



OOI SOFTWARE APPLICATION FRAMEWORK (SAF): CHANGE CONTROL BOARD APPLICATION SYSTEM USER GUIDE

TABLE OF CONTENTS

1. OVERVIEW OF SAF	3
2. CHANGE CONTROL BOARD APPLICATION.....	8
3. PREPARING ECRS FOR SUBMITTAL	9
4. CHANGE CONTROL CHAIRPERSON ACTIVITIES	21
4.1. EDITING FIELDS ON AN ECR	22
4.2. SELECTING THE CLASS AND SCHEDULING AN ECR.....	24
4.3. REVIEWER MANAGEMENT	27
5. ECR REVIEW AND COMMENTS	30
5.1. ADDING COMMENTS TO AN ECR.....	30
5.2. REQUESTOR AND AUTHOR REVIEW OF COMMENTS.....	31
5.3. CHAIRPERSON REVIEW OF COMMENTS	32
6. CONDUCTING A CCB SESSION AND ADJUDICATING ECRS	34
7. USERS	39
8. GENERAL INFORMATION AND DEFINITIONS	40
9. REPORTS	43

1. Overview of SAF

1.1. Introduction and Access

The Software Application Framework (SAF) provides a unifying framework for Program Management applications in which multiple applications are consolidated and provides the user a single point of access to modify application content, browse assets in catalog systems and perform tasks within a workflow.

Here is a quick list of shared application-related functions:

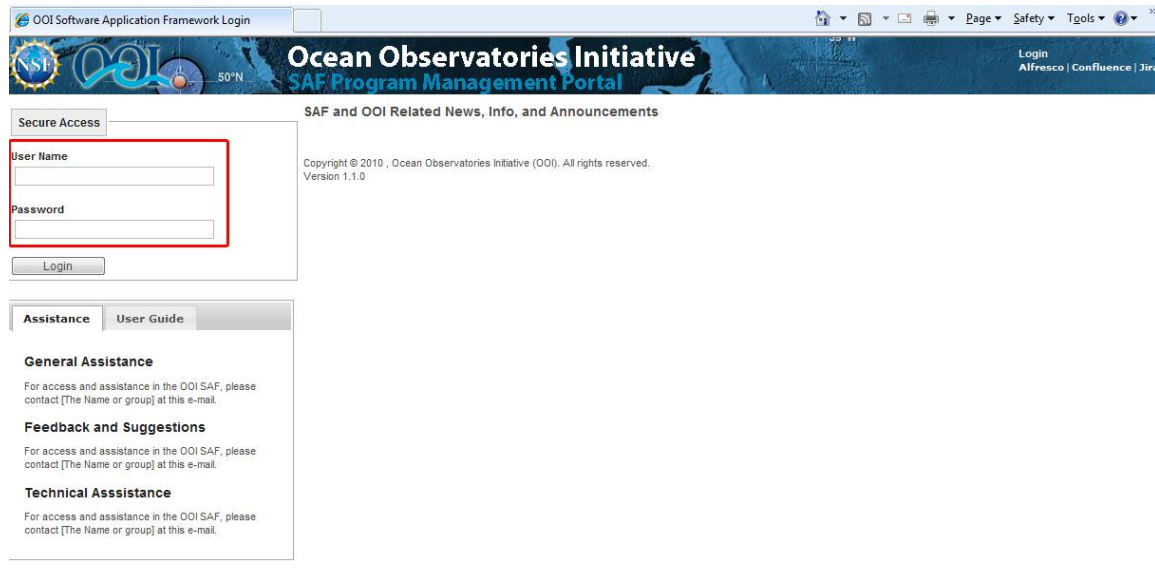
- User authentication
- User roles management and access rights
- Reporting framework
- Help framework
- Alfresco document management interface
- Search support

Varying levels of access to the specific applications are given to members of OOI organizations. Application-specific access details follow in the application sections below.

Login Screen

Log in to SAF by entering the following URL in your web browser:

<http://pmo.oceanobservatories.org/>



OOI Software Application Framework Login

Ocean Observatories Initiative
SAF Program Management Portal

50°N

Login
Alfresco | Confluence | Jira

Secure Access

User Name

Password

Login

SAF and OOI Related News, Info, and Announcements

Copyright © 2010 , Ocean Observatories Initiative (OOI). All rights reserved.
Version 1.1.0

Assistance User Guide

General Assistance
For access and assistance in the OOI SAF, please contact [The Name or group] at this e-mail.

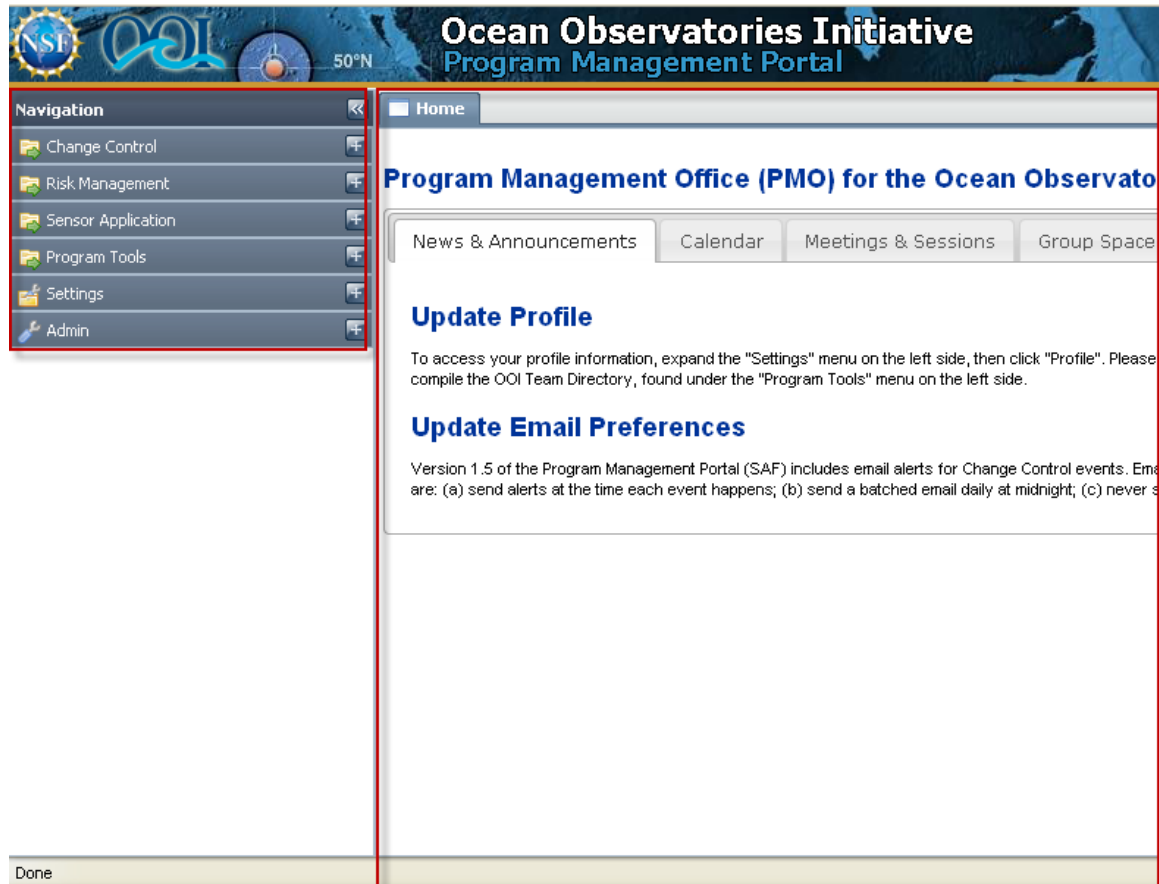
Feedback and Suggestions
For access and assistance in the OOI SAF, please contact [The Name or group] at this e-mail.

Technical Assistance
For access and assistance in the OOI SAF, please contact [The Name or group] at this e-mail.

The login page appears as shown in the screenshot above. Enter username and password corresponding with existing Confluence and Alfresco login information.

1.2. General Navigation

After login, the SAF homepage will be displayed on the right as the Application Content. A tabbed Navigation Menu will be displayed on the left.



Within the Navigation Menu, elements are arranged logically according to a workflow. For example, the **Change Control** tab in the Navigation Menu includes the following:

- **Change Control Home** is a consolidated view of important details and action items.
- **Create ECR** allows a user to create an Engineering Change Request.
- **View/Edit ECRs** displays sets of ECRs for viewing or editing that can be filtered by attributes.
- **CCB Sessions** displays sets of CCB Sessions that can be filtered by attributes. New CCB Sessions can also be scheduled here.
- **Reports** allow the user to generate several types of preexisting reports.
- **Board Management** displays board members of the selected Change Control Board. Board chairpersons are allowed to make board modifications.

As each of the elements on the Navigation Menu's **Change Control** tab is selected, the Application Content on the right changes within the corresponding horizontal **Change Control** tab.

If the Navigation Menu's **Program Tools** tab on the left is selected, and under that **Document Mgmt 1199** is selected, then a new horizontal tab called **Tools** appears within the Application Content on the right.



The screenshot shows the Ocean Observatories Initiative Program Management Portal. The Navigation Menu on the left has 'Program Tools' selected, which has opened a sub-menu containing 'Document Mgmt 1199', 'WBS Dictionary', 'OOI Team Directory', and 'OOI Acronyms and Definitions'. The 'Tools' tab is active in the Application Content area, displaying 'Document (File) Management 1199'. Below this, there is an 'Export List' button and a table titled 'Add New Artifact'.

File Name	Version	Release Date	Notes	Owner	Configure
Edit 1000-00000_CMP_OOI	2-88	11/20/2009	CB	Ferlino, Anthony	Ferlino, Anthony
Edit 1000-00001_B2_Table	1-06	11/24/2009	CB	Ferlino, Anthony	Ferlino, Anthony
Edit 1001-00000_PEP_OOI	3-08	4/22/2010	CB	Williams, Stuart	Ferlino, Anthony
Edit 1001-00000_PEP_OOI	3-06	11/20/2009	CB	Williams, Stuart	Ferlino, Anthony
Edit 1001-00001_Permit_List_OOI	1-04	1/20/2009	J21	Banahan, Susan	Ferlino, Anthony
Edit 1001-00100_Annual_Work_Plan_OOI	3-05	11/20/2009	CB	Ferlino, Anthony	Ferlino, Anthony
Edit 1002-00000_CEP_OOI	5-01	11/20/2009	CB	Talalayevsky, Alex	Ferlino, Anthony
Edit 1003-00000_OA_OOI	3-03	11/15/2009	CB	Christman,	Ferlino,

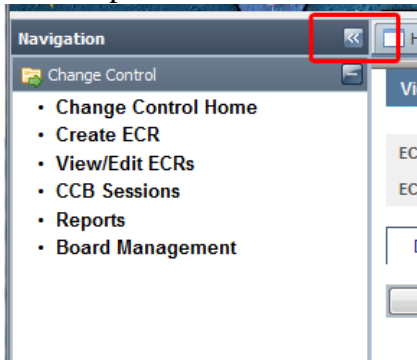
Select **WBS Dictionary** in the left Navigation Menu. The Application Content within the **Tools** tab on the right adjusts accordingly.

It is easy to toggle between Application Content by selecting the tabs at the top. For example, see the **Home** and **Tools** tabs in the screenshot above. The Application Content contains collapsible sections to make it easier to scroll (shown below).

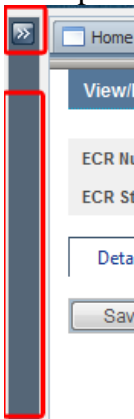
Detail Documents History			
Save Draft Submit Cancel / Close Print			
ECR Name	Gliders - Change to Spectral Irradiance Sensors	Requesting Organization	Coastal Global
Requestor	Daniel Isaacs	Requestor Phone	202-787-1623
ECR Class	1	Current Status	Draft
WBS Elements	Add WBS Remove WBS 1.3.4.3.6 - Gliders 1.3.4.3.6.1 - Glider Procurement and Pre-Installation Integration Test		
Document Control Number	None	Configuration Manager	George Dussault
Control Account Name	Glider Procurement and Pre-Installation Integratio	Control Account Manager	Ed Dever
Change Details			
Requestor Assessment of Impact to Control Account			
Scope None			

The Navigation Menu on the left can be collapsed and hidden by selecting the arrow button at its top. When collapsed, the Application Content on the right will fill the entire screen. The Navigation Menu can be temporarily accessed again by clicking the gray side bar at the left of the browser. To permanently restore the Navigation Menu to its full size, select the arrow button at the top of the gray side bar. See images below:

To collapse menu:



To expand menu:



2. Change Control Board Application

2.1. Overview and Purpose

Changes in the OOI Program are controlled through a formal approval process. The OOI change control process is multi-level with the applicable review/approval level assigned based on the potential impact to the program. This application supports the tracking of all requested changes, and accounts for evaluations of risk and impact on design/capability, schedule, and cost within an IO, between IOs and within the OOI system.

The Change Control Board (CCB) application is designed to support the management and tracking of Engineering Change Requests (ECRs). An ECR is a formally requested change to the functional requirements of a specific project. ECRs are submitted by team members in various organizations within OOI. These requests are in turn reviewed by one or more Change Control Boards (CCBs).

The application supports the management of multiple Change Control Boards in the organization: Implementing Organization (IO) Level (including PMO, CI, CG, RSN and EPE), System Level, OOI Level, and NSF Level. The system also allows scheduling of ECRs to CCB Sessions and tracking of CCB actions on any ECR submitted.

2.2. General Process

The CCB application supports a process where users in multiple OOI organizations can submit ECRs for approval by one or more CCBs, run CCB sessions and adjudicate the ECRs. With all ECR data consolidated in one application, the CCBs can more easily make decisions regarding the ECRs.

3. Preparing ECRs for Submittal

3.1. Creating and Editing of ECRs

3.1.1. From the Navigation Menu, click on **Create ECR** under the Change Control tab. This will open the **Create Engineering Change Request (ECR)** page to fill in the ECR form. The following steps detail and define the fields in the form.



The screenshot shows the 'Ocean Observatories Initiative SAF Program Management Portal' interface. The left navigation menu is expanded, showing options: Change Control Home, Create ECR, View/Edit ECRs, CCB Sessions, and Reports. A red arrow points to 'Create ECR'. The main content area shows 'Upcoming CCBs' with a calendar view for January 2010, and a table of 'Latest ECRs'.

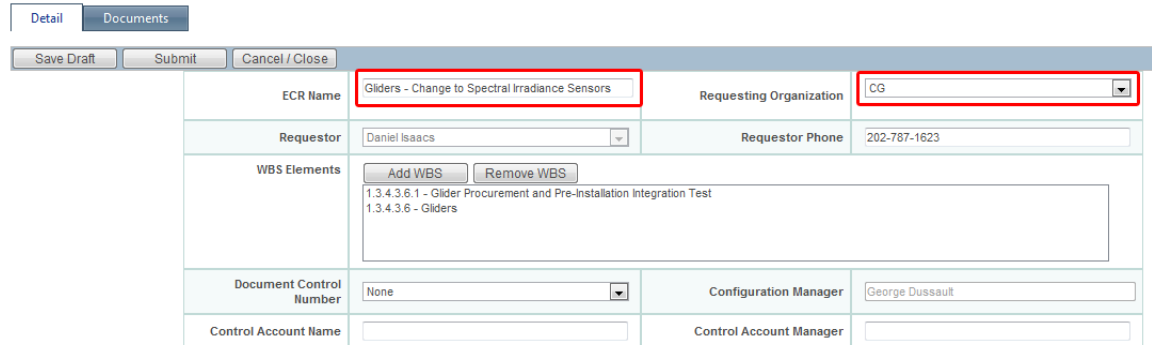
ECR ID	ECR Name	Requestor	Requesting Organization	Status	Board	Modified
1301-00004	New ECR	SAFTUser SAFTUser	PMO	Draft	PMO	1/28/2010 4:51:03 PM
1301-00003	test	SAFTUser SAFTUser	PMO	Submitted	PMO	1/28/2010 3:03:27 PM
1301-00002	test	SAFTUser SAFTUser	PMO	Draft	PMO	1/28/2010 3:01:15 PM
1301-00001	add new draft issue 183	SAFTUser SAFTUser	PMO	Draft	PMO	1/28/2010 11:10:06 AM
1303-00047	L4 Glider Requirements, DOORS	Ed Dever	Coastal Global	Deferred	System	1/26/2010 4:34:09 PM

Below the table, there are sections for 'Drafts', 'ECRs Awaiting Scheduling', 'Scheduled ECRs', and 'ECRs To Review'. The 'Drafts' section shows a table with ECR IDs: 1301-00004, 1301-00002, and 1301-00001. The other sections show 'No records to display'.

3.1.2. Enter the ECR name into the **ECR Name** field. The name should be descriptive and include a Document Control Number where applicable, but should not be a filename. In this example (see below), the user is submitting a request for gliders to change to spectral irradiance sensors. Note: This is a required field.

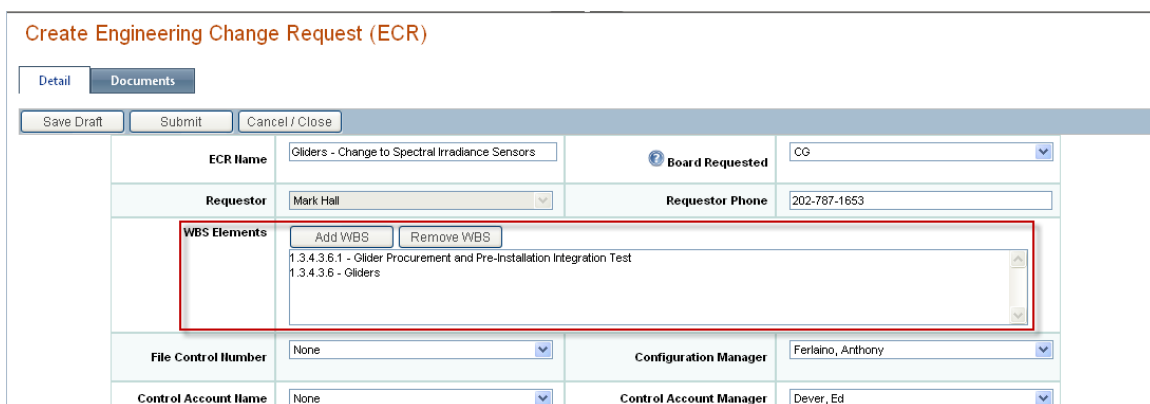
3.1.3. Select the appropriate Board **Requesting Organization** -- the first board to review the change request. The requesting organization is the first board to which the ECR is being submitted. In this example,

select CG from the drop-down box as the governing board to review the request. Note: This is a required field.



3.1.4. The **Requestor** and **Requestor Phone** fields are auto-populated based on the currently logged in user and cannot be changed.

3.1.5. Optionally, add one or more Work Breakdown Structure (WBS) element(s) by clicking on **Add WBS**. The WBS element determines the level, scope, and area of work the change falls under. In this example, “**1.3.4.3.6 - Gliders**” and “**1.3.4.3.6.1 – Glider Procurement and Pre-installation Integration**” are related to the change request.



3.1.5.1. Expand the drop-down menu, select a WBS element to add to the list and click on **Add Selected**. Repeat the process to add

additional WBS elements to an ECR.



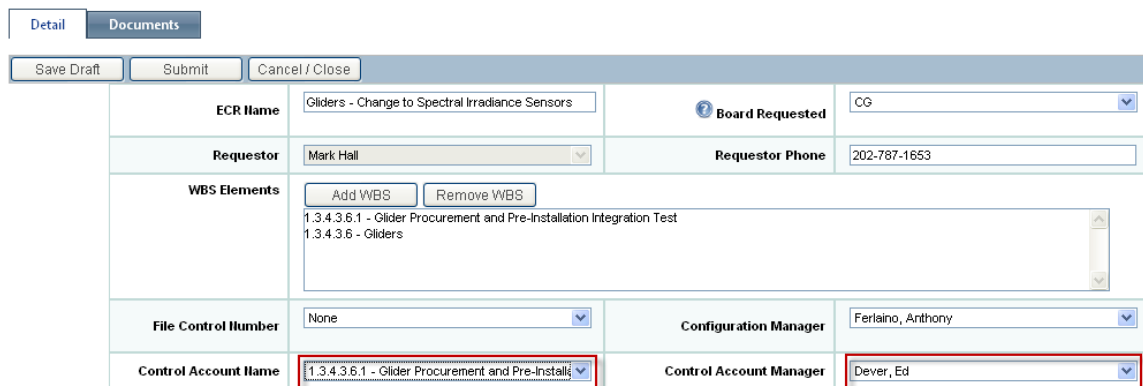
3.1.5.2. To remove a WBS code on the list, highlight it and then click **Remove WBS**

3.1.6. The **File Control Number** can be selected from the drop-down, if the ECR is related to a specific controlled artifact. Adding additional artifacts to the system so they appear in the dropdown menu can be done via the **Document Mgmt 1199**, found under the **Program Tools** tab on the left Navigation Menu.

3.1.7. Select the **Configuration Manager** from the dropdown menu. The Configuration Manager selected will be in charge of verifying the ECR, and their signature will appear on the completed ECR.

3.1.8. Select the **Control Account Name** from the dropdown menu. The name is typically related to the first WBS element assigned. For example, selecting “1.3.4.3.6.1 – Glider Procurement and Pre-installation Integration” means naming the Control Account Name “Glider Procurement and Pre-installation Integration Test”.

3.1.9. Select a **Control Account Manager** from the dropdown. The Control Account Manager should be the name of a person related to the first assigned WBS element.



3.1.10. Change Details

This information helps to add context to the change request.

Enter in a **Change Description**. Documents should be attached with “Track Changes” turned on, or changes should be detailed below. For example:

“Change the design to change PAR sensors to Spectral Irradiance sensors on Gliders (note: PAR was left off of Pioneer Gliders in error). See attached sheet for details of what documents/requirements modules are affected by this change.”

<p>Change Description</p> <p>Change the design to change PAR sensors to Spectral <u>irradiance</u> sensors on Gliders (note: PAR was left off of Pioneer Gliders in error). See attached sheet for details of what documents/requirements modules are affected by this change</p>
<p>Reason for Change</p> <p>In January 2009, NSF directed <u>OOI</u> to increase observatories' capabilities in areas pertinent to climate change, ecosystem health, carbon cycling and ocean acidification. Both PAR and spectral <u>irradiance</u> measurements can be used to address research in these areas, but spectral <u>irradiance</u> is superior to PAR. In response to this directive, <u>OOI</u> scientists met in August 2009 in Washington DC and proposed the addition of spectral <u>irradiance</u> as a core glider sensor. PAR is the integrated radiation over visible wavelengths in the photosynthetic band. PAR is a necessary input to ecosystem models of primary production. Spectral <u>irradiance</u> is the <u>irradiance</u> at several discrete wavelengths. Spectral <u>irradiance</u> can be integrated over photosynthetic wavelengths to estimate PAR. Because spectral <u>irradiance</u> measurements occur at several discrete wavelengths, they provide more information than an integrated PAR measurement. Spectral <u>irradiance</u> can be used to determine optical properties of the water</p>
<p>Benefit to OOI</p> <p>see above plus The addition of spectral <u>irradiance</u> to coastal gliders will benefit the several of the science questions identified in the L2 science requirements notably, A1 Global Biogeochemistry and Carbon Cycling (L2-SQ-RQ-32), A3 Ocean Circulation, Mixing and Ecosystems (L2-SQ-RQ-36), A7 Climate Variability and Ecosystems (L2-SQ-RQ-45), A9 Coastal Ocean Dynamics and Ecosystems - Hypoxia on Continental Shelves (L2-SQ-RQ-50), and A10 Coastal <u>OCean</u> Dynamics and Ecosystems Shelf/Slope Exchange (L2-SQ-RQ-53)</p>

Give a **Reason for Change**. The reason should be sufficient to explain why the change is needed. For example:

“In January 2009, NSF directed OOI to increase observatories' capabilities in areas pertinent to climate change, ecosystem health, carbon cycling and ocean acidification. Both PAR and spectral irradiance measurements can be used to address research in these areas, but spectral irradiance is superior to PAR. In response to this directive, OOI scientists met in August 2009 in Washington DC and proposed the addition of spectral irradiance as a core glider sensor...

Change Description

Change the design to change PAR sensors to Spectral irradiance sensors on Gliders (note: PAR was left off of Pioneer Gliders in error). See attached sheet for details of what documents/requirements modules are affected by this change

Reason for Change

In January 2009, NSF directed OOI to increase observatories' capabilities in areas pertinent to climate change, ecosystem health, carbon cycling and ocean acidification. Both PAR and spectral irradiance measurements can be used to address research in these areas, but spectral irradiance is superior to PAR. In response to this directive, OOI scientists met in August 2009 in Washington DC and proposed the addition of spectral irradiance as a core glider sensor. PAR is the integrated radiation over visible wavelengths in the photosynthetic band. PAR is a necessary input to ecosystem models of primary production. Spectral irradiance is the irradiance at several discrete wavelengths. Spectral irradiance can be integrated over photosynthetic wavelengths to estimate PAR. Because spectral irradiance measurements occur at several discrete wavelengths, they provide more information than an integrated PAR measurement. Spectral irradiance can be used to determine optical properties of the water

Benefit to OOI

see above plus The addition of spectral irradiance to coastal gliders will benefit the several of the science questions identified in the L2 science requirements notably, A1 Global Biogeochemistry and Carbon Cycling (L2-SQ-RQ-32), A3 Ocean Circulation, Mixing and Ecosystems (L2-SQ-RQ-36), A7 Climate Variability and Ecosystems (L2-SQ-RQ-45), A9 Coastal Ocean Dynamics and Ecosystems - Hypoxia on Continental Shelves (L2-SQ-RQ-50), and A10 Coastal Ocean Dynamics and Ecosystems Shelf/Slope Exchange (L2-SQ-RQ-53)

Specify a **Benefit to OOI**. Similar to the change description and reason for change, the benefit description should be sufficiently detailed. For example:

“See above plus The addition of spectral irradiance to coastal gliders will benefit the several of the science questions identified in the L2 science requirements notably, A1 Global Biogeochemistry and Carbon Cycling (L2-SQ-RQ-32), A3 Ocean Circulation, Mixing and Ecosystems (L2-SQ-RQ-36), A7 Climate Variability and Ecosystems (L2-SQ-RQ-45), A9 Coastal Ocean Dynamics and Ecosystems - Hypoxia on Continental Shelves (L2-SQ-RQ-50), and A10 Coastal Ocean Dynamics and Ecosystems Shelf/Slope Exchange (L2-SQ-RQ-53).”

Change Description

Change the design to change PAR sensors to Spectral Irradiance sensors on Gliders (note: PAR was left off of Pioneer Gliders in error). See attached sheet for details of what documents/requirements modules are affected by this change

Reason for Change

In January 2009, NSF directed OOI to increase observatories' capabilities in areas pertinent to climate change, ecosystem health, carbon cycling and ocean acidification. Both PAR and spectral irradiance measurements can be used to address research in these areas, but spectral irradiance is superior to PAR. In response to this directive, OOI scientists met in August 2009 in Washington DC and proposed the addition of spectral irradiance as a core glider sensor. PAR is the integrated radiation over visible wavelengths in the photosynthetic band. PAR is a necessary input to ecosystem models of primary production. Spectral irradiance is the irradiance at several discrete wavelengths. Spectral irradiance can be integrated over photosynthetic wavelengths to estimate PAR. Because spectral irradiance measurements occur at several discrete wavelengths, they provide more information than an integrated PAR measurement. Spectral irradiance can be used to determine optical properties of the water

Benefit to OOI

see above plus The addition of spectral irradiance to coastal gliders will benefit the several of the science questions identified in the L2 science requirements notably, A1 Global Biogeochemistry and Carbon Cycling (L2-SQ-RQ-32), A3 Ocean Circulation, Mixing and Ecosystems (L2-SQ-RQ-36), A7 Climate Variability and Ecosystems (L2-SQ-RQ-45), A9 Coastal Ocean Dynamics and Ecosystems - Hypoxia on Continental Shelves (L2-SQ-RQ-50), and A10 Coastal Ocean Dynamics and Ecosystems Shelf/Slope Exchange (L2-SQ-RQ-53)

3.1.11. Requestor Assessment of Impact to Control Account

This information will be useful for the reviewer to gauge the impact of this change request.

- Describe the **Scope** of the change request. In other words, how much of an effect will it have on OOI? Which and how will WBS be affected?

Scope
None
Schedule
None
Cost
\$59,730 additional in 1.3.4.2.8.1 \$59,730 additional in 2.3.3.7.10 and \$66,480 additional in 1.3.4.3.6.1 and \$66,480 additional in 2.3.3.8.8.

- Describe the **Schedule** Impact. How will the change request affect the program schedule

Scope
None
Schedule
None
Cost
\$59,730 additional in 1.3.4.2.8.1 \$59,730 additional in 2.3.3.7.10 and \$66,480 additional in 1.3.4.3.6.1 and \$66,480 additional in 2.3.3.8.8.

- Describe the **Cost** impact. Approximate the cost of the change request. For example, “\$59,730 additional in 1.3.4.2.8.1 \$59,730 additional in 2.3.3.7.10 and \$66,480 additional in 1.3.4.3.6.1 and \$66,480 additional in 2.3.3.8.8”.

Scope

None

Schedule

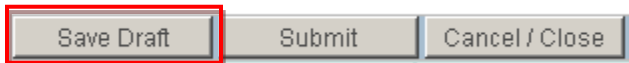
None

Cost

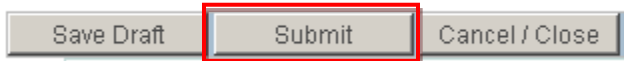
\$59,730 additional in 1.3.4.2.8.1 \$59,730 additional in 2.3.3.7.10 and \$66,480 additional in 1.3.4.3.6.1 and \$66,480 additional in 2.3.3.8.8.

3.2. Draft and Submission

3.2.1. The ECR Requestor can either save a draft, submit the ECR form, or cancel, which does not save the form. To save a draft for editing later, select **Save Draft** at the bottom of the Detail tab page.



3.2.2. Select Submit to save the ECR form and submit it for review and assignment to a CCB session.



3.2.2.1. **IMPORTANT:** Once the ECR is submitted, it **cannot be edited later** by the requestor.

3.2.3. To cancel any changes made after the last draft save, select **Cancel/Close**.




3.3. Attaching Files and Documents to a Saved ECR

3.3.1. A user can attach supporting files and documents to be reviewed alongside the ECR.

3.3.2. Go to the **Documents** tab by selecting the tab at the top of the ECR details

3.3.3. Select files to be added by clicking **Add New File**. Select a file by clicking on Browse Explorer to find the file to upload. Once a file is selected, add it to the list of files to be attached by choosing “Attach File”. Note that documents to be attached shall be named in accordance with the Configuration Management Plan. If applicable, “Track Changes” should be used.

3.3.4. **Attach File(s).** Once a file is successfully attached, it will appear under **Review selected file(s)**.

- 3.3.5. To upload multiple files, repeat step 1
- 3.3.6. To remove an attached file, click on the  icon next to the file name.
- 3.3.7. Finally, save attached files to the ECR by clicking **Save attached file(s) to ECR**. If the ECR has not yet been saved, the application will prompt the user to save as draft.

3.4. History View

Once an ECR is saved as a draft or submitted, the **History** tab appears. It is an ongoing log of when and how many times an ECR has been drafted or updated in the review process.

Detail	Documents	History	
Status Date	User	Status	CCB Session
2/25/2010 3:25:23 PM	Daniel Isaacs	Draft	
2/25/2010 3:25:43 PM	Daniel Isaacs	Draft	
2/25/2010 3:25:50 PM	Daniel Isaacs	Draft	
2/25/2010 3:26:06 PM	Daniel Isaacs	Submitted	
2/25/2010 3:26:28 PM	SAFTestUser SAFTestUser	Rejected	
2/25/2010 3:26:52 PM	Daniel Isaacs	Draft	
2/25/2010 3:27:09 PM	Daniel Isaacs	Submitted	

Status Date – Date and time the update was made

User – The first and last names of the person who made the update

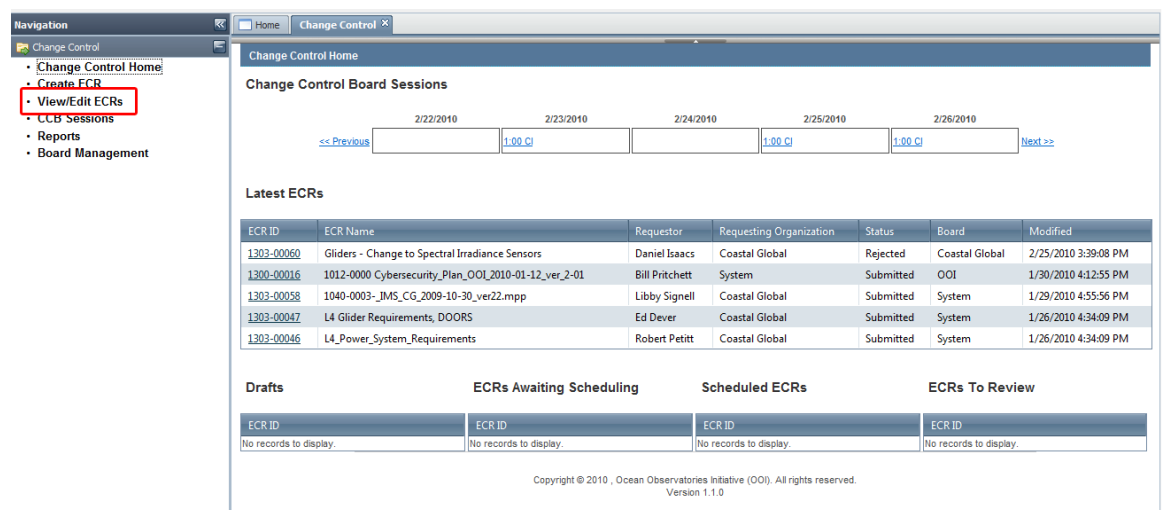
Status – The status of the ECR when the update was made

CCB Session – The date and time of the CCB Session when the ECR status was updated, if that update was made during a CCB Session

3.5. Viewing/Editing an ECR

An ECR saved as a draft can be edited later by the original drafter. Once an ECR is submitted for review it cannot be edited.

- 3.5.1. To edit an ECR, click **View/Edit ECRs** in the Navigation Menu. The **View Engineering Requests (ECRs)** page will be displayed, showing a list of all ECRs. Select the ECR to be edited from the list by clicking on the ECR ID link for that ECR.



Change Control Board Sessions

2/22/2010 2/23/2010 2/24/2010 2/25/2010 2/26/2010

<< Previous 1.00 CI Next >>

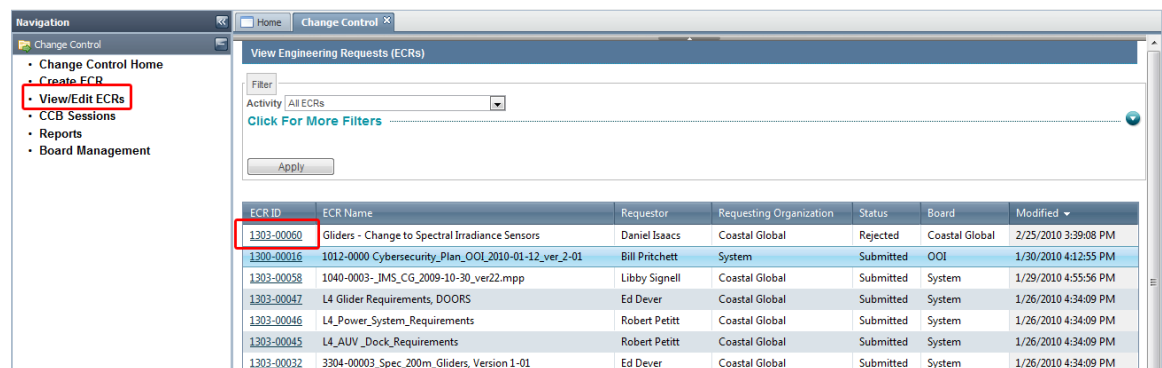
Latest ECRs

ECR ID	ECR Name	Requestor	Requesting Organization	Status	Board	Modified
1303-00060	Gliders - Change to Spectral Irradiance Sensors	Daniel Isaacs	Coastal Global	Rejected	Coastal Global	2/25/2010 3:39:08 PM
1300-00016	1012-0000 Cybersecurity_Plan_OOI_2010-01-12_ver_2-01	Bill Pritchett	System	Submitted	OOI	1/30/2010 4:12:55 PM
1303-00058	1040-0003- JMS_CG_2009-10-30_ver22.mpp	Libby Signell	Coastal Global	Submitted	System	1/29/2010 4:55:56 PM
1303-00047	L4 Glider Requirements, DOORS	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00046	L4_Power_System_Requirements	Robert Pettit	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM

Drafts **ECRs Awaiting Scheduling** **Scheduled ECRs** **ECRs To Review**

ECR ID	ECR ID	ECR ID	ECR ID
No records to display.	No records to display.	No records to display.	No records to display.

Copyright © 2010 , Ocean Observatories Initiative (OOI). All rights reserved.
Version 1.1.0



View Engineering Requests (ECRs)

Filter: Activity All ECRs

Click For More Filters

Apply

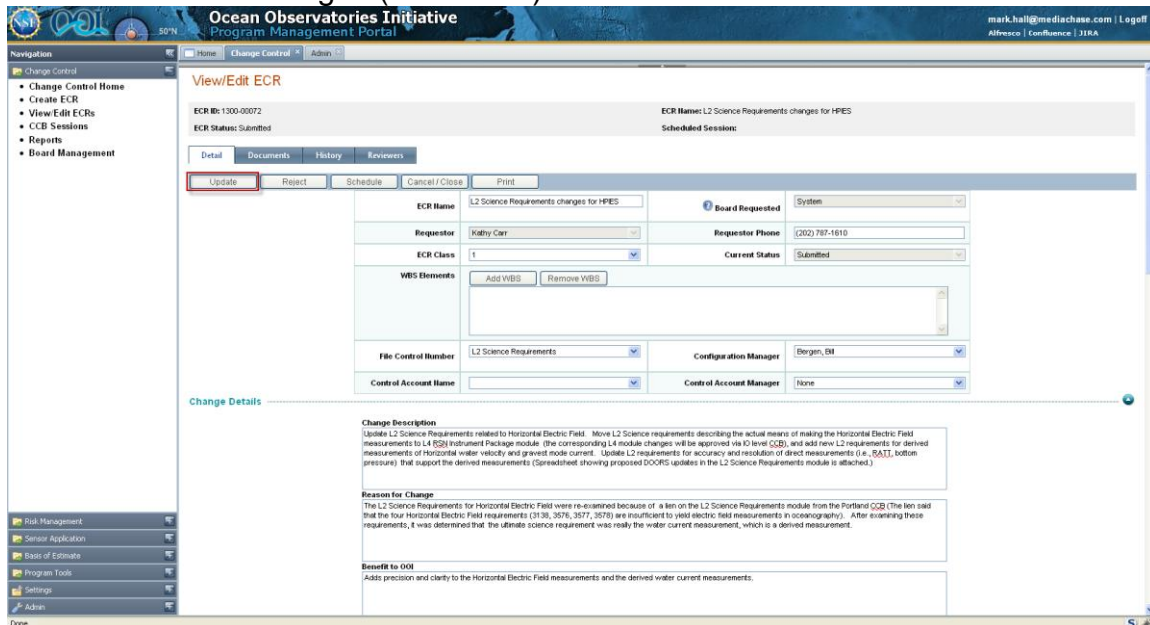
ECR ID	ECR Name	Requestor	Requesting Organization	Status	Board	Modified
1303-00060	Gliders - Change to Spectral Irradiance Sensors	Daniel Isaacs	Coastal Global	Rejected	Coastal Global	2/25/2010 3:39:08 PM
1300-00016	1012-0000 Cybersecurity_Plan_OOI_2010-01-12_ver_2-01	Bill Pritchett	System	Submitted	OOI	1/30/2010 4:12:55 PM
1303-00058	1040-0003- JMS_CG_2009-10-30_ver22.mpp	Libby Signell	Coastal Global	Submitted	System	1/29/2010 4:55:56 PM
1303-00047	L4 Glider Requirements, DOORS	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00046	L4_Power_System_Requirements	Robert Pettit	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00045	L4_AUV_Dock_Requirements	Robert Pettit	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00032	3304-00003_Spec_200m_Gliders, Version 1-01	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM



4. Change Control Chairperson Activities

The ability to edit ECRs and schedule CCB Sessions is enabled by a role-based security provided by the Software Application Framework (SAF). **The functions outlined below will only work for users who have Change Control Chairperson access.**

1. From the Navigation Menu's **Change Control** tab, select either **Change Control Home** or **View/Edit ECRs**, and select an ECR.
2. A View/Edit screen for the ECR will be displayed.
3. Edits can be made to the ECR fields, additional reviewers can be added, additional documents can be attached, and ECRs can be scheduled.
4. After edits are made, the **Update** button at the top or bottom of the page saves the changes (see below).



Ocean Observatories Initiative Program Management Portal

Navigation: Home | Change Control | Admin

View/Edit ECR

ECR # 1300-00072 ECR Name: L2 Science Requirements changes for HPES

ECR Status: Submitted Scheduled Sessions:

Detail Documents History Reviewers

Update Reject Schedule Cancel / Close Print

ECR Name: L2 Science Requirements changes for HPES Board Requested: System

Requestor: Kathy Carr Requestor Phone: (202) 787-1610

ECR Class: 1 Current Status: Submitted

WBS Elements: Add WBS Remove WBS

File Control Number: L2 Science Requirements Configuration Manager: Bergen, NM

Control Account Name: Control Account Manager: None

Change Details

Change Description
Update L2 Science Requirements related to Horizontal Electric Field. Move L2 Science requirements describing the actual means of making the Horizontal Electric Field measurements to L4 (E2) Instrument Package module (the corresponding L4 module changes will be approved via IO level CCB), and add new L2 requirements for derived measurements of Horizontal water velocity and gravest mode current. Update L2 requirements for accuracy and resolution of direct measurements (i.e., RATT, bottom pressure) that support the derived measurements (Specialized showing proposed DOORS updates in the L2 Science Requirements module is attached.)

Reason for Change
The L2 Science Requirements for Horizontal Electric Field were re-examined because of a lien on the L2 Science Requirements module from the Portland CCB (The lien said that the four Horizontal Electric Field requirements (D130, 3076, 3577, 3578) are insufficient to yield electric field measurements in oceanography). After examining these requirements, it was determined that the ultimate science requirement was really the water current measurement, which is a derived measurement.

Benefit to OOI
Adds precision and clarity to the Horizontal Electric Field measurements and the derived water current measurements.

4.1. Editing Fields on an ECR

4.1.1. Click **View/Edit ECRs** on the Change Control tab on the Navigation menu; the **View Engineering Requests (ECRs)** page appears. Click on an ECR ID number to access that ECR.

View Engineering Requests (ECRs)

Filter

Activity

All ECRs

Click For More Filters

Status

All

Class

All

Search ECR Name

Current Board

Any

Scheduled CCB

All

Initial Board

All

Requestor

All

Apply

ECR ID	ECR Name	Requestor	Requesting Organization	Status
1300-00001	Revisions to Doc 1001-00000 OOI Project Execution Plan (PEP) Version 2-09, January 30, 2009	Susan Banahan	System	Approved
1300-00002	Revisions to Doc 1005-00000 Acquisition Plan OOI Version 1-09, January 30, 2009	Jim Christman	System	Approved
1300-00003	Revisions to Doc 1020-00000 Schedule Management Plan OOI Version 1-07, January 30, 2009	Mike Kleinow	System	Approved
1300-00004	Revisions to Doc 1040-00000 Integrated Master Schedule (IMS) OOI Version 1-03 Composite, Jan 30, 2009 (build date may vary).	Mike Kleinow	System	Approved

4.1.2. The **View/Edit ECR** page appears. All fields can be edited except ECR Request Name, Board Requested, Requestor and Requestor phone.

- 4.1.3. Additionally, as a chairperson, the fields in the “Chairperson Assessment of Impact to Control Account” section of the ECR are available for editing. Enter in as much detail as needed. Save all changes by clicking **Update**.

Chairperson Assessment of Impact to Control Account

Master Schedule

Project Cost

Deliverables

☐ Potential Impact to Science and Design / As-built Capability Description

Estimated Percent Impact (Science As-Built Capability):

WBS Element:

0.00

%

OOI:

0.00

%

Update

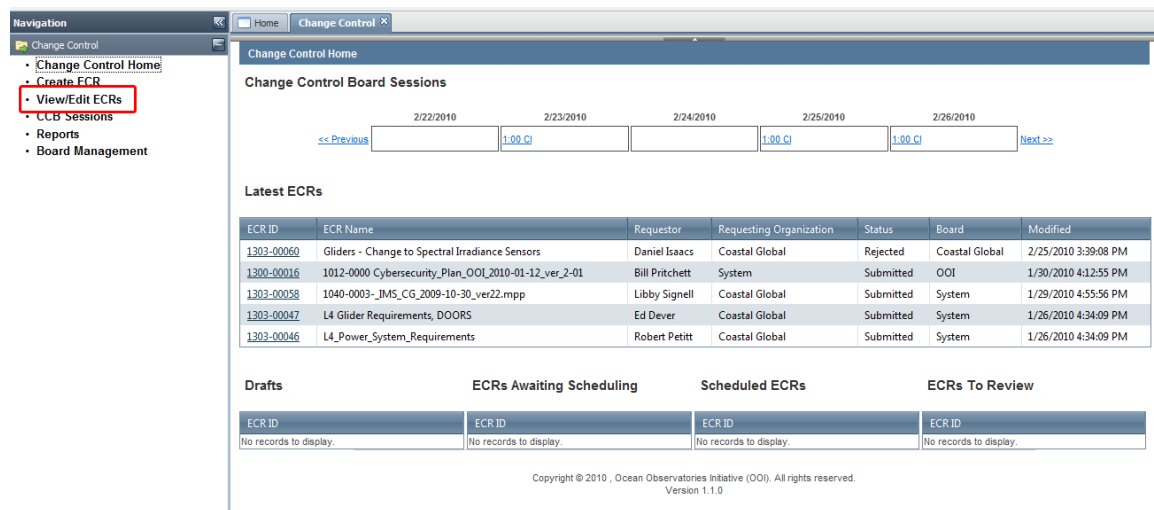
Cancel / Close

Print

4.2. Selecting the Class and Scheduling an ECR

An ECR cannot be reviewed and commented on until it has been scheduled for an upcoming CCB Session by the appropriate CCB Chairperson. Prior to scheduling, the Chairperson should select the Class of the ECR.

4.2.1. Access the list of ECRs by clicking on **View/Edit ECRs** on the Change Control tab in the Navigation Menu



Navigation: Home Change Control x

Change Control Board Sessions

Change Control Board Sessions

2/22/2010 2/23/2010 2/24/2010 2/25/2010 2/26/2010

<< Previous 1:00 CI 1:00 CI 1:00 CI Next >>

Latest ECRs

ECR ID	ECR Name	Requestor	Requesting Organization	Status	Board	Modified
1303-00060	Gliders - Change to Spectral Irradiance Sensors	Daniel Isaacs	Coastal Global	Rejected	Coastal Global	2/25/2010 3:39:08 PM
1300-00016	1012-0000 Cybersecurity_Plan_OOI_2010-01-12_ver_2-01	Bill Pritchett	System	Submitted	OOI	1/30/2010 4:12:55 PM
1303-00058	1040-0003- JMS_CG_2009-10-30_ver22.mpp	Libby Signell	Coastal Global	Submitted	System	1/29/2010 4:55:56 PM
1303-00047	L4 Glider Requirements, DOORS	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00046	L4_Power_System_Requirements	Robert Petitt	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM

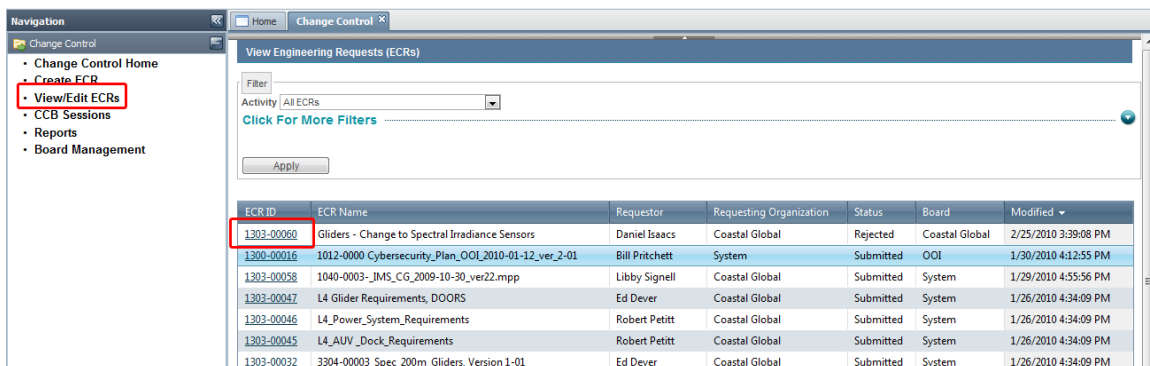
Drafts ECRs Awaiting Scheduling Scheduled ECRs ECRs To Review

ECR ID ECR ID ECR ID ECR ID

No records to display. No records to display. No records to display. No records to display.

Copyright © 2010 , Ocean Observatories Initiative (OOI). All rights reserved.
Version 1.1.0

4.2.2. Click on an ECR ID link to open the detail page of a specific ECR.



Navigation: Home Change Control x

View Engineering Requests (ECRs)

Filter

Activity All ECRs

Click For More Filters

Apply

ECR ID	ECR Name	Requestor	Requesting Organization	Status	Board	Modified
1303-00060	Gliders - Change to Spectral Irradiance Sensors	Daniel Isaacs	Coastal Global	Rejected	Coastal Global	2/25/2010 3:39:08 PM
1300-00016	1012-0000 Cybersecurity_Plan_OOI_2010-01-12_ver_2-01	Bill Pritchett	System	Submitted	OOI	1/30/2010 4:12:55 PM
1303-00058	1040-0003- JMS_CG_2009-10-30_ver22.mpp	Libby Signell	Coastal Global	Submitted	System	1/29/2010 4:55:56 PM
1303-00047	L4 Glider Requirements, DOORS	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00046	L4_Power_System_Requirements	Robert Petitt	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00045	L4_AUV_Dock_Requirements	Robert Petitt	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM
1303-00032	3304-00003_Spec_200m_Gliders, Version 1-01	Ed Dever	Coastal Global	Submitted	System	1/26/2010 4:34:09 PM

4.2.3. Select the Class of the ECR from the dropdown.

ECR Number: 1303-00060 ECR Name: Gliders - Change to Spectral Irradiance Sensors
ECR Status: Submitted Scheduled Session:

Detail Documents History Reviewers

Update Reject Schedule Cancel / Close Print

ECR Name	Gliders - Change to Spectral Irradiance Sensors	Requesting Organization	Coastal Global
Requestor	Daniel Isaacs	Requestor Phone	202-787-1623
ECR Class	1	Current Status	Submitted
WBS Elements	1.3.4.3.6 - Gliders 1.3.4.3.6.1 - Glider Procurement and Pre-Installation Integration Test		
Document Control Number	None	Configuration Manager	George Dussault
Control Account Name	Glider Procurement and Pre-Installation Integratio	Control Account Manager	Ed Dever

[Change Details](#)

4.2.4. Select **Schedule** to open the **Schedule ECR** page.

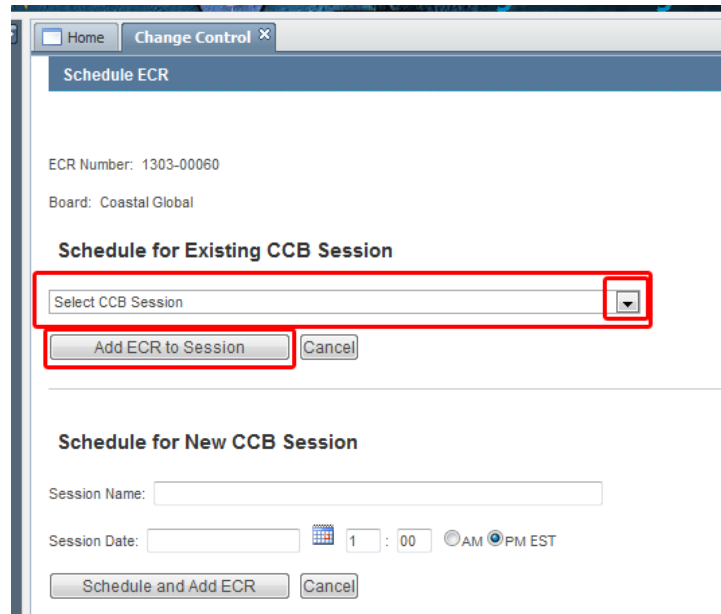
ECR Number: 1303-00060 ECR Name: Gliders - Change to Spectral Irradiance Sensors
ECR Status: Submitted Scheduled Session:

Detail Documents History Reviewers

Update Reject Schedule Cancel / Close Print

ECR Name	Gliders - Change to Spectral Irradiance Sensors	Requesting Organization	Co
Requestor	Daniel Isaacs	Requestor Phone	202
ECR Class	1	Current Status	Su
WBS Elements	Add WBS Remove WBS 1.3.4.3.6 - Gliders 1.3.4.3.6.1 - Glider Procurement and Pre-Installation Integration Test		

4.2.5. If there is an existing CCB Session to which the ECR will be scheduled, select the drop-down box and locate the Session. Once located, select **Add ECR** to Session.




Home Change Control X

Schedule ECR

ECR Number: 1303-00060

Board: Coastal Global


Schedule for Existing CCB Session

Select CCB Session 


Add ECR to Session Cancel

Schedule for New CCB Session

Session Name:


Session Date:  1 : 00 ☐ AM ☒ PM EST


Schedule and Add ECR Cancel

4.2.6. To schedule a new CCB Session, enter in a **Session Name**. For example, "AUV Change Request." Enter a date into the **Session Date** field or click on  to pick a date from the calendar and specify a time. After the CCB Session information is filled in, the **Schedule and Add ECR** button schedules the Session, adds the ECR to that Session, and automatically re-directs the user back to the ECR detail page. The ECR Status on the detail page will be "Scheduled".

Schedule for New CCB Session

Session Name:

Session Date:  1 : 00 ☐ AM ☒ PM EST

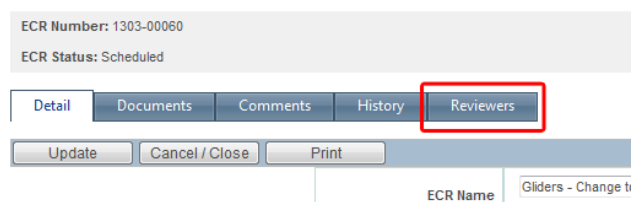
 Cancel

4.3. Reviewer Management

4.3.1. Chairpersons can add and remove additional participants for review of an ECR. Typically this is done when domain-specific knowledge is needed for adjudication of an ECR. Additional reviewers may be either voting or non-voting reviewers.

4.3.1.1. Go to an ECR, and select the “Reviewers” tab at the top:

[View/Edit ECR](#)



ECR Number: 1303-00060
ECR Status: Scheduled

Detail Documents Comments History **Reviewers**

Update Cancel / Close Print

ECR Name Gliders - Change ti

4.3.1.2. At the top portion of the screen, the current permanent board members are shown. These members cannot be edited at this screen. (See Section 4.2.2 below for management of permanent board members.)


Detail	Documents	Comments	History	Reviewers
Current Board: Coastal Global				
Permanent Board Members				
Board Title	User	Title	Chairperson	
CG Systems Engineer	Don Peters	Systems Engineer (Global)	Yes	
CG Project Manager	Libby Signell	Project Manager		
CG Program Director / PI	Bob Weller	Program Director/PI		
CG Quality Manager	George Dussault	QA Engineer		
CG Design Cognizant Engineer				
CG Control Account Manager				
Other				

4.3.1.3. At the bottom portion of the screen, additional reviewers specific to this ECR can be added and removed.

4.3.1.3.1. To add a reviewer, select the name from the dropdown list. To set the reviewer as a voter for this ECR, select the checkbox. To confirm the selection, click the “Add Reviewer” button. The user will now appear in the grid.



Additional Reviewers

Name	Title	Voting Rights	Delete
Sheri White	Engineer, Scientist	False	

Update Reviewers

Add Additional Reviewers

Reviewer: White, Sheri - Engineer, Scientist

Is Voting Member: ☐

Add Reviewer

4.3.1.3.2. To remove a reviewer, select the “Delete” checkbox next to their name. Click the “Update Reviewers” button.

Additional Reviewers

Name	Title	Voting Rights	Delete
Shari White	Engineer, Scientist	False	<input checked="" type="checkbox"/>

[Update Reviewers](#)

4.3.2. Managing permanent Change Control Board Members:

4.3.2.1. Permanent board members are managed through the “Board Management” tool. Select “Board Management” on the left navigation menu to access the tool.

Navigation

- Change Control
 - Change Control Home
 - Create ECR
 - View/Edit ECRs
 - CCB Sessions
 - Reports
 - Board Management**

4.3.2.2. Via the dropdown list, select the board to be managed. This will display all current members of the board, and all unfilled positions per the Configuration Management Plan. Note: boards can only be modified by the chairperson of that board.

Board Management

Board: OL

[Apply](#)

Remove User?	Board Position	Name	Title	ID	Institution	Phone	Chairperson
Delete	OOI Systems Engineer	Bill Bergen	Senior Systems Engineer	OL	Ocean Leadership	(202) 448-1221	Yes
Delete	OOI Project Manager	Anthony Ferlano	Project Manager	OL	Ocean Leadership	(202) 787-1638	
Delete	OOI Program Director / PI	Tim Cowles	Program Director/PI	OL	Ocean Leadership	(202) 787-1640	
	OOI Quality Manager						
	OOI Design Cognizant Engineer						
Delete	OOI Control Account Manager	Alex Talalayevsky	Project Controls Manager	OL	Ocean Leadership	(202) 787-1633	
	Other						

Note: Board Chairperson cannot be removed.

Add Additional Permanent Board Members

Select User: Select User Board Position: Select Role

Add Selected User to Board Selected Above: [Add Selected User](#)

- 4.3.2.3. To add a board member, select the name from the left dropdown list and select the board position from the right dropdown list. Click the “Add Selected User” button.
- 4.3.2.3.1. Users added with the board position “Non-voting Reviewer” will receive all email alerts (dependant on that user’s email settings), but will not appear in the roll-call or the voting list.

Remove User	Board Position	Name	Title	ID	Institution	Phone	Chairperson
	OOI Systems Engineer	Bill Bergen	Senior Systems Engineer	OL	Ocean Leadership	(202) 448-1221	Yes
Delete	OOI Project Manager	Anthony Felaino	Project Manager	OL	Ocean Leadership	(202) 787-3638	
Delete	OOI Program Director / PI	Tim Cowles	Program Director/PI	OL	Ocean Leadership	(202) 787-3640	
	OOI Quality Manager						
	OOI Design Cognizant Engineer						
Delete	OOI Control Account Manager	Alex Talalayevsky	Project Controls Manager	OL	Ocean Leadership	(202) 787-3633	
Delete	Other	Kathy Carr	Reg. & Test Engineer	OL	Ocean Leadership	(202) 787-3610	

Note: Board Chairperson cannot be removed.

Add Additional Permanent Board Members

Select User: Board Position:

Add Selected User to Board Selected Above:

- 4.3.2.4. To remove a board member, click the “Delete” link to the left of their name. NOTE: Board chairperson cannot be removed.

Remove User	Board Position	Name	Title	ID	Institution	Phone	Chairperson
	OOI Systems Engineer	Bill Bergen	Senior Systems Engineer	OL	Ocean Leadership	(202) 448-1221	Yes
Delete	OOI Project Manager	Anthony Felaino	Project Manager	OL	Ocean Leadership	(202) 787-3638	
Delete	OOI Program Director / PI	Tim Cowles	Program Director/PI	OL	Ocean Leadership	(202) 787-3640	
	OOI Quality Manager						
	OOI Design Cognizant Engineer						
Delete	OOI Control Account Manager	Alex Talalayevsky	Project Controls Manager	OL	Ocean Leadership	(202) 787-3633	
Delete	Other	Kathy Carr	Reg. & Test Engineer	OL	Ocean Leadership	(202) 787-3610	

Note: Board Chairperson cannot be removed.

Add Additional Permanent Board Members

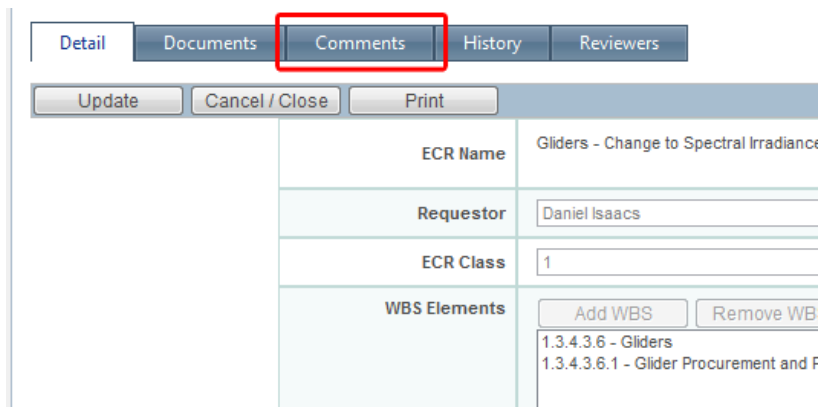
Select User: Board Position:

Add Selected User to Board Selected Above:

5. ECR Review and Comments

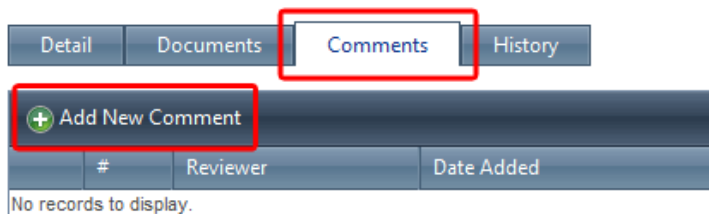
5.1. Adding Comments to an ECR

5.1.1. After an ECR has been scheduled for a CCB Session, Board members and other reviewers can leave comments and discuss the ECR. To add comments on an ECR, select the ECR from the View/Edit ECRs page, then select the **Comments** tab on the ECR detail page.



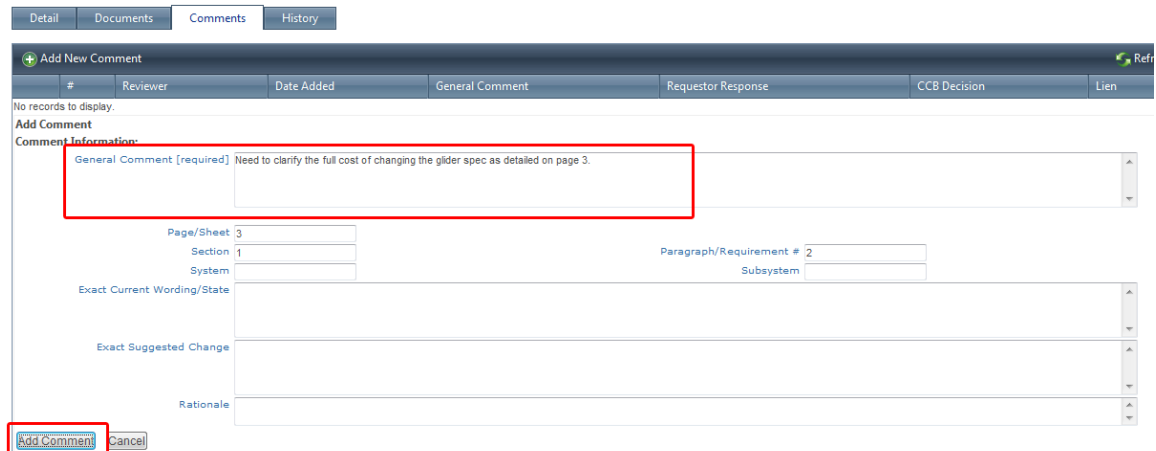
The screenshot shows the ECR detail page with the 'Comments' tab selected. The page includes a navigation bar with 'Detail', 'Documents', 'Comments', 'History', and 'Reviewers'. Below the navigation bar are buttons for 'Update', 'Cancel / Close', and 'Print'. The main content area displays the ECR details: ECR Name (Gliders - Change to Spectral Irradiance), Requestor (Daniel Isaacs), ECR Class (1), and WBS Elements (1.3.4.3.6 - Gliders, 1.3.4.3.6.1 - Glider Procurement and F). There are also buttons for 'Add WBS' and 'Remove WB'.

5.1.2. To add a comment, select **Add New Comment**. Comments should be limited to one topic per comment to ease adjudication.



The screenshot shows the ECR detail page with the 'Comments' tab selected. A red box highlights the 'Add New Comment' button, which is located below the navigation bar. Below the button is a table with columns for '#', 'Reviewer', and 'Date Added'. The table currently displays 'No records to display.'

5.1.3. The only required field to submit the comment is General Comment. Enter your comment text in the General Comment field, per the example below.



Detail Documents **Comments** History

+ Add New Comment Refresh

#	Reviewer	Date Added	General Comment	Requestor Response	CCB Decision	Lien
No records to display.						

Add Comment

Comment Information:

General Comment [required] Need to clarify the full cost of changing the glider spec as detailed on page 3.

Page/Sheet 3
Section 1
System
Paragraph/Requirement # 2
Subsystem

Exact Current Wording/State
Exact Suggested Change
Rationale

Add Comment Cancel

5.1.4. After a comment is entered, save it using the **Add Comment** button, as shown in screenshot in 3.7.3.

5.1.5. The Comment tab page appears and the comment is added to the list. To go back and view all comment fields, click **Review**.

Detail Documents **Comments** History

+ Add New Comment Refresh

#	Reviewer	Date Added	General Comment	Requestor Response	CCB Decision	Lien
Review	1	Daniel Isaacs	2/26/2010 2:10:21 PM	Need to clarify the full cost of changing the glider spec as detailed on page 3.		No

5.2. Requestor and Author Review of Comments

5.2.1. After a comment has been left by a reviewer, the Requestor of the ECR and the Author of the document being changed have the ability to accept or reject the comment, and leave a decision rationale.

5.2.2. As a Requestor/Author, go to the comments page, and click the “Review” link next to a comment. This will expand the comment to show all fields,



The screenshot shows the 'Comments' tab in the SAF Change Control system. A table lists comments, with the first comment by Daniel Isaacs on 2/26/2010 at 2:10:21 PM. The 'Review' link next to this comment is highlighted with a red box. Below the table, the 'Review Comment' form is expanded, showing details for the comment, including the reviewer's name, the general comment text, and various metadata fields like page, section, and subsystem. The 'Requestor/Author Information' section shows a dropdown for 'Requestor/Author Response' set to 'reject'. The 'Chairperson/Designee Information' section shows a dropdown for 'CCB Decision' set to 'no'. The 'Update Comment' button is highlighted with a red box at the bottom left.

5.2.3. The Requestor/Author can select the response and enter the rationale. After entering the data, select the “Update Comment” button at the bottom.



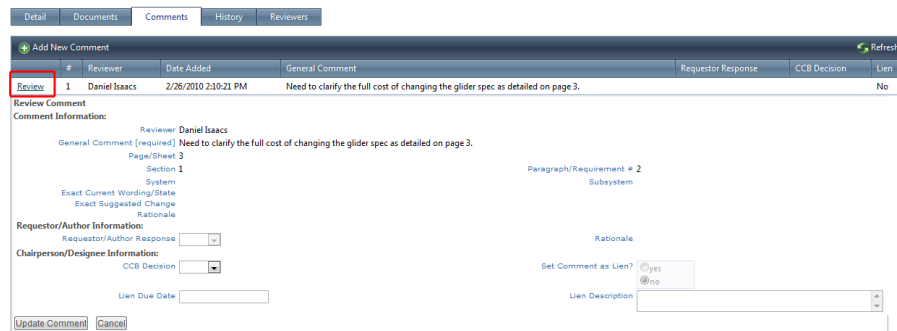
This screenshot shows the same 'Review Comment' form as the previous one, but with additional fields filled out. The 'Requestor/Author Response' dropdown is now set to 'reject' and is highlighted with a red box. The 'Rationale' text area is filled with 'Cost is clarified in section 2 on page 4.' and is also highlighted with a red box. The 'Update Comment' button at the bottom left is highlighted with a red box. The 'Chairperson/Designee Information' section shows the 'CCB Decision' dropdown set to 'no'.

5.2.4. The Requestor/Author response can be updated by the Chairperson at any time until the ECR is completed or promoted.

5.3. Chairperson Review of Comments

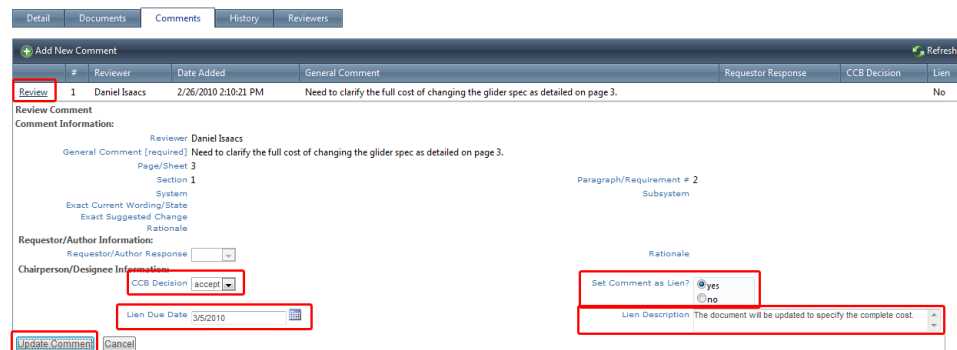
5.3.1. After a comment has been left by a reviewer, the Chairperson of the current board has the ability to accept or reject the comment, and optionally set the comment as a lien on the ECR and set corresponding due date and lien text.

5.3.2. As a Requestor/Author, go to the comments page, and click the “Review” link next to a comment. This will expand the comment to show all fields,



The screenshot shows the 'Comments' tab in the SAF Change Control system. A table lists comments, with the first comment by Daniel Isaacs on 2/26/2010 highlighted. The 'Review' link next to this comment is highlighted with a red box. Below the table, the 'Review Comment' form is expanded, showing various fields for comment information, requestor/author information, and chairperson/designee information.

5.3.3. The Chairperson can select the CCB Decision. If accepted, the comment can be set as a lien. Liens require corrections or modifications to the original ECR's description of the proposed change. If the comment is set as a lien, the Chairperson is required to select the lien due date and enter the lien text. After entering the data, select the “Update Comment” button at the bottom.

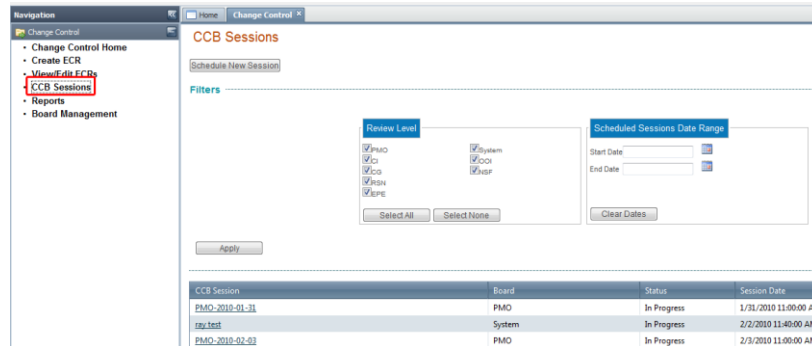


This screenshot shows the same 'Review Comment' form as the previous one, but with additional fields filled out. The 'CCB Decision' is set to 'accept', the 'Lien Due Date' is 3/5/2010, and the 'Set Comment as Lien?' option is selected as 'yes'. The 'Lien Description' field contains the text: 'The document will be updated to specify the complete cost.' The 'Update Comment' button at the bottom left is highlighted with a red box.

5.3.4. The Chairperson response can be updated by the Chairperson at any time until the ECR is completed or promoted.

6. Conducting a CCB Session and Adjudicating ECRs

6.1. After a CCB Session has been scheduled, a CCB Session is ready to be started. Select **CCB Sessions** from the Change Control tab on the Navigation Menu (see below).



CCB Session	Board	Status	Session Date
PMO-2010-01-31	PMO	In Progress	1/31/2010 11:00:00 AM
ray test	System	In Progress	2/2/2010 11:40:00 AM
PMO-2010-02-03	PMO	In Progress	2/3/2010 11:00:00 AM

6.2. Select the CCB session to be run by clicking on the session name.

CCB Session	Board	Status	Session Date
AUV Change	Coastal Global	In Progress	2/5/2010 1:00:00 PM
AUV Change Request	Coastal Global	In Progress	2/5/2010 2:00:00 PM
CG 2010-03-09	Coastal Global	Scheduled	3/9/2010 1:00:00 PM
CG CCB SAF (Previous ECRs promoted 1)	Coastal Global	Closed	1/13/2010 2:00:00 PM
Jan 13 2010 CG BOARD	Coastal Global	Closed	1/13/2010 1:00:00 AM

6.3. Click the “Conduct Session” button to begin the session.

CCB Session Details

Update Session Details **Conduct Session**

Session Details

Session Name: CG 2010-03-09 Board: Coastal Global

Session Date: 3/9/2010 Session Time: 1 : 00 AM PM EST

6.4. During an active CCB Session, a blue bar appears over the Session details area:

Active Session

Session Name: [RSN IO Level CCB](#) Board: Regional

Session Date: 3/4/2011 Session Time: 1:30 PM

6.5. The first action after a Session is started is the Roll Call. All reviewers for the ECRs in that Session are listed. The chairperson will mark the current status of each voter as Present, Absent or Delegate. If a Delegate is representing an existing voter, the Chairperson selects the Delegate's name from the drop-down list. After completion of the Roll Call, select the Save and Continue button at the bottom of the screen.

Roll Call

Voter Name	Present	Absent	Delegate	Delegate
George Dussault	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Select Delegate
Don Peters	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Select Delegate
Libby Signell	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Select Delegate
Bob Weller	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Select Delegate

Save And Continue Stop Session

6.6. There is a list of all ECRs scheduled for this Session. Select the ECR to be adjudicated by clicking the ECR Number

Scheduled ECRs

ECR Number	Name	Board Decision	Requestor	Requesting Organization
1303-00061	Gliders - Change to Spectral Irradiance Sensors		Daniel Isaacs	CG

6.7. Chairperson / Board Review of Comments

6.7.1. As noted in section 5.3, the Chairperson of the current board has the ability to accept or reject the comment, and optionally set the comment as a lien on the ECR and set corresponding due date and lien text. This can be done as part of the ECR review during the session.

6.8. After reviewing the existing data and setting any additional liens as appropriate, the chairperson can select the Vote tab. The top of the page lists all Liens set on the Comments tab; to modify Liens, the Chairperson must go to that tab. Below that, the chairperson asks each voting member what their vote is, and marks votes appropriately, along with any comments from the individual voters. The chairperson also records initial Board Comments, and then selects the Board Decision from the dropdown. To finalize the selection, click Confirm Board Decision and Return to Main Session.

ECR Number: 1303-00061

ECR Status: Scheduled

ECR Name: Gliders - Change to Spectral Irradiance Sensors

Scheduled Session: [CG 2010-03-09 - 3/9/2010 1:00:00 PM](#)

Detail

Documents

Comments

History

Reviewers

Vote

Lien(s) - To Modify Liens click on Comments in Above Tab

Lien	Due Date
No records to display.	

Vote

Title	Member Name	Delegate Name	Approve	Approve w. Liens	Disapprove	Defer	Comment
QA Engineer	George Dussault		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Systems Engineer (Global)	Don Peters		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Project Manager	Libby Signell		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Program Director/PI	Bob Weller		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Board Comments

Passed unanimously.

Board Decision

Approve

[Confirm Board Decision and Return to Main Session](#)

6.9. An in-progress session may be Suspended or Closed via the buttons at the top of the page when in an active session:

Conduct CCB Session

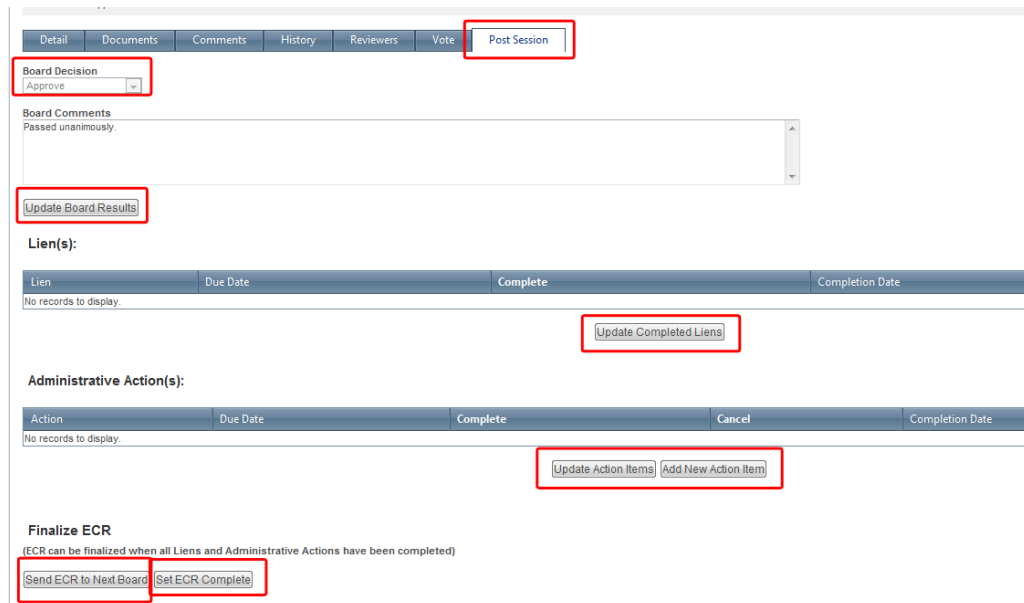
Suspend Session

Close Session

6.9.1. Suspended Session – typically used when taking a break during a long session. ECRs stay in current state (Scheduled) and can be adjudicated when restarting a session (in same way as starting it originally).

6.9.2. Closed Session – This option ends the meeting. Any non-adjudicated ECRs in a session when the session is closed will automatically be set to Deferred, and will need to be scheduled for a new session.

6.10. ECR Next Steps: After an ECR is adjudicated and the session is closed, the “Post-Session” tab of an ECR becomes available to the Chairperson. At this page, the Chairperson can view the board decision, update board comments, update/close liens, and add/update/close action items. After all liens and action items are completed or canceled, the Chairperson can promote the ECR to the next level board if required, or set the ECR to Completed status.



Detail Documents Comments History Reviewers Vote **Post Session**

Board Decision
Approve

Board Comments
Passed unanimously.

Update Board Results

Lien(s):

Lien	Due Date	Complete	Completion Date
No records to display.			

Update Completed Liens

Administrative Action(s):

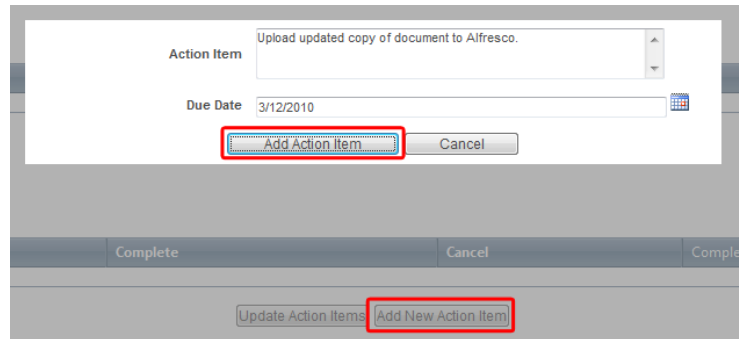
Action	Due Date	Complete	Cancel	Completion Date
No records to display.				

Update Action Items **Add New Action Item**

Finalize ECR
(ECR can be finalized when all Liens and Administrative Actions have been completed)

Send ECR to Next Board **Set ECR Complete**

- 6.10.1. Updating Board Comments: To update board comments, enter/edit the text in the “Board Comments” text box. Click “Update Board Comments”
- 6.10.2. Completing Liens: Click the checkbox in the “Complete” column on the appropriate row. Click the “Update Completed Liens” button.
- 6.10.3. Administrative Actions: Administrative actions are supplemental actions required to implement the change proposed by the ECR (e.g., update DOORS, accept redlines and post a document). This is in contrast to Liens, which require corrections or modifications to the original ECR's description of the proposed change.
 - 6.10.3.1. Adding an Action: Click the “Add New Action Item” button below the list of action items. In the new window, fill in the action item and the due date, and click “Add Action Item”



The screenshot shows a web interface for managing action items. At the top, there is a text input field containing 'Upload updated copy of document to Alfresco.' Below this is a 'Due Date' field set to '3/12/2010'. A red rectangular box highlights the 'Add Action Item' button. To the right of this button is a 'Cancel' button. Below these fields, there is a row of three buttons: 'Complete', 'Cancel', and 'Complete'. At the bottom of the interface, there is a row of two buttons: 'Update Action Items' and 'Add New Action Item', with the latter also highlighted by a red rectangular box.

6.10.3.2. To set an action as complete or canceled, click the appropriate checkbox, and click the “Update Action Items” button.

6.10.4. After all liens and actions are completed or canceled, the Chairperson can promote the ECR to the next level board if required, or set the ECR to Completed status.

6.10.4.1. Promote ECR: Click the “Send ECR to Next Board” button.

6.10.4.2. Complete ECR: Click the “Set ECR Complete” button.

7. Users

Users of the system are assigned one or more of the following roles by the system administrator. These roles define what information regarding the ECRs the user can see and change.

Requestors – The requestor is responsible for generating the ECR and for coordinating the ECR with appropriate team members prior to submitting to the Chairperson for submittal to the board. The requestor is also responsible for addressing comments from the board members and other assigned reviewers and incorporating the review comments into the change documentation. Upon board approval, the requestor (or designee) is responsible for implementing the change into the applicable baseline items per direction of the board.

Change Management Board Chairpersons – The Change Management Board Chairperson is in charge of accepting ECRs for a session, scheduling ECRs, reviewing ECRs and setting Liens, and conducting Change Control Sessions and adjudicating ECRs.

Reviewers – Reviewers are responsible for reviewing ECRs and associated documents and for entering comments for board member and requestor analysis and adjudication. Selected reviewers are chosen by the Board Chair as needed to ensure a complete analysis and review. Additional reviewers should be assigned if specific domain knowledge is needed to properly review an ECR.

Board Members – Board members are responsible for reviewing ECRs and associated documents, for entering comments for requestor analysis and adjudication, and for voting on ECRs at CCB sessions.

8. General Information and Definitions

Each page has a standard format to assist in user navigation and selection of application functions.

8.1. Status

The current state of the ECR in the change control review process.

Status	Role Update Access	Status Description/ECR Behavior
Draft	Requestor	ECR has been added by requestor but has not yet been submitted.
Submitted	Requestor	ECR has been submitted by requestor. Chairperson must take action of submitted items.
Rejected	Chairperson	ECR has been rejected by CP/D because of errors or omissions from the ECR by the requestor.
Scheduled	Chairperson	ECR is acceptable to CP/D and has been scheduled for Review and CCB Session
Approved	Chairperson	ECR has been approved
Approved with Liens	Chairperson	ECR has been approved but the noted liens still need to be applied
Disapproved	Chairperson	ECR has been disapproved and request will not be implemented
Deferred	Chairperson	ECR was not voted on during the CCB Session.
Arbitration	Chairperson	ECR has been reviewed by CCB but CCB was not able to come to resolution. Guidance review will be provided by next higher-level board.
Completed	Chairperson	ECR has been completed as well as all relevant action items

8.2. ECR Detail

Basic ECR Details

Current Status	Assigned by system. See 'ECR Status' table for details. Combination of current assigned CCB level and review status.
Change Request Number	System assigned unique ID from ECR control file.
Date ECR Added	System assigned
ECR Class	Class I or Class II, as set by Chairperson prior to scheduling
WBS	User selected from WBS dropdown/selection control. Multiple WBS values may be entered for a single



SAF | Change Control User Guide



	ECR.
Control Account Name	Name of the Control Account
Configuration Manager	System assigned based on Board Requested.
Control Account Manager	Manager of the Control Account selected
Requestor	System assigned. requestor name.
Telephone Number:	System assigned. requestor phone
Request Name	User entry, summary description of ECR
Affected Document Number	Controlled document selected from 'Search/Add Controlled Documents'.
Description of Change	User entry. Detailed description of ECR change
Reason for Change	User entry
Benefit to OOI	User entry
Control Account Scope Impact Assessment	User entry
Control Account Schedule Impact Assessment	User entry
Control Account Cost Impact Assessment	User entry
Reviewer Name(s)	Assigned 'reviewer' role list from selecting Search/Add Reviewers tab. Multiple reviewers may be selected. Assigned by Chairperson.

8.3. CCB Board Results

CCB Date	System assigned
CCB Name	System assigned
Add Date	System assigned
Last Updated	System assigned
CCB Results	Dropdown selection of CCB review results. Approve Approve with Liens Defer Disapprove Arbitration Completed
CCB Chairperson	System assigned
Master Schedule	User entry of assessment of impact to project.
Deliverables	User entry of assessment of impact to project.
Project Cost	User entry of assessment of impact to project.
CCB Comments	User entry of miscellaneous comments
Approved Liens Description	If ECR status is 'Approved with Liens', user entry of liens that must be satisfied before ECR is complete.

8.4. Basic CCB Schedule Details

CCB Date	Date CCB is to be held
CCB Description	Misc description of the CCB
CCB Level	Level of the change control board to be scheduled.

9. Reports

Various reports can be created and accessed under the **Reports** button in the Navigation Menu.

9.1. Metrics Report

The Metrics Report displays how many how many CCB Sessions are scheduled, conducted, and how many ECRs are scheduled and processed by each Change Control Board.

9.2. Metrics Report Expanded

The Metrics Report Expanded displays how many CCB Sessions are scheduled and conducted as well as information about the status of ECRs by CCB.

9.3. Metrics Report Detailed

The Metrics Report Detailed displays ECR level information. Each ECR is displayed with its CCB Session and each CCB Session is displayed with its CCB.

Appendix A-1 OOI/Change Management Control Acronyms

Acronym	Translation	Description
CP/D	Change Control Board Chairperson / Delegate	Perform preliminary review of the submitted ECR and manages the CCB ECR review schedule
IO	Implementing Organization	May be CG, RSN, CI, EPE
CG	Coastal Global	Implementing Organization
RSN	Regional Scale Node	Implementing Organization
EPE	Education & Public Engagement	Implementing Organization
CI	Cyber Infrastructure	Implementing Organization
CCB	Change Control Board	
WBS	Work Breakdown Structure	