

# EGI Change Management CHM

## The EGI Change Management (CHM) Process Introduction and Overview

This is the public homepage of the EGI Change Management Process. Change management within the EGI's production IT environment is extremely important in ensuring high-quality delivery of IT services.

The purpose of the IT Change Management Policy is to manage *higher risk changes* in a planned and predictable manner in order to assess risks, assign resources, and minimize any potential negative impact to services. This is done by requiring change owners to prepare submit a [Jira ticket](#) including information about the change, which is then considered by the Change Advisory Board (CAB).

The CAB meets to assess and approve changes and is coordinated on the [egi-cab@mailman.egi.eu](mailto:egi-cab@mailman.egi.eu) mailing list. It consists of employees of the EGI Foundation including the Technical Director and members of the senior operations and management team. The CAB chair and members consists of employees of the EGI Federation. Others may be invited to join to provide additional expertise when discussing specific changes. The decision to approve changes is made unanimously by the CAB using input from experts, when present. CAB meetings are now tracked on Indico [here](#).

Here is a brief introduction to the different change management procedures. More details may be found in the [CHM Process Pages](#).

### Normal changes

The basic procedure for a *normal change*, is as follows:

1. For **higher risk changes** (score >4), the Change Requester (usually the Service Supplier - see below) opens a [Jira ticket](#). Lower risk changes *do not need to be recorded* unless the change can affect other services under EGI Change Control, or unless the Change Requester feels that there is benefit from doing so.
2. The change risk of something going wrong (risk = likelihood X impact) should be recorded in the ticket in preparation for the CAB review. Further details about evaluating risk may be found [here](#).
3. If the change is urgent, the Change Requester should send an email to [EGI-CAB](#) to convene the CAB which reviews the change with the Change Requester present. Once approved, this decision is recorded on the ticket (along with the planned intervention date) and the change may proceed.
4. The change should be implemented following Release and Deployment Management. After the change, the Change Owner should update the Jira ticket with the intervention date, a comment about the outcome of the change.
5. The change is reviewed at the next CAB and the ticket closed, with the intervention date recorded, if different from the planned intervention date.

### Standard changes

In addition, repeated changes of a similar type may be approved as a *standard change* by the CAB. Subsequent changes that have first been registered as a normal change and executed without problems do not then require explicit approval (or review) by the CAB; it is sufficient for the Service Instance Owner to submit a [Jira ticket](#) to recording the change and confirming that it is a standard change. After the change, the Service Instance Owner can then review the change by adding a comment to the ticket saying whether the change was successful and close the ticket. The list of standard changes is provided [below](#).

### Emergency changes

Sometimes changes need to be done to address a critical situation (e.g. patch to fix a newly discovered vulnerability) and there may be insufficient time to follow the normal change procedure.

1. The Change Requester opens a [Jira ticket](#).
2. CHM staff approve the change
3. The change should be implemented following Release and Deployment Management. After the change, the Change Owner should update the Jira ticket with the intervention date, a comment about the outcome of the change.
4. The change is reviewed at the next CAB and the ticket closed, with the intervention date recorded, if different from the planned intervention date.

### Services that fall under EGI Change Control

This is the list of services that are under the scope of EGI Change Control. The people responsible for these services are listed in the [SFRM database](#).

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Service	Service Supplier
DataHub	CYFRONET
Training Infrastructure	EGI Foundation
Collaboration Tools (Document Repository, Indico, Mailing lists, Mediawiki, RT, SSO)	CESNET
Notebooks	EGI Foundation

## Previous services that fell under EGI Change Control but are now under EOSC-hub Change Control

Under the EOSC-hub project, a new Service Management System has been set up. Within it is Change Management covering the services within the EOSC Hub portfolio. This includes some services that were previously under EGI Change Management. As such, changes to these services should no longer be submitted to the EGI Change Management, but instead should be submitted [here](#). Standard changes for these services are listed [here](#).

Service
EGI AppDB
Operations Portal
Service Monitoring - ARGO
Configuration Database - GOCDB
Helpdesk - GGUS
Accounting - Accounting repository (Computing and Grid)
Accounting - Accounting Portal
Messaging
Check-in

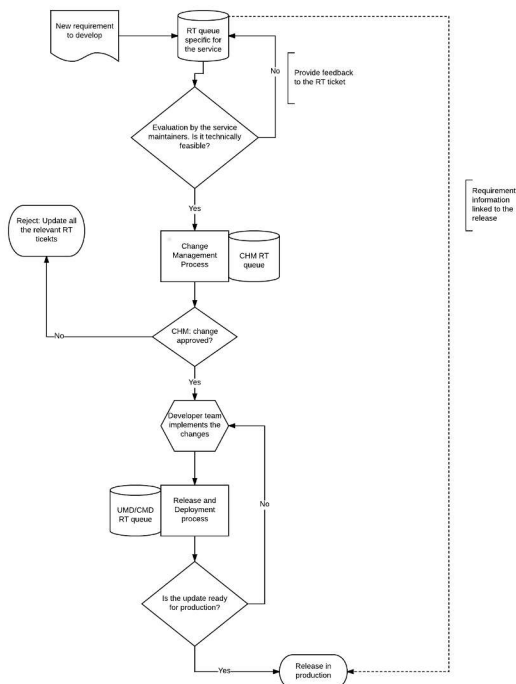
## Standard Changes

Service	Title	Description	Change Request Reference
DataHub	Upgrade Onedata on the EGI DataHub	Upgrade of the EGI DataHub Onezone.	<a href="#">RT#12396</a>
Collaboration Tools	Reboot of a VM following a regular OS update	Rebooting Collaboration Tools VMs following regular OS updates.	<a href="#">JIRA#IMSCHM-28</a>

## Software Development changes

Most changes that fall under the scope of CHM are likely changes to production service delivery (e.g. upgrades, major hardware changes etc). However, changes may also be in the form of software development to production services. For example, if a user community requests new functionality from developers that requires 2 months of development effort, there may be a risk of insufficient funded effort, or a risk of reduced manpower elsewhere in the project. This can especially be the case if such development is unforeseen at the beginning of a project. In such cases, persons managing services are encouraged to bring such changes to the CAB for discussion, approval and (where appropriate) appropriation of development effort.

The workflow of such changes can be seen on this diagram, which additionally shows how the output of the Change Management process interacts with the Release and Deployment process.



## Federated Change Management

The EGI Change Management is a centralized process for the EGI Federation. If organisations are providing EGI branded services and are already running their own internal Change Management process, they may continue to do so if their process meets the essential requirements of ISO20k with respect to change management:

- is there a systematic way of evaluating the risk for changes?
- is there a procedure within the organisation for approving high-risk changes
- are high-risk changes recorded (who implemented the change, when was it implemented and what was its outcome)?

In addition to the above, if any changes are planned that have the potential to impact other EGI branded services, then the EGI Change Management process should be informed in advance by submission of a ticket to the Jira queue linked above.

EGI should keep track of organizations running their own internal Change Management process and should periodically run a lightweight audit to ensure that the above requirements are being met.

## Full Procedure Documentation

Documentation of the complete CHM procedures and policy is available on the [internal EGI Confluence](#). Please note that these pages are only accessible to EGI Employees, so PDF snapshots of these pages are additionally available here:

[Change Management Process Definition, including Goals, Requirements, Roles and Definitions](#)

[Change Management Policy](#)

[CHM1 - Manage changes including emergency changes](#)

[CHM2 - Maintain the list, descriptions and step-by-step workflows for well-known and recurring changes](#)

[CHM3 - Federated Change Management](#)

## Contact

If you have any questions relating to EGI Change Management, please contact Valeria Ardizzone (valeria.ardizzone AT egi.eu).