# **Operational Change Approval Process**



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# Change Management Process Roles

The operational change process asks for approval at varying levels throughout the stages of the Change Request life-cycle. This could include approvals from one or more of the following:

- Assignment Group Owner The IT manager in charge of managing the primary business facing IT service or application system
- Service Owner The IT Director in charge of managing a specific service area or group IT components/configuration items
- Change Manager Person(s) that coordinates all CAB meetings, organizes and processes all changes through the CAB on behalf of the Change Process Owner
- Change Process Owner IT person in charge of the IT change management process and improvements to the process defined

Change Manager Approval - Change evaluation review for CAB approval to implement/deploy

OCH Status - EVALUATION COMPLETE

At the Change Advisory Board, someone must be present to represent the change in order to receive approval. This should be a Development Lead or Owner of the product/application.

Assignment Group Owner Approval - Request to implement/deploy

OCH Status - APPROVAL

All OCHs require application owner approval before implementing.

Assignment Group Owner/Service Owner Approval - implement/deploy (Minor, Medium and Major Changes)

OCH Status - APPROVAL

A Minor Risk OCH requires one approval - Development Lead or IT Manger/owner of the product/application.

A Medium or Major OCH requires two approvals - Development Lead or IT Manger/Owner of the product/application and Service Owner/Director of the impacted region.

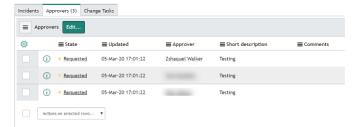
#### Approval Denied!

# Things that Sink OCHs -

- · No evidence of testing
- Poor descriptions
- No approval from application owner CHECK STATUS
- Not completing tasks (Evaluation, Implementation) CHECK STATUS

# Processing Approval for Next Stage in Change Life-Cycle

Approver's name and state of approval (Requested/Approved) can be found at the bottom of the OCH under the "Approvers" Section. If approvals permissions are shared among a group of approvers. (Global, CAB, etc.), you will see all members of the approval group listed.



Check the box next to YOUR NAME ONLY, select "Actions on Selected Rows...." and select the appropriate approval state form drop down list.



Note: If a request is manager/director level rejected, the status will move back to "Evaluation" and the Operational Change Evaluation task will re-open

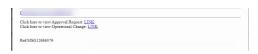
Once updates are made and the task is closed, the user will then select "Request Change" to send back for manager/director approval only. The status will then move to "Approval."

If no other approvals are required, the request will move to the next stage in the change life-cycle



Approvers are also notified via email notification and can approve the task from within the email.





# Approval Matrix

As we unify the CAB process for swe've restructured the approval matrix, to streamline the approval process.

A Minor Risk OCH requires one approval - Development Lead or IT Manger/owner of the product/application. The Assignment Group Owner will receive 1st level approval request.

A Medium or Major OCH requires two approvals - Development Lead or IT Manger/owner of the product/application and Service Owner/Director of the impacted region. 2nd level approval will be determined based upon the Region and Service impacted (see 2nd level approvers table).

When 2nd level approval is requested, the former Service Owner/Director responsible for approving medium and major requests, will receive notice of request via email. No action required.

2nd level approval for Global change requests will route to and where either member can approve the request.

### 2nd Level Approvers - Medium and Major Risk Levels

Service Group		
Account Administration		
Applications		
Hardware		
Infrastructure		
Legacy		
Master Data Management - EMEA		
Master Data Management - US		
Printer		
Salesforce		
SAP		
Site Wide		

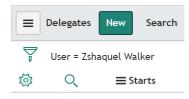
To assure segregation of duties the "Deputy" role set on the Assignment Group drives conflict-checking between the 1st and 2nd level approval, in regions where this may exist.

### Delegate Approval

To avoid approval gridlock, we advise ALL approvers to delegate someone as an approver in their absence. This may be especially useful to manage request volume.

To assign a delegate, visit the "Profile" section in the drop down under your name. Then select "New" to create a delegate.





+ Add label

