IBM Innovate 2010

A Change Management Request Portal

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The Rational Software Conference

Let's build a smarter planet.

Abstract

A primary purpose of a change management repository is to allow stakeholders to provide issues and change requests to the development teams, and for the development teams to provide feedback to the stakeholders on progress. It is necessary to control the visibility of information, since some stakeholders might not want information they provide to be visible to other stakeholders, and some development information should not be visible to the stakeholders. In many companies, there are multiple change management repositories in use. This makes it difficult for stakeholders to interact with development because they don't know to which repository to submit an issue, and each repository will commonly have its own idiosyncratic GUI paradigms. Rational Change Management, a subset of Rational Team Concert, can provide a common change management portal that provides a uniform experience for all stakeholders, while bi-directionally synchronizing information with the various internal change management repositories.

While distributed teams were designed to enhance "business agility", organizational, geographical, and technical silos can make things worse

Few stakeholders are satisfied with the speed of internal application development...

or satisfied with the quality

Silos of people, process, and projects

Geographic Barriers

- Poor communication
- Language, culture and time differences
- Process gaps resulting in errors and rework
- High degree of friction across teams

Organizational Barriers

- Lack of meaningful stakeholder input
- Poor LOB oversight
- Weak project governance
- Missed opportunities to leverage domain expertise

Infrastructure Barriers

- Incompatible tools and repositories
- Unreliable access to common artifacts
- Lengthy project and team member on-boarding
- Brittle and inflexible tooling integrations

Given the rise of distributed teams and the pace of technology change, managing software development cycles has never been more difficult

What we're hearing…

"I want to start with change management and adopt more capabilities over time"

"My stakeholders don't need agile planning. How can I give them change management at a low price point"
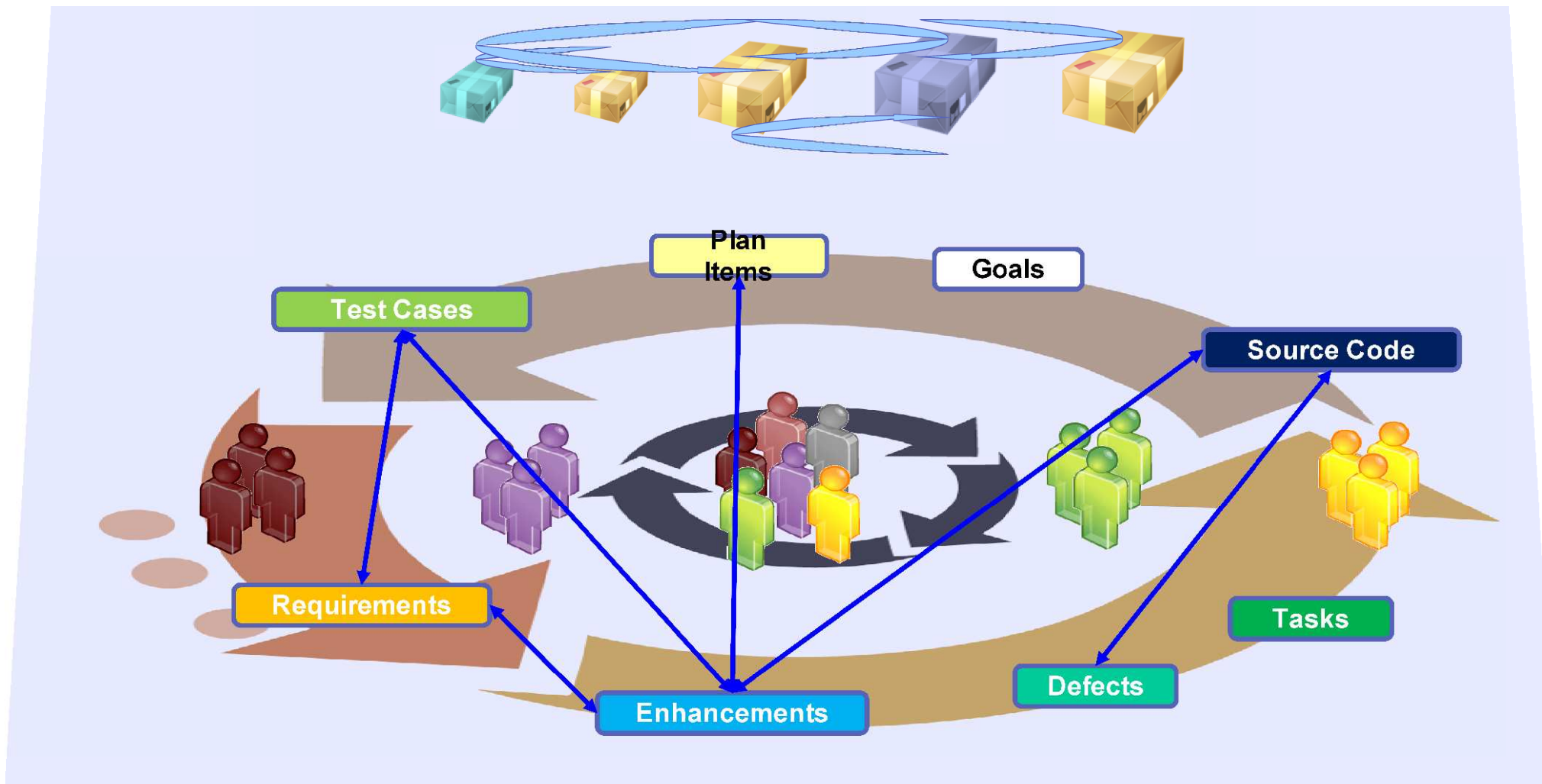
"I already have an SCM"

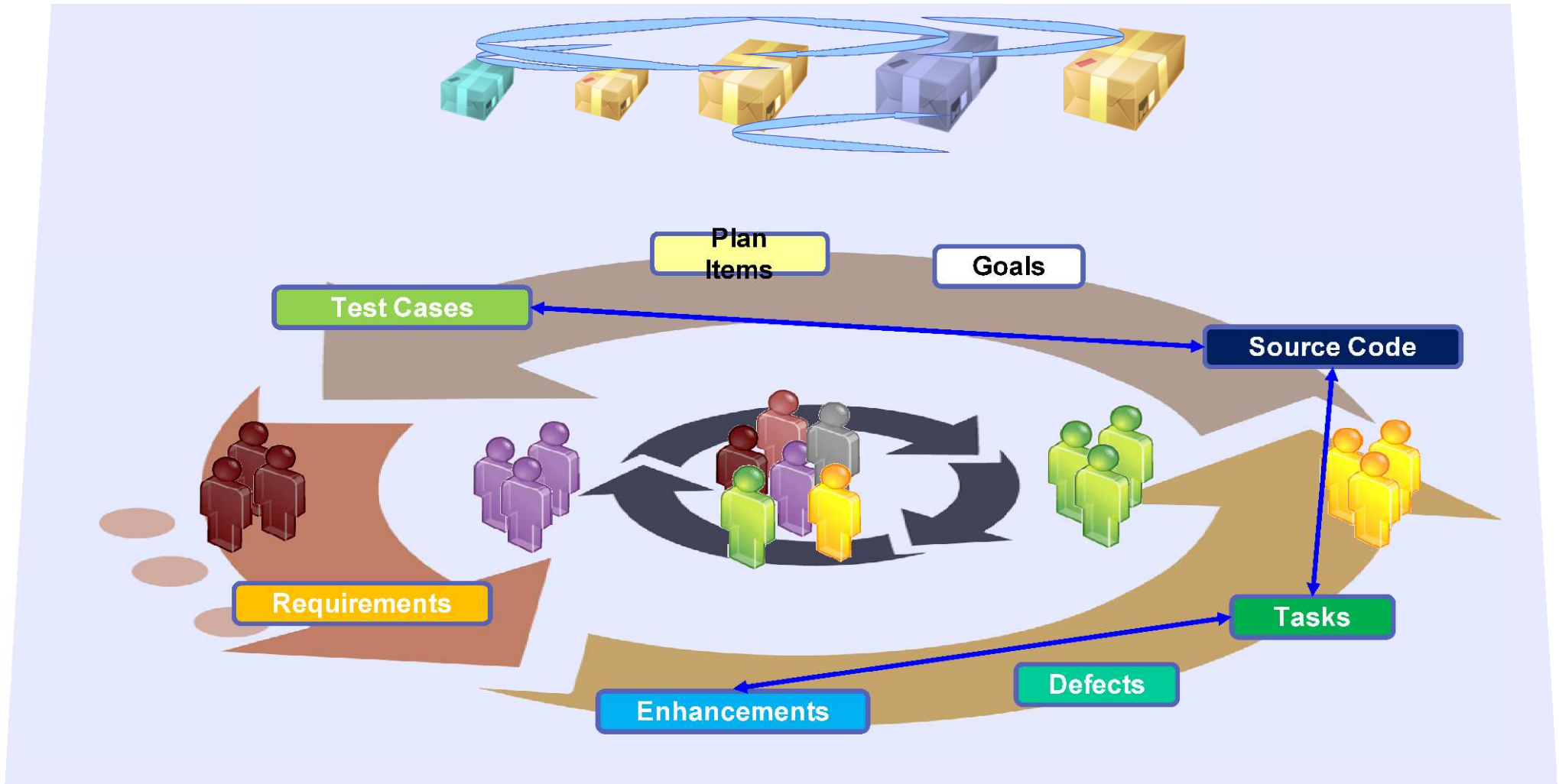### What we're providing…

- Rational Change Management Express allows incremental adoption of IBM Jazz products at a low priced entry point to satisfy varying deployment needs.

- Grow when you're ready and your business needs change

- Open, customizable, framework enabling new business models
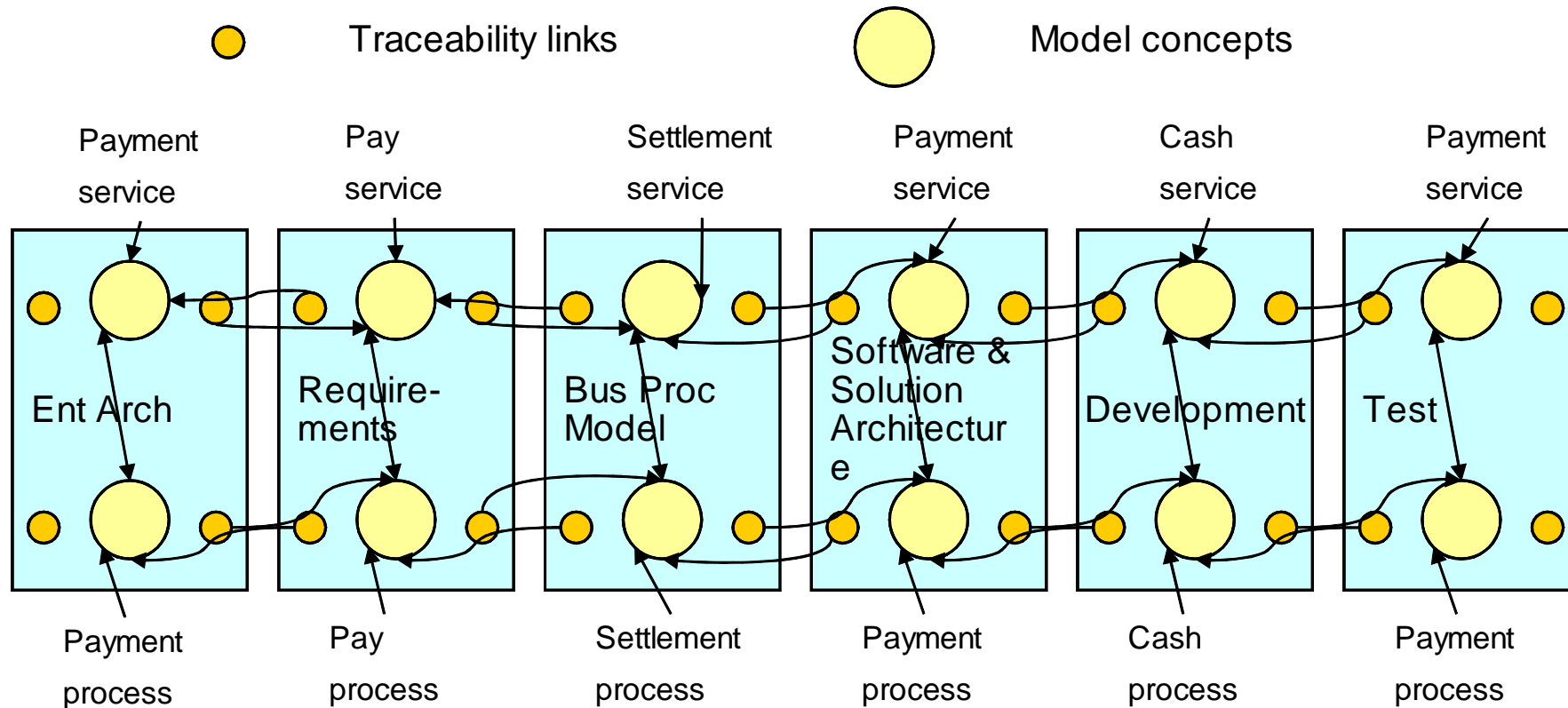
Change management provides the glue that links the wide variety of software development artifacts

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Let's build a smarter planet.

The old way

Traceability links   Model concepts

Payment service   Pay service   Settlement service   Payment service   Cash service   Payment service

Ent Arch   Require-ments   Bus Proc Model   Software & Solution Architecture   Development   Test

Payment process   Pay process   Settlement process   Payment process   Cash process   Payment process

Similar silos for repositories, including links to products

Multiple repositories deployed

- There are many reasons for multiple repositories
  - ▶ Different autonomous groups within the company happen to have selected different repositories
  - ▶ Change management repositories built-in to existing tools
- Testing tools, source control tools, and requirements tools often have some level of change management built-in to the repository for that tool
  - ▶ Different change management repositories have different strengths:
- simple and cheap to deploy
- easy to customize
- can define very complex semantics

Costs of Multiple Repositories

- A user has to keep track of the location of all the change management repositories that they might be interested in.

- A user will often not know which change management repository should be used to submit a given issue/request

- The user interface to each repository will often be significantly different, resulting in confusion and mistakes when submitting or querying for information

- Access control is difficult to manage, since each change management repository will commonly have its own mechanisms for controlling access, and those mechanisms may not give the granularity of control needed for a wide range of stakeholders.

A Change Management Portal

- A change management portal is a single change management repository, that contains an entry for every public record in each of the change management repositories in use by an organization

- If a given record has both public and private information, only the public information is exposed in the change management portal

- A record can be created directly in the change management portal or as a side-effect of creating a record in a change management repository.

- If the change management portal record was created to correspond to a record in a change management repository, or was subsequently associated with a record in a change management repository, a link is created between the record in the change management portal to the corresponding record in a change management repository. This link can be traversed only by someone with access permission to that change management repository.

IBM Rational Team Concert Change Management

▪**Improves Collaboration**

▶ Integrated work items, chat and process guidance, reporting

▪**Streamlines Change Management**

▶ Out-of-the-Box, Customizable Workflows*

▪**Automates Project Governance**

▶ Assess project status and trends in real-time with web-based dashboards, metrics and reporting

▪**Scales to the Enterprise**

▶ Supports teams ranging from a few to thousands of contributors and stakeholders

▪**Unifies Diverse Teams**

▶ Supports Visual Studio, Eclipse, Web, and open source

▪**Provides a Foundation for Collaborative ALM**

▶ Easily meet your growing software delivery needs with seamless integration of Jazz based lifecycle products

IBM Rational Change Management Express

transparent *defect tracking* *Team Concert* real-time reporting chat documents Web 2.0 *custom* dashboards EXTENSIBILITY open services *work item management* *FREEDOM TO CREATE*

JAZZ TEAM SERVER

Open and extensible on

Jazz

✓Collaborate
✓Automate
✓Report

Implementing a Change Management Portal with Rational Change Management and OSLC Bridges

Let's build a smarter planet.

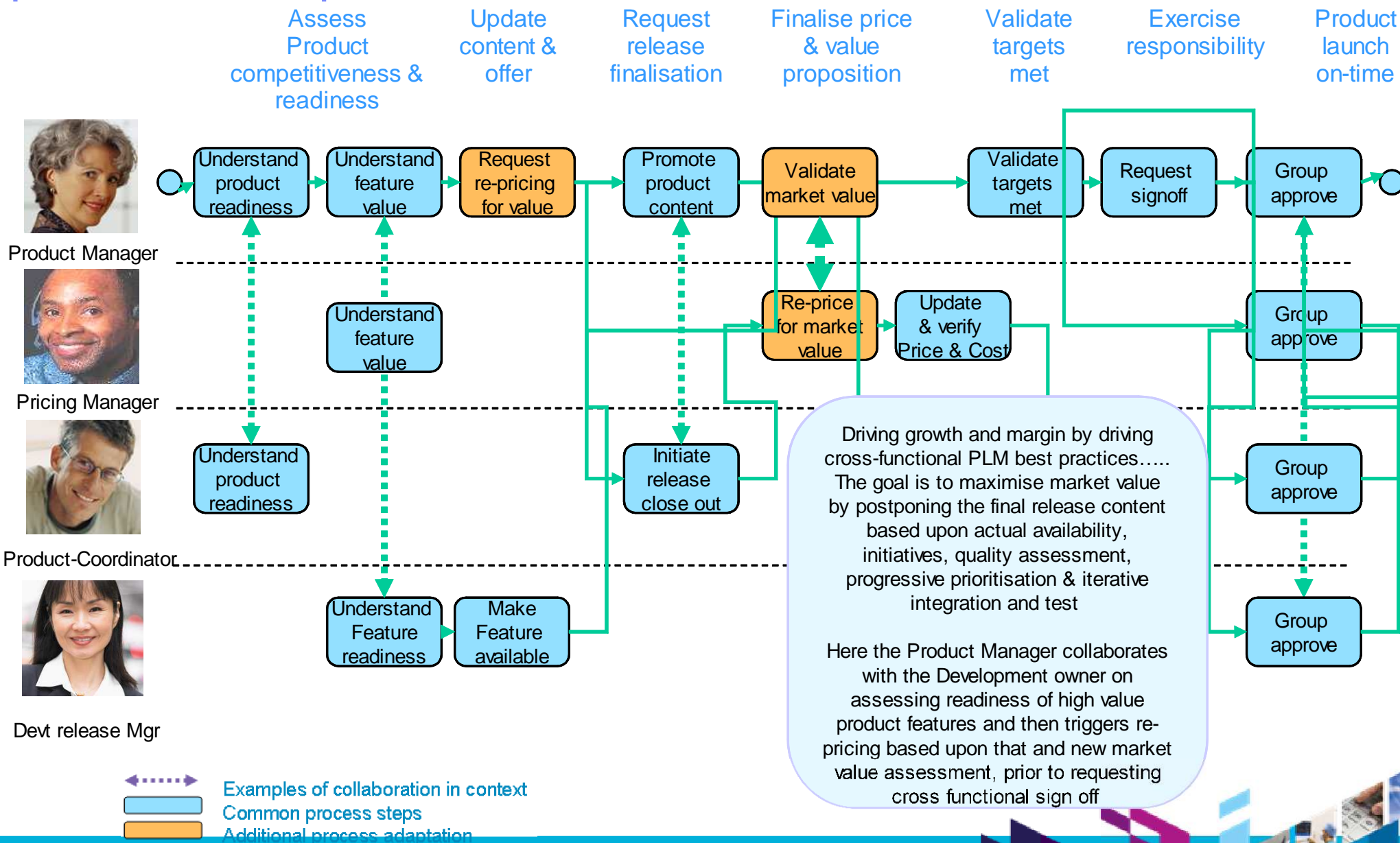# Implementing a Change Management Portal with Rational Change Management and Item Synchronizers

What is Product Lifecycle Management ?

▪PLM can be summarised as the ability to manage all types of products over all aspects of their life to meet business goals, including responsibility for

  ▶ revenue, profit, quality

  ▶ innovation, definition (content), realisation and support

  ▶ defining and configuring the path from source to customer and back again

  ▶ organisational and technical capability including compliance

▪The client has a mature and extensive view of PLM which covers the compete end to end responsibilities for product planning, definition and transition into the supply chain, sales and service

A typical scenario – agile product management coupled with agile product development

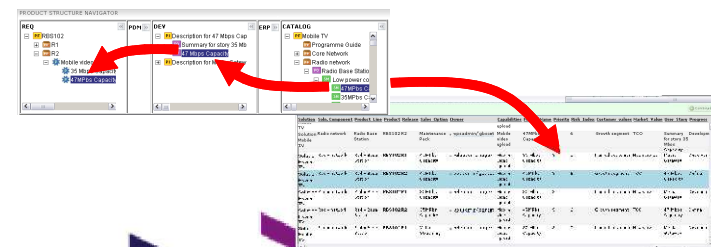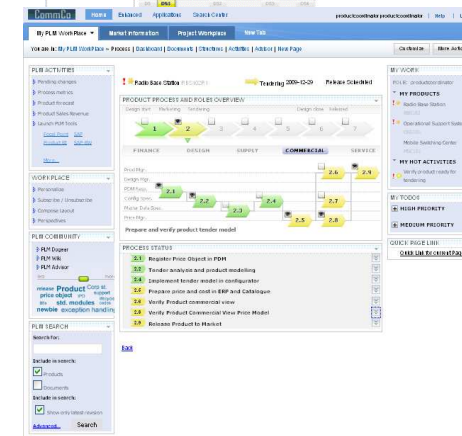| Assess Product competitiveness & readiness	Update content & offer	Request release finalisation	Finalise price & value proposition	Validate targets met	Exercise responsibility	Product launch on-time

Product Manager

Understand product readiness → Understand feature value → Request re-pricing for value → Promote product content → Validate market value → Validate targets met → Request signoff → Group approve

Pricing Manager

Understand feature value

Re-price for market value → Update & verify Price & Cost

Group approve

Product-Coordinator

Understand product readiness

Initiate release close out

Group approve

Devt release Mgr

Understand Feature readiness → Make Feature available

Group approve

Driving growth and margin by driving cross-functional PLM best practices….. The goal is to maximise market value by postponing the final release content based upon actual availability, initiatives, quality assessment, progressive prioritisation & iterative integration and test

Here the Product Manager collaborates with the Development owner on assessing readiness of high value product features and then triggers re-pricing based upon that and new market value assessment, prior to requesting cross functional sign off

Examples of collaboration in context
Common process steps
Additional process adaptation

Our demo will highlight how a cross functional team can keep focused, multitask, collaborate and add-value

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Devt release Mgr

Understand Feature readiness → Make Feature available → Group approve

1. Understand product status
2. Understand goal, objectives and gaps
3. Understand responsibilities
4. Simplified what-if analysis
5. Commit based upon responsibilities
6. Promote for sign off

- Common view always available
- Faster to evaluate options
- Faster to deliver and execute responsibilities
- More time to innovate, save cost or raise quality

Examples of collaboration in context
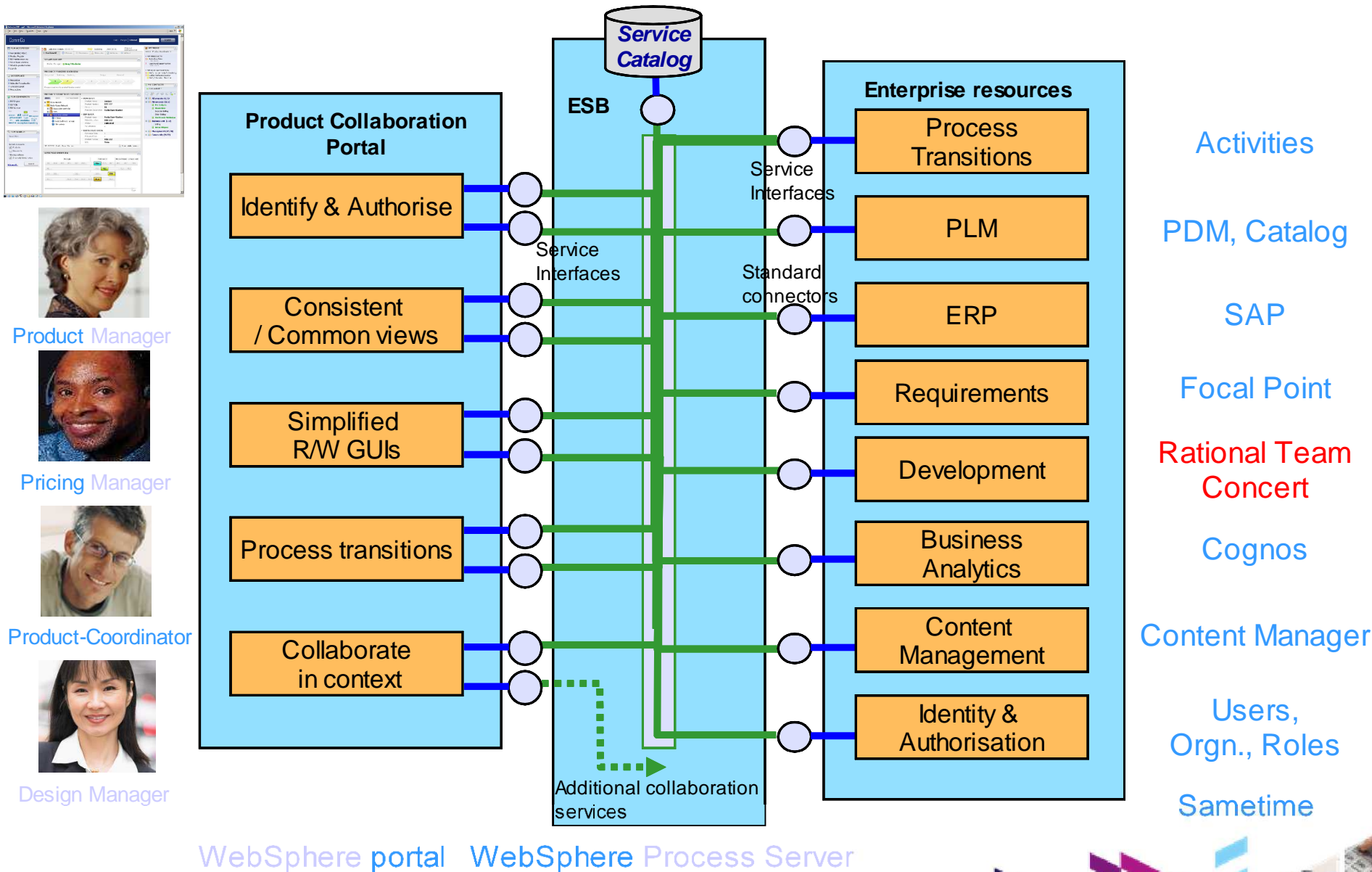Common process steps
Additional process adaptation

Key concepts of the Product Collaboration Portal

- Provides clear and consistent ways of working across disciplines and functions

- Supports common way of engaging process participants and contributors

- Allows decision support and activity focused mash up and combinations

- Allows progressive simplification of the business process, its management and supporting IT

- Combines predefined, user defined and ad-hoc activities and workflows

- Provides Web 2.0 collaboration in the context of process formality

The architecture

Product Manager

Pricing Manager

Product-Coordinator

Design Manager

Service Catalog

ESB

Product Collaboration Portal

Identify & Authorise

Consistent / Common views

Simplified R/W GUIs

Process transitions

Collaborate in context

Service Interfaces

Service Interfaces

Standard connectors

Additional collaboration services

Enterprise resources

Process Transitions

PLM

ERP

Requirements

Development

Business Analytics

Content Management

Identity & Authorisation

Activities

PDM, Catalog

SAP

Focal Point

Rational Team Concert

Cognos

Content Manager

Users, Orgn., Roles

Sametime

WebSphere portal   WebSphere Process Server

Let's build a smarter planet.

Our approach provides the best of today's capability combined to drive cross functional collaboration

Role based portal
Common views
Role and personal filters and mashups

Design Manager

Product Manager

Key collaborative activity support

Activity triggers

Enterprise views

Rational Team Concert
Development activity management

Information mash up

Simplified updates

Rational Focal Point
Product release planning

Detailed daily workings by organisation

Detailed daily workings by disciplines

IBM Integrated *Product* Management capabilities
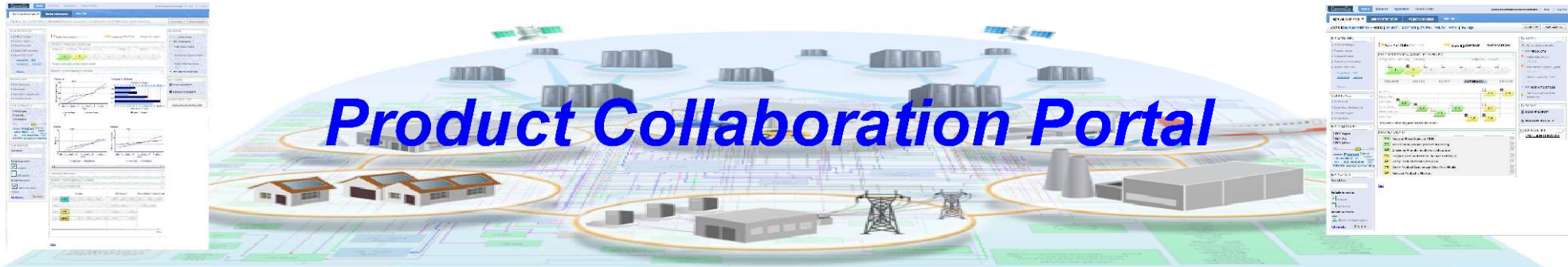
Product Collaboration Portal

BUSINESS PLANNING & TRANSFORMATION

- Business transformation and strategy
- Product portfolio management
- Enterprise architecture

PRODUCT & SYSTEMS DEVELOPMENT

- Requirements management
- Model-driven development
- System and software lifecycle
- Quality, security and compliance management

DESIGN CHAIN COLLABORATION

- Enterprise application integration
- Business process management
- Partner ecosystem management

ASSET MANAGEMENT & OPERATIONS

- Enterprise asset management
- Product Information Management & Re-use
- Application management

COLLABORATE
Achieve common goals by optimizing how people work

AUTOMATE
Increase efficiency and predictability by integrating workflows

REPORT
Continuously improve by measuring and reporting progress in real time

Repeatable activities producing a desired business outcome

Product Collaboration Portal

When you can achieve this level of performance …what will you gain ?

- Faster delivery
- Better schedule conformance

- Lower operating cost
- Cost savings implemented faster

- Problems closed out faster
- Fewer errors and less rework
- Quality improved faster

- Leading to more time to add value
- And more time to innovate

Additional Resources

- Participate in Open Services for Lifecycle Collaboration at www.open-services.net

- Participate in the transparent commercial development project at jazz.net

- Learn about IBM change management solutions at www-01.ibm.com/software/rational/offerings/crm/change.html

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