

AIPAC Change Management in eProject

Step-By Step Instructions

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Overview

AIPAC has elected to use eProject for project Change Management. The process is described in the AIPAC Change Management Model document that can be downloaded from the eProject Documents tab under the Admin-Change Management Process project.

Projects are divided into four phases. The first phase, Initiation, involves the creation of the Change Request and establishment of a Change Management Project in eProject. In this phase, IT receives and validates the request. The request may be accepted by IT, or returned to the Change Requestor.

Phase	Tasks	Description
Initiation	Request Change	The change request is submitted to IT.
	Receive Change	It is received and logged by IT.
	Review Change	IT accepts or reject the request

Once a Change Request has been accepted by IT, the Change Request is divided into deliverable units. The following tasks are performed for each deliverable in the Change Request. For example, if a Change Request calls for the development of four reports, these tasks will be duplicated and tracked for each report.

First, the ramifications of each change are determined via impact analysis. The Impact Analysis Report is presented to the Change Requestor, who decides whether development of each deliverable should proceed. Those deliverables that are selected to proceed are assigned to development staff, and then tested by both IT and the Change Requestor to verify that the developed product functions and does what was requested.

Phase	Tasks	Description
Planning	Impact Analysis	IT determines the feasibility, time, effort, and cost to fulfill the request.
	Solution Review	The Change Requestor decides whether to proceed in light of the time, effort, and cost.
	Assign Change	Requests that continue are assigned to personnel for development
Execution	Develop In-House Solution	Requests that do not require outside staff are assigned to IT personnel.
	Develop Contract Solution	Requests that require outside staff are assigned to contract personnel.
	Unit Test	Contractors are required to provide evidence of successful unit testing when delivering products.
	System Test	IT personnel verify that developed solutions function properly and accept or reject solution packages.
	Implement Solution	Accepted solution packages are implemented in production.


Phase	Tasks	Description
	Acceptance Test	The Change Requestor verifies that what they requested has been achieved.

When all the deliverables for a Change Order have been accepted by the Change Requestor, they signal that the Change Order has been satisfied and IT closes the Change Management project.

Phase	Tasks	Description
Close Out	Approval of Solution	When all elements of the change order have been implemented and accepted, the Change Requestor indicates that the Change Order has been satisfied.
	Change Request Closure	IT closes out the Change Management project.

The following sections outline the steps in eProject necessary to complete each of the tasks in the Change Management process. The tasks are presented in chronological order and identify what role performs them.

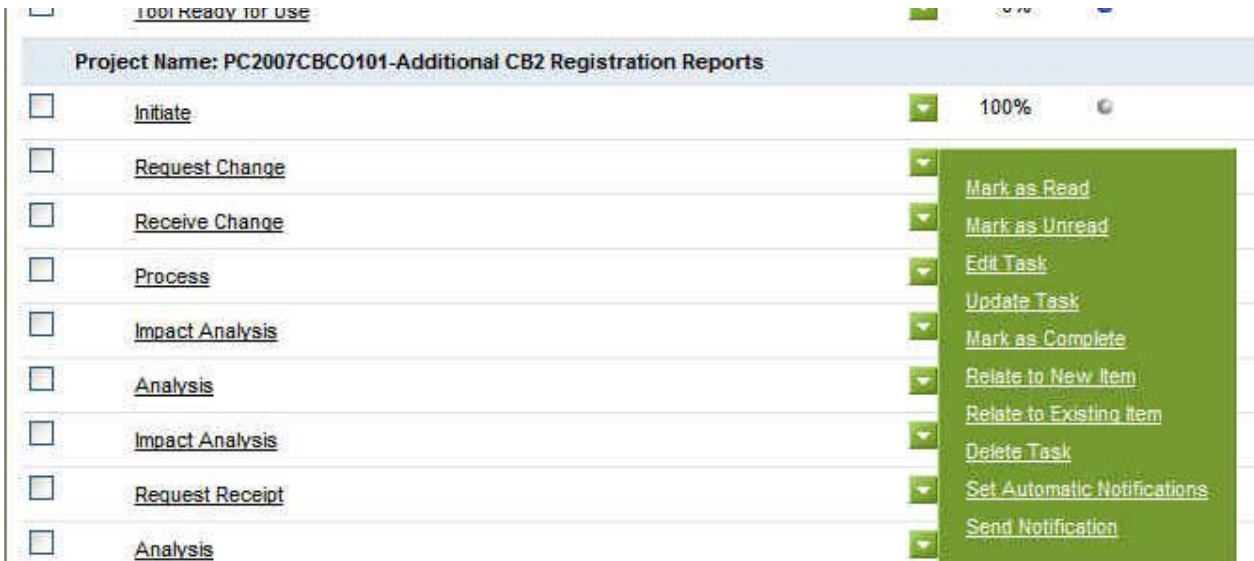
Action Menu

Most of the operations performed in eProject are executed via the Action menu, which is identified with the  icon. The Action menu is located to the right of the item to be action upon (the project, task, or document). The menu will vary depending on what kind of item it is related to and under various conditions.



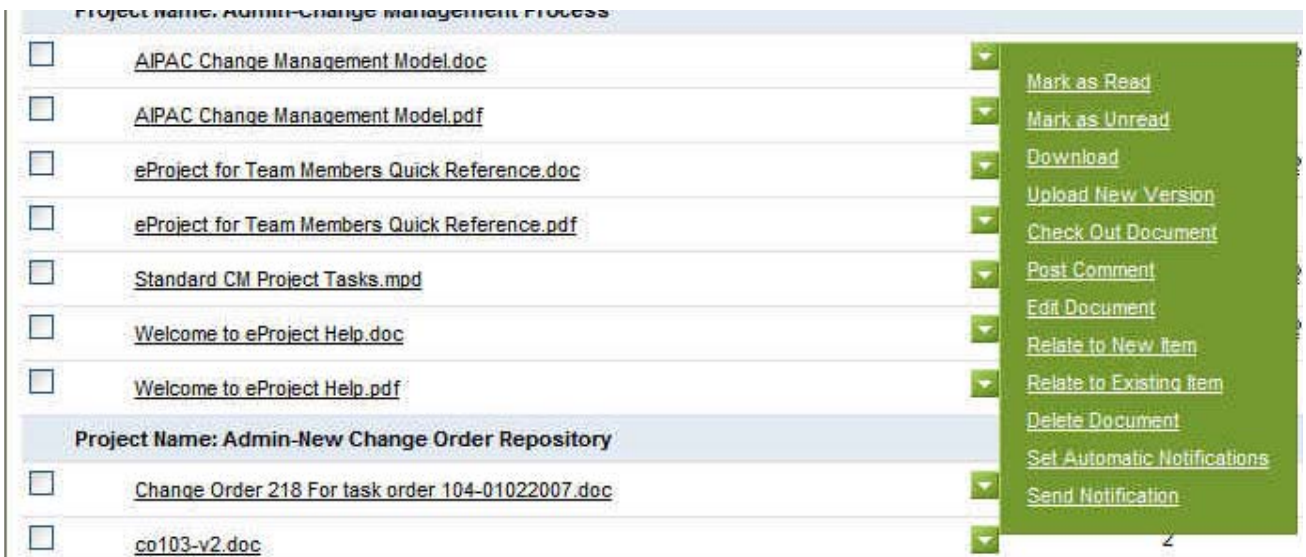
Project Action Menu

The View Task Outline option will be particularly useful for most team members in order to see where tasks fall within the scope of the project. Most other options here are for use by the project manager(s).



Task Action Menu

The Update Task, Mark as Complete, and Relate to New Item options will be used most often by most team members.




Documents Action Menu

The Download, Upload New Version, Post Comment, and Edit Document options will be used frequently by most team members.

Related Items

Many of these tasks require the linking of new items to the tasks. These items include:

-  Documents – There are several documentation deliverables required for each project. These include:
 - Change Request Document
 - Impact Analysis Report

- Change Order Document
- Solution Package Documentation
- Unit Test Document
- System Test Document

These are uploaded to eProject and linked to their respective tasks as the project proceeds.



Issues – Used to catalog anything that causes changes to the size, effort, cost or schedule of the project. Cataloging issues ensures that they are all tracked and resolved.



Discussions – Used to capture conversations regarding Issues to document their resolution.



News – Used to announce major milestones in the project. News items will be used to announce:

- Change Request Acceptance
- Proposed Solution Acceptance or Rejection
- Solution Package Acceptance or Rejection
- Change Order Solution Completion and Approval.



Tasks – Once the item has been related, this icon will appear next to the item in its respective screen tab (Documents, Discussions, Issues, News).

These icons are noted in the following procedures where new item creation is indicated.


There are other items available in eProject, but we will not be using them initially. This functionality may be incorporated into the process later.

Assignments

Items are assigned to specific individuals for various reasons: Tasks to be completed, Documents to be approved, Issues to be resolved, Discussions to be contributed to, and News to be notified of significant events. Each person's assignments will be visible on the Dashboard tab when they log in. Each person is expected to update eProject with the status of their tasks on a regular basis, and also to address the other items that are assigned to them in a timely manner. The steps for doing this are provided on the following pages.






Initiation




Request Change (Change Requestor)

1. Identify a change to an existing system.
2. Compose description of the change as the Change Request Document.
3. Upload Change Request Document to eProject.
 - a. Log into eProject.
 - b. Click on the Documents tab.
 - c. Under “Project Name: Admin-Change Management Process,” click the Action menu  for “Change Request Template.doc”.
 - d. Click Download and select Save – note file location.
 - e. Edit template and complete Change Request section to create new Change Request Document. Save as “CO###.doc”.
 - f. Click on Documents tab.
 - g. Click Create Document.
 - h. Select Admin-New Change Order Repository project.
 - i. Click browse and select Change Request Document.
 - j. Select status Final.
 - k. Select Submit for Approval.
 - l. Click Continue.
 - m. Deselect Routing Enabled.
 - n. Select Approval by Any Selected Members.
 - o. Click the Roles link and select Administrator.
 - p. Click the box next to Name to select all users.
 - q. Click Save & Close.
 - r. Click Close.


Receive Change (IT)

1. Change Request Document approval notification is received.
2. Create change request project in eProject.
 - a. Log into eProject.
 - b. Click on Projects tab.
 - c. Click on Create Project.
 - d. Enter the project name.
 - e. Enter Start Date.
 - f. Enter End Date.



- g. Click on Phase Drop Down and select Initiation.
 - h. Click on Browse Member Directory.
 - i. Click the box next to Name to select all users.
 - j. Click Save & Close.
 - k. Click on Action menu  for the project.
 - l. Click on Edit Project Profile.
 - m. Select the Project Manager.
 - n. Click Save & Close.
 3. Import standard milestones from Microsoft Project file.
 - a. Click on Documents.
 - b. Under “Project Name: Admin-Change Management Process,” click the Action menu  for “Standard CM Project Tasks.mpd”.
 - c. Click Download and select Save – note file location.
 - d. Click on Projects tab.
 - e. Click on Action menu  for the project.
 - f. Select Import Tasks.
 - g. Click Browse and select “Standard CM Project Tasks.mpd”.
 - h. Click Upload.
 - i. When the link appears, click Next Step.
 - j. In the Choose Role selector, select Project Member.
 - k. Click Import Tasks.
 - l. Click Close when tasks have been imported.
 4. Update Request Change task.
 - a. Click on Action menu  for the project.
 - b. Select View Task Outline.
 - c. Click the + next to Initiate to expose the Request Change task.
 - d. Click on the Action menu  for Request Change task.
 - e. Select Edit Task.
 - f. Change the Planned Start date to today’s date.
 - g. Click on Browse Member Directory.
 - h. Click the box next to the Change Requestors name.
 - i. Click Save & Close.
 - j. Change Percent Complete to 100.
 - k. Click Save & Close.




5. Link to Change Request Document.
 - a. Click the + next to Process.
 - b. Click on the Action menu  for Receive Change task.
 - c. Select Relate to Existing Item.
 - d. Select Document. 
 - e. Click Close.
 - f. Click on Documents Tab.
 - g. Click on the title of the Change Request Document.
 - h. Click Complete Link.
6. Mark Receive Change as Complete.
 - a. Click on the Action menu  for Receive Change task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.

Review Change (IT)



1. eProject Approval Request received.
2. Review Change Request Document in eProject.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for Change Request Document.
 - d. Select Download.
 - e. Save and review document.


Accept Change

1. Accept Approval.
 - a. Click on the title of the Change Request Document.
 - b. Click on the Accept Link.
2. Document the decision.
 - a. Click on the Action menu  for Change Request Document.
 - b. Click on Relate to New Item.
 - c. Select News. 
 - d. Enter “Change Request Accepted” in the Headline field.
 - e. Enter any comments related to the decision.
 - f. Click on Browse Member Directory.

- g. Click the boxes for the Change Requestor and the Project Manager(s).
 - h. Click Save & Close.
3. Assign Impact Analysis task to analysis personnel.
 - a. Click on the Action menu  for Review Change task.
 - b. Select Edit Task.
 - c. Click on Browse Member Directory.
 - d. Click the box for the person being assigned to do the Impact Analysis.
 - e. Click Save & Close.
4. Update Project Status to Planning
 - a. Click on the Action menu  for the change request project.
 - b. Select Update Status.
 - c. Change Project State to In Progress.
 - d. Change Phase to Planning.
 - e. Click Save & Close.
5. Update the Review Change task to Complete.
 - a. Click on the Action menu  for Review Change task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.







Reject Change




1. Decline Approval.
 - a. Click on the title of the Change Request Document.
 - b. Click on the Decline Link.
2. Document the decision.
 - a. Click on the Action menu  for Change Request Document.
 - b. Click on Relate to New Item.
 - c. Select Discussion. 
 - d. Select the change request project.
 - e. Enter "PC07CBCR####" Change Request" as the Topic.
 - f. Enter any comments related to the decision in the message box.
 - g. Click on Browse Member Directory.
 - h. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - i. Click Save & Close.

3. Update the Review Change task to 50%.
 - a. Click on the Action menu  for Request Change task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 50.
 - d. Click Save & Close.


Planning

Impact Analysis (IT)







1. eProject Change Request approval received.
2. Evaluate change in terms of size, effort, cost and schedule.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for Change Request Document.
 - d. Select Download.
 - e. Save and evaluate request.
3. Post issues and discussions as needed.
 - a. Click on the Action menu  for the Impact Analysis task.
 - b. Click on Relate to New Item.
 - c. Select Issue. 
 - d. Select the change request project.
 - e. Enter a descriptive title for the Topic.
 - f. Enter the issue to be logged as thoroughly and succinctly as possible in the Description box.
 - g. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - h. Click Save.
 - i. Click Close.
 - j. Click on the Action menu  for the Impact Analysis task.
 - k. Click on Relate to New Item.
 - l. Select Discussion. 
 - m. Select the change request project.
 - n. Enter the title of the Issue as the Topic.
 - o. Enter any comments related to the decision in the message box.
 - p. Click on Browse Member Directory.
 - q. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - r. Click Save & Close.
4. Revise the Change Request Document.
 - a. Complete the Impact Analysis section of the Change Request Document.
 - b. Click on the Action menu  for Impact Analysis task.

- c. Select Document. 
 - d. Select the change request project.
 - e. Click browse and the revised Change Request Document.
 - f. Select status Draft.
 - g. Select Submit for Approval.
 - h. Click Continue.
 - i. Deselect Routing Enabled.
 - j. Select Approval by All Selected Members.
 - k. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - l. Click Save & Close.
 - m. Click Close.
5. Assign Solution Review task to appropriate personnel.
- a. Click on the Action menu  for Solution Review task.
 - b. Select Edit Task.
 - c. Click on Browse Member Directory.
 - d. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - e. Click Save & Close.
6. Schedule Impact Analysis Review Meeting.
7. Update the Impact task to Complete.
- a. Click on the Action menu  for Review Change task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.

Solution Review (Change Requestor)








1. eProject Approval Request received.
2. Review Impact Analysis Report in eProject.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for Change Request Document.
 - d. Select Download.
 - e. Save and review document.

If there are issues with the solution:

- a. Click on the Action menu  for the Solution Review task.
 - b. Click on Relate to New Item.
 - c. Select Issue. 
 - d. Select the change request project.
 - e. Enter a descriptive title for the Topic.
 - f. Enter the issue to be logged as thoroughly and succinctly as possible in the Description box.
 - g. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - h. Click Save.
 - i. Click Close.
 - j. Click on the Action menu  for the Solution Review task.
 - k. Click on Relate to New Item.
 - l. Select Discussion. 
 - m. Select the change request project.
 - n. Enter the title of the Issue as the Topic.
 - o. Enter any comments related to the decision in the message box.
 - p. Click on Browse Member Directory.
 - q. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - r. Click Save & Close.
2. Hold Impact Analysis Review Meeting.
 3. Revise the Change Request Document.
 - a. Click on the Action menu  for the Solution Review task.
 - b. Select Document. 
 - c. Select the change request project.
 - d. Click browse and the revised Change Request Document.
 - e. Select status Final.
 - f. Select Submit for Approval.
 - g. Click Continue.
 - h. Deselect Routing Enabled.
 - i. Select Approval by All Selected Members.
 - j. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - k. Click Save & Close.





1. Click Close.

Accept Solution


1. Accept Approval.
 - a. Click on the Action menu  for Change Request Document.
 - b. Click on the Accept Link.
 - c. Click on the Action menu  for the Solution Review task.
 - d. Click on Relate to New Item.
 - e. Select News. 
 - f. Enter "PC07CBCR####" [specific deliverable] Solution Accepted" in the Headline field.
 - g. Enter any comments related to the decision.
 - h. Click on Browse Member Directory.
 - i. Click the boxes for the Change Requestor and the Project Manager(s).
 - j. Click Save & Close.
2. Update Change Request and upload as Change Order.
 - a. Click on Documents tab.
 - b. Click on the Action menu  for Change Request Document.
 - c. Select Download.
 - d. Revise the Change Request Document and save as Change Order Document.
 - e. Click on the Action menu  for Solution Review task.
 - f. Select Document. 
 - g. Select the change request project.
 - h. Click browse and select Impact Analysis Report.
 - i. Select status Final.
 - j. Select Submit for Approval.
 - k. Click Continue.
 - l. Deselect Routing Enabled.
 - m. Select Approval by All Selected Members.
 - n. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - o. Click Save & Close.
 - p. Click Close.
3. Update the Solution Review task to Complete.
 - a. Click on the Action menu  for Solution Review task.



- b. Select Mark as Complete.
- c. Click Close.
- d. Click Refresh to update the screen.

Reject Solution

1. Decline Approval.
 - a. Click on the Action menu  for the Solution Review task.
 - b. Click on the Decline Link.
2. Document the decision.
 - a. Click on the Action menu  for the Solution Review task.
 - b. Click on Relate to New Item.
 - c. Select News. 
 - d. Enter "PC07CBCR####" [specific deliverable] Solution Rejected" in the Headline field.
 - e. Enter any comments related to the decision not to proceed with this specific deliverable.
 - f. Click on Browse Member Directory.
 - g. Click the boxes for the Change Requestor and the Project Manager(s).
 - h. Click Save & Close.
3. Update the Solution Review task to 50%.
 - a. Click on the Action menu  for the Solution Review task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 50.
 - d. Click Save & Close.




Assign Change (IT)

1. eProject Solution approval received.
2. Select development route.
 - a. Click on Action menu  for the project.
 - b. Select View Task Outline.
 - c. Click the + next to specific change summary task to expose the Process summary task.
 - d. Click the + next to the Process summary task.
 - e. Click the box(es) next to the solution that will not be used (either the Develop In-House Solution, or the Develop Contract Solution and Unit Test tasks).
 - f. Click the Checked Item Actions link and select Delete Task,.
3. Assign Development and Testing Staff.


- a. Click the box(es) next to the remaining solution (either the Develop In-House Solution, or the Develop Contract Solution and Unit Test tasks).
 - b. Click the Checked Item Actions link and select Assign Tasks.
 - c. Click on Browse Member Directory.
 - d. Click the box(es) for the people to be assigned this work.
 - e. Click Save & Close.
 - f. Click the box next to the System Test task.
 - g. Click the Checked Item Actions link and select Assign Tasks.
 - h. Click on Browse Member Directory.
 - i. Click the box(es) for the people to be assigned this work.
 - j. Click Save & Close.
 - k. Click the box next to the Implement Solution task.
 - l. Click the Checked Item Actions link and select Assign Tasks.
 - m. Click on Browse Member Directory.
 - n. Click the box(es) for the people to be assigned this work.
 - o. Click Save & Close.
4. Update the Assign Change task to Complete.
 - a. Click on the Action menu  for Solution Review task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.
5. . Update Project Status to Execution
 - a. Click on the Action menu  for the change request project.
 - b. Select Update Status.
 - c. Change Phase to Execution.
 - d. Click Save & Close.




Execution

Develop In-House Solution (IT)


1. eProject assignment notice received.
2. Identify and document root cause of change.
3. Prepare and document solution package.
4. Upload solution package to eProject documents section (repeat for each file.).
 - a. Click on the Action menu  for Develop In-House Solution task.
 - b. Select Relate to New Item.
 - c. Select Document. 
 - d. Select the change request project.
 - e. Click browse and select the solution package files.
 - f. Select status Final.
 - g. Click the box(es) for the Project Manager(s) to be notified.
 - h. Select Submit for Approval.
 - i. Click Continue.
 - j. Deselect Routing Enabled.
 - k. Select Approval by Any Selected Members.
 - l. Click the box for the System Tester.
 - m. Click Save & Close.
 - n. Click Close.
5. Update the In-House Solution task to 50%.
 - a. Click on the Action menu  for In-House Solution task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 50.
 - d. Click Save & Close.





Develop Contract Solution (Contractor)


1. eProject assignment notice received.
2. Identify and document root cause of change.
3. Prepare and document solution package.
 - a. Upload solution package to eProject documents section (repeat for each file.).
 - b. Click on the Action menu  for Develop Contract Solution task.
 - c. Select Relate to New Item.

- d. Select Document. 
 - e. Select the change request project.
 - f. Click browse and select the solution package files.
 - g. Select status Draft.
 - h. Click Save & Close.
 - i. Click Close.
4. Document time in Timesheet function of eProject.
- a. Click on Timesheet tab.
 - b. If timesheet does not already exist for the period, click Create Timesheet.
 - c. Enter a date in the timesheet period.
 - d. Click Save.
 - e. Refresh the screen to see the new timesheet.
 - f. Click on the Action menu  for the appropriate timesheet.
 - g. Select Create Work Entry.
 - h. Select the change request project the work is related to.
 - i. Select Develop Contract Solution from the Task dropdown.
 - j. Enter a brief description of the work completed.
 - k. Select the date to report on.
 - l. Enter the hours and minutes worked for the date indicated.
 - m. Enter percentage of completion.
 - n. Click Save.
 - o. Click Close.
5. Update the Develop Contract Solution task to 25%.
- a. Click on the Action menu  for Develop Contract Solution task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 25.
 - d. Click Save & Close.



Unit Test (Contractor)

1. Review Solution Package in eProject.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for each Solution Package element.
 - d. Select Download.
 - e. Save and test solution package.


2. Create Unit Test document.
 - a. Click on the Documents tab.
 - b. Under “Project Name: Admin-Change Management Process,” click the Action menu  for “Testing Script Template.doc”.
 - c. Click Download and select Save – note file location.
 - d. Edit template to create test script and save as “PC07CBCR####” [specific deliverable] Unit Test Script.doc”.
 - e. Execute test script and document results.
 - f. Add completed test script to Solution Package.
3. Revise Solution Package as necessary.
4. Upload solution package to eProject documents section (repeat for each file.).
 - a. Click on the Action menu  for Unit Test task.
 - b. Select Relate to New Item.
 - c. Select Document. 
 - d. Select the change request project.
 - e. Click browse and select the Unit Test document.
 - f. Select status Final.
 - g. Click the box(es) for the Project Manager(s) to be notified.
 - h. Select Submit for Approval.
 - i. Click Continue.
 - j. Deselect Routing Enabled.
 - k. Select Approval by Any Selected Members.
 - l. Click the box for the System Tester.
 - m. Click Save & Close.
 - n. Click Close.
5. Document time in Timesheet function of eProject.
 - a. Click on Timesheet tab.
 - b. If timesheet does not already exist for the period, click Create Timesheet.
 - c. Enter a date in the timesheet period.
 - d. Click Save.
 - e. Refresh the screen to see the new timesheet.
 - f. Click on the Action menu  for the appropriate timesheet.
 - g. Select Create Work Entry.
 - h. Select the change request project the work is related to.
 - i. Select Develop Contract Solution from the Task dropdown.



- j. Enter a brief description of the work completed.
 - k. Select the date to report on.
 - l. Enter the hours and minutes worked for the date indicated.
 - m. Enter percentage of completion.
 - n. Click Save.
 - o. Click Close.
6. Update the Develop Contract Solution task to 50%.
- a. Click on Action menu  for the project.
 - b. Select View Task Outline.
 - c. Click the + next to specific change summary task to expose the Process summary task.
 - d. Click the + next to the Process summary task.
 - e. Click the boxes next to the Develop Contract Solution and Unit Test tasks.
 - f. Click the Checked Item Actions link and select Mark As In Progress (50%).

System Test (IT)





1. eProject Approval Request received,.
2. Review Solution Package in eProject.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for each Solution Package element.
 - d. Select Download.
 - e. Save and test solution package.
3. Update the Review Change task to 25%.
 - a. Click on the Action menu  for System Test task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 25.
 - d. Click Save & Close.


Accept Solution Package

1. Accept Approval (repeat for all files).
 - a. Click on each Solution Package element.
 - b. Click on the Accept Link.
2. Document the decision.
 - a. Click on the Action menu  for System Test task.
 - b. Click on Relate to New Item.






- c. Select News. 
 - d. Enter any comments related to the decision in the Headline field.
 - e. Click on Browse Member Directory.
 - f. Click the boxes for the Change Requestor , the Solution Implementer, and the Project Manager(s).
 - g. Click Save & Close.
3. Update the System Test task to Complete.
 - a. Click on the Action menu  for System Test task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.




Reject Solution Package

1. Decline Approval (repeat for all files).
 - a. Click on each Solution Package element.
 - b. Click on the Decline Link.
2. Document the decision.
 - a. Click on the Action menu  for System Test task.
 - b. Click on Relate to New Item.
 - c. Select Discussion. 
 - d. Select the change request project.
 - e. Enter " PC07CBCR###" [specific deliverable] Solution Package” as the Topic.
 - f. Enter any comments related to the decision in the message box.
 - g. Click on Browse Member Directory.
 - h. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.
 - i. Click Save & Close.
 - j. Click on the Action menu  for the System Test task.
 - k. Click on Relate to New Item.
 - l. Select Issue. 
 - m. Select the change request project.
 - n. Enter a descriptive title for the Topic.
 - o. Enter the issue to be logged as thoroughly and succinctly as possible in the Description box.
 - p. Click the boxes for the Change Requestor and the Project Manager(s) in the Assignment section.

- q. Click Save.
- r. Click Close.
3. Update the System Test task to 50%.
 - a. Click on the Action menu  for System Test task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 50.
 - d. Click Save & Close.

Implement Solution (IT)



1. eProject Approval received.
2. Review Solution Package in eProject.
 - a. Log into eProject.
 - b. Click on Documents tab.
 - c. Click on the Action menu  for each Solution Package element.
 - d. Select Download.
 - e. Save and verify that solution package is complete.
3. Post issue if solution package is not complete.,.
 - a. Click on the Action menu  for the Implement Solution task.
 - b. Click on Relate to New Item.
 - c. Select Issue. 
 - d. Select the change request project.
 - e. Enter a descriptive title for the Topic.
 - f. Enter the issue to be logged as thoroughly and succinctly as possible in the Description box.
 - g. Click the boxes for the Developer and the Project Manager(s) in the Assignment section.
 - h. Click Save.
 - i. Click Close.
 - j. Click on the Action menu  for the Implement Solution task.
 - k. Click on Relate to New Item.
 - l. Select Discussion. 
 - m. Select the change request project.
 - n. Enter the title of the Issue as the Topic.
 - o. Enter any comments related to the decision in the message box.
 - p. Click on Browse Member Directory.


- q. Click the boxes for the Developer and the Project Manager(s) in the Assignment section.
 - r. Click Save & Close.
4. Implement change solution per included instructions.
5. Notify change requestor that solution has been implemented.
 - a. Click on the Action menu  for the Implement Solution task.
 - b. Click on Relate to New Item.
 - c. Select News. 
 - d. Enter “Implementation Completed” in the Headline field.
 - e. Enter comment “The solution package for [project name] has been implemented.” Add any additional details as necessary.
 - f. Click on Browse Member Directory.
 - g. Click the boxes for the Change Requestor, the Developer, and the Project Manager(s) in the Assignment section.
 - h. Click Save & Close.
 - i. Click Save & Close.
6. Update the Implement Solution task to Complete.
 - a. Click on the Action menu  for Implement Solution task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.

Acceptance Test (Change Requestor)






1. eProject Implementation notification received.
2. Test change solution and verify proper operation of system.

Accept Implementation

1. Document acceptance.
 - a. Click on the Action menu  for the Acceptance Test task.
 - b. Click on Relate to New Item.
 - c. Select News. 
 - d. Enter “Solution Accepted” in the Headline field.
 - e. Enter comment “The solution package for [project name] is Accepted.” Add any additional details as necessary.
 - f. Click on Browse Member Directory.
 - g. Click the boxes for the Change Requestor, the Developer, and the Project Manager(s) in the Assignment section.

- h. Click Save & Close.
 - i. Click Save & Close.
2. Update the Acceptance Test task to Complete.
 - a. Click on the Action menu  for System Test task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.




Reject Implementation

1. Document rejection.
 - a. Click on the Action menu  for Acceptance Test document.
 - b. Click on Relate to New Item.
 - c. Select Issue. 
 - d. Select the change request project.
 - e. Enter a "PC07CBCR####" [specific deliverable] Acceptance Test Failure" for the Topic.
 - f. Enter the issue to be logged as thoroughly and succinctly as possible in the Description box.
 - g. Click the boxes for the Developer and the Project Manager(s) in the Assignment section.
 - h. Click Save.
 - i. Click Close.
 - j. Click on the Action menu  for the Acceptance Test task.
 - k. Click on Relate to New Item.
 - l. Select Discussion. 
 - m. Select the change request project.
 - n. Enter the title of the Issue as the Topic.
 - o. Enter any comments related to the decision in the message box.
 - p. Click on Browse Member Directory.
 - q. Click the boxes for the Developer and the Project Manager(s) in the Assignment section.
 - r. Click Save & Close.
2. Update the Acceptance Test task to 50%.
 - a. Click on the Action menu  for Acceptance Test task.
 - b. Select Edit Task.
 - c. Change Percent Complete to 50.

- d. Click Save & Close.



Close Out


Approval of Solution (Change Requestor)

1. eProject Acceptance notifications received for all project deliverables.
2. Document Approval of Solution.
 - a. Click on the Action menu  for the Approval of Solution task.
 - b. Click on Relate to New Item.
 - c. Select News. 
 - d. Enter "Solution Approved" in the Headline field.
 - e. Enter comment "The solution package for [project name] is Approved." Add any additional details as necessary.
 - f. Click on Browse Member Directory.
 - g. Click the boxes for the Change Requestor, the Developer, and the Project Manager(s) in the Assignment section.
 - h. Click Save & Close.
 - i. Click Save & Close.
3. Update the Approval of Solution task to Complete.
 - a. Click on the Action menu  for Approval of Solution task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.




Change Request Closure (IT)

Change Request Rejection

1. eProject Change Request Rejection notification received.
2. Update the Change Request Closure task to Complete.
 - a. Click on the Action menu  for Change Request Closure task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.
3. Update Project Status
 - a. Click on the Action menu  for the change request project.
 - b. Select Update Status.
 - c. Change Project State to Cancelled.
 - d. Change Phase to Close Out.

- e. Click Save & Close.
4. Archive Project
 - a. Click on the Action menu  for the change request project.
 - b. Select Archive Project.
 - c. Click Yes
 - d. Click Refresh to update the screen.

Solution Approval

1. eProject Solution Approval notification received.
2. Update the Change Request Closure task to Complete.
 - a. Click on the Action menu  for Change Request Closure task.
 - b. Select Mark as Complete.
 - c. Click Close.
 - d. Click Refresh to update the screen.
3. Update Project Status
 - a. Click on the Action menu  for the change request project.
 - b. Select Update Status.
 - c. Change Project State to Completed.
 - d. Change Phase to Close Out.
 - e. Click Save & Close.
4. Archive Project
 - a. Click on the Action menu  for the change request project.
 - b. Select Archive Project.
 - c. Click Yes
 - d. Click Refresh to update the screen.