**Request for Change (RFC) form**

All fields on this form are mandatory.

Please complete and return to [SHGITChangeManage@specialistholidays.com](mailto:SHGITChangeManage@specialistholidays.com)

**Change Detail**

|  |  |  |  |
| --- | --- | --- | --- |
| **Number:** | *\*system generated, no input required* | **State:** | *\*system generated, no input required* |
| **Requested by:**  The person raising the request, who could be submitting on behalf of others | Luke Reader | **Approval:** | *\*system generated, no input required* |
| **Requested for:**  This can be anyone in the organisation who needs a change to be made | Chris Storey | **Type:**   * Normal * Emergency * Unauthorised | Check ***ONE*** of the boxes above |
| **Template:**  Specify catalogue template name, if applicable | N/A |
| **Category:**   * Application * Infrastructure * Telecoms * Network | Check ***ONE*** of the boxes above | **Implementation team:**  Team responsible for change coordination and implementation | **Marine IT** (for Neptune, Triton, Hubspot), and  **MI Team** (for Data Warehouse) |
| **Configuration item:**  Specify which CIs are impacted by this change | N/A | **Implementer:**  Person responsible for physical deployment, which could include building and testing | Nick Harris  Paul Foster  Tim Wilson  Adrian Sprake |
| **Affected System:**  Specify the system(s) that will be impacted by this change | Neptune  Triton  Data Warehouse  Hubspot | **Parent:**  Specify the incident/request number, if this change is to resolve an incident/request | N/A |
| **Priority:**  Specify how urgently the change is required   * Critical * High * Moderate * Low | Check ***ONE*** of the boxes above | **Project reference:**  If this change is project related, the project reference or description needs to be provided | Project Name: CRM Phase III  Project Code: 700342 |

**Planning**

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| **Short description:**  Short sentence accurately describing the change | Changes (mainly new fields) to existing data-feeds of bookings and quotes data from two Marine reservations systems Neptune and Triton, via the Data Warehouse, and into Hubspot. |
| **Description:**  Full summary of the change, to include the reason for change, business benefit and the impact of not making the change | |
| * What we are doing?   **Neptune changes** – significant - update database schema and contents, screen changes, and changes to file outputs to Data Warehouse.  **Triton changes** – very small – just use two different fields in the file outputs to Data Warehouse.  **Data Warehouse changes** – significant – currently the live service runs from a UAT instance. This change will put an amended service live, with rebuilt code, using the amended inputs from Neptune and Triton, and also creating amended uploads for Hubspot.  **Hubspot changes** – some - Hubspot will have some amended field names. The main activity will be to wipe out the Hubspot history (backed-up first!), and then reload it all with the new field structure via volume-controlled loads over 4 working days.   * Why we are doing it?   This release is all about improving the data available in Hubspot for CRM activities, primarily targeted marketing to known contacts and customers, for the Marine brands.   * What the outcome of implementing the change will be? (what will be different)   Specifically this release will:   1. make the Neptune data be based around ‘Contact’ rather than ‘Booking’; 2. will improve and correct the data coming from Neptune and Triton into Hubspot; 3. will put the Data Warehouse part of the data-flow onto a formally live platform. | |
| **Implementation plan:**  Detailed step by step implementation plan and associated resource, if more than one. If the change spans more than 24 hours, please include timeline of activities. Timings to be included for how long each activity will take. | **Back out plan:**  Detailed step by step back-out plan and the associated resource, if more than one. Timings to be included for how long each activity will take. |
| Tues 8th May working hours     * Neptune - build release in staging area incl. table rebuilds, code update and compilation, oracle DBA. 4 hours * Hubspot– CRM team will create backups of all data held within the Sunsail. Moorings and Le Boat HubSpot accounts at close of business on Tuesday * Data Warehouse daily jobs for Marine are halted from 13:30hrs as follows (Estimated time: 1 hour):   On UAT server V-AWD-SQL-10 disable the following MS SQL Server jobs:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM  On Live server V-AWD-SQL-09 disable the following MS SQL Server jobs:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  And archive copies of the downloaded Triton and Neptune data feed files ready for the Backout Plan.  Tues 8th May 9:00pm UK time   * Neptune - backup live contact tables for rollback. 1 hour   Tues 8th May 10:30pm UK time   * Neptune database and code changes made (estimate is 2 hours):  1. Backup live source area : 10 mins 2. Transfer changed table definitions and update deployment script : 5 mins 3. Take Neptune offline : 1 min 4. Run deployment script : 15 mins 5. Oracle DBA for grants etc. : 10 mins 6. Run data conversions : 1hr 7. Bring Neptune online : 1 min 8. Smoke test : 20 mins    1. Direct bookings    2. Contact view/mod    3. Online bookings  * Triton changes made using Rocket Aldon Change Management System. Additional setups will be done by Paul Foster. (estimate is 1 hour, including brief smoke testing)   Weds 9th May from 8am UK time   * Data Warehouse release is done, and first new downloads from Neptune and Triton are taken, as follows (estimated time: 3 hours):   *All the following actions will be performed on Live server* ***V-AWD-SQL-09***  Backup databases CelerityMarine\_Stage and NEPTUNE\_Stage ready for the Backout Plan  Copy new versions of these databases from the development server V-AWD-SQL-11  Copy new database HUBSPOT from the development server V-AWD-SQL-11  In the HUBSPOT database modify the selection stored procedures to select 10 days’ worth of data (just for the initial run)  Backup the following SSIS packages ready for the Backout Plan:  NeptuneDataExtract.dtsx  NeptuneDataLoad.dtsx  NeptuneCRM.dtsx  TritonCelerity.dtsx  TritonCelerity\_ENews.dtsx  Backup the following SSIS packages' configuration files ready for the Backout Plan:  G:\SSIS\_Configs\Marine\Import\NeptuneDataExtract.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneDataLoad.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneCRM.dtsConfig  G:\SSIS\_Configs\Marine\Import\TritonCelerity.dtsConfig new file  G:\SSIS\_Configs\Marine\Import\TritonCelerity\_ENews.dtsConfig new file  Deploy new versions of the following SSIS packages from the development server V-AWD-SQL-11:  NeptuneDataExtract.dtsx  NeptuneDataLoad.dtsx  NeptuneCRM.dtsx  TritonCelerity.dtsx  TritonCelerity\_ENews.dtsx  Deploy new versions of SSIS packages' configuration files from the development server V-AWD-SQL-11:  G:\SSIS\_Configs\Marine\Import\NeptuneDataExtract.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneDataLoad.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneCRM.dtsConfig  G:\SSIS\_Configs\Marine\Import\TritonCelerity.dtsConfig new file  G:\SSIS\_Configs\Marine\Import\TritonCelerity\_ENews.dtsConfig new file  Update SSIS packages' configuration files to reflect the Live environment  e.g. server names, data feed file locations and names, etc.  Deploy new versions of operating system batch files, etc. into these folders:  G:\Marine\MarineCRM\HUBSPOT  G:\Marine\Triton\Batch\_files  Update operating system batch files to reflect the Live environment  e.g. server names, data feed file locations and names, etc.  Create a new MS SQL Server job ‘Marine – Export – HubspotCRM’ copying the configuration details from the job on UAT server V-AWD-SQL-10  Enable the following MS SQL Server jobs (but do not enable their schedules):  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM  Perform a one off run of the following MS SQL Server jobs in turn checking results / errors / etc.:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM  Once all the one off and historical period loads have been completed then the following MS SQL Server jobs’ schedules can be enabled:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM  Note that the following MS SQL Server jobs on UAT server V-AWD-SQL-10 will NOT be re-enabled:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM   * First new upload from Data Warehouse to Hubspot is done - Initial load to be 10 days worth of eNews/ then Brochure requests/ then quotes then Bookings across all 3 HubSpot accounts and in that order. CRM team to then check the new data in HubSpot and confirm whether they are happy with it***.***   Thurs 10th, Mon 14th, Tues 15th May UK working day   * Each day another catch-up upload from Data Warehouse to Hubspot is done - Once CRM team are happy with the limited 10 day load, MI team to go ahead and load all data in the same order as the 10 day test. Adrian to request increase of contact API limit via the HubSpot account manager to enable the complete database update to be completed as quickly as possible. | Neptune : estimate 2 hours :   1. Take Neptune offline : 1 min 2. Restore backup source area : 10 mins 3. Rebuild changed tables on previous definition    * May require use of backed up data    * 1 hour 4. Oracle DBA for grants etc : 10 mins 5. Bring Neptune online : 1 min 6. Smoke test : 20 mins    * Direct bookings    * Contact view/mod    * Online bookings   Triton: Triton backout of changes made using Rocket Aldon Change Management System. Additional setups will be reversed out by Paul Foster. (estimate is 1 hour, including brief smoke testing)  Hubspot: should anything go wrong on Wednesday, Adrian will look to replace the incorrect data loaded into HubSpot on Weds morning with the backup data from CoB on Tuesday. This should take about an hour per account – there are 3 accounts.  Data Warehouse (Estimated time: 2 hours):  On UAT server V-AWD-SQL-10 enable the following MS SQL Server jobs:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Marine - Export - HubspotCRM  On Live server V-AWD-SQL-09:  Restore the CelerityMarine\_Stage and NEPTUNE\_Stage databases from backups  Drop the HUBSPOT database  Delete the Marine – Export – HubspotCRM MS SQL Server job  On Live server V-AWD-SQL-09 restore the following SSIS packages from backups:  NeptuneDataExtract.dtsx  NeptuneDataLoad.dtsx  NeptuneCRM.dtsx  TritonCelerity.dtsx  TritonCelerity\_ENews.dtsx  On Live server V-AWD-SQL-09 restore the following SSIS packages’ configuration files from backups:  G:\SSIS\_Configs\Marine\Import\NeptuneDataExtract.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneDataLoad.dtsConfig  G:\SSIS\_Configs\Marine\Import\NeptuneCRM.dtsConfig  G:\SSIS\_Configs\Marine\Import\TritonCelerity.dtsConfig new file  G:\SSIS\_Configs\Marine\Import\TritonCelerity\_ENews.dtsConfig new file  On Live server V-AWD-SQL-09 enable the following MS SQL Server jobs:  Marine - Import - Neptune  Marine - Import - NeptuneCRM  TritonCelerity  TritonCelerity\_Enews  Manual run of HubSpot data feed file processing and data upload using data feed files saved on Tuesday. |
| **Impact/Risk assessment:**  A consequence statement that helps clearly articulate the impact/risk (s) associated with this change. | **Test plan:**  Detailed pre and post implementation test steps, and to specify test resource where this is someone other than the implementer. Test Evidence to be provided when the change is submitted. |
| **Neptune** – in the worst case the changes could leave the system unusable and Neptune data corrupted in the schema. The mitigating factors are the prior testing, a practise release exercise into Staging, and smoke-testing with rollback option post go-live.  **Triton** – very little risk to business usage.  **Data Warehouse** – the risk is minimal because the current service is run from a test environment which won’t be changed.  **Hubspot** - in the worst case the changes could leave the data in Hubspot unusable and/or massively incomplete. The mitigating factors are the prior testing plus a full copy being taken allow a rollback option post go-live.  In terms of Outage, the only systems being used in real-time are **Neptune** (2 hours outage estimated) and **Triton** (no outage anticipated) | **Pre-release testing** has been performed over a period of months involving staff from all affected teams. All Critical and High issues were logged in Jira and have been resolved.  **Post go-live Smoke Testing** is scheduled for Neptune (significant changes) and Triton (small changes). And data-checking of the uploads into Hubspot will test that the Data Warehouse and Hubspot changes are working correctly. |
| **Communication plan:**  Summarise what stakeholder communication/engagement (business, IT, 3rd party) has been undertaken and what is still required, if any. | |
| **IT Teams and Managers** – Luke Reader to issue daily comms as release stages progress.  **Neptune users** (Le Boat) – Paul Lambert will as usual issue a release notification including the downtime.  **Tritons users** (Yachts) – no specific comms as user functionality not impacted and risk of adverse impact regarded as vanishingly small.  **Hubspot/Data Warehouse users** – Adrian Sprake will handle the comms to the users. First email to go to the marketing heads this week advising them of trickle-down email comms he will initial with them by Tuesday night for dissemination to their teams. Adrian to also ask for them to keep an eye on their list volumes and contents to check these are not adversely affected.  No communications are needed to be sent from the Service Desk. | |

**Schedule**

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| --- | --- |
| **Planned start date:**  Planned start date & time, of the first implementation step | Tuesday 8th May |
| **Planned end date:**  Planned end date & time should allow for post implementation testing and rollback, if required | Tuesday 15th May – see full schedule above |

**Service outage**

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| --- | --- |
| **Outage start date:**  Outage start date & time, of the first implementation step requiring an outage | Neptune – Tues 8th May 10:30pm |
| **Outage end date:**  Outage end date & time should allow for rollback, if required | Neptune – Weds 9th May 00:30am (2 hours) (if go-live successful).  If rollback required :   * Temp reschedule overnight crons between 00:30 & 2:30 to post 2:30 * Further 2 hours to 2:30 for rollback |

**Implementation Record**

This section should be completed and returned to [SHGITChangeManage@specialistholidays.com](mailto:SHGITChangeManage@specialistholidays.com) within 24 hours of the scheduled change end time

|  |  |  |  |
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| **Work start:**  Please specify ACTUAL change start time |  | **Work end:**  Please specify ACTUAL change end time |  |
| **Closure state:**   * Successful * Successful with issues * Failed backed out successfully * Failed backed out with issues * Closed skipped | Check ***ONE*** of the boxes above | **Work notes:** |  |

**Post Implementation Review**

If anything other than ‘successful’ has been selected as the ‘closure state’ above, please complete the relevant questions below:

**Successful with issues**

|  |  |
| --- | --- |
| Did the change cause an incident?   * Yes * No | Check ***ONE*** of the boxes above |
| Incident Number: |  |
| What will be done differently at the next attempt? |  |

**Partially completed**

|  |  |
| --- | --- |
| What will be done differently at the next attempt? |  |
| Why the change was partially completed. |  |
| What tasks within the change are still outstanding? |  |
| What issues occurred during the change? |  |

**Failed backed out successfully**

|  |  |
| --- | --- |
| Why did the change fail? |  |
| Did the change cause an incident?   * Yes * No | Check ***ONE*** of the boxes above |
| Incident Number: |  |
| What issues occurred during the change? |  |
| What will be done differently at the next attempt? |  |

**Failed backed out with issues**

|  |  |
| --- | --- |
| Why did the change fail? |  |
| Did the change cause an incident?   * Yes * No | Check ***ONE*** of the boxes above |
| Incident Number: |  |
| What issues occurred during the change? |  |
| What will be done differently at the next attempt? |  |

**Closed Skipped**

|  |  |
| --- | --- |
| Why was the change skipped? |  |