ABC Bank - Condensed Change Management Guide

1. Core Concepts & FAQs

- **What is a change request (CR)?** A formal proposal to modify systems or processes, which must include a description, justification, risks, and a rollback plan.
- **What types of changes are there?** There are three types: Standard, Normal, and Emergency. Each has its own process.
- **What is the Change Advisory Board (CAB)?** The CAB is a group of stakeholders responsible for reviewing and approving changes based on their potential risk and impact. Its members include the Change Manager, technical leads, and business owners.

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2. Change Workflow States

The states a change request can go through are:

- Draft
- Submitted
- In Review
- Approved
- Scheduled
- In Progress
- Validation
- Closed
- Rejected

A **Rejected** state means the change request was declined, and feedback has been provided.

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3. Sample Change Activity Templates

- **Template ID:** ABC00001
  - **Name:** Software Update - Activity 1
  - **Usage:** For routine updates to ensure system stability.
  - **Approval:** CAB Approval
- **Template ID:** ABC00002
  - **Name:** Database Migration - Activity 2
  - **Usage:** Applied during server migrations to improve performance.
  - **Approval:** Standard Change Approval
- **Template ID:** ABC00004
  - **Name:** Hardware Replacement - Activity 4

- ○ **Usage:** Used when replacing or upgrading hardware components.
  - ○ **Approval:** Auto-Approved
- ● **Template ID:** ABC00005
  - ○ **Name:** Security Patch - Activity 5
  - ○ **Usage:** Applied to fix security vulnerabilities quickly.
  - ○ **Approval:** Executive Approval
- ● **Template ID:** ABC00007
  - ○ **Name:** Disaster Recovery Drill - Activity 7
  - ○ **Usage:** Conducted to test disaster recovery plans.
  - ○ **Approval:** Standard Change Approval
- ● **Template ID:** ABC00016
  - ○ **Name:** Configuration Change - Activity 16
  - ○ **Usage:** Applied to adjust system settings or configurations for optimization.
  - ○ **Approval:** CAB Approval
- ● **Template ID:** ABC00018
  - ○ **Name:** Vendor Onboarding - Activity 18
  - ○ **Usage:** Applied when integrating new vendors or third-party services.
  - ○ **Approval:** Emergency Approval
- ● **Template ID:** ABC00028
  - ○ **Name:** Cloud Migration - Activity 28
  - ○ **Usage:** Applied when migrating workloads to cloud infrastructure.
  - ○ **Approval:** CAB Approval