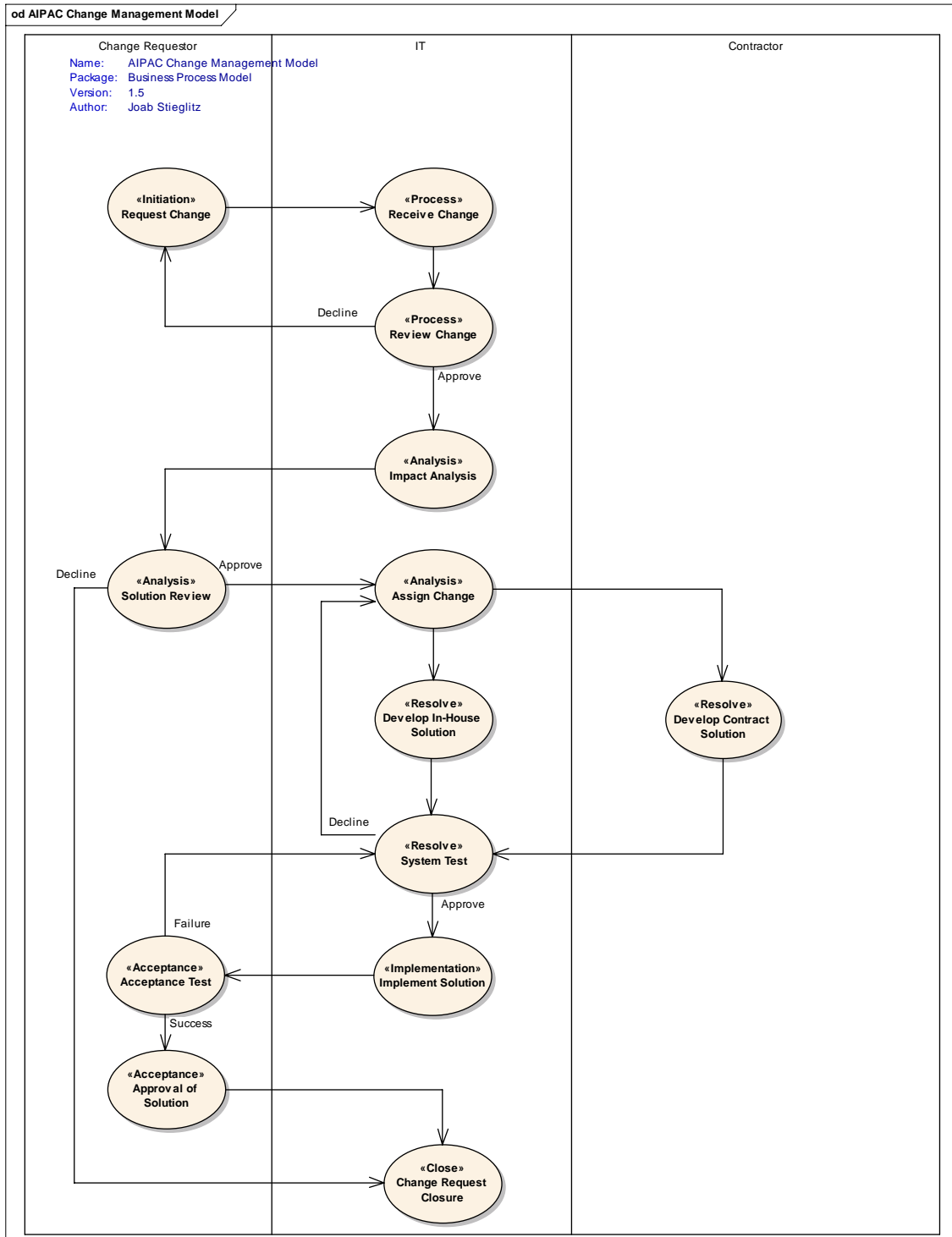


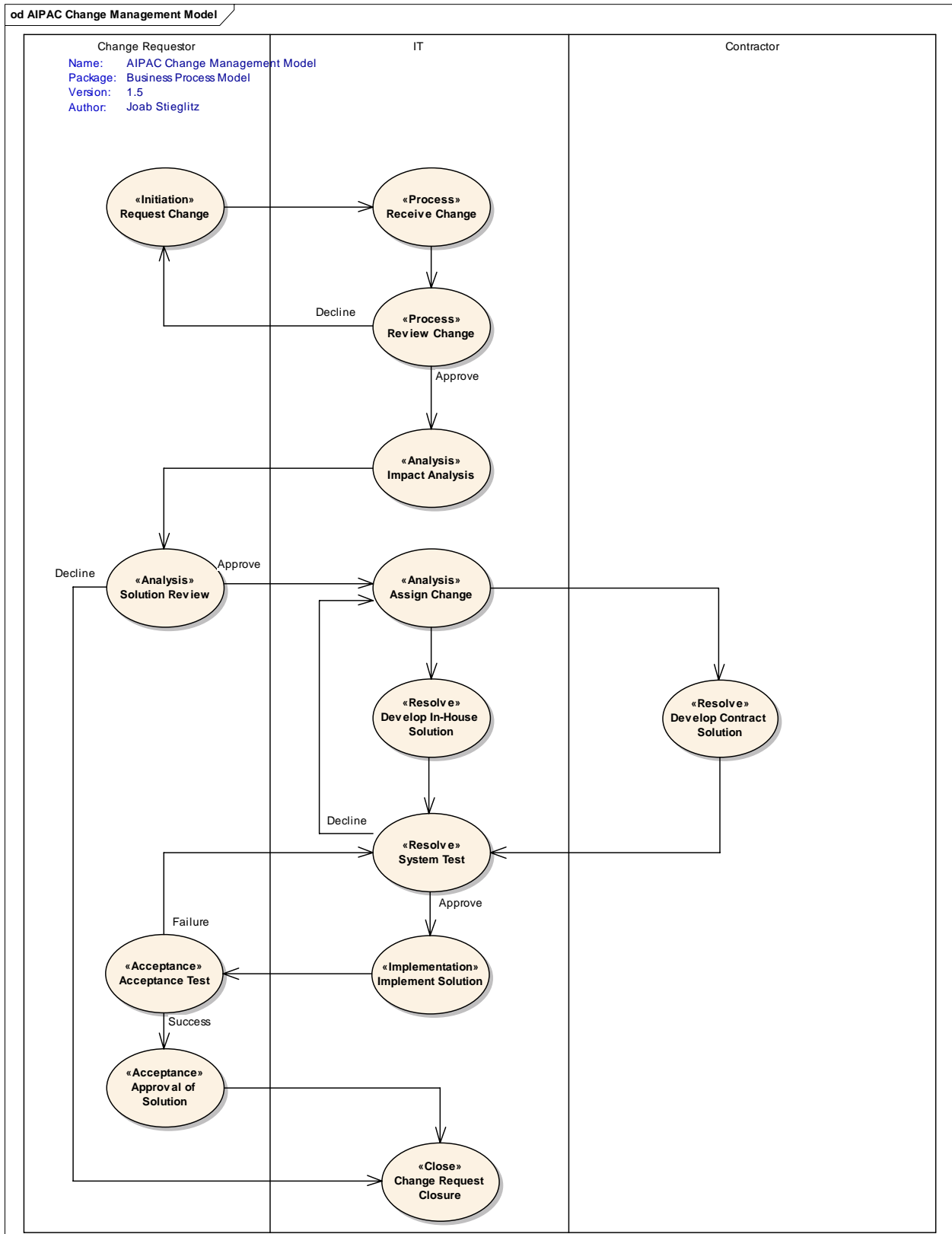
# AIPAC Change Management Model



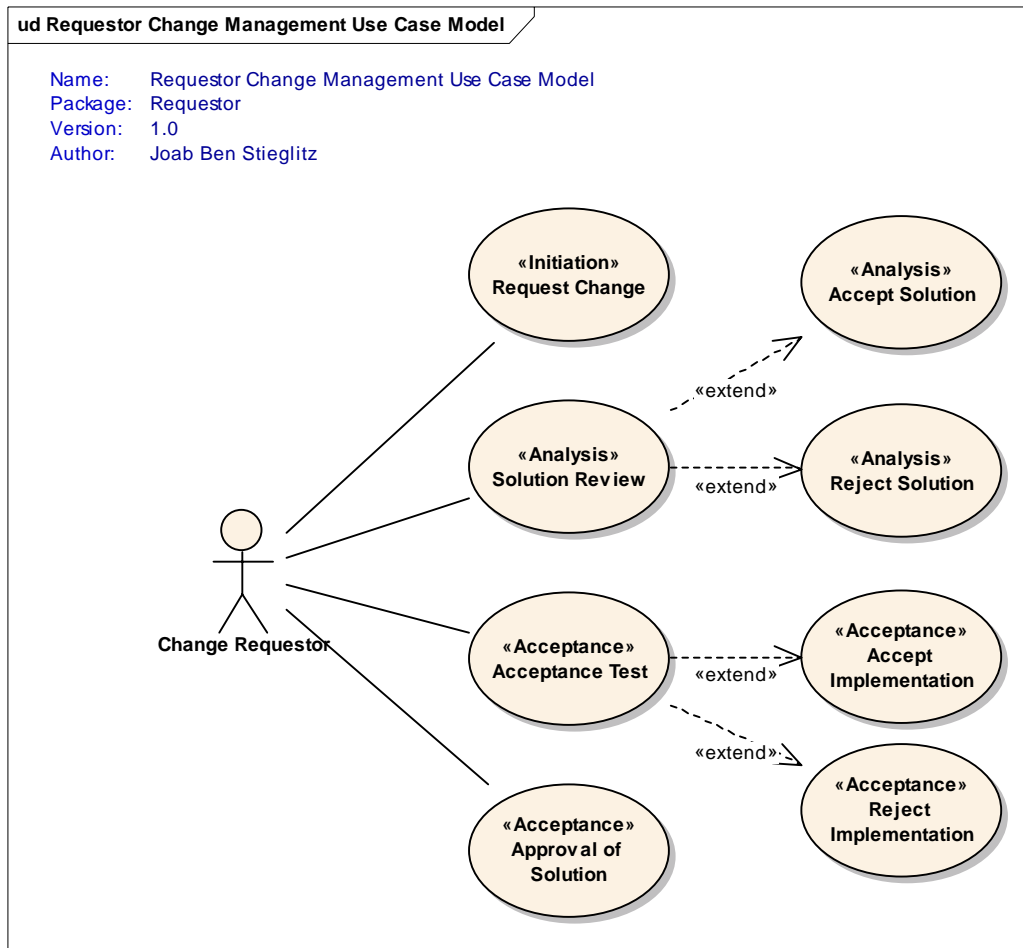
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# AIPAC Change Management Model



## Change Requestor



**Figure 1 : Requestor Change Management Use Case Model**

**Actor:** The Change Requestor role is responsible for initiating the Change Request Process and verifying that the provided solution works and is acceptable.

### *Internal Requirements*

- The change requestor must be the person with authority to approve the solution.

## Request Change

**UseCase:** Change Management process is initiated by the Change Requestor, who creates the Change Request document. The change request will become a Change Order upon acceptance of the impact analysis following the Solution Review.

### *Internal Requirements*

- All change requests must be in writing.
- Create/respond to Issues and Discussion Threads.
- Respond to rejection notifications.
- Update task information in eProject.

### *Scenarios*

1. Identify a change to an existing system. {Basic Path}.

2. Compose description of the change as the Change Request Document. {Basic Path}.

The Change Request Document is the first document of record for the project and serves to initiate the process. A Change Request Document is created using the Change Request Template. The Change Requestor completes the first section only.

A Change Order is created when the Impact Analysis section of the form has been completed and approved. Elements of the Change Request Document are then used to create the Change Order Document.

3. Upload Change Request Document to eProject. {Basic Path}.

Change Request document is uploaded to the Admin-New Change Order Depository project with approval notification to the project manager.

## **Solution Review**

**UseCase:** Requestor is briefed on impact analysis and a decision to proceed or not is made. The possible decisions are that the Change Request should proceed or the Change Request should be cancelled.

### *Internal Requirements*

- Approve/Decline Impact Analysis.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1.eProject Approval Request received. {Basic Path}.

2. Review impact analysis document in eProject. {Basic Path}.

All approvers of the Impact Analysis Report should review the document and create issues and discussions as needed to expose any issues prior to the Impact Analysis Review Meeting.

3. Hold Impact Analysis Review Meeting. {Basic Path}.

Impact analysis author briefs change requestor and answers any questions. The goal of this meeting is to come to consensus on the Change Request. The outcome of the meeting should be noted in the Solution Review section of the Change Request Document.

4. Revise and upload Impact Analysis Report. {Basic Path}.

This step is repeated until the revised document is approved or rejected.

## **Accept Solution**

**UseCase:** If the change is accepted, the decision is documented and prepared to be assigned for work.

### *Scenarios*

1. Accept Approval. {Basic Path}.

The Approve link in eProject is clicked. The Change Requestor should Relate a New News Item to indicate their decision to proceed with the Change Request.

2. Update Change Request and upload as Change Order. {Basic Path}.

The Change Request document is updated with details from the Impact Analysis Report to create the Change Order document. This is uploaded to eProject for the developers to work from.

3. Update the Solution Review task to Complete. {Basic Path}.

## Reject Solution

**UseCase:** If the solution package is rejected, the change request will not be pursued. The decision is documented so the project manager can close the project.

### *Scenarios*

1. Decline Approval. {Basic Path}.

The Decline button is clicked in eProject.

2. Document decision. {Basic Path}.

The Change Requestor should Relate a New News Item to indicate their decision not to proceed with the Change Request.

3. Update the Solution Review task to Complete. {Basic Path}.

## Acceptance Test

**UseCase:** Change requestor or designate tests the solution to verify that it does what it is supposed to do.

### *Internal Requirements*

- Approve/Decline Solution Package.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. eProject Implementation notification received. {Basic Path}.

2. Test change solution and verify proper operation of system. {Basic Path}.

## Accept Implementation

**UseCase:** If the solution package is rejected, the change request will not be pursued. The decision is documented so the project manager can close the project.

### *Scenarios*

1. Document acceptance. {Basic Path}.

Relate News item to the Acceptance Test task announcing acceptance of solution.

2. Update the Acceptance Test task to Complete. {Basic Path}.

## Reject Implementation

**UseCase:** If the solution package is rejected, the change request will not be pursued. The decision is documented so the project manager can close the project.

### *Scenarios*

1. Document rejection. {Basic Path}.

If the solution is incomplete, an issue should be created with notification to the project team.

2. Update the Review Change task to 50%. {Basic Path}.

## Approval of Solution

**UseCase:** Change requestor (the person who initiated the process) approves provided change request solution by notifying IT that change has been successfully implemented.

*Internal Requirements*

- Update task information in eProject.

*Scenarios*

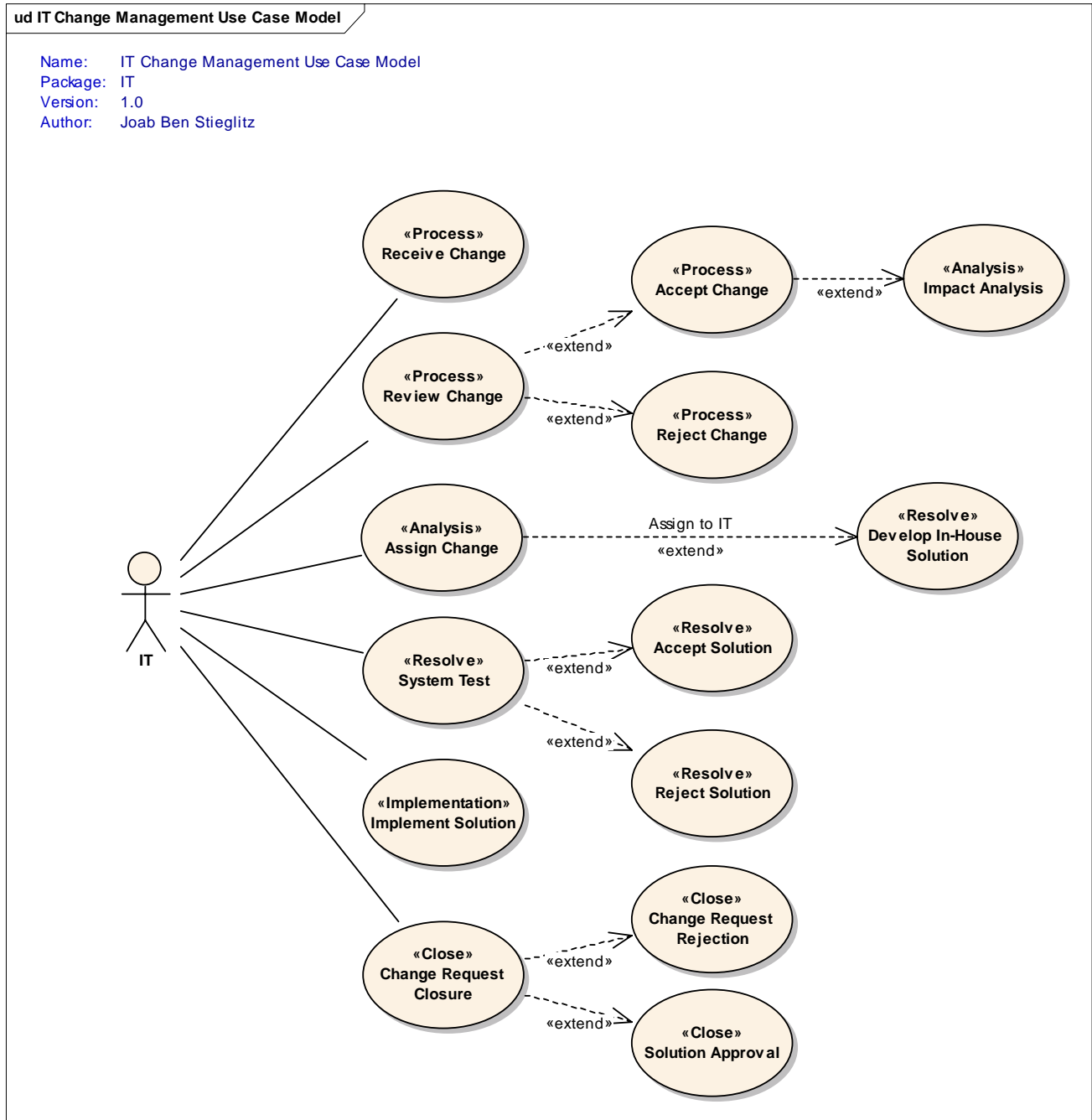
1. eProject Acceptance notifications received for all project deliverables. {Basic Path}.

2. Document Approval of Solution. {Basic Path}.

Relate News item to the Acceptance Test task announcing approval of complete Change Request solution.

3. Update the Approval of Solution task to Complete. {Basic Path}.

# IT



**Figure 2 : IT Change Management Use Case Model**

**Actor:** The IT role is responsible for tracking the progress of the change request, assigning the change request to appropriate staff, in some cases developing the change request solution, and implementing the solution.

Different staff members may perform different tasks associated with the IT role.

## Receive Change

**UseCase:** All change requests are received and cataloged in eProject by IT.

### Internal Requirements

- Assign all Change Requestor tasks to Change Requestor.
- Assign IT Reviewer and Assigner tasks.
- Create eProject project.
- Create/respond to Issues and Discussion Threads.
- Insert task template.
- Update task information in eProject.
- Upload Change Request to eProject for approval.

### Scenarios

1. Change request document approval notification is received. {Basic Path}.

Change Request is NOT approved at this time. The Receive Change task is solely intended to establish the structure for tracking the progress of the request.

2. Create change request project in eProject. {Basic Path}.

Project is created and labelled "PC07CBCO####" to identify PC07 Conference Builder Change Orders projects.

3. Import standard milestones from Microsoft Project file. {Basic Path}.

The standard milestone datafile from Microsoft Project includes the standard tasks to be included in any project plan. Additional tasks will need to be added for each element of the change request. This is easier done in Microsoft Project before the tasks are imported into eProject. Tasks should be assigned to Team Member in the Import Tool.

4. Update Request Change task. {Basic Path}.

The Request Change must be updated to reflect the actual start date of the project and marked as complete.

5. Link to Change Request Document. {Basic Path}.

The Change Request Document is linked to the Receive Change task as a deliverable and routed for approval..

6. Mark the Receive Change task as Complete. {Basic Path}.

## Review Change

**UseCase:** Received change requests are reviewed by appropriate IT personnel and accepted or rejected. Accepted change requests are prioritized. Rejected changes are returned to the requestor.

### Internal Requirements

- Approve/Decline Change Request.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### Scenarios

1. eProject Approval Request received. {Basic Path}.

2. Review Change Request Document in eProject. {Basic Path}.

The Change Request Document is reviewed to determine if the request is redundant or not worth consideration at this time.

## Accept Change

**UseCase:** Changes are accepted using the eProject Approval process. Comments may be posted regarding the approval as necessary.

### *Internal Requirements*

- Assign Impact Analysis Task.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. Accept Approval. {Basic Path}.

The Approve link is clicked in eProject.

2. Document the decision. {Basic Path}.

Post comments regarding the approval as necessary.

3. Assign Impact Analysis task to analysis personnel. {Basic Path}.

The Impact Analysis task should be assigned to the person responsible for performing and documenting the possible impact of the proposed changes.

4. Update Project Status to Planning {Basic Path}.

At this point, the project has been established, and actual work on the project is beginning.

5. Update the Review Change task to Complete. {Basic Path}.

## Reject Change

**UseCase:** Change requests are rejected (declined) using the eProject Approval process. In the event of a rejection, a discussion is created to log resolution of the open issues regarding the change request.

### *Internal Requirements*

- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. Decline Approval. {Basic Path}.

The Decline link is clicked in eProject.

2. Document the decision. {Basic Path}.

Create a discussion for the Change Order. This will be used to document discussion of issues regarding the change order.

3. Update the Review Change task to 50%. {Basic Path}.

The Review Change task is incomplete because the review is still in progress. The request may be revised via discussion and a new version of the Change Request document uploaded for approval, at which time the change may be approved.

## Impact Analysis

**UseCase:** Request is evaluated in terms of size, effort, cost and schedule and a briefing is prepared for the requestor.

### Internal Requirements

- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.
- Revise and upload the Change Request Document to eProject for approval.

### Scenarios

1. eProject Change Request approval received. {Basic Path}.

2. Evaluate change in terms of size, effort, cost and schedule. {Basic Path}.

The proposed change is reviewed to determine if it is feasible, how much time, effort, and money is required to fulfill it.

3. Post issues and discussions as needed. {Basic Path}.

The analyst should create Issues in eProject for any issues that are identified and create discussion threads to discuss them. All issues must be addressed (not necessarily resolved) before the Impact Analysis Report can be presented. Resolved issues should be marked as completed in eProject.

4. Revise and upload the Change Request Document. {Basic Path}.

The second section of the Change Request Document identifies the impact of the proposed change in terms of size, effort, cost and schedule, and options prepared for how to proceed. This document is uploaded to eProject and marked for approval by the Change Requestor and Project Management.

5. Assign Solution Review task to appropriate personnel. {Basic Path}.

The Solution Review task is assigned to the Change Requestor to start the clock on getting the proposed change request solution approved.

6. Schedule an Impact Analysis Review Meeting. {Basic Path}.

For Change Request that encompass several of complex issues, a meeting may be called to discuss the proposed solution in detail. The goal of this meeting is to come to consensus on the Change Request.

7. Update the Impact task to Complete. {Basic Path}.

## Assign Change

**UseCase:** Accepted Change Requests are assigned to appropriate personnel for solution development.

### Internal Requirements

- Assign Impact Analysis Task.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### Scenarios

1. eProject Solution approval received. {Basic Path}.

2. Select development route. {Basic Path}.

Either the Develop In-House Solution task or the Develop Contract Solution and Unit Test tasks will be chosen. The other task(s) should be deleted from the project.

3. Assign Development staff. {Basic Path}.

The task(s) should be assigned to the people responsible for completing them.

4. Update Project Status to Execution {Basic Path}.

The project has advanced beyond the planning phase. The steps documented in the Change Order are now to be executed.

5. Update the Assign Change task to Complete. {Basic Path}.

## ***Develop In-House Solution***

***UseCase:*** Solutions that do not require an outside contractor are developed by IT staff.

### ***Internal Requirements***

- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.
- Upload solution to eProject for approval.

### ***Scenarios***

1. eProject assignment notice received. {Basic Path}.

2. Identify and document root cause of change. {Basic Path}.

Before work is done to address the problem, the developer should determine that the requested change will actually resolve the problem and document it. If the proposed change will not address the issue, a discussion thread should be created to communicate the findings.

3. Prepare and document solution package. {Basic Path}.

The developer creates the solution package and also documents what is being done and the steps that IT will take to implement it in testing as well as into production.

4. Upload solution package to eProject documents section. {Basic Path}.

The completed solution, including all code and documentation, is uploaded to eProject in the Documents section. If there are a significant number of files, two files should be uploaded: a cover document with instructions, and a ZIP file containing all the files including the cover document. The cover document should be marked for approval by the System Tester.

5. Update the In-House Solution task to Complete. {Basic Path}.

## ***System Test***

***UseCase:*** Developed solutions are tested by IT staff before being implemented.

### ***Internal Requirements***

- Approve/Decline solution package.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### ***Scenarios***

1. eProject Approval Request received. {Basic Path}.

2. Review Solution Package in eProject. {Basic Path}.

The System Tester should verify successful completion of them and that the solution does what it is supposed to do.

3. Update the Develop Contract Solution task to Complete. {Basic Path}.

3. Update the System Test task to Complete. {Basic Path}.

## Accept Solution

**UseCase:** Changes are accepted using the eProject Approval process. Comments may be posted regarding the approval as necessary.

### *Internal Requirements*

- Assign Impact Analysis Task.
- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. Accept Approval. {Basic Path}.

The Approve button is clicked in eProject.

2. Document the decision. {Basic Path}.

Post comments regarding the approval as necessary.

3. Update the System Test task to Complete. {Basic Path}.

## Reject Solution

**UseCase:** Change requests are rejected (declined) using the eProject Approval process. In the event of a rejection, a discussion is created to log resolution of the open issues regarding the change request.

### *Internal Requirements*

- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. Decline Approval. {Basic Path}.

The Decline button is clicked in eProject.

2. Document the decision. {Basic Path}.

If the proposed solution has problems, an issue should be created and with notification to the developer.

3. Update the System Test task to 50%. {Basic Path}.

System testing is not completed until the Solution Package is approved.

## Implement Solution

**UseCase:** Solution is received from developer and implemented in production environment.

### *Internal Requirements*

- Create/respond to Issues and Discussion Threads.
- Update task information in eProject.

### *Scenarios*

1. eProject Approval Request received. {Basic Path}.

2. Review Solution Package in eProject. {Basic Path}.

The implementer verifies that all the necessary files and documentation are present to perform the implementation.

3. Post issue if solution package is not complete. {Basic Path}.

If the solution is incomplete, an issue should be created and with notification to the project team.

4. Implement change solution per included instructions. {Basic Path}.

5. Assign the Acceptance Test task to the Change Requestor. {Basic Path}.

6. Update the Implement Solution task to Complete. {Basic Path}.

## **Change Request Closure**

**UseCase:** IT personnel close the change request project in eProject.

### ***Internal Requirements***

- Archive project.
- Update task information in eProject.

## **Change Request Rejection**

**UseCase:** IT personnel close the change request project in eProject.

### ***Internal Requirements***

- Archive project.
- Update task information in eProject.

### ***Scenarios***

1. eProject Change Request Rejection notification received. {Basic Path}.
2. Update the Change Request Closure task to Complete. {Basic Path}.
3. Update Project Status {Basic Path}.
4. Archive Project {Basic Path}.

## **Solution Approval**

**UseCase:** IT personnel close the change request project in eProject.

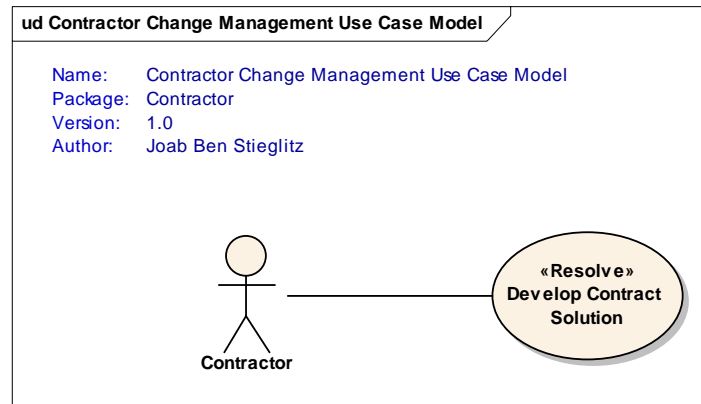
### ***Internal Requirements***

- Archive project.
- Update task information in eProject.

### ***Scenarios***

1. eProject Solution Approval notification received. {Basic Path}.
2. Update the Change Request Closure task to Complete. {Basic Path}.
3. Update Project Status {Basic Path}.
4. Archive Project {Basic Path}.

## Contractor



**Figure 3 : Contractor Change Management Use Case Model**

**Actor:** The contractor role develops change request solutions when assigned, verifies that the change request is properly addressed, and verifies that the solution package functions properly and is complete.

### Develop Contract Solution

**UseCase:** Contractor develops change solution.

#### Internal Requirements

- Complete timesheet(s).
- Update task information in eProject.

#### Scenarios

1. eProject assignment notice received. {Basic Path}.
2. Identify and document root cause of change. {Basic Path}.

Before work is done to address the problem, the developer should determine that the requested change will actually resolve the problem and document it. If the proposed change will not address the issue, a discussion thread should be created to communicate the findings.

3. Prepare and document solution package. {Basic Path}.

The developer creates the solution package and also documents what is being done and the steps that will be taken to implement it in testing as well as into production.

4. Upload solution package to eProject documents section. {Basic Path}.

The completed solution, including all code and documentation, is uploaded to eProject in the Documents section. If there are a significant number of files, two files should be uploaded: a cover document with instructions, and a ZIP file containing all the files including the cover document. The cover document should be marked for approval by the System Tester.

5. Assign Unit Test task to appropriate personnel. {Basic Path}.
6. Document time in Timesheet function of eProject. {Basic Path}.

Time should be linked to the specific task worked on, in hours, on a daily basis.

7. Update the Develop Contract Solution task to 50%. {Basic Path}.

The development process is only 50% complete. It solution must then be system tested by IT (50%). Once all these steps are completed, the development task can be marked as complete.