

Operational Change Approval Process

ZW

Owned by Zshaquel Walker

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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.

IncidentsApprovers (3)Change Tasks

ApproversEdit...

	State	Updated	Approver	Short description	Comments
<input type="checkbox"/>	Requested	05-Mar-20 17:01:22	Zshaquel Walker	Testing	
<input type="checkbox"/>	Requested	05-Mar-20 17:01:22		Testing	
<input type="checkbox"/>	Requested	05-Mar-20 17:01:22		Testing	

☐ Actions on selected rows...

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

IncidentsApprovers (3)Change Tasks

ApproversEdit...

	State	Updated	Approver	Short description
<input checked="" type="checkbox"/>	Requested	05-Mar-20 17:01:22	Zshaquel Walker	Testing
<input type="checkbox"/>	Requested	05-Mar-20 17:01:22		Testing
<input type="checkbox"/>	Requested	05-Mar-20 17:01:22		Testing

☐ Actions on selected rows...

Actions on selected rows...

Revert Approval Email

Cancel

Revert

Request Approval

Create Application File

Assign Task

New...

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

Status

Evaluation

* Service ⓘ

Applications

🔍

🔊

🕒

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

Preview Email

The Operational Change below now requires your approval.

Requested by [REDACTED]

Region: US & Canada

Short Description: TEST CHANGE

Comments: TEST CHANGE

[REDACTED]

Approval Matrix

As we unify the CAB process for [redacted] we'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 [redacted] and [redacted] where either member can approve the request.

2nd Level Approvers - Medium and Major Risk Levels

Service Group	EMEA - Lead/Owner	EMEA - Backup/Owner	EMEA - Director
Account Administration	[redacted]	[redacted]	[redacted]
Applications	[redacted]	[redacted]	[redacted]
Hardware	[redacted]	[redacted]	[redacted]
Infrastructure	[redacted]	[redacted]	[redacted]
Legacy	[redacted]	[redacted]	[redacted]
Master Data Management - EMEA	[redacted]	[redacted]	[redacted]
Master Data Management - US	[redacted]	[redacted]	[redacted]
Printer	[redacted]	[redacted]	[redacted]
Salesforce	[redacted]	[redacted]	[redacted]
SAP	[redacted]	[redacted]	[redacted]
Site Wide	[redacted]	[redacted]	[redacted]

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.

ZW Zshaquel Walker

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