



Change Management

Purpose: “[C]ontrol the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services.” (ST 4.2.1)

Activities include: Assessing the impact of business change on IT, analyzing the risk of a service or IT change, controlling change authorization, notifying potentially affected parties (of proposed, planned and implemented changes), recording and maintaining accurate change, and other related records (ST 4.2.3.)

General Platform Criteria Assessment Questions

PinkVERIFY #	General Platform Criterion Assessment Question
ISS #	
Vendor Response: (cell expands to accommodate response)	
CHG-11-G-001	Does the tool use ITIL® 2011 Edition process terms and align to ITIL 2011 Edition workflows and process integrations?
N/A	
<i>Comment:</i>	
CHG-11-G-002	RFC Control
3.15	Does the tool control the ability to open, modify and close RFCs based on role? (To ensure that only authorized amendments are made.)
<i>Provide an overview description of the tool's security permissions' capability, structure and authority basis (e.g.: based on role, organization, location).</i>	
CHG-11-G-003	Does the tool support designating fields as mandatory?
N/A	
<i>Provide an overview:</i>	
CHG-11-G-004	Management Reports
3.20	Does the tool produce reports from record detail captured? E.g., number of changes closed over any given period, total number of active, closed, successful, failed, by category, by CI, by performing team; number of change proposals, RFC (assessments, assessment status), by change lifecycle stage, by requestor, by performing team; number of change reviews; change evaluation reports/interim reports; projected service outages; change schedule; CAB actions on RFCs by category, CI, requestor, performing team.
<i>Provide an overview:</i>	
CHG-11-G-005	Does the tool facilitate the production of management reports from historical records?
N/A	
<i>Provide an overview:</i>	
CHG-11-G-006	Secure Audit Log
3.19	Does the tool provide a secure audit log of all change updates, resolution notes and who made them?
<i>Describe:</i>	
CHG-11-G-007	Escalation
3.13	Does the tool support client-defined escalation?
<i>Describe:</i>	



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<i>Vendor Response: (cell expands to accommodate response)</i>	
CHG-11-G-008 N/A	Does the tool provide facilities within the tool database for archiving closed records?
<i>Describe:</i>	



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Core Criteria Assessment Questions

PinkVERIFY #	Core Criterion Assessment Question
ISS #	
<i>Vendor Response: (cell expands to accommodate response)</i>	
CHG-11-C-001	Raise and Record Changes
3.1	Does the tool automatically allocate a unique reference number for each RFC?
<i>Describe (can include screenshots):</i>	
CHG-11-C-002	RFC Date and Time Stamp
3.2	Does the tool automatically apply the date and time to new/updated change records?
<i>Describe (can include screenshots):</i>	
CHG-11-C-003	Monitoring and tracking
3.16	Does the tool support change monitoring and tracking throughout its lifecycle? E.g., that the change is being assessed, has been approved, built, reviewed or has been closed. May include a reference to SLAs.
<i>Describe (can include screenshots):</i>	
CHG-11-C-004	Type of Change
3.4	Does the tool recognize/handle standard, normal and emergency types of change? E.g., does the tool handle a separate process flow for each?
<i>Describe (can include screenshots):</i>	
CHG-11-C-005	Change Category
3.5	Does the tool differentiate between minor, significant and major changes?
<i>Describe (can include screenshots):</i>	
CHG-11-C-006	Change Authorization hierarchy
3.8	Does the tool support the formal documentation, in the CMS, of the change authorization hierarchy for approving changes?
<i>Describe (can include screenshots):</i>	
CHG-11-C-007	Reject RFCs
3.3	Does the tool support the ability to reject changes and that this can be done by specified role only?
<i>Describe (can include screenshots):</i>	
CHG-11-C-008	CAB Responsibilities
3.7	Can the tool accommodate the ChM responsibilities of CAB members on a role by role basis?
<i>Describe (can include screenshots):</i>	



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PinkVERIFY #	Core Criterion Assessment Question
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Vendor Response: (cell expands to accommodate response)	
CHG-11-C-009 3.6	Priority Allocation Does the tool support client-defined business impact and urgency to determine the priority of changes?
<i>Describe (can include screenshots):</i>	
CHG-11-C-010 3.9	Change Authorization Does the tool support the means to indicate, such as a check-box, that a change has been approved?
<i>Describe (can include screenshots):</i>	
CHG-11-C-011 3.10	Change Assessment Does the tool support the assessment process? E.g., client definable data for resources, technical, financial or business risks and benefits.
<i>Describe (can include screenshots):</i>	
CHG-11-C-012 3.11	Change Scheduling Does the tool provide a change schedule that records all approved changes (including standard changes and changes using change models) with appropriate access control for the change manager - and clear communication to users, customers and support staff.
<i>Describe (can include screenshots):</i>	
CHG-11-C-013 3.12	Projected Service Outage Does the tool provide a PSO view or schedule?
<i>Describe (can include screenshots):</i>	
CHG-11-C-014 3.14	Remediation Planning Does the tool require for every change authorization presentation of evidence that a successfully tested back out or remediation plan is associated with the change to be authorized?
<i>Describe (can include screenshots):</i>	
CHG-11-C-015 3.18	Change Review Does the tool prompt when completed changes are ready to be reviewed and accommodate details about change reviews that have been carried out?
<i>Describe (can include screenshots):</i>	
CHG-11-C-016 3.17	Change Closure Does the tool show when a change has been closed? Client-defined closure categories would be a helpful feature.
<i>Describe (can include screenshots):</i>	



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Vendor Response: (cell expands to accommodate response)	
CHG-11-C-017 3.23	Change Models Does the tool support the creation and use of change models for the management of changes?
<i>Describe (can include screenshots):</i>	
CHG-11-C-018 3.24	Standard Changes Does the tool support the workflow associated with implementing standard changes?
<i>Describe (can include screenshots):</i>	
CHG-11-C-019 3.25	Standard Changes Does the tool show standard changes in the change schedule?
<i>Describe (can include screenshots):</i>	
CHG-11-C-020 3.26	Change Proposals Does the tool support the submission, analysis, design & scheduling of change proposals?
<i>Describe (can include screenshots):</i>	
CHG-11-C-021 3.27	Change Proposals Does the tool accommodate the linking of change with its business case, risk and requirements documentation?
<i>Describe (can include screenshots):</i>	
CHG-11-C-022 3.28	Change Impact Does the tool support the understanding of the impact of the change (by reference to the CMS, SLAs and other information)?
<i>Describe (can include screenshots):</i>	
CHG-11-C-023 3.29	Service Change Does the tool ensure that the scope of a service change is documented?
<i>Describe (can include screenshots):</i>	
CHG-11-C-024 3.30	CAB Meetings Does the tool provide support for the CAB & eCAB process, including meetings?!
<i>Describe (can include screenshots):</i>	



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Integration Criteria Assessment Questions

PinkVERIFY #	Integration Criterion Assessment Question
ISS #	
<i>Vendor Response: (cell expands to accommodate response)</i>	
CHG-11-I-001	Does the tool integrate with Incident Management to enable the creation and maintenance of the linked relationships between Incident Record(s) and associated Change Records?
N/A	
<i>Describe (can include screenshots):</i>	
CHG-11-I-002	Does the tool facilitate the communication of Change information and schedules that can be distributed to the Service Desk and user groups? For example, the use of email, change schedules and whiteboard communication methods
N/A	
<i>Describe (can include screenshots):</i>	
CHG-11-I-003	Problems & Known Errors Does the tool support the association of problem and known error records with RFCs?
3.22	
<i>Describe (can include screenshots):</i>	
CHG-11-I-004	Does the tool integrate with a Configuration Management System (CMS) / Configuration Management Database (CMDB) to enable the creation and maintenance of the linked relationships between Change Record(s) and associated Configuration Item (CI) Records?
N/A	
<i>Describe (can include screenshots):</i>	
CHG-11-I-005	CMS Integration Does the tool have an integrated CMS to aid change management assessment and authorization?
3.21	
<i>Describe (can include screenshots):</i>	
CHG-11-I-006	Does the tool facilitate integration with Release and Deployment activities by supporting Release and Change workflow integration at the task and record level? For example: release activity scheduling and authorization through Change Management
N/A	
<i>Describe (can include screenshots):</i>	