

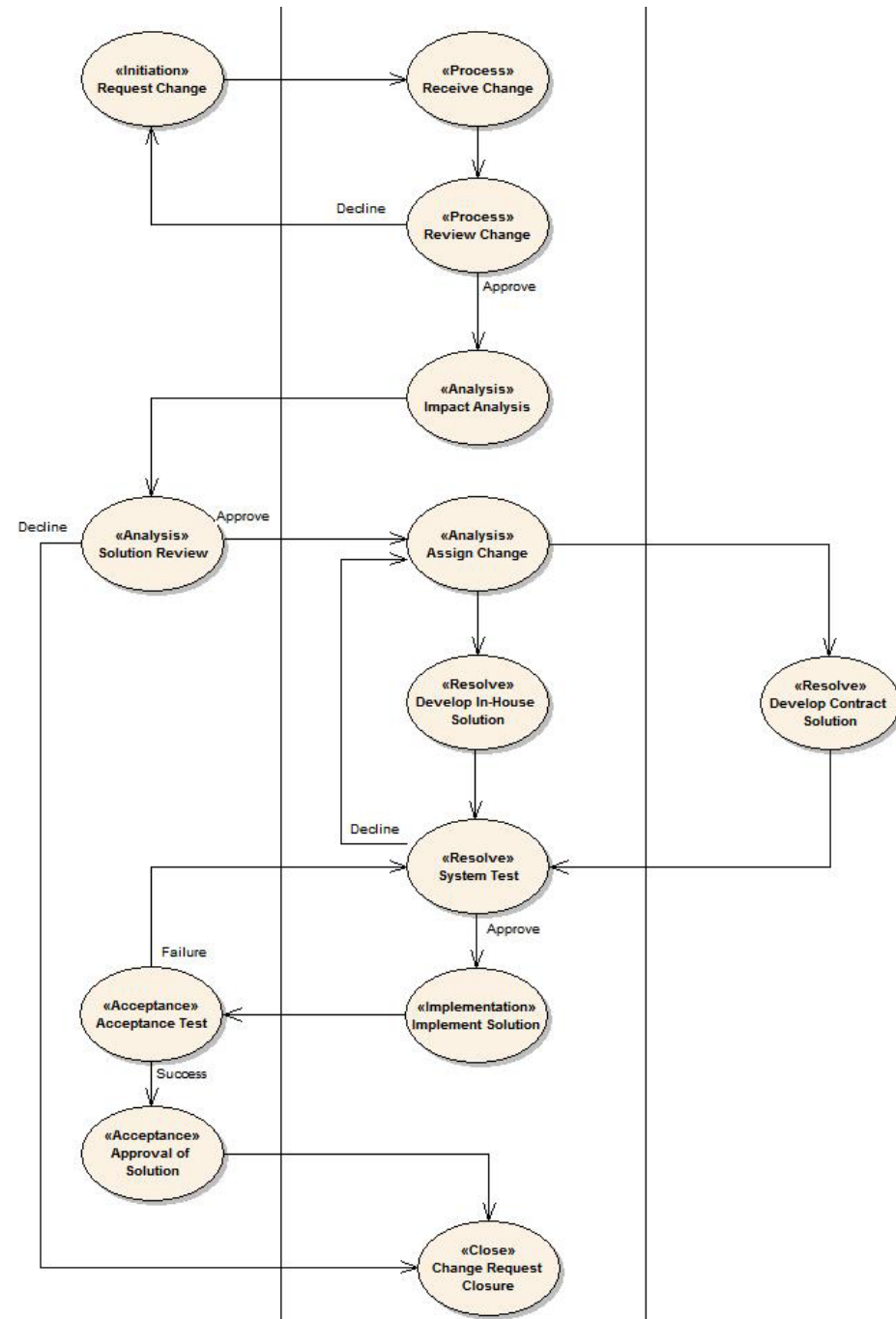
AIPAC Change Management Training

Introduction to Structured
Project Management Using



Overview

- AIPAC is implementing structured Project Management using eProject
- Each project will follow a standard set of tasks, and provide a standard set of deliverables.



eProject

eProject is a set of online applications.



Projects – containers for sets of tasks to achieve specific goals.



Tasks – Steps in projects to be completed.



Documents – collects deliverables and tracks versions.



Issues – Catalogs and tracks to resolution anything that causes changes to the project.



Discussions – Capture conversations regarding Issues to document decision-making.



News – Used to announce major milestones.


Projects in eProject

- eProject is being piloted to manage Conference Builder Change Requests.
- Each Change Request will be treated as a separate project.
- The projects are divided into four phases: Initiation, Planning, Execution and Close Out.

Initiation

- The Initiation Phase is composed of the following tasks:
 - Request Change (Change Requestor)
 - Receive Change (IT)
 - Review Change (IT)
- In this phase, the project is introduced and the infrastructure established.

Request Change (Change Requestor)

- The first step is for someone to identify something that needs a change.
-  The change is documented in a Change Request Document created from the Change Request template.
- This document is uploaded to the Admin-New Change Order Repository project in eProject and sent to IT for approval.

Receive Change (IT)

- In this task, IT:
 - Receives the Change Request Document
 - Establishes a new project for tracking the progress of this change request in eProject
 - Uploads the standard project tasks
 - Links the Change Request Document to the new project.

Review Change (IT)

- IT staff review the Change Request document to determine that the change is properly identified, is not redundant, and is necessary.
- ❗ is properly identified, is not redundant, and is necessary.
- 💡 IT will either Approve the Change Request, which will then proceed to the next step, or return it to the Change Requestor for clarification.

Change Request Deliverables

- If the Change Request is Approved, it will be subdivided into deliverables, which will each be tracked individually.
- The following steps are conducted for each deliverable.

Planning

- The Planning phase is composed of the following tasks
 - Impact Analysis (IT)
 - Solution Review (Change Requestor)
 - Assign Change (IT)
- In the Planning stage, the work to be completed is identified and approved before actual work is started.

Impact Analysis (IT)

- The Impact Analysis determines what the impact of the deliverable will have in terms of
 - Size – will the scope of the system increase
 - Effort – how much work is required
 - Cost – how much the deliverable will cost
 - Schedule – how long it will take to do the work and any changes to scheduled work
- This is documented in the Impact Analysis section of the Change Request Document.

Solution Review (Change Requestor)

- This task is where the Change Requestor is presented with the Impact Analysis and decides whether the work for the deliverable is worth doing.
 - The options are to proceed with this deliverable, or to remove the deliverable from the Change Request.
 - The review is documented in the Solution Review section of the Change Request Document.
- If the Solution Review decision was to proceed, a Change Order Document is created.



Assign Change (IT)

- IT management assigns the work to appropriate staff for:
 - Development of the Deliverable (IT or Contract)
 - IT Testing of the Deliverable (System Test)
 - Implementation of the Deliverable



Execution

- The Execution phase is where the activities mapped out in the Planning phase are executed. This phase includes:
 - Development
 - System Test (IT)
 - Implement Solution (IT)
 - Acceptance Test (Change Requestor)
- At the conclusion of the Execution phase, the deliverable is in Production and approved for use.

Development

- In this phase, the deliverable is created.
-  This includes documentation describing what it is, how it works, and how to
-  implement it into production.
- The development with either be done by IT staff or by outside contractors.
- The deliverable is uploaded for approval by the System Tester.

System Test (IT)

- The IT staff will follow the instructions in the deliverable Solution Package to verify that the instructions are complete and that the deliverable works.
-  If any problems with the deliverable Solution Package appear, it will be rejected and communicated to the developer via an eProject Issue and Discussion thread.
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Implement Solution (IT)



When the deliverable Solution Package successfully passes the System Test, it will be introduced into the Production environment.

Acceptance Test (Change Requestor)

- Once the deliverable has been implemented, the Change Requestor must verify that the deliverable does what they want it to.



The Change Requestor accepts or rejects the deliverable Solution Package.



Rejection will be communicated to the developer via an eProject Issue and



Discussion thread

Close Out

- The Close Out phase completes all record keeping and ends the project. It is composed of the following tasks:
 - Approval of Solution (Change Requestor)
 - Change Request Closure (IT)
 - Change Request Rejection
 - Solution Approval

Approval of Solution (Change Requestor)



Once all the deliverables in a Change Order have been accepted, the Change Requestor notifies IT that the Change Order has been satisfied.

Change Request Closure (IT)

- This task concludes the project. It is executed when:
 - The Change Requestor elects not to proceed with a Change Request in the Solution Review task, or
 - When the Change Requestor signals that the Change Order has been satisfied in the Solution task.
- The project is the closed and archived.

References

- The following documentation of this process is available in eProject:
 - AIPAC CM Step-By-Step Instructions.pdf lists the eProject steps for performing every task in the project.
 - AIPAC Change Management Model.pdf provides a high level description of the entire process.
- They can be found in the Documents tab in the Admin-Change Management Process project.

Thank You.

Call Joab at (202) 639-5193
if you have any problems.