Technical and Functional Approval Checklist

**Important:**

The following questions must be used as a guideline in determining what **Technical Approvers** need to be assigned in the Change Request.

*Select all check boxes which apply to your Change.*

*If any item in a section has a check box selected then that section must have a Technical Approval order assigned and completed by the appropriate team member in that group.*

*If the answer to* ***any*** *of the questions for any group is “I don’t know”, please contact a member of that group to find the answer.*

Digital Application Support

Will this Change?

* Addition of or modification to the code platform for our Digital Banking
* Contain modifications to the supporting architecture for Digital Banking
* Impact any T24 functional areas of **Digital Membership Opening (DMO):**
  + Creation - Customer profile, Membership, Account and/or Card
  + Creation or Update - Online Personal Access Code (PAC) or CRM notes
  + Mobile Deposit Capture (Deposit On-the-go)
* Involve modifications to:
  + CCS.com, Coast Online, Coast Mobile or any other e-business app
* Directly or Indirectly impact components of our Digital Banking platform

Digital Experience

Will this Change?

* Impact how the Digital Banking platform interacts with members
* Cause a planned or unplanned outage to the Digital Banking platform
* Introduce new features to the Digital Banking platform
* Require the involvement or awareness of the Digital Experience team

Enterprise Architecture

Will this Change?

* Impact the Design/Architectural documentation?
* *If so, has updated Architecture attached to Change Request?*
* Require the creation, removal or renaming of an item in the Enterprise

Architecture Service Catalogue

* Require the involvement or awareness of the Enterprise Architecture team

Disaster Recovery

Will this Change?

* Introduce a new system/service to CCS?
* Introduce major updates to a system/service impacting how DR is executed
* Take a DR system offline or make it out of sync with PR?
* Have potential to directly or indirectly impact our Disaster Recovery posture

Help Desk

Will this Change?

* Require additional training or support documentation for Help Desk to support?
* Potentially increase call volume to the Help Desk/ Contact Centre

Information Security Officer (ISO)

Does this Change?

* Relate to a system which processes or stores confidential data like:
  + Member Personal Data, (i.e. name, email, SIN, date of birth, address)
  + Member PACs (Personal Access Codes) or PANs?
  + Other sensitive/confidential data?
* Significantly affect existing network and/or server topology or introduce new

Network objects/assets?

* Involve new or existing external (partner) services/assets?
* Include any new types of data (such as new protocols, applications, business

data classes)?

* Have the potential to impact a critical business system?
* Require the awareness or involvement of the Infosec team?

Infrastructure – Client Desktop

Will this Change involve modifications to?

* Software licensing
* Client desktop hardware or software? (except for Banking Systems)
* Require the awareness or involvement of Desktop SE’s

Infrastructure – Packaging

Will this Change require?

* Automated deployment (Group Policy, Softgrid, SCM etc)
* The creation or modification of a deployment package
* Require the awareness or involvement of SE – Packager

Infrastructure – Server

Will this Change involve any of the following?

* Purchasing new server hardware
* Modifications to existing server hardware/ server firewalls
* Mods to server software
* Modifications to back end processes
* Require the awareness or involvement SE Server
* Have potential to take a server out of service during normal service hours

IT Service Management

Will this Change?

* Release a new software system or large functional change to the end user
* Require a transitional hand off of the software or system to the business

SQL DBA

Will this Change?

* Involve modifications to a Database or Database instance
* Impact a server which has Oracle installed on it
* Affect a large volume of data risking increased time required to process
* Have potential to directly or indirectly impact SQL services

Network

Will this Change:

* Involve modification to Network hardware/services
* Involve disruptions to Network related services
* Involve modification to OOB/Edge/Internet Firewall hardware/services
* Require the involvement or awareness of the Network team

Operations

Will this Change:

* Involve mods to, or impact standard Ops procedures/overnight processes
* Will alarms be generated when Change is implemented?
* Require the involvement or awareness of the on duty Ops staff

Oracle DBA

Will this Change?

* Directly or Indirectly impact a T24 Database or Database instance
* Impact a server which has Oracle installed on it
* Affect a large volume of Oracle data risking increased processing time
* Require the awareness or involvement of a DBA
* Have potential to directly or indirectly impact Oracle services

Platform Engineering Banking

Will this Change involve?

* Addition of new, or mods to existing, T24 server hardware?
* Modifications to T24 Firewall/Firewall Rules
* Mods to T24 server software/applications? (ESB, JBoss, Browser Web)
* Modifications to Banking Platforms OS or Firmware
* Modifications to T24 back end processes
* Potential to directly or indirectly impact the T24 Banking Platform

Project Management

* Is this change generated due in part to a Project or SR
* If so, identify the BR or SR#
* EPMO Project Go Live Certificate Attached to Change Request?

Quality Assurance

Does the Change:

* Make changes to system/service which may negatively impact our monitoring

or reporting for regulatory requirements (Fintrac, AMLTF, CRA)

* Impact the ongoing work of any QA projects
* Involve the addition, removal or modification of software code
* Introduce new or modified functionality to CCS or its members
* Require the awareness or involvement of QA
* Was a Test Summary Report Created? If so, is it attached to Change Request?

Robotic Process Automation (RPA)

Will this Change:

* Make changes to a system which supports or is supported by RPA

Training

If this Change requires updates to training materials:

* Has Corporate Learning been engaged to provide training documentation?
* Has new or updated Training documentation been generated for support? 
  + Has documentation been attached to Change Request?
* Require the awareness or involvement of Corporate Learning