



**Corporate Services for the Natural Resource Sector
Information Management Branch**

NRS Standards for TCRM Request for Change

Last Updated: June 15, 2016
Version: 1.2
Document: NRS Standards for TCRM Request for Change.docx

Table of Contents

- Version Control 3**
- 1.0 Introduction..... 4**
 - Diagram 1 – TCRM Governance5*
- 2.0 Overview of ISSS Infrastructure..... 6**
 - Diagram 2 – ISSS Infrastructure6*
- 3.0 Request for Change Process..... 7**
 - 3.1. RFC Categories 7
 - 3.2. Deploy release unit or package..... 7
 - 3.3. Infrastructure Change 8
 - 3.4. Emergency Change 8
- 4.0 Release Policy 9**
- 5.0 Appendix 10**
 - Diagram 3 – TCRM RFC – Process and Tools RACI Matrices 10*
 - Diagram 4 – TCRM RFC – Release RACI Matrix 11*

Version Control

Document Version	Date	Author(s)	Change Reference
1.0	June 15, 2016	David Lee, Rick Stroebel, Stephane LeRoy	Initial Draft

1.0 Introduction

The Natural Resource Sector (NRS) is currently transforming Technical Change and Release Management (TCRM) with a focus on Integrated Systems and Services Strategy (ISSS), which is an Integrated Environment where change impacts all. The main objective of TCRM is to ensure that standards and procedures are in place so that changes to the technical environments are managed efficiently, effectively and with the lowest possible impact on service quality. TCRM formed a committee to support the authorisation of technical changes and to assist change management in the assessment and prioritization of changes.

Role of Technical Change and Release Management Committee (TCRMC)

TCRMC provides oversight for ongoing development, management and improvement of Technical Change and Release Management across the Natural Resources Sector.

TCRMC membership includes individuals who are capable of ensuring that the change is adequately assessed from both a business and a technical viewpoint. To achieve this, TCRMC includes resources with a clear understanding across the whole range of stakeholder needs.

The TCRMC acts as a Change Advisory Board (CAB) that meets on a weekly basis to review changes that are pending for the deployment environments.

Change Working Groups receive assignments from TCRMC in order to fulfill its mandate of technical change and release management with continuous improvement.

The TCRMC has the authority to delegate the evaluation of certain types of changes outside of the weekly meeting. There are two types of change that fall under this description:

- Emergency Change – dealt with through emergency meetings of TCRMC members
- Infrastructure Change – delegated to Change Manager

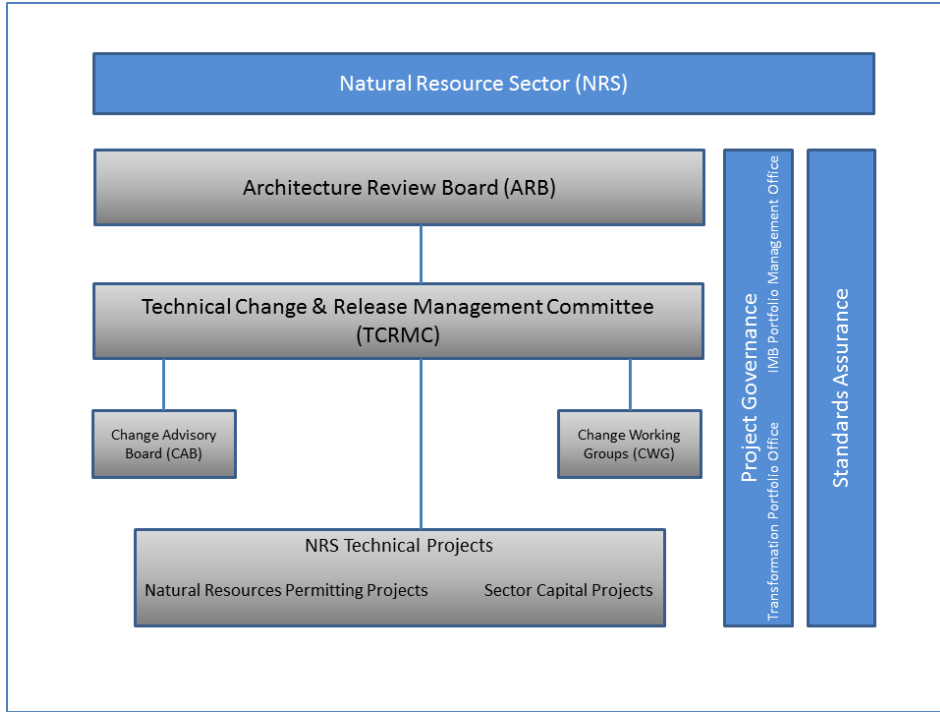


Diagram 1 – TCRM Governance

Diagram 1 shows the Technical Change and Release Management governance and where the Technical Change and Release Management Committee (TCRMC) positions itself.

2.0 Overview of ISSS Infrastructure

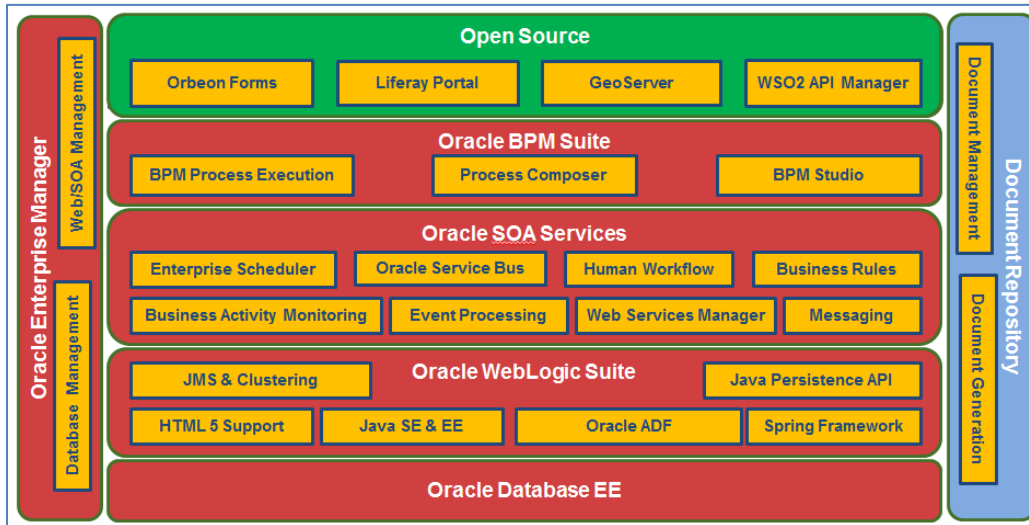


Diagram 2 – ISSS Infrastructure

Diagram 2 shows an overview of the ISSS Infrastructure that TCRMC manages change for. Though the Service Oriented Architecture minimizes much of the complexity of change a high level of coordination is still required to manage impact and deployment change in this infrastructure.

The ISSS Infrastructure is a mix of Oracle and Open Source technologies.

3.0 Request for Change Process

Request for Change (RFC) is the process available for the organization to know change is ready to move through environments and into Production in a controlled manner to minimize the impact to clients.

The Request for Change process highlights information required for the assessment of change. This information is normally available during the Design and Build phases of the SDLC. Sometimes this information is available earlier.

To ensure readiness of all stakeholders of the change the RFC has a subprocess called Request for Deployment (RFD) that articulates the tasks involved in implementing the change.

The workflows for both processes have been implemented in Atlassian JIRA.

Detailed workflows are described by two BPMN diagrams that can be found in the Appendix and are called:

1. BPMN RFC Process in JIRA
2. BPMN RFD Process in JIRA

3.1.RFC Categories

1. Deploy release unit or package
2. Infrastructure change

3.2.Deploy release unit or package

- RFC **should** be created as early as possible
- RFC **should** be created before the end of the Design phase
- RFC **must** be created before deploying to the Integration environment
- RFC **must** be submitted for evaluation 3 business days before the weekly TCRM RFC review meeting
- RFC and RFD will be evaluated upon submission by the Change Manager (CM), Release Manager (RM), Deployment Manager (DM) and technical resources
- RFC being submitted for evaluation **must** have RFD for environment ready for review and approval
- RFC deployment date for applicable environment **must** be set
- RFC being submitted for evaluation **must** have the IRS Application Name (acronym) set

- RFC being submitted for evaluation **must** have the Business Portfolio Manager (BPM) set

3.3. Infrastructure Change

- Infrastructure RFC **must** have a Technical Environment Change (TEC) bulletin posted if the outage causes an outage that impacts users. If in doubt a bulletin must be posted.
- Infrastructure RFC are reviewed by technical resources and **must** be authorised by the CM or their delegate
- Infrastructure RFC being submitted for evaluation **must** have the Business Portfolio Manager (BPM) set

Note: Infrastructure Change is using the RFC workflow and may or may not include RFD workflow as this is still formative. Authorization is delegated to the CM – Change Manager and does not go to the TCRMC for review. This will be formalized in a future release of the RFC process. Deadlines for submission are still formative as well but a good guideline is to allow for two weeks as this is also the requirement for TEC bulletin submissions. This allows time for stakeholders to comment on the timing and the nature of the change.

A RFC will have priorities as follows:

1. Low
2. Medium
3. High
4. Emergency

Low, Medium and High Change

Low, medium and high changes are used to guide the order of required reviews. Most RFC will follow a priority of medium.

3.4. Emergency Change

Emergency change has not been formalized but will still follow the RFC process and does not have to align with the weekly TCRMC RFC review. These changes will be evaluated as required by an ad-hoc meeting/discussion of business stakeholders, the members of the TCRMC and technical resources. This will be formalized in a future release of the RFC process.

4.0 Release Policy

All changes to an NRS Environment are initiated with a Request for Change (RFC).

- An RFC should be initiated as early as possible via the JIRA tool
- RFCs are reviewed every Thursday, and must be submitted at least three (3) business days in advance
- RFCs must be updated and resubmitted for each target environment (Integration, Test, and Production).
- An emergency RFC may be handled outside of this policy on an exception basis.

Deployment constraints:

- Integration environment – Daily
- Test environment – Daily
- Production environment – To be negotiated

5.0 Appendix

The RACI matrices that follow are used to clarify roles and responsibilities for these processes along with definitions.

- **Responsible:** Those who do the work or ensure the work is done to achieve the deliverable. There is typically one role with a participation type of responsible, although others can be delegated to assist in the work required (see also RACI below for separately identifying those who participate in a supporting role).
- **Accountable:** (also approver or final approving authority): The one ultimately answerable for the correct and thorough completion of the deliverable, and the one who delegates the work to those responsible. In other words, an accountable must sign off (approve) on work that responsible provides. There must be only one accountable specified for each deliverable.
- **Consulted:** has critical information or skill sets to complete or participate in a deliverable. Those whose opinions are sought, typically Subject Matter Experts; and with whom there is two-way communication.
- **Informed:** Those who are kept up-to-date on progress, often only on completion of the deliverable; and with whom there is just one-way communication.

	Change Manager	Deployment Manager	Release manager	TCRMC	Business Portfolio Manager (Business)	IMB or Vendor Technical Lead	JIRA Administrator (App Delivery)
PROCESS							
ISSS RFC process	R	I	C	A	C	I	I
ISSS RFD process	C	AR	I	C	C	C	I
TOOLS							
RFC and RFD implementation in JIRA	C	C	I	A	C	I	R
ISSS Release Policy and Release calendar	C	I	R	A	C	I	

Diagram 3 – TCRM RFC – Process and Tools RACI Matrices

	Change Manager	Deployment Manager	Release manager	TCRMC	Business Portfolio Manager (Business)	Vendor Technical Lead	IMB Technical Resource(s)
RELEASE							
ISSS RFC creation and closing	C		I		AR	I	
ISSS RFD creation and closing	I	I	I		AR	C	
ISSS release scheduling (in BPM portfolio)	C	C	C	I	AR	I	
ISSS scheduling conflict management	I	C	AR	I	C	C	
RFC evaluation	AR	C	C		C		
RFC authorization	A	I	C	R	I	I	I
RFD evaluation	I	AR	C	I	I	C	C
RFD authorization		A			I	C	R

Diagram 4 – TCRM RFC – Release RACI Matrix