



**Work Instruction: Change Management Process
ITG QWI-26**

Purpose:

This quality work instruction defines the process for implementing changes within the Company using the Change Management module in CENTRE.

Scope:

This instruction applies to staff and managers who contemplate proposing and implementing changes within the Company. All changes related to company defined configuration items (CIs) are to be processed and implemented through the Change Management module in CENTRE. This instruction applies to changes affecting configuration items, intra-departmental transactions or impacting contract performance or requiring CENTRE modifications. Changes not adhering to the procedure defined by the module are considered invalid and unauthorized.

References:

Procedure: Change Management, ITG QP-16
CENTRE, Change Management Module

Definitions:

Change Management is a series of actions required to initiate and implement changes within the Company.

Change Categories: Changes are classified as major, significant, standard, minor and urgent.

Major and Significant Changes are substantial modifications to configuration items (CIs) and require compliance with all the requirements of the Change Request Module in CENTRE. Approval by the Change Authority is necessary. Examples are: ISO Corrective and Preventive Actions, changes to work flow charts, to Company-wide manuals like the Business Quality Manual (BQM), the TAM and SME Reference Guide, and to all major initiatives.

Standard and Minor Changes are routine staff actions not requiring CENTRE modifications or issuance of Software Requirements. Approval by the Change Authority is not necessary. Examples are: Website bugs, updates of standard reports in CENTRE, IT service upgrades and the like. These changes are generated in CENTRE for recording purposes and are issued, approved and completed by the staff issuing the change.



Urgent Change is one which requires immediate resolution.

Responsibility:

This work instruction designates all management staff as responsible to issue and implement changes within the Company. The chairperson of the Best Practices MRB is the designated Change Manager responsible for monitoring the efficient implementation of the Change Management System.

Instructions:

The steps to complete the various categories of Change Requests are listed below:

Major and Significant Changes:

- a. Staff member issues Request for Change (RFC) through CENTRE and assigns it to a table-driven Change Authority or relevant Management Review Board (MRB). This is mandatory. For the purposes of this instruction, staff member is a manager authorized to enter change requests in CENTRE. If the Change Authority cannot easily be identified and assigned, the default Change Authority would be the Best Practices MRB.
- b. At the RFC screen include an “Affected Areas” segment. There should be two list boxes. One list box enabling the user to select Departments, and one that identifies affected contracts by the proposed change. Once the affected contracts have been selected the user should be able to enter text into a memo field, pertaining to the impact of the change and other data for that area(s).
- c. The chairperson and another member of the Board of the selected Change Authority are automatically notified about the issuance of the RFC. Depending on the criticality of the request, Change Authority convenes to review, evaluates risk, impact, and benefit of proposed change and decides on its disposition. Records of evaluation are kept in CENTRE Change records.
- d. If rejected, Change Authority records justification and notifies issuer.
- e. If approved, and if default change authority deems it necessary, assigns the RFC to table-driven change authority (e.g., Infrastructure MRB might assign it to SW MRB).
- f. Second level Change Authority reviews requests, evaluates risk, impact, and benefit of proposed change. Records of evaluation are kept in Change record.



- g. If necessary, issue a SW Requirement from within the RFC record.
- h. If necessary, issue an Action item or Project from within the RFC record.
- i. Monitor and Report. This is to be done by the Change Authority, and the issuer, as appropriate.
- j. Change is implemented. Post implementation review of the RFC is mandatory and will be done by the issuer of the RFC.
- k. System allows attachment of documents to RFC.
- l. If the status of the RFC is set to “Denied” the system automatically notifies the issuer.

Standard and Minor Changes:

- a. Authorized staff member issues RFC in CENTRE, proceeds to approve and completes all actions needed for the maintenance of the operation. Staff informs his/her manager, as appropriate.
- b. Issuer prepares Post Implementation Review and closes the Change Request.

Urgent Change:

- a. Authorized staff member contacts Executive Management directly, defines the nature of the emergency and the change needed, as well as potentially affected departments and any known risks associated with the proposed change.
- b. Executive management evaluates risk, impact and benefits, then either denies the request or approves change concept and implementation of the change on an emergency basis.
- c. Authorized staff member performs steps a and b of the major change procedure, assigns resources designated or approved by Executive Management, and notifies stakeholders, including the default change authority, that an urgent change is taking place.
- d. Implementation proceeds.



Integration Technologies Group, Inc.

- e. Change Manager ensures that steps c and e through j of the procedure for major change are satisfied as quickly as possible during and after implementation of the urgent change.

Records:

An RFC is a record located in the Change Management module in CENTRE.