University of Oregon

Change Management Process

UO Blogs
Revision History

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<tr>
<th>Date</th>
<th>Author</th>
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<tr>
<td>4/3/2012</td>
<td>K. Davis</td>
<td>1.0</td>
<td>New document</td>
</tr>
<tr>
<td>4/16/12</td>
<td>K. Davis</td>
<td>1.1</td>
<td>Revision</td>
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Introduction
ITIL defines the Change Management process as the following endeavor:

The goal of the Change Management process is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the impact of change-related incidents upon service quality, and consequently improve the day-to-day operations of the organization.

The purpose of this document is to propose or outline a process that can be implemented for the UO Blogs review board at the University of Oregon. A process that will allow us to better identify, schedule, communicate, and implement the changes we see and act on as an organization.

Considerations/Assumptions
A primary consideration in implementing a new change management process is to not build a system that will create more red tape and slow business down. Instead, if done correctly, it should help the UO Blogs review board better understand the UO Blogs infrastructure and application we support and allow us to better plan for future growth.

To that point, this is going to be an organization wide effort with a number of considerations and assumptions that will need to be addressed. Following is a list of major items:

- Define and create a Change Advisory Board (CAB)
- Define what signifies a change to UO Blogs versus change to user accounts.
- Define change request categories (Minor, Significant, and Major).
- Define change request priority levels (Normal vs. Urgent).
- Determine which tool will be used to submit change requests.
- Determine how change communications will be handled.

Please note that this list may very well expand as we move through the project.

Change Request Workflow
Following the guidelines laid forth by ITIL, the Change Request process would resemble the following:

1. Request for Change (RFC)
2. Log Change Request
   2.1. Description of business need
   2.2. Outline work to be completed
   2.3. Outline back out plan
   2.4. Set priority level
      2.4.1. Normal
2.4.2. Urgent

2.5. Determine type of change
   2.5.1. Incident/defect in UO Blogs
   2.5.2. Change to UO Blogs
   2.5.3. Change to User Account

2.6. Categorize
   2.6.1. Minor
   2.6.2. Significant
   2.6.3. Major

3. CAB Review
   3.1. Approved
   3.2. Not Approved/Re-Work

4. Schedule and Communicate

5. Implement Change
   5.1. Review for success
   5.2. Back-out if unsuccessful

6. Close RFC
Change Request Workflow Diagrams

Change Request for UO Blog User Activity/Content

Request for change via RT*

Change request AUP violation?

Yes

Change implemented.

No

General Counsel consulted/approval provided?

Yes

General Counsel consulted/approval provided

No

User must contact general counsel for approval for specified change request

Documentation that general counsel has approved change request

Yes

Change implemented

No

Ticket closed

Request for change must be for your user within your school/college/unit.

Change requests for blog users could be the following:

- Shutting down a blog
- Changing blog username
- Blogger violates AUP
- Changing blog content for user
- Adding admin for user
Change Request for UO Blogs Functionalitiy

Change request for UO Blogs could be the following:
- Change management of homepage
- Change to service that will effect all blog users
- Theme implementation
- Plugin implementation
- Department specific implementation of themes/plugins

Request for change

Log change

Incident/Defect?

CAB review change request

Re-work?

Schedule and communicate, specifically with the User Group

Implement change

Back-out

Close ticket

Successful

Not successful

Not approved

Yes

Approved

No
Change to UO Blog User Account Process

Changes to a UO Blogs user account could be the following:

- Shutting down a user’s blog due to:
  - Violation of AUP ([http://it.uoregon.edu/acceptable-use-policy](http://it.uoregon.edu/acceptable-use-policy) and [http://it.uoregon.edu/aup-addendum](http://it.uoregon.edu/aup-addendum))
  - Violation of Terms of Service
- Change user’s username
- Change user’s blog content
- Adding administrator to user’s blog
- Any change to user’s blog account

Please note that this list may very well expand as we move through the project.

All change requests to user’s blog account will need to be approved by General Counsel before implementation. If change requests have not been approved by General Counsel, requests will be sent back for approval from General Counsel.

Approval confirmation via email or other documented form from General Counsel is required for all change requests.

Changes that can be made to user’s blog account without General Counsel’s approval are the following:

- AUP violation
- AUP addendum violation

Changes to user’s blog account will not require a meeting by the Change Advisory Board because of General Counsel’s involvement for approval. Changes will be implemented by the appropriate support resources that will be identified when the change is scheduled.
UO Blogs Change Management Proposal

UO Blogs Change Process

Changes to UO Blogs requests could be the following:

- Change/addition to homepage (blogs.uoregon.edu) content or design.
- Management of homepage (specially, featured blogs).
- Implementation of UO custom themes
- Implementation of UO custom plugins or additional plugins that are not currently active
- Department specific blog request
- Implementation of department specific themes, plugins, etc.
- Any change to the UO Blogs service that will affect all blog users

Please note that this list may very well expand as we move through the project.

Changes* to UO Blogs would initiate a meeting for the UO Blogs Change Advisory Board. The CAB will be comprised of volunteers from the school and units on campus.

The Change Advisory Board will review the change requested, approve or re-work the request, communicate the change, and schedule the change (see workflow diagram). Changes will be implemented by the appropriate support resources that will be identified when the change is scheduled.

The Change Advisory Board will meet bi-monthly each month to manage the homepage content, review all outstanding, and new change requests. After the service has launched and users are familiar with the service, the CAB will meet on an as-needed basis to review change requests.

If a change request is determined to be an incident or defect** in the application, it will be prioritized and scheduled dependent on resources and vendor availability. The Change Review Board is not required to review incident/defects reports, but may do so at the group’s discretion.

If the Change Advisory Board cannot agree on a change request, the request will be escalated the Blogs Partners Advisory Board for resolution.

*Change request definition: Change requests are those items that are related to new or changed business requirements, items that are questions or concerns with design, use or performance of UO Blogs. Further analysis of a given change request could result in that item becoming re-classified as an incident/defect if it is determined the definition below applies.

**Incident/defect definition: Incidents/defects are items that are production errors in that UO Blogs is not performing as expected. Can also be defined as those events that are not part of the standard operation of UO Blogs and that causes, or may cause, an interruption to, or a reduction in, the quality of that service.