

OCI Ops Essentials

Course Summary

This three-course set (Change Management, CAPA, and On-Call) explains the essential concepts and business practices for Operations employees at OCI.

Software

- Captivate 2019 (course development)
- Audacity (audio)
- PowerPoint (for storyboard and image editing)
- GIMP (image editing)

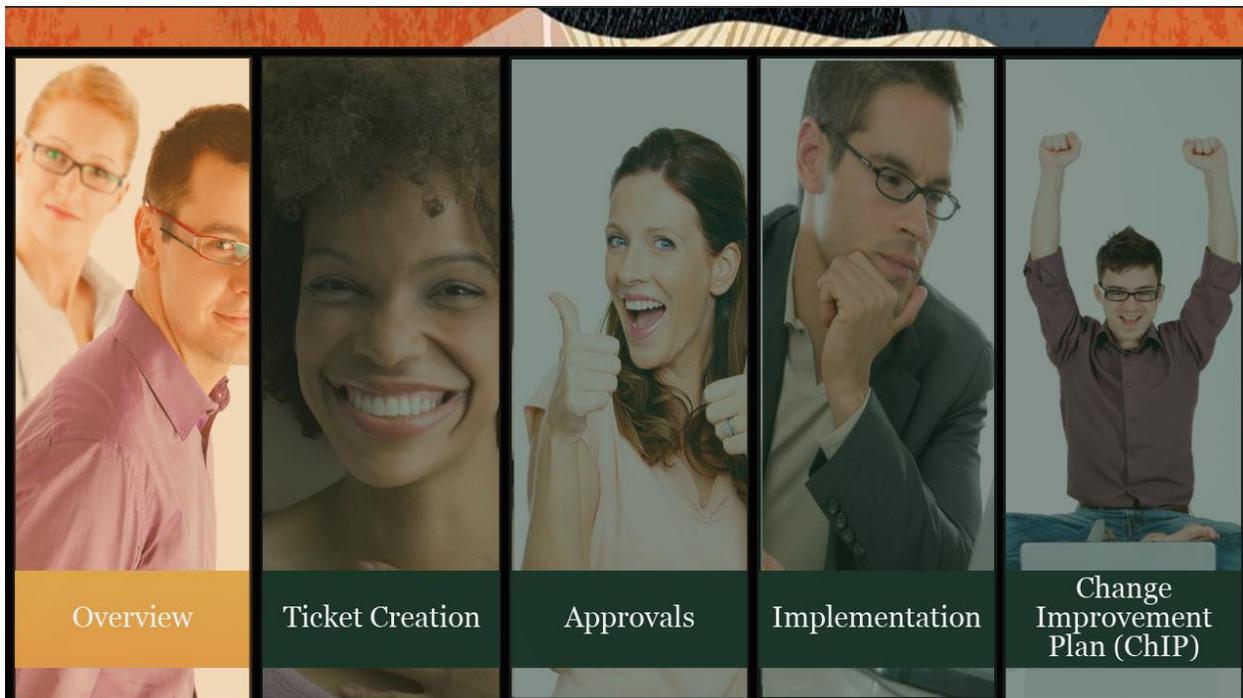
Other Course Details

- First OCI-wide (7,000+ employees) course required for all employees. 100% completion.
- Duration: 45 minutes each
- 10-15 question assessment each

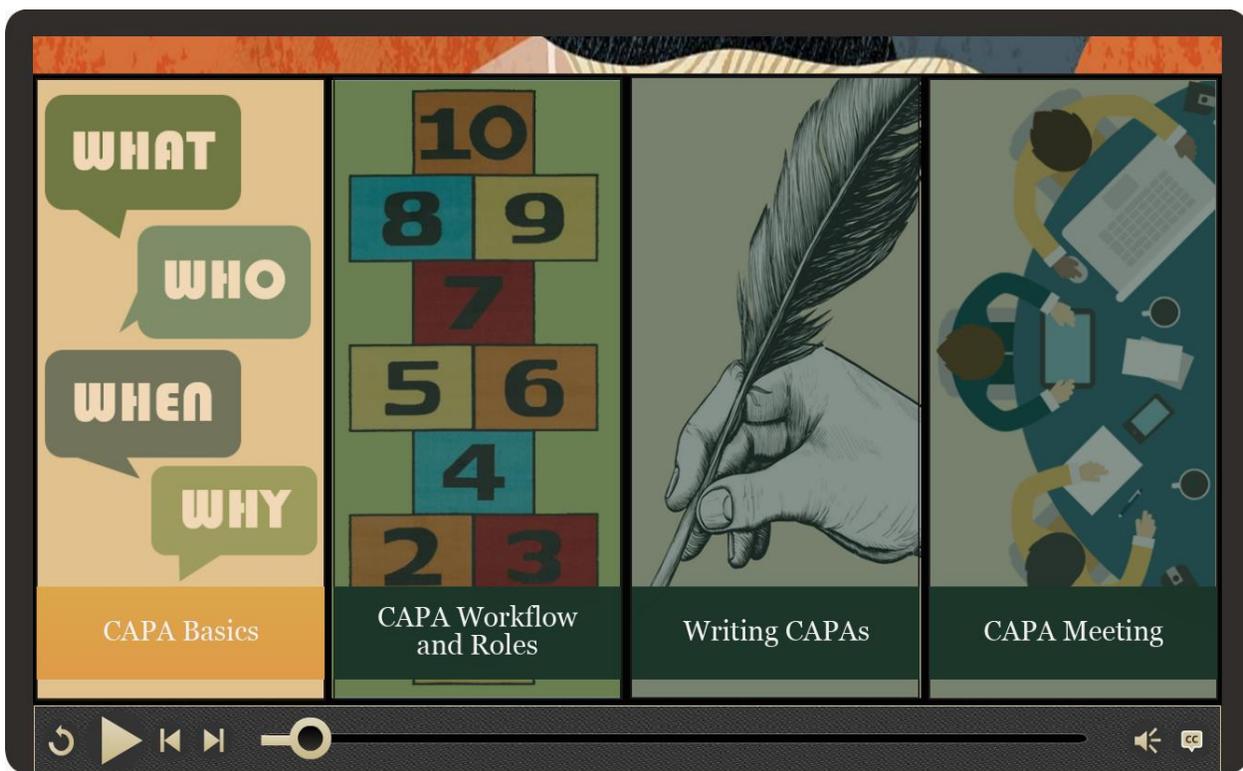
Design Elements

- Drag-and-drop exercises
- Scenarios with questions and customized feedback
- Scenarios based on real-life metaphors to aid understanding of concepts
- Audio with captions
- Complex timed animation





Custom menus (above and below images)



CAPA Scenario

A Narrow Miss



A Sev 3 incident narrowly avoided causing customer impact. Fortunately, resourceful mitigation steps fixed the system errors before a noticeable outage occurred. However, proper policies weren't followed, which nearly caused a catastrophe worse than the initial problem.

Policies and procedures aren't garbage!

In this situation, a CAPA is:

- Required
- Suggested
- Not needed at all

Correct! While there was no customer impact, a CAPA is required here, because not following policy is a serious issue. It can set a precedent that can cause major problems.

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Scenario examples with customized feedback (above and below images)

CAPA Scenario

A Narrow Miss



Recognizing the importance of learning from this issue, you create a CAPA and invite all teams involved to the CAPA review. The meeting goes extremely well, and it was discovered that there were gaps in the procedure documents. What helpful items might the CAPA notes include?

The CAPA includes:

- Successful mitigation steps discovered and implemented
- A list of which employees didn't follow procedures
- A note on why procedures weren't followed and how to handle this going forward
- Action Items regarding updating and correcting outdated and missing procedure steps

Correct! Any successful mitigation steps should be recorded for future use, and procedures must be corrected and updated. It's also helpful to note why procedures weren't followed, and determine a better response to that situation. However, CAPA is a blameless culture, and it's not important to capture who didn't follow procedures.

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Three Change Types



Emergency Change

Has a strong business justification with Director approval.

Is either:

- needed to fix an incident within 24 hours
- needed within a Change Freeze period



Non-emergency Change

Requires 24 hours between all approval and implementation.

Has one or more of the following characteristics:

- new or ad hoc change that has been done <4 times
- new or ad hoc build with custom implementation
- Impacts are not fully known



Routine Change

Has been implemented at least four times before. Implementation steps have been the same for each routine change.

Impacts are negligible or known.

Cloned from a linked master template and always follow the same steps. Multiple templates can be created for each service team covering common updates.



Even texty slides don't have to be ugly. Ugly is for ironic Christmas sweaters.

Approvals Exercise

Drag the correct role in the word bank to its place in the paragraph at the right. Then click Submit. One role isn't used.



Change Mgmt Team

Managers

Peers

Leadership

Bartenders

ensure the rollbacks are tested. They also ensure that the impacts are valid, along with . If there's an emergency change, review the impact of the change and go over the necessary documentation.

Reset

Submit



Drag-and-drop exercise where trainees drop proper words into paragraph.

Change Management Roles

Click each role to learn about their responsibilities.

- Change Requester
- Change Approver
- Executing Engineer



Click Box

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Interactive slide where trainees click on each role at the left to reveal its responsibilities (such as the slide below), along with audio. (State View animation tool in Captivate used)

Change Management Roles

Click each role to learn about their responsibilities.

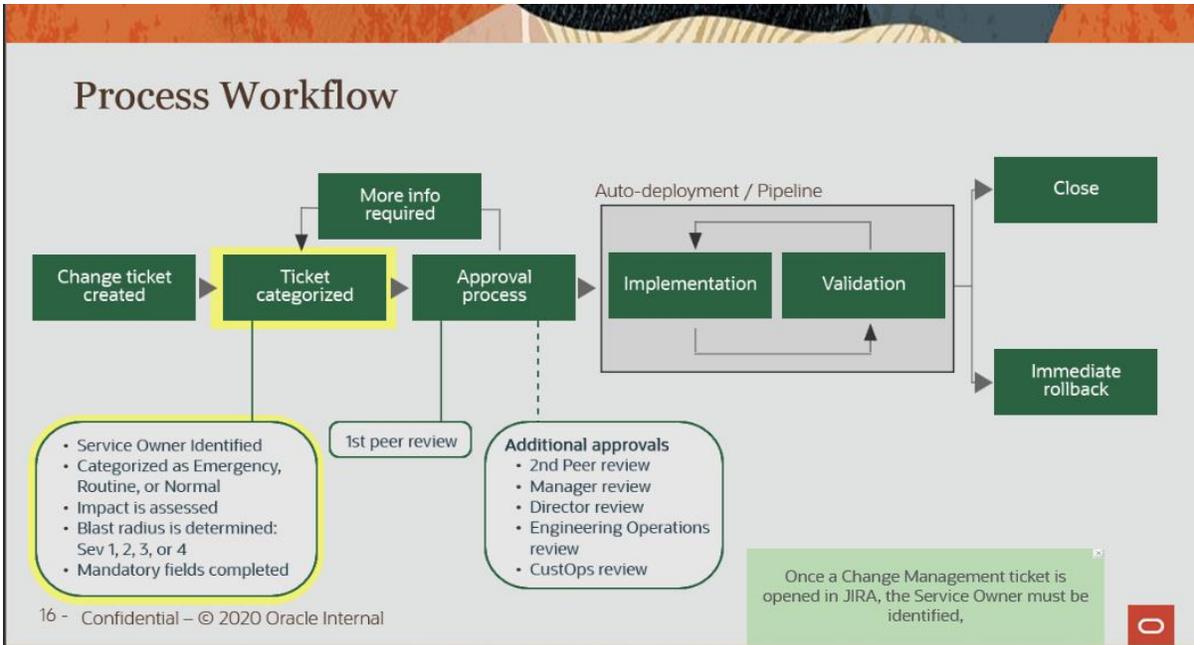
- Change Requester
- Change Approver
- Executing Engineer

I do everything around here. My LinkedIn profile is super impressive.

- Executes actual change, and follows the scope of the change
- Communicates with On-Call during the change execution
- Checks validation results



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Animated slide of detailed process workflow (each state highlighted as it's discussed) (timeline below)

Change Management.cpbx* x

Process Workflow

Change ticket created → Ticket categorized → Approval process → Implementation / Validation → Close / Immediate rollback

Tasks for Ticket categorized:

- Service Owner Identified
- Categorized as Emergency, Routine, or Normal
- Impact is assessed
- Blast radius is determined: Sev 1, 2, 3, or 4
- Mandatory fields completed

Additional approvals:

- 2nd Peer review
- Manager review
- Director review
- Engineering Operations review
- CustOps review

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TIMELINE

Event	Start Time	End Time
Click_Box_9	00:00	00:04
Group_29	00:04	00:08
Group_30	00:08	00:12
Group_27	00:12	00:16
Title_AutoShape_55	00:16	00:20
highlight_create	00:20	00:24
highlight_rollback	00:24	00:28
highlight_close	00:28	00:32
highlight_categorized	00:32	00:36
highlight_categorize2	00:36	00:40
highlight_approval	00:40	00:44
highlight_approvals1	00:44	00:48
highlight_approvals2	00:48	00:52
highlight_implement	00:52	00:56
highlight_close2	00:56	00:60
highlight_rollback2	00:60	00:64
Slide 16	00:64	01:00

15.wav

Change Execution Guidelines

Click all eight hopscotch squares to uncover change execution guidelines.

Check all pre-CM checklist items and make sure there are no conflicts before starting the change. See the example checklist linked below.

[Pre-CM Checklist example](#) in JIRA

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Animated slide where trainees click on each number to reveal a guideline in the chalk outline at left

Change Management Scenario

Car trouble



Let's look at another car scenario as a change management event. You're driving on the freeway and run over a large piece of scrap metal that has flown off the back of another car. Your tire has a dangerous leak and must be replaced immediately.

What type of change is this?

- Routine
- Non-emergency
- Emergency

Submit

Correct! This is an unexpected incident that could impact other drivers and must be resolved immediately. That is an emergency change.

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One of several scenarios where real life (car trouble) is a metaphor for the concept being presented (code change an engineer is implementing)

Change Management Scenario

Car trouble



Before you pull over through three lanes of traffic, you turn on your blinker to warn nearby drivers, and you make sure that the lanes are free of cars.

What Change Pillar do these actions represent?

- coordination and notification
- documentation and reference
- review and approval
- testing and validation

Coordination and notification is correct. Signaling and checking for cars behind you is like notifying impacted teams and making sure your actions aren't going to interfere.

Submit



The scenario continues, demonstrating change management concepts through the car trouble metaphor (above and below images)

Change Management Scenario

Car trouble



A new tire is put on and rotated. It meets the specifications, but upon driving out of the auto shop, it wobbles and makes the car drive unevenly. You return to the shop right away to have it removed.

What three process steps do these actions represent?

- Approval -> validation -> implementation
- Validation -> implementation -> rollback
- Implementation -> validation -> rollback
- Implementation -> validation -> close

Correct! The tire was replaced (implementation), it wobbled the car while leaving the shop (a failed validation), and it was returned and removed upon failure (rollback).

Submit



ChIP Implementation



Strategy

- Generate actionable data through self-assessment - identify gaps and improvement opportunities
- Biweekly ticket review cadence



Legend



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In Step 1, the ChIP team creates a Sev3 JIRA SD ticket for each component-level service team.



Animated process flow (captions shown)

Answering Assessment Questions

The most common queries about the assessment questions are about the intended information to be gained and how to answer them. Drag the letters below to the boxes to create a word. With each proper placement, you will see one of the eight assessment questions, and learn more about the kind of information it is asking you for.

I T Q U E S

N O Reset

Question

Does the change ticket have a pre-CM checklist including a **communication plan** to inform all impacted teams?

Answer

Notifying impacted teams will allow them to plan for any impacted services. Did the Change Requester reach out to teams who depend on their service? to teams whose service they depend on?

The communication plan is the road map each team uses to inform the impacted teams of the upcoming change. It includes all impacted teams and those who coordinate changes OCI-wide, such as O2C2 and Change Management.

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Interactive exercise where trainees drop letters into crossword. Each correct placement reveals a question and answer combination beneath. (State View, Advanced Actions, and Drag-and-drop used)