**Change Management Plan**



**SRM System**

**HIT Team**

Consulting

Sales

Staffing

Support

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# Document Revision History

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# Change Management Purpose

In order to ensure that change is well managed by Big Goal in the process of developing its mini project, a plan has been drafted in accordance with the Configuration Management Policy. This document is intended to serve as a standard for team members in the execution of the change management process. It outlines the objectives of the Configuration Management Plan, details what products are to be placed under change control, and describes the processes by which work products are controlled.

# Change Management Goals

The goals of SRM Change Management Plan:

1. Reasonable change activities are planned.
2. Ensure that new tasks and other requested changes are justified, and that affected deliverables are identified and modified accordingly.
3. Project plans are changed to reflect the requested changes.
4. Changes are negotiated and communicated to all affected parties.
5. Identify changes in scope, or other unplanned activity, in advance and control them.
6. Resolve any questions or issues that may surface between vendors and the project team regarding scope and/or project deliverables
7. Obtain authorization to proceed with the changes and assign them to appropriate individuals to be completed.
8. Monitor the progress and cost of the changes.

The Change Management Plan will apply to the following types of changes:

* Any change of project scope or unplanned activity not explicitly within the scope of the current baselined work plan.
* Any change to the baselined project plan.
* Modifications to approved (signed-off) project deliverables except where the deliverable has a suspected fault (e.g., where factual errors are subsequently discovered in an approved document).

# Change Management Responsibilities

A change request can originate from a variety of sources. This includes, but is not limited to, the immediate project team, sub-contractors, any state agency and stakeholders. Regardless of the source, each change request will be subject to same process for documentation, evaluation, analysis and disposition.

The change management responsibilities are:

1. The SRM project is responsible to develop the Change Management Plan.
2. The Business change management plans are managed by the team leader and are to be incorporated into the overall project change management plan.
3. Adequate resources and funding are obtained to ensure the change management plan can and will be executed.
4. The SRM is responsible for ensuring that changes are delivered as planned.
5. Records of changes are tracked and maintained.
6. The change management activities will be reviewed with senior management on a periodic basis.

# Change Management Roles and Definitions

The following roles are involved in the change management process:

|  |  |
| --- | --- |
| **Role** | **Definition** |
| Support Manager | The individual responsible for managing the Change Management activities of the team Matrix, also known as the ‘process specialist’ |
| Change Control Board (CCB) | A group who is responsible for reviewing change requests for approval or disapproval. For Big Goal it is the whole team, and necessary changes are discussed during the weekly team meetings. |
| Client | The agent representing the client's interests in a particular configuration item. |
| Originator | The individual with whom a change request originates and the person informed when the change request is closed-out or deferred to the Change Control Board. |

**The Role of the Change Control Board**

Once a work product defined baseline, it must be monitored to avoid unauthorized modification. The Change Control Board is formed of all members of Big Goal team whose mission is to govern post-baseline change of the team’s configuration items.

Membership

The Support Manager shall chair Big Goal Change Control Board. All members of Big Goal are members of the CCB. In addition to the team members, the team mentors will be invited to sit on meetings to advise the team regarding issues of change management.

Voting

In order to approve any change, a quorum of members must be present. After discussion, each of the members shall vote on the change being considered. A majority is required for a change to be approved. Members may abstain if they feel that they are having a conflict of interest. In the event that a tie occurs, the Support Manager will cast the tie-breaking vote.

**Tools**

Change management will require the use of an online tool for version control. The following section describes the tool to be used, the technical support required, and the physical resources needed to maintain the configuration management environment.

Big Goal will use Google Code for configuration management of all configuration items. This software is available from the Department server. Each team member should have the client software, Team Foundation Server, installed on his/her machine. Information on installing and setting up GOOGLE CODE is available from team support manager. All Big Goal members should have password and account. Also all team members should be sure to have Read/Add/Delete access to the project directory. The way to use tool must be researched before starting the project

# Change Control Process

This section provides process scripts that outline the entry criteria, inputs, activities, and outputs of each of the processes that implement Big Goal team change control plan. It is expected that these scripts will be used by all team members in executing the change control process.

The project manager will be assigned and have full responsibility for facilitating or executing the change management process to officially provide new requirements, scope, schedule and resources as follows:

* Identify a change -document and log a change request.
* Evaluate a change - analyze changes to the project plan, work products or activities, and changes to project time and effort estimates.
* Assess for risk - assess impact or risk of change to the project, system, or business.
* Obtain change decision - propose or recommend the change solution, obtain approval, rejection, or rework and negotiate agreements on schedule and effort commitments of all affected parties.
* Integrate changes into project plan - update or re-baseline the project plan(s), estimates, and schedule. Communicate the final changes to commitments or assignments to all affected parties, and obtain approval of the updated project plan and schedule.
* Track to completion – track the change from identification through update project plan and schedule.



**Identifying a Configuration Item**

Identifying a configuration item results in the placement of that item into the GOOGLE CODE project folder and the addition of an entry in the database. The module may exist for an unlimited period of time and have multiple revisions before it is baselined. In fact, it may never be baselined.

Activities

1. The owner submits the Identification Request to the Support Manager.
2. If there is no doubt about the need for change control on the item, approval is sent to the owner.
3. Otherwise, the team is notified of the request and a discussion item is added to the next team meeting agenda.
4. A vote is taken at the next team meeting based on the discussion.
5. If approval is granted, the owner adds the item, under the name given, to the GOOGLE CODE project folder and creates a new entry in the Change Control database.

**Any Detailed Process**

Any detailed process for CM or how to use GOOGLE CODE will be defined and trained before Implementation phase.

# Scope Change/Requirements Management

The Requirement Management Plan will be used to define and manage the product scope of the project in support of and consistent with the project objectives throughout the life of the project. It details the process, assigns responsibilities and identifies the techniques to be used, associated tools, and documentation needs.

In summary the plan for Requirements Management is to:

1. Identify stakeholders and gather, validate, prioritize, and document stakeholder needs and constraints,
2. Transform needs into high-level requirements, evaluate and correct deficiencies, validate findings with stakeholders, and prepare a matrix for tracing requirements,
3. Assign and categorize the high-level requirements to products, refine the high-level requirements to obtain greater precision and detail, and validate that the detailed requirements align with the high-level requirements,
4. Verify through each phase of the project that the end product or deliverable meets the requirements specifications, i.e. the code meets the design specification,
5. Use the project’s change management process to manage deletions, modifications and additions to stay in line with the original objectives or to formally modify these objectives, and the supporting schedule and resourcing.

The Requirements Management Plan is a subsidiary plan of the change management plan and is located in the project planning/change management section of the project file or notebook.

# Configuration Items

Having established where configuration items will reside, it is now necessary to outline which of the team’s work products should be configuration items. Work products that require change control include, but are not limited to, the following:

* Software Requirements Specification (SRS)
* Software Project Management Plan (SPMP)
* User Interface(UI) prototype
* Use Case Diagram
* Use Case Description
* Sequence Diagram
* Class Diagram
* Entity Relationship Diagram(ERD)
* Entity Specification
* Source Code
* Test Plans
* Test Reports
* Team Plans, Templates, and Process Documents
* Power Point for Presentation

In addition to these configuration items, other items may be placed under change control at the discretion of the team. If changes to a work product have the potential to impact the development schedule or plan, that work product must be placed under change control. Also, any work product that is to be edited by more than one member of the team must be placed under change control to ensure that team members are aware of each other’s work. Examples of work products that do not fall under change control are team meeting agendas, minutes, and correspondence.

If any of these documents reside on the team’s web site, it is the responsibility of the person who checks in the file to make sure the web site also has the latest version of the file.

# Schedule for Baseline Configuration Items

At the end of each phase, CM audit will be done. Each baseline will be checked by check lists. Configuration items are to be baselined according to the following schedule.

|  |  |
| --- | --- |
| **Configuration item** | **Baseline Schedule** |
| Software Requirements Specification (SRS) | After client acceptance |
| Software Project Management Plan (SPMP) | After client acceptance |
| User Interface(UI) prototype | After finishing the first prototyping |
| Use Case Diagram | After review and update |
| Use Case Description | After review and update |
| Sequence Diagram | After review and update |
| Class Diagram | After review and update |
| Architecture | After review and update |
| Entity Relationship Diagram(ERD) | After review and update |
| Entity Specification | After review and update |
| Source Code | After finishing the first prototyping |
| Test Plans | After review and update |
| Test Reports | After review and update |
| Team Plans, Templates, and Process Documents | After review and update |

# Reference

[CMM] SEI’s Capability and Maturity Model, Software Configuration Management

Key Process Area.