid: Info.ans ska senast kl 12.00 påföljande veckodag skicka ut kundinformation.

* I incident gruppen kan ingå t ex skiftledare eller plattformansvarig, Prg-ansvarig , närmast ansvarig gruppchef, etc
** I Task Force kan ingå t ex Incident gruppen, Problem Manager, driftchef, FL-repr, leverantör, etc

