

Information Technology Services (ITS)

Standard Change Request Process Guide

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1. Purpose

The purpose of this document is to define the processes within The Uniting Church in Australia, Synod of NSW and The ACT for managing a Standard Change request.

2. Definitions

Standard Change

A change to an IT service or infrastructure for which there is a defined trigger, a pre-authorised approach and an accepted and established procedure to fulfill the request.

IT service

Any technological based service within the Synod of NSW and the ACT which helps facilitate work productivity– laptop, printer, desktop, mobile phone, network connectivity, software and business applications.

Line Manager

The person to whom individuals or teams directly report to in an organization and who has the responsibility to a higher level of management for those individuals or teams.

Authorised Delegate

An Authorised Delegate is an employee who has been formally authorised to submit and approve an online form request on behalf of another staff member within their department. Authorised Delegates are not permitted to authorise their personal account or profile amendments, requiring their manager, equivalent or higher to submit the request on their behalf e.g. an Executive Director or HR in some cases.

Records Manager

The person responsible for Records Management in the Synod. Records Management covers all aspects of the lifecycle of a record including creation and use of records, active and inactive records, records appraisal, retention and disposal.

3. Scope

The scope of the Standard Change process in this document is limited to the below requests:

- Hardware installation
- Software installation
- Access provisioning

4. Roles and Responsibilities

Role	Responsibilities
Employee/End User	<ul style="list-style-type: none">• Where applicable, discuss any Standard Changes with your Line Manager or Authorised Delegate for their consideration and approval.• Verify the change once fulfilled.
Line Manager/Authorised delegate	<ul style="list-style-type: none">• Consider and evaluate requests from a role and security perspective.• Initiate Standard Change as appropriate with the employee's status.• Approve and complete the relevant IT form (see below).• Where applicable, approve the associated costs.• Review the quarterly report on access and advise/approve any changes.
ITS Helpdesk	<ul style="list-style-type: none">• Fulfill the Standard Change as per established procedure. Delegations for IT forms are held in SharePoint. Verify authority to approve as per the delegations.

	<ul style="list-style-type: none"> • Maintain record of all Standard Change requests fulfilled. • Supplementary review for access to confidential information. • Periodic audit of user access to specific systems e.g. T24, TechOne (Technology One), EDRMS, Shared drive and Delegations is supplied to Line Managers for review. Any changes are to be actioned by the Line Manager.
Records Manager	<ul style="list-style-type: none"> • To review all requests for access to Electronic Document and Records Management System (EDRMS) to ensure provisioning of right access to right users.

5. Process Controls

5.1. Authorisation

All Standard Changes outlined in the scope are raised by the Line Manager or the Authorised Delegate on behalf of the employee. The Line Managers are provided with access to the [IT forms page](#) on the Intranet. The Line Manager will need to login, choose and complete the appropriate electronic form. All Standard Change Request forms are to be sent to the IT Helpdesk helpdesk@nswact.uca.org.au for processing, which occurs when you submit the form.

Link to the IT forms page on the intranet is:

<https://nswact.uca.org.au/staff-intranet/its-forms-for-managers/>

Note:

- Managers or Authorised Delegates requiring access to the forms page on the intranet will need to contact IT Helpdesk.
- Access can only be requested by a higher-level Manager. A Manager cannot request or authorise his/her own access.
- A list of all Authorised Delegates for IT forms is held in SharePoint Online.
- Approval to be an Authorised Delegate will need to come from Senior Management.

5.2. Supplementary Review

A supplementary review will be conducted by the IT Helpdesk on all requests for access to confidential information in the shared folders or mailboxes.

If the team has migrated its shared folders to Electronic Document and Records Management System (EDRMS), this supplementary review will be conducted by the Records Manager before being fulfilled.

This is to ensure provisioning of the right access to the right people.

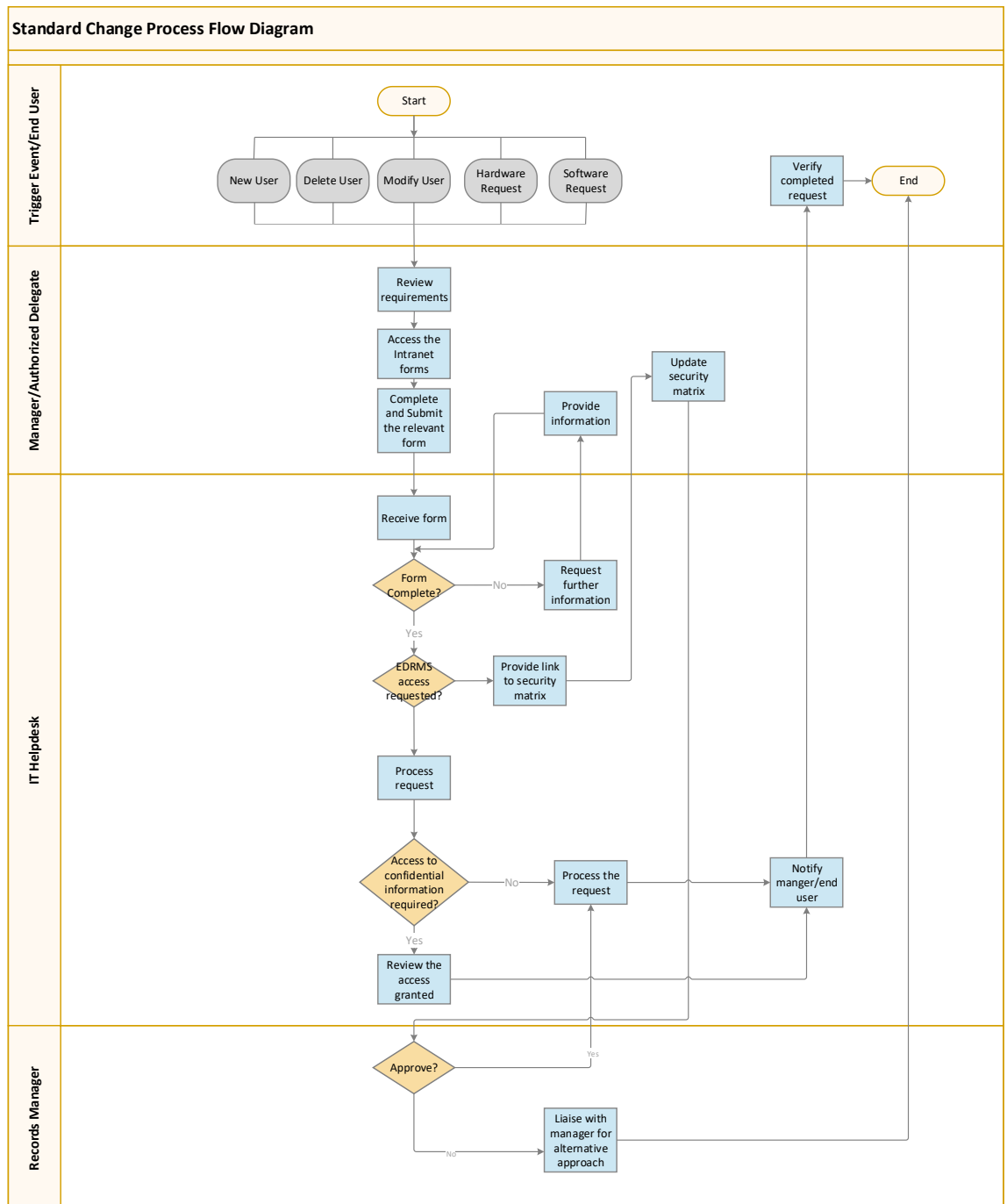
5.3 Filing process

- All requests received and the details of action taken are held in the Helpdesk system.
- Documentation related to Fulfillment Procedure, Policy, Guidelines, Security Matrix and Delegations for IT forms are held in SharePoint.

5.4 Audit Process

- Audit process covers quarterly review of access to T24, Tech One, Delegations for IT forms, Shared Drive (starting March 2019) and SharePoint (starting March 2019).
- A status report on current access will be distributed to Managers every quarter for their review.
- Any changes required as a part of the review will be actioned and documented in the Helpdesk system and/or SharePoint as appropriate.

6. Process flow diagram



7. Forms Overview

The forms available on the Synod intranet are:



ITS Request Forms for Managers

- [Add User](#)
- [Hardware & Mobile Device Order](#)
- [Modify User](#)
- [Remove User](#)
- [Software Request](#)
- [File Restore](#)
- [T24 - Create New User](#)
- [T24 - Group Credit Interest Change for Expense Facility](#)
- [T24 - Group Credit Interest Change for Self Help](#)
- [T24 - Modify Account](#)
- [TechOne](#)
- [Workstation Relocation Request](#)

Form Type	Description
Add User	Used when a new team member is hired. Access to the Synod network, email address, shared mailbox and EDRMS or shared drive is provided.
Hardware & Mobile Order	Used for desktop, laptop, docking station, Monitor, peripherals or any special hardware requests.
Modify User	Used for changes in role and/or responsibility. Access to additional mailboxes, shared drive/EDRMS library.
Remove User	Used when an employee has left the organisation and it is part of the HR offboarding process
Software Request	Used for the request of non-standard software or applications when such is required to fulfil the role.
File Restore	Used if a backed-up version of a document at a point in time is required.
T24 – Create New User	Used if access to the T24 banking application is required for a new Uniting Financial Services (UFS) team member or IT Support.
T24 - Group Credit Change For Expense Facility Form	Used if a change to the Group Credit Interest for Expense Facility is required.
T24 - Group Credit Change For Self Help Form	Used if a change to the Group Credit for Self Help is required.
T24 – Modify Account	Used if a change of T24 access is required.
TechOne	This consolidated form is used when a new, change or removal of access to the TechOne application is required.
Workstation Relocation Request	Used if there is a change to seating arrangements for an employee or a team.

8. Add User Form

Used: Formal registration process when an employee is hired.

Outcome: Access to the Synod of NSW and the ACT network, email address, shared drive/EDRMS library and/or shared mailbox.

Add User Form

Please note: While we update the software for these forms if you tick "Yes" to give the new user access to **TechOne, T24** or have a **Hardware & Mobile Device Request** you will need to submit these forms separately to ITS.

First Name

Last Name

Board

Please select

Group

Please select

Location

Please select

Job Title

Board

Please select

- Uniting Resources
- Uniting Mission and Education
- Financial Services
- Secretariat
- Assembly
- Frontier Services
- Uniting World
- UnitingCare Australia

Group

Please select

- Finance
- HR
- Information Technology & Systems
- Insurance
- Investor Relations
- Legal
- Marketing
- Payroll
- Royal Commission
- Property
- Uniting Venues
- Work Safety Service
- Other

Location

Please select

- 222 Pitt Street
- 3 Masons Drive, Nth Parramatta
- 16 Masons Drive, Nth Parramatta
- 2 Tomson Pl, Bonny Hills
- Lady Game Drive, Chatswood (Naamaroo)
- 19a Wesley St, Elanora Heights
- Level 3, 42 Macquarie St, Barton ACT

Contact Number**Mobile Number****Start Date****Similar User Access****New User - Other Comments****TechOne Form**☐ Yes ☒ No**T24 - Create User Form**☐ Yes ☒ No**Hardware & Mobile Device Order Form**☐ Yes ☒ No**Authorising Manager****Note:**

1. Though the New user form has inclusions for TechOne, T24 and Hardware provisioning, separate forms are to be submitted as they have specific information required.
2. If access to an ex-employee's mailbox is required, it is mandatory to complete the form and provide the extent of the access i.e. current emails, only for last 12 months or all email inbox/outbox from the day they began in the organisation to when they left etc. It is also mandatory to provide the date of expiry of the access.

EDRMS access provisioning process

With the phased implementation of the Electronic Document Management System (EDRMS) project across the Synod, the shared drive will cease to exist at a point in time. All team documents will be held within the EDRMS and all personal documents will be moved to One Drive for Business.

For a team that has migrated their shared drive to EDRMS, every new user access request raised will need to incorporate permissions to the EDRMS team site. Once the Add User form is submitted, the manager/requestor will be emailed a link to the EDRMS Security Matrix for their team. This Security Matrix will contain the document libraries for their team site and the permissions applied. The Manager or the Authorised Delegate is required to add the new user to the relevant libraries to where access is required. All access requests to EDRMS will be reviewed by the Records Manager before being provisioned.

Note:

The IT forms will be updated to include the link to the security matrix library in SharePoint Online/MacroView. When this is completed, it is the responsibility of the manager to access the security matrix for their team via the link and make the necessary updates to permissions for the new user.

9. Hardware & Mobile Device Order Form

Used: Formal registration process when an employee is hired or a change of hardware is required.

Outcome: Desktop, Laptop or Mobile phone provisioned for the employee with standard software.

Hardware and Mobile ITS Requirements

First Name

Last Name

Board

Please select

Group

Please select

Location

Please select

Contact Number

Device Type

☐ PC

☐ Laptop 14"

☐ Laptop 12"

☐ Docking Station

☐ Mouse

☐ Keyboard

☐ Additional AC Adapter

☐ Monitor

Any Other Device Requested?

Device (initial cost - ongoing cost)

☐ Smart Phone (\$0 - \$80 per month)

Authorising Manager

Submit

Board

Please select

Uniting Resources

Uniting Mission and Education

Financial Services

Secretariat

Assembly

Frontier Services

Uniting World

UnitingCare Australia

Group

Please select

Finance

HR

Information Technology & Systems

Insurance

Investor Relations

Legal

Marketing

Payroll

Royal Commission

Property

Uniting Venues

Work Safety Services

Other

Location

Please select

222 Pitt Street

3 Masons Drive, Nth Parramatta

16 Masons Drive, Nth Parramatta

2 Tomson Pl, Bonny Hills

Lady Game Drive, Chatswood (Naamaroo)

19a Wesley St, Elanora Heights

Level 3, 42 Macquarie St, Barton ACT

Note: The timelines and cost of the hardware are subject to change depending on the vendor and the market price at the given time. Please contact the IT Helpdesk for a current quote or ETA (Estimated Time of Arrival).

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10. Modify User Form

Used: Change in role or require updated access.

Outcome: Modified/updated access to Shared folders, mailboxes or EDRMS.

Note:

1. If access to an ex-employee's mailbox is required, it is mandatory to complete the form and provide the extent of the access i.e. current emails, only for last 12 months or all email inbox/outbox from the day they began in the organisation to when they left etc. It is also mandatory to provide the date of expiry of the access.
2. For any change in access to TechOne, T24 or Mobile phone, the relevant forms titled 'TechOne', 'T24 - ' or 'Hardware & Mobile order form' will need to be completed.

Modify User ITS Requirements

First Name <input type="text" value="First Name"/>	Board <div><div>Please select</div><div>Uniting Resources Uniting Mission and Education Financial Services Secretariat Assembly Frontier Services Uniting World UnitingCare Australia</div></div>
Last Name <input type="text" value="Last Name"/>	Group <div><div>Please select</div><div>Finance HR Information Technology & Systems Insurance Investor Relations Legal Marketing Payroll Royal Commission Property Uniting Venues Work Safety Services Other</div></div>
Board <div><div>Please select</div><div></div></div>	Location <div><div>Please select</div><div>222 Pitt Street 3 Masons Drive, Nth Parramatta 16 Masons Drive, Nth Parramatta 2 Tomson Pl, Bonny Hills Lady Game Drive, Chatswood (Naamaroo) 19a Wesley St, Elanora Heights Level 3, 42 Macquarie St, Barton ACT</div></div>
Group <div><div>Please select</div><div></div></div>	
Location <div><div>Please select</div><div></div></div>	
Contact Number <input type="text" value="Contact Number"/>	

Applications
☐ Mailbox Access ☐ Personal Folder Access (V: Drive)
☐ System Access/Security Permission Change (provide details below)

TechOne Form
☐ Yes ☐ No

T24 Modify Account Form
☐ Yes ☐ No

Hardware & Mobile Device Order Form
☐ Yes ☐ No

Authorising Manager

Comments

Note:

The EDRMS access provisioning process outlined in the Add User form section will be applied to the Modify User process.

11. Remove User Form

Used: When an employee no longer works for the organisation.

Outcome: Removal of access to shared drive, mailboxes, remote access, TechOne, T24 and EDRMS. Collection of Synod hardware.

Removal of access to Risk Console will be actioned by the Risk, Safety and Compliance team.

Remove User Form

*Please specify additional request such as email forwarding or redirection for one month, personal folder access etc. Ensure that an 'Out of Office' message has been applied to the mailbox and desk phone prior to the departure date.

First Name**Last Name****Board****Group****Location****Contact Number****Board**

Uniting Resources
Uniting Mission and Education
Financial Services
Secretariat
Assembly
Frontier Services
Uniting World
UnitingCare Australia

Group

Finance
HR
Information Technology & Systems
Insurance
Investor Relations
Legal
Marketing
Payroll
Royal Commission
Property
Uniting Venues
Work Safety Services
Other

Location

222 Pitt Street
3 Masons Drive, Nth Parramatta
16 Masons Drive, Nth Parramatta
2 Tomson Pl, Bonny Hills
Lady Game Drive, Chatswood (Naamaroo)
19a Wesley St, Elanora Heights
Level 3, 42 Macquarie St, Barton ACT

Departure Date**Application Access Removal**

- ☐ Email (Mailbox access and email forwarding can be requested below)
- ☐ Personal data (V: Drive data access can be requested below)
- ☐ T24
- ☐ Remote Access
- ☐ Risk Console
- ☐ TechOne

Hardware

☐ Laptop ☐ Mobile Phone ☐ Tablet ☐ Other

Other Hardware - details**Comments****Authorising Manager****EDRMS access removal process**

When a Remove User Form is submitted by the manager, IT will remove the user's access to EDRMS and One Drive. The security matrix will be updated by IT to reflect the access removal.

12. Software Request Form

Used: To request any software specifically as a result of change in role, responsibility or an additional task.

Outcome: Software license purchased and installed on the workstation or Cloud Access defined.

Software Request Form

All prices above have been updated as of 03/2015 and should be used only as a guide. The prices above will be altered without notification to the business. A purchase order will be created with the exact amount. Please advise the Service Desk if a quote is required before placing the order.

First Name

Last Name

Board

Group

Location

Contact Number

Software Required

- ☐ Adobe Professional
- ☐ Adobe CS, CCT Bundle
- ☐ Adobe Photoshop
- ☐ MS Visio Pro
- ☐ MS Project Pro

Any other software?

Business Case - Reason Required

Authorising Manager

Note: A quote for the cost of the software will be provided upon receipt of the form. Any requirement for other non-standard software (outside the ones indicated in the form) will be managed on a case by case basis.

Board

- Uniting Resources
- Uniting Mission and Education
- Financial Services
- Secretariat
- Assembly
- Frontier Services
- Uniting World
- UnitingCare Australia

Group

- Finance
- HR
- Information Technology & Systems
- Insurance
- Investor Relations
- Legal
- Marketing
- Payroll
- Royal Commission
- Property
- Uniting Venues
- Work Safety Services
- Other

Location

- 222 Pitt Street
- 3 Masons Drive, Nth Parramatta
- 16 Masons Drive, Nth Parramatta
- 2 Tomson Pl, Bonny Hills
- Lady Game Drive, Chatswood (Naamaroo)
- 19a Wesley St, Elanora Heights
- Level 3, 42 Macquarie St, Barton ACT

13. File Restore

Used: Restore a document at a point in time from the shared drive or external storage. Once the EDRMS is implemented across the Synod, the documents for future reference in the retain folder will be moved to a low-cost storage. Any retrieval of documents from this low-cost storage requires this form to be completed.

Outcome: Document retrieved from storage.

File Restore Form

First Name

Last Name

Location

Contact Number

Restore Date

Exact File Path

Restore Action

Comments (additional information that will assist in the restore)

14. T24 – Create User

Note: This form is restricted to the Uniting Financial Services (UFS) employees, contractors or IT support users.

Used: New UFS team member requiring access to the T24 core banking application.

Outcome: Access to T24 provisioned as per the form parameters.

T24 - Create New User Form

Full Name

Sign-on Name

Location

Department

Override Code

Applications #1

Applications #2

Applications #3

Start Time

End Time

Authorising Manager

Location

Please select
222 Pitt Street
3 Masons Drive, Nth Parramatta
16 Masons Drive, Nth Parramatta
2 Tomson Pl, Bonny Hills
Lady Game Drive, Chatswood (Naamaroo)
19a Wesley St, Elanora Heights
Level 3, 42 Macquarie St, Barton ACT

Override Code

Please select
L1
L1V
L2
L2V

Applications #1

Please select
ALL.PG
@AC.RESTRICT
@E1
@F1
@ITUC
@L1
@L1V
@L2
@L2V
@UFS.DEF.SMS

Applications #2

Please select
ALL.PG
@AC.RESTRICT
@E1
@F1
@ITUC
@L1
@L1V
@L2
@L2V
@UFS.DEF.SMS

Applications #3

Please select
ALL.PG
@AC.RESTRICT
@E1
@F1
@ITUC
@L1
@L1V
@L2
@L2V
@UFS.DEF.SMS

15. T24 - Group Credit Interest Change for Expense Facility

Used: Change in Group credit interest rates for Expense facility.

Outcome: Group Credit change processed as per form parameters.

T24 - Group Credit Change For Expense Facility Form

Group Credit Interest ID

Interest Day Basis

Credit Balance Type

☐ None ☐ Average ☐ Daily ☐ Minimum

Calculation Type

☐ None ☐ Band ☐ Level

Fixed Interest #1

Slab Amount #1

Fixed Interest #2

Slab Amount #2

Fixed Interest #3

Slab Amount #3

Authorising Manager

16. T24 - Group Credit Interest Change for Self Help

Used: Change in Group credit interest rates for Self Help.

Outcome: Change processed as per form parameters.

T24 - Group Credit Change For Self Help Form

Group Credit Interest ID**Fixed Interest Rate****Interest Day Basis****Tax Key****Credit Balance Type**

☐ None ☐ Average ☐ Daily ☐ Minimum

Calculation Type

☐ None ☐ Band ☐ Level

Minimum Credit Balance**Basic Rate Key****Fixed Interest****Spread Operans****Max Intt Rate****Intt Spread****Slab Amount****Negative Rates****Authorising Manager**

17. T24 – Modify Account

Used: Change in Override code (access and authority level) for a UFS employee or contractor.

Outcome: Override code changed as per form parameters.

T24 - Modify Account Form

Full Name**Sign-on Name****Date of Change - Commence****Date of Change - Conclude****Override Code - Current****Override Code - New****Other****Authorised Manager****Override Code - Current**

Please select

L1

L1V

L2

L2V

Override Code - New

Please select

L1

L1V

L2

L2V

18. TechOne Form

Used: New user or change in role/responsibilities.

Outcome: Access to TechOne application provisioned.

TechOne Form

First Name

First Name

Last Name

Last Name

Contact Number

Contact Number

Board

Please select

Board

Please select

Uniting Resources
Uniting Mission and Education
Financial Services
Secretariat
Assembly
Frontier Services
Uniting World
UnitingCare Australia

Group

Please select

Finance
HR
Information Technology & Systems
Insurance
Investor Relations
Legal
Marketing
Payroll
Royal Commission
Property
Uniting Venues
Work Safety Services
Other

Group

Please select

Environment

☐ Production ☐ Train ☐ Test ☐ Build

Access Type - New Access

dd/mm/yyyy

Modify Access - Commence

dd/mm/yyyy

Modify Access - Conclude

dd/mm/yyyy

Remove Access

dd/mm/yyyy

Application Access - Similar Access

Application Access - Profile

Application Access - Limit Amount

Application Access - Security Category

Other

Authorising Manager

Submit

19. Workstation Relocation Request

Used: Change in seating arrangement for an employee or a team/teams.

Outcome: The new desk is configured with plug points, hardware, network ports, phone connectivity etc.

Workstation Relocation Form

Please allow 3 working days for IT&S to organise a date and time for the relocation.

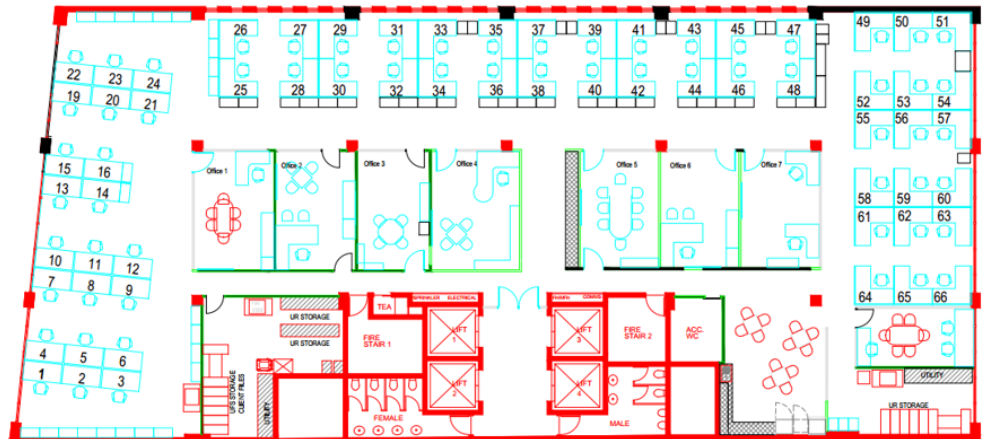
Approvers Full Name [Click here to enter text.](#)

Board [Choose an item.](#)

Group [Choose an item.](#)

Contact Number [Click here to enter text.](#)

Staff Full Name	Phone Ext	Old location #	New location #	Hardware to move (PC, Monitor , Keyboard & Mouse) Specify if other hardware available



Note: The form is an editable word document. Once completed the form will need to be emailed to the IT Helpdesk.