



Change & Release: Draft Policy Document

Purpose of Change & Release

1. To ensure the efficient provision of IT and business services by effectively managing changes to configuration items (e.g. IT infrastructure, software and services), thereby minimising any disruption to IT services delivered to the University.
2. To establish the process for controlling modifications to hardware, software and documentation to ensure information services are protected against undocumented modification before, during, and after system changes.
3. To communicate to all appropriate staff, details of all changes that impact on the provision of any shared computing system or service that uses the University's network, IT infrastructure or software.
4. To ensure that standardised methods and procedures are used for efficient and prompt handling of all changes, so as to minimise the impact of change-related incidents and problems upon service quality, and to reduce overall service and University costs.
5. To provide management information regarding change and the change process.

Scope of Change & Release

This policy should cover all changes (additions, deletions and modifications) to a service under change control regardless of who initiates it. It encompasses changes, including those to:

- The University's IT infrastructure, including but not limited to hardware, software, operating systems and related documentation.
- Data stores and databases
- Network, Telephones and Communications
- Backup and Disaster recovery facilities

Included under Change Management are modifications to an existing service, maintenance to an existing service or a project to implement a new service.

Principles of Change & Release

1. Any change to a resource must be performed in compliance with the Change Management Policy and Procedures. The Change Management procedures are described in a separate document called “Change Management Procedure”.
2. No unauthorised change, or change by an unauthorised staff member, may be performed against any production environments which are under change control.
3. Clear roles and responsibilities are defined for the Change Management process. The roles and responsibilities for Change Management are described in a separate document called “Change Management – Roles and Responsibilities”.
4. Change authorisation is managed and maintained by a Change Advisory Board (CAB). The University has the concept of multiple CABs, where CABs are aligned to services. A framework for CAB structures is in place to record CAB activity, their members and the services they represent. CABs can pre-authorise change and delegate change authority. The Service Owner may substitute for a CAB, whilst plans for CAB deployment are being implemented, and provided a clear CAB launch date has been scheduled.
5. Emergency changes are authorised by the Emergency Advisory Board (ECAB). The University has the concept of multiple ECABs, where ECABs are aligned to services. A framework for ECAB structures is in place to record ECAB activity, their members and the services they represent. A CAB or ECAB can govern changes for one or more services, where the preferred model is for multiple logical services to be managed together within one business area.
6. The University has the concept of a Change Coordinator role. There are multiple Change Coordinators heading each of the University’s main IT areas, which are: IS Applications, Unix Systems, Architecture, Networks, Library & Collections, User Services, and Telephones
7. The impact and risk of a change to a service is evaluated, communicated and recorded. The change schedule will follow business cycles and adequate change windows are in place. Projected service outage is recorded in the IS Alert system (<http://reports.is.ed.ac.uk/alerts/>).
8. Change Management will integrate with other service management processes, such as Incident and Problem Management.
9. Change Coordinators will form a central change committee to oversee policy. This committee will include either an ITIL® Change Management practitioner or ITIL® Expert in order to help maintain overall process cohesion.