



CHANGE CONTROL PLAYBOOK:

A how-to guide to implementing a formal change control process using Contour.

What is change control? Managing change effectively is crucial to ensure a project's scope, schedule and budget don't spiral out of control, which is a common point of failure for large organizations managing complex development projects. For quality assurance purposes, a change control process enables a team to identify, evaluate, approve and document proposed changes to a project. The goals of a formal change control process are to:

- Anticipate, recognize and predict changes before they wreak havoc
- Prevent unauthorized or unintended deviation from the approved project baseline
- Evaluate and understand the technical, financial, schedule and quality assurance impacts of each change to the approved project baseline
- Ensure each change is authorized at the proper level within the organization

In this paper, we provide a practical step-by-step process to follow within Contour to help you respond quickly to change and keep everyone in sync.

Terminology

Demystify change requests & related concepts.

Before we dive into an example, let's take a moment to define a few terms to make sure we understand the lingo.

Change Request	The formal mechanism for proposing and assessing a change, addition or deletion to a project. In Contour, a Change Request is created as a unique item and linked using trace relationships to the requirements and other items associated with the proposed change.
Baseline	A snapshot of the approved scope of a project at a specific time. Baselines are useful in comparing the changes in scope during the development of a project and are often used as an aid in managing releases.
Change Control Board (CCB)	The formal committee within an organization empowered to review change requests and approve/reject changes before the team allocates resources to implement them.
Impact Analysis	A tool used within Contour to assess the impact a change will have on other requirements based on the trace relationships that have been created.
Version History	A detailed history of each requirement and other items is documented and stored in Contour, enabling complete audit trails used over the lifecycle of the requirement.
Status	The phase the Change Request is in. The status field within Contour is customizable, but commonly used states include: <ul style="list-style-type: none">• New – a new change request is created in Contour• Pending – analysis has been done is awaiting review from Change Control Board• Approved – Change Control Board has reviewed and approved change request• Rejected – Change Control Board has reviewed and declined the change request• Completed – change has been implemented by the team

❖ Master change control – an overview of the process.

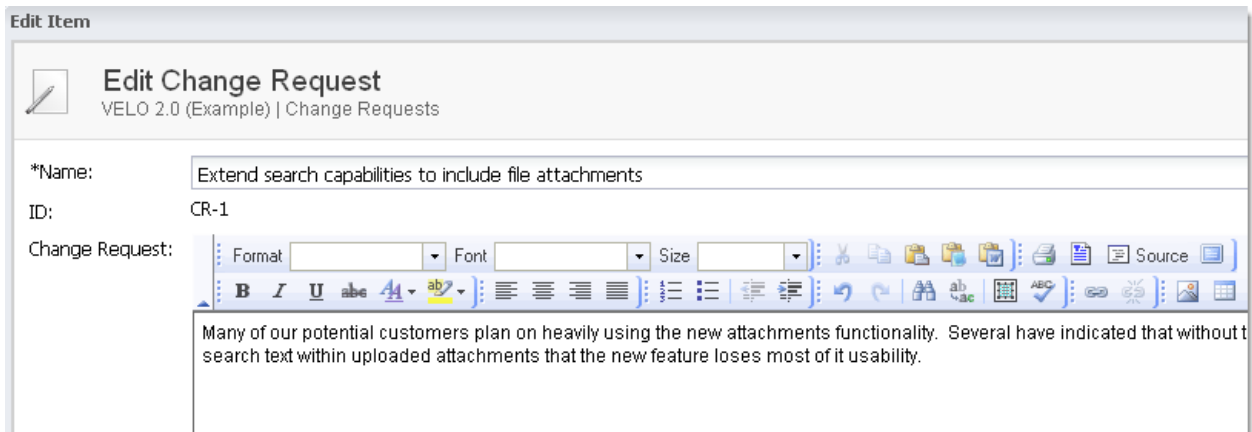
1. Create a change request.
2. Notify project manager.
3. Associate change request to requirements.
4. Run impact analysis.
5. Update requirements & notify relevant team members.
6. Team members review change.
7. Compare version history for change detail.
8. Team discusses change & provides feedback.
9. PM runs filter on open change requests.
10. Runs report with details for Change Control Board review meeting.
11. Change Control Board approves or denies request.

example scenario: The requirements for a new software application the team is building were approved months ago, but with just three weeks before the release, the team has discovered during a usability review that several potential customers of the application need the “Search” requirement expanded to include file attachments before they will adopt the application. Since this has significant impact on customer satisfaction, this enhancement needs to go through the change control process and seek approval from the Change Control Board (CCB).

[begin the example >>](#)

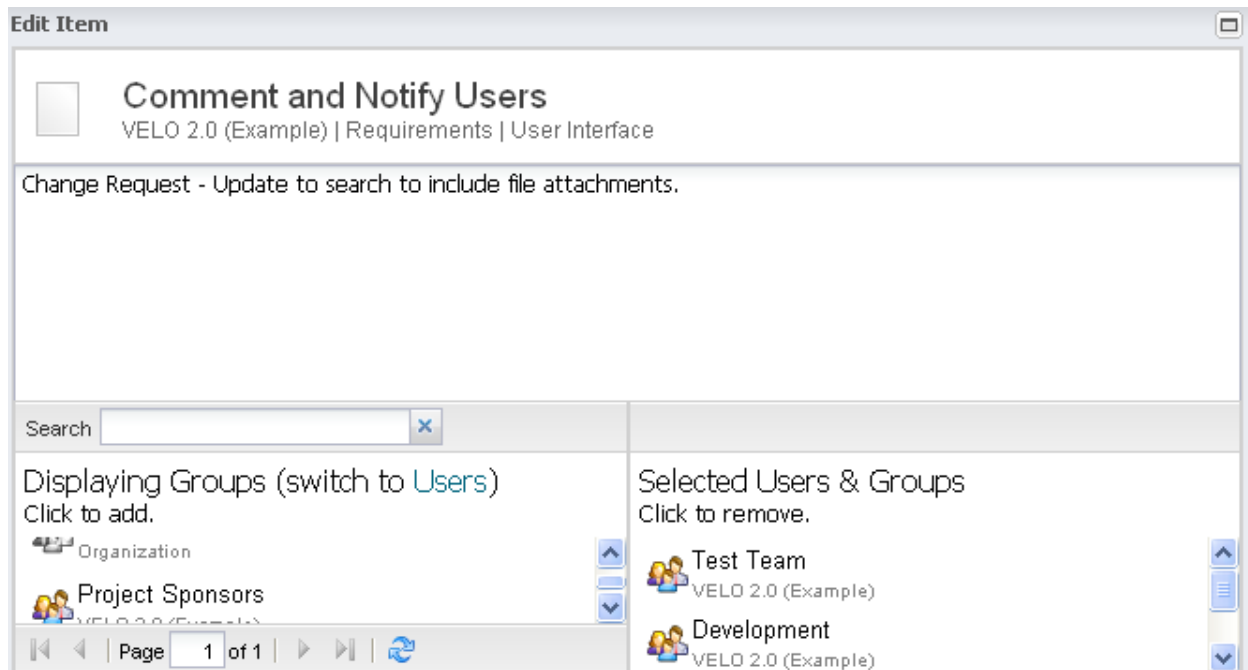
ONE: CREATE change request.

Thomas Jennings, the product manager, quickly creates a Change Request in Contour describing the enhancement needed to the requirement.



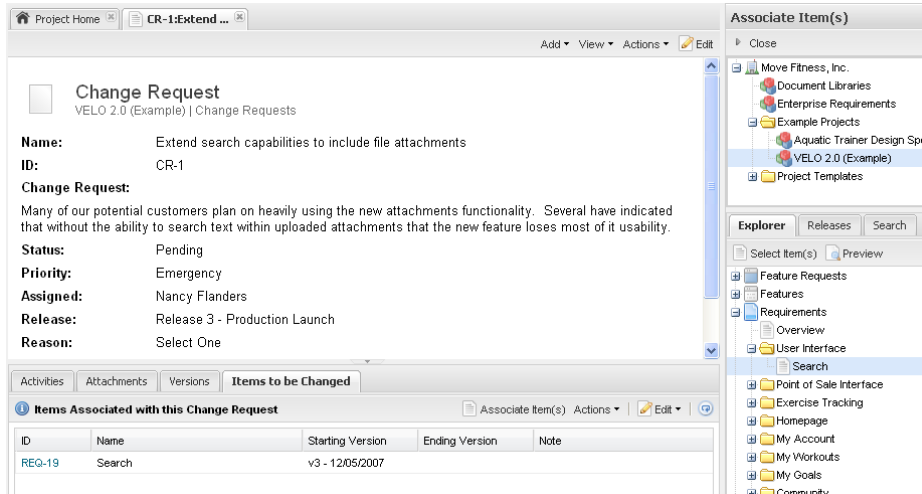
TWO: NOTIFY project manager.

Thomas notifies the project manager, Nancy Flanders, when saving the Change Request.



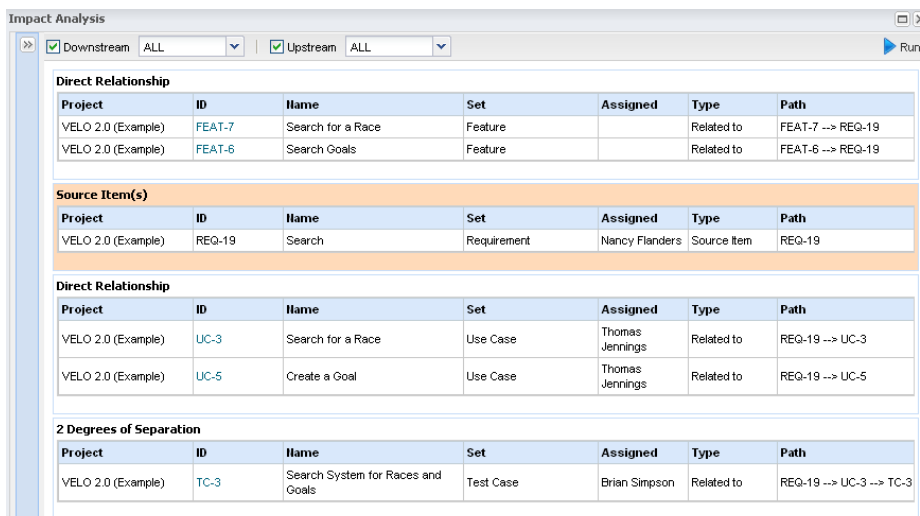
THREE: ASSOCIATE CR to requirements.

Nancy reviews the requirements and discovers that only one requirement, Search (REQ-19), is affected by the potential change. She associates the requirement to the Change Request (CR-1) allowing the team to quickly identify the item being discussed.



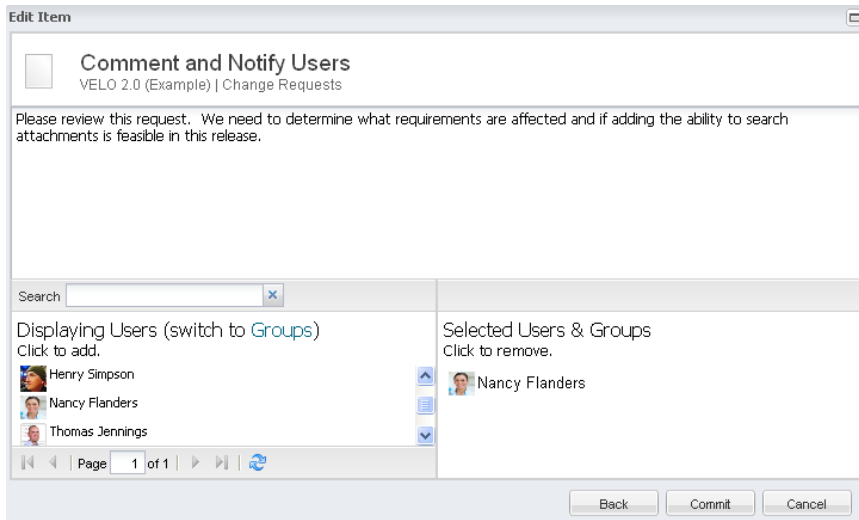
FOUR: RUN impact analysis.

After identifying the requirement, Nancy performs Impact Analysis on the item to determine the effect of the change on items downstream from the requirement. She can quickly gauge how far reaching the change will be and identify the team members that can provide detailed information about the affected areas.



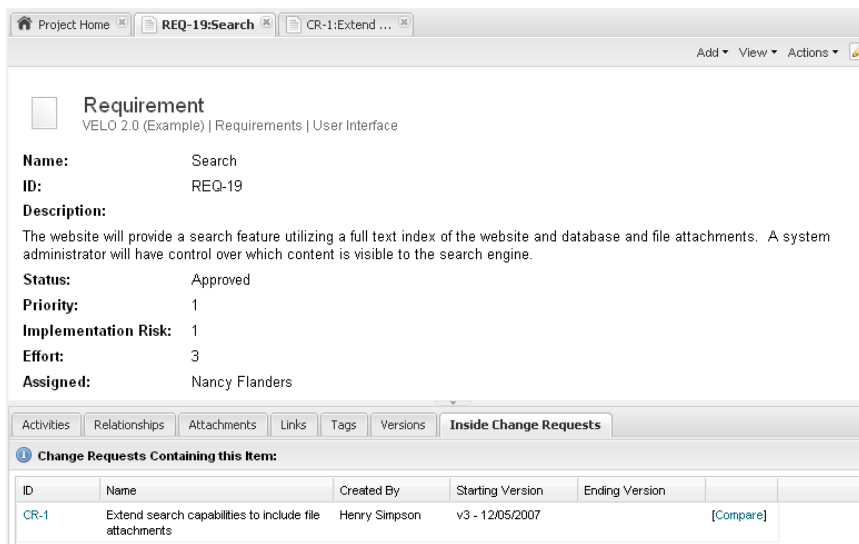
FIVE: UPDATE REQUIREMENTS & notify team.

Nancy updates the Search requirement and when saving, pushes email notifications out to the affected team members to review.



SIX: TEAM MEMBERS review change.

The team members receive emails that contain a URL that directly links them to the specific impacted requirement. The requirement now includes a tab within Contour that will refer them to the related Change Request.



SEVEN: COMPARE VERSION history for change detail.

Henry Simpson, the developer responsible for implementing the search feature, immediately sees what changed in the requirement by using the version compare feature where the precise change is highlighted.

Version Compare		
	Version #3	Version #5
Version Number	3	5
Version Comment	Changes made: ("Description")	"Description" changed
Version Date	12/05/2007	07/02/2010
versionBy	Nancy Flanders	
Name	Search	
ID	REQ-19	
Description	The website will provide a search feature utilizing a full text index of the website. A system administrator will have control over which content is visible to the search engine.	The website will provide a search feature utilizing a full text index of the website. A system administrator will have control over which content is visible to the search engine.

Update from Change Request Highlighted

EIGHT: TEAM DISCUSSES change & provides feedback.

Henry and Nancy discuss the change request to estimate the hours needed to implement it. The entire conversation is captured in-line within the Activities Stream within Contour, so everyone has context and no information is lost in separate email strings or offline communications.

Activities | Relationships | Attachments | Links | Tags | Versions | Inside Change Requests

Comments | All Activities | My Settings

Search | Add Comment | Settings

Nancy Flanders
1 second ago

Commented on

@Henry - Does that include updating screens to deal with results & search criteria?

[Reply](#) · [Edit](#) · [Delete](#)

Henry Simpson
4 minutes ago

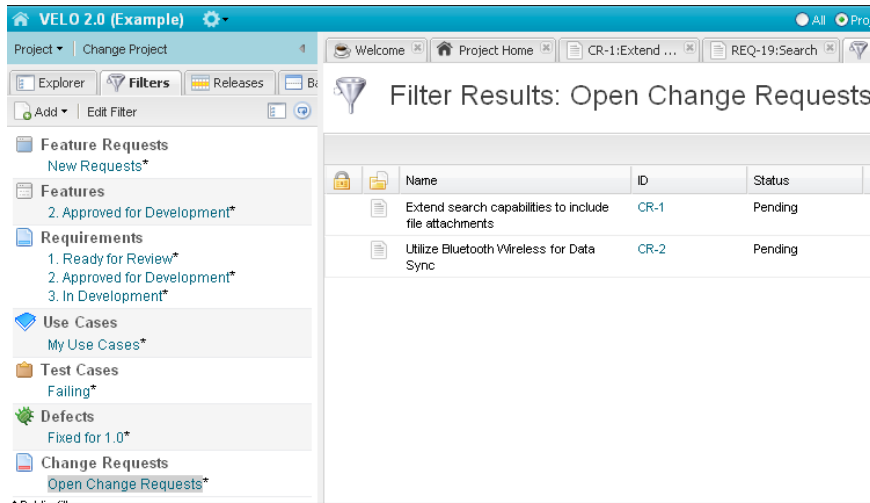
Commented on

The search engine we use has this option available, we just need to turn it on. Probably only take 4 hours to reconfigure and test.

[Reply](#)

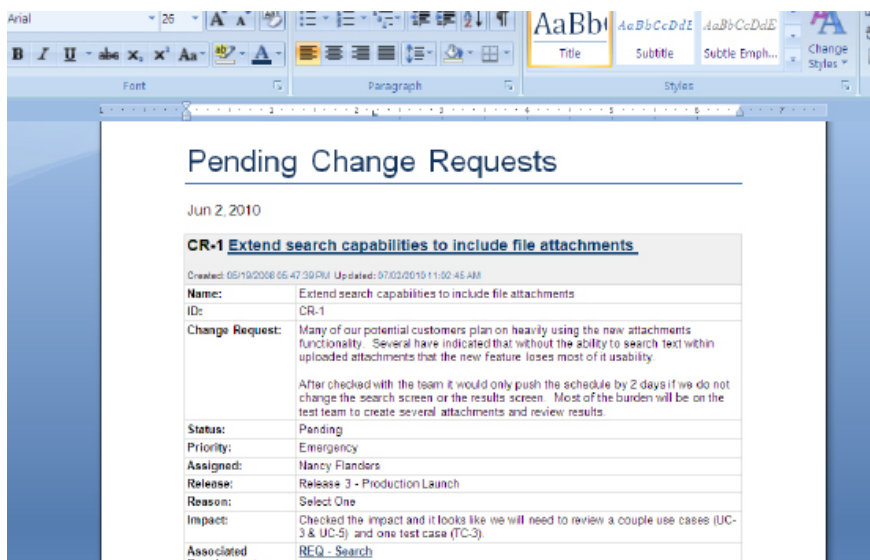
NINE: PM RUNS FILTER on open change requests.

Having the feedback she needs, Nancy gathers the open Change Requests in preparation for the weekly Change Control Board meeting by accessing the specific filter marked “Open Change Requests”. In this case, there are just two to be reviewed this week.



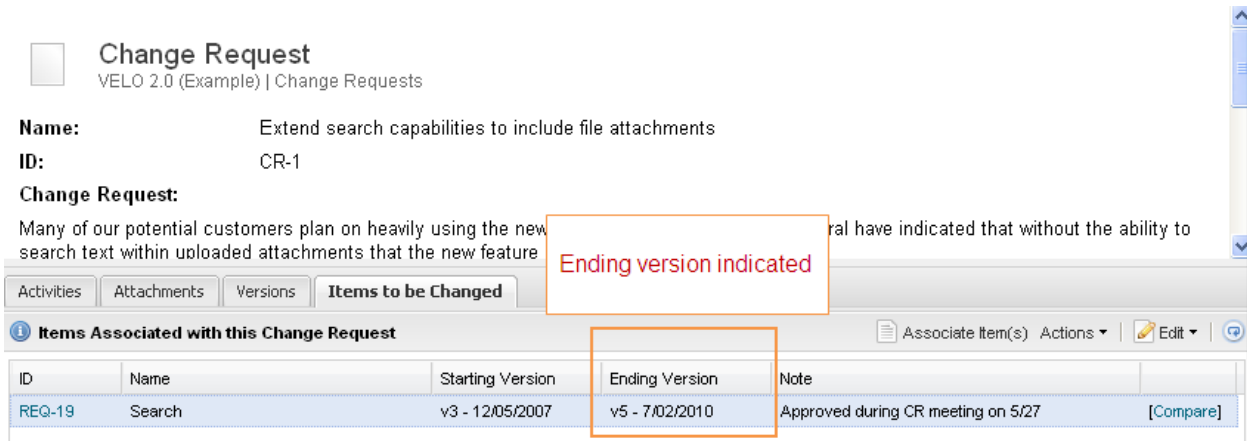
TEN: RUNS REPORT with details for CCB review meeting.

Nancy runs a report from Contour to be printed out for the CCB meeting that includes the details of each Change Request, along with its associated items and a description of the impact. The format of the report is customized to match the format the CCB likes to see.



ELEVEN: CCB APPROVES or denies request.

The CCB approves the request. Nancy updates the status of the Change Request to indicate that it is now approved and closes the request. Contour automatically inserts the current version of the Search requirement, so the team knows that the Approved version of the requirement has changed and it is time to get to work on the updates.



Change Request
VELO 2.0 (Example) | Change Requests

Name: Extend search capabilities to include file attachments
ID: CR-1

Change Request:
Many of our potential customers plan on heavily using the new search text within uploaded attachments that the new feature

Ending version indicated

Items Associated with this Change Request

ID	Name	Starting Version	Ending Version	Note
REQ-19	Search	v3 - 12/05/2007	v5 - 7/02/2010	Approved during CR meeting on 5/27 [Compare]

About Jama Software

Thousands of users worldwide. Billions in R&D projects managed within Contour.

Jama Software is the leader in collaborative requirements management solutions for improving enterprise collaboration and managing complex software development projects. Its Web application, Jama Contour, helps organizations manage the entire requirements management lifecycle through an intuitive, easy-to-use interface that brings people, process and data together to ensure software quality is delivered as specified.

Customers, from agile start-ups to the largest and most sophisticated technology and IT organizations in the world, turn to Jama to help drive innovation, improve the decision-making process and harness the collective genius of all stakeholders involved in building great software. For more information please visit: <http://www.jamasoftware.com>.