

Introducing a new application  
with a decade of experience

Project Gateway<sup>®</sup>  
**Collaborative**  
Change Management<sup>™</sup>

ND7  
web services

ND6 compatible



*with activity pipelines<sup>™</sup>*

**MARIN RESEARCH, INC.**

*Bringing Projects Into Focus*

# Collaborative Change Management

**...BECAUSE EXECUTION IS THE BOTTOM LINE**

***Collaborative Change Management is a comprehensive system that assists organizations in coordinating and executing their commitments to customers and colleagues.***

***Commitments to implement systems, to provide services, and to develop products.***

## **Providing a place for everything**

From a customer service request that might take a few hours to a new product development that spans years, your commitments come in many sizes. It's important that simple things should be kept simple, but complex activities be fully supported. For this purpose CCM provides a wide range of activity processes from simple action items to project process management. CCM enables people across departments and management levels to see a common reality so that everyone is working toward the proper goal.

## **Ensuring follow through**

How often have your "to-dos" died in someone's inbox or lost in an SMS blizzard? How do you even know whether or not something you asked to be done has in fact been done? CCM action items not only alert the assignee, but they also notify the creator when completed or late. Hence, they never get forgotten.

## **Connecting activity with objectives**

Most activities occur in the context of a larger objective. Everything that is related to an objective, whether it is a simple customer request or a multiyear program, is logically interconnected and easily displayed. That's the real advantage of putting all the commitments together in one purpose built system rather than trying to glue separate systems together.

## **Supporting change as a way of life**

A system that supports change must itself accommodate constant changes. Due dates and responsibilities evolve, approvals sometimes need to be overridden, action items become projects. CCM documents change, but does not impede it.

## **Providing the visibility that makes the difference**

Just putting things into a database doesn't improve productivity. It's the ability to see what's important and to communicate priorities that can improve your results. CCM provides hundreds of tabular views and reports and the remarkable Activity Pipelines presentation facility to help you see what you need to know.

## Why CCM may be the right choice for your organization

This application is the product of over a decades work in understanding how activity management systems work in the real world. We think that you will find it strikes the right balance between the "reengineer your business" and the "let's have a web site" extremes of collaborative systems.

CCM is deliberately designed to have a low impact on your teams' time yet deliver performance improvements you can see. On one hand, it gives you a complete arsenal of ready to use best practices, on the other, it lets you use only what works for you.

## Complete and ready to use

When you choose CCM, you get a complete system that's ready to use this week, not next year. CCM requires only hours to setup and little if any end user training. Instructions are provided at the form level for common activities. The system is extensively documented with both on-line and printed manuals.

## A Genuine Value

CCM includes a requests facility, a archiving system, action items, issues tracking, risk management, a full scope change control process, document management, digital asset storage, project lifecycle management and much more. All fully web accessible with excellent document level security and change logs.

CCM includes Web Services support for enterprise integration and it comes with fully open source code.

And CCM is built on the IBM Lotus Domino platform. It is very secure, inexpensive to administer and highly reliable.

## How CCM helps you

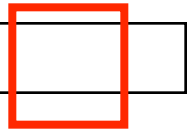
- CCM provides a single place to record and retrieve all of your organization's commitments and the information that drives them.*
- CCM provides active processes to ensure that every commitment is actually accomplished.*
- CCM provides an organized structure for linking, categorizing, and extracting information.*
- CCM facilitates the continuous update of details that is expected in results based organizations while maintaining permanent records of changes.*
- CCM provides exceptional visibility and transparency to the current state of work so that decisions can be made quickly.*

## Personal Time Management

The output of your organization is directly related to how effectively people spend their time.

CCM provides prioritization tools to help your people make the best use of their workdays.

- Individual activities such as issues can have intrinsic priorities assigned from a system wide scale.
- Each project manager has a "Project Priorities Worksheet" which allow them to rank every commitment and adjust those priorities at any time.
- Every user has a "Personal Priorities Worksheet" showing everything assigned them. From this worksheet, they can see the both the intrinsic and project manager assigned priorities as well as the due dates. Using this information and they can rank activities into the sequence that works best for them.



*Whether your focus is in creating great products, first class support, or systems integration, you will find the facilities of CCM of real bene-*

**Project Process Management** Consistency is the hallmark of a professional organization. Process management makes it happen by enforcing an approval discipline over the life of each project in a stage and gate fashion. You define the required approval points. The system will actively assist each project leader to achieve compliance.

**Request Management** The system provides a complete request lifecycle process to collect and respond to customer requirements. It provides for customization, prioritization, implementation tracking, and automated feedback.

**Action Item Management** This provides a lightweight, yet reliable way to assign responsibilities that will not fall through the cracks. This simplest of tools brings order and visibility to everyday work.

**Scope Management** This service creates an open, visible, and yet very formal process for setting and adjusting the goals of the project while it is underway. It documents the approval and disapproval of goal changes and tracks the cumulative impact.

**Issues Management** All projects run into difficulties that require the collaboration of stake-holders. This facility lets team members surface problems and collaborate on solutions. Issues management also provides an intellectual history which aids newcomers.

**Risk Management** Risk management ensures that potential problems are addressed by the project stake-holders and that contingency plans are approved before they are needed. Risk management is essential for projects that have a high cost of failure or delay. The system supports risk definition, mitigation, contingency planning, and periodic reassessment.

**Document Management** Provides a place for the creation and formal approval of the specifications, charter, milestone definitions, and work products of each project. Allows the future production of documents to be assigned and tracked. Supports checkout and versioning.

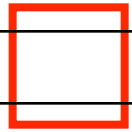
**Asset Library** Whether drawings or images, technical papers or source files, the system provides a logical place to keep your important digital assets and the convenience of version control and response threads to maintain them.

**Status Reporting** This provides a system for documenting both individual and project progress. It provides a way to record the ongoing accomplishments and intentions of each member of the project team as the project evolves.

**Group Review** The Group Review facility provides a formal "request for comments" process for any document or project.

**Archiving** The fully automatic archiving process captures all the details of projects for management review.

# THE ACTION ITEM PROCESS



*An action item is an instruction from one person to another to do something by a specific date. An instruction that cannot be ignored, lost, or forgotten.*

**Accountable** Creating an action item initiates a workflow which will notify and remind the assignee and keep the creator informed of progress and changes.

Action items are either done or not done. The assignee can add comments and report time spent, but must ultimately mark the item as complete. If it cannot be completed, then it must be canceled by the creator to remove it from the system.

**Permanent** Action items can be created to implement requests. Completing the action item will complete the request and notify the requesting party.

Action items are tabulated as part of the project statistics. The due date of open action items can drive the finish date of the project. Unless canceled, every action item becomes a permanent part of the history of its project and will be archived when the project is completed.

**In Context** Action items are linked to the subject document from which they were originated, as well as to the project. This implied context means that the creator can simply say "please fix this!" and know that the recipient will know the subject.

**Connected** Action items themselves can be the starting point for new action items. In this way an instruction can trigger a chain reaction of actions as it passes through and across the layers of the organization.

Each action item has direct visibility to all of its offspring so that you can see when all of the secondary actions you have initiated have been completed.

**Easy to Update**

- ◆Notes users can access a page showing their action items from the system menu. They can marking items done or just update status directly from this page.
- ◆Web users select "My Action Update" to review and update all of their action items.
- ◆Users with advanced cellphones can update their action items using a special version of the action update designed for the small screen.

**Transformation** You can transform an action item into a Issue, Risk, Scope Change, Discussion Topic, or Project while preserving the relevant information such as the due date and description.

## Action Item Rules

Only the creator can cancel or change the description of an action item.

Only the assignee can report that an action item is done.

The assignee, project manager, or creator can reassign or change the due date of the action item. The creator will always be notified of such changes.

For action items that are not due right away, the assignee can enable a personal reminder that will be sent a week prior to the due date.

A closed action item can be reopened only by the original creator.

Every change to the action item is logged.

Time reporting is optional.

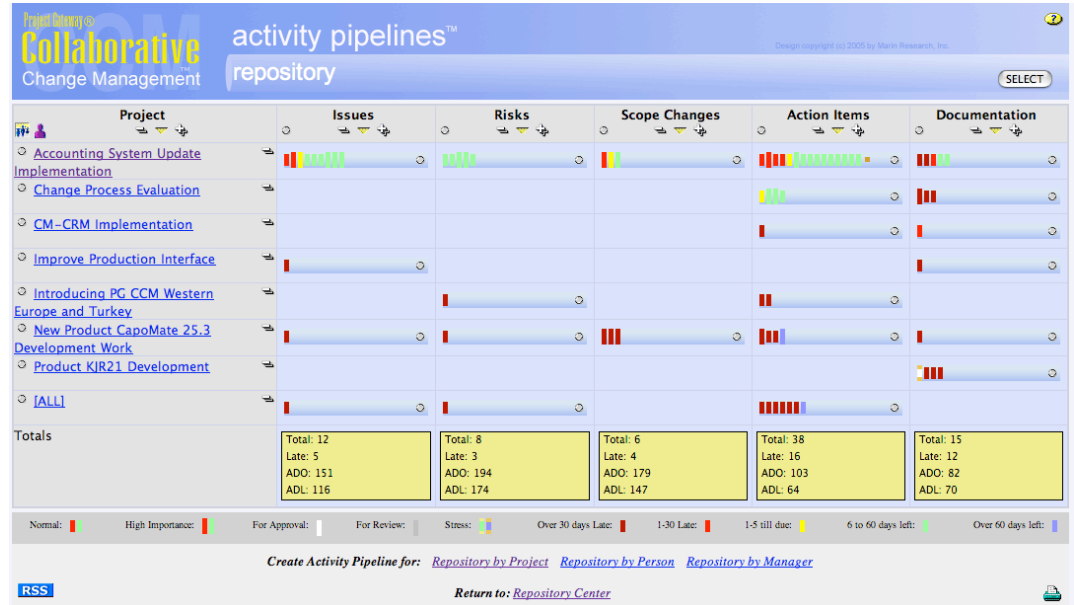
# ACTIVITY PIPELINES™

*Activity Pipelines is a visual, interactive inventory system for your repository.*

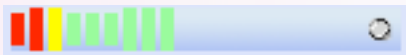
The Activity Pipelines facility lets you view the repository, not as a monolithic entity, but rather as an array of document collections.

For example, all the issues in a particular project might be considered to be a collection. Another collection might be all the scope changes assigned to a particular person. One document can be part of many logical collections.

Each individual pipeline is a



## Inside an Activity Pipeline



Each visual pipeline contains a set of colored blocks that represent the individual repository documents. Touching a block reveals the document title.

The sequence represents the due dates of the commitments.

The color indicates the relative time remaining on the commitment (or the time overdue).

The height indicates the relative priority or importance.

The width (where appropriate) indicates the relative effort. When width is used, there will be a "recycle" icon on the column or in the left most column heading. This will switch between fixed width and proportional display modes.

And the presence of stripes indicate the presence of problems (more about this later).

Thus, even without touching the pipeline, you can see if any of the work is overdue, near term, important or problematic. By comparing pipelines across projects or people, you can see the relative workloads and timeliness.

visual representation of a collection of related repository items such as issues, risks, requests, etc. An Activity Pipelines presentation is an array of from one to thousands of individual pipelines organized in an interactive table.

Each cell of the table contains an individual activity pipeline which in turn contains the documents of that collection.

The Activity Pipelines design combines the time sense of Gantt style displays with the iconic status representation of a dashboard, the comparative power of bar charts, and the drill down convenience of views.

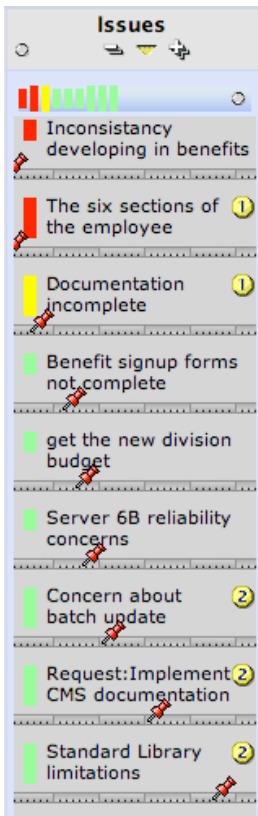
It provides a truly simple and intuitive way to visualize and manipulate the commitments recorded in the repository.

## Expanding a Pipeline into a Report

Clicking a pipeline expands it vertically into a report in two stages.

The first stage of expansion (headings) shows the document title, the priority badges (which designate the reasons for high importance), and the relative due date which is represented as a pushpin on a timeline.

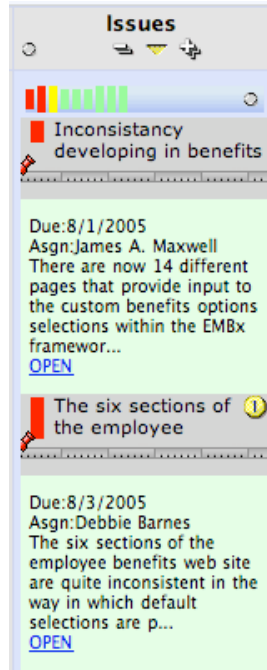
The second level of expansion (details) adds details such as the project name, due date, list of problems, a summary of the body text of the document, and a link to open the actual document. In some cases this includes a checkbox



to select the document for modification (more on this later.) The detail blocks are also color coded so that recently created items are easily recognized.

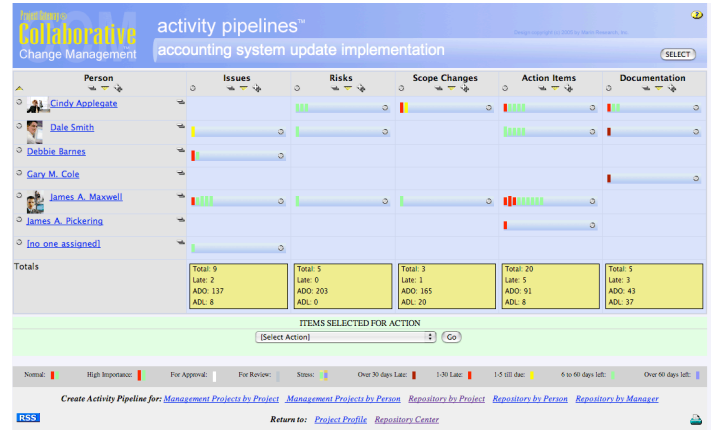
### Zooming

The zoom action is the lens icon in the column or row header and at the right each pipeline. Clicking it will regenerate the display to show only the se-



lected content.

inclusion in the presentation.

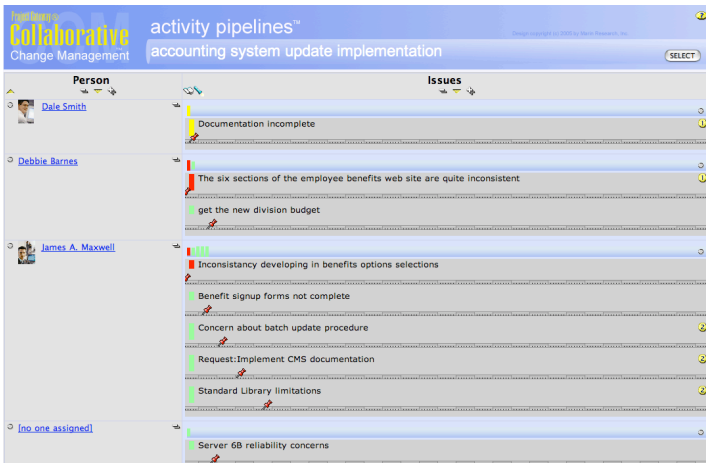


Clicking a row name will change focus to that subject. So, for example, if you are looking at "repository" and have rows showing projects, clicking on the row title will regenerate the presentation with the focus being that project.

### Project Manipulation

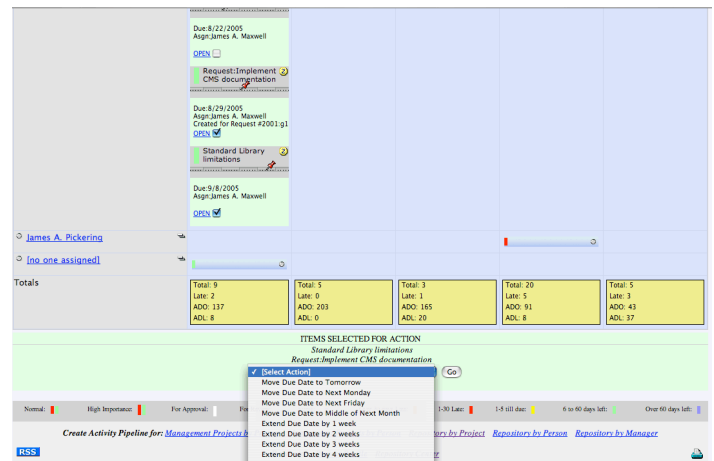
The green action panel allows a project manager to make changes to one or many of the commitments shown.

When the action panel is shown, a checkbox will appear at the end of the detail area of each document. Checking the box will "select" the document for possible modification.



### Focusing

The focus of a presentation is shown as the title in the heading. When the focus is "Repository" it means that all of the commitments in the database are candidates for



*Action Panel showing two selected documents (checkboxes above, names below) and the first part of the drop-list of actions. Clicking GO will apply the selected action to the selected documents and regenerate the pipelines presentation.*

The action selector allows you to change the due dates, the priority, and the assignee of the selected items. You can move due-dates in and out in time, or move them to the near future. You can set or remove project manager

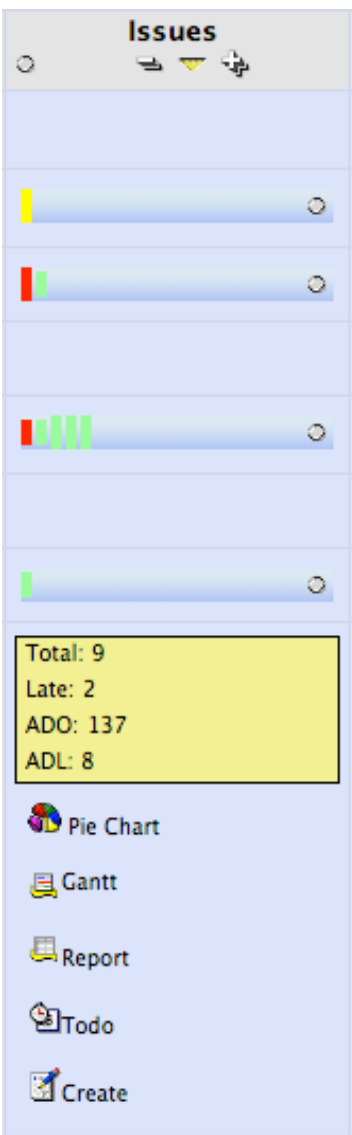
priority on the items, and you can change the assignee to some other participant.

## Totals

The yellow Totals area show statistics such as the total number of items, the average age, and the average number of days late.

## And More Reports

Clicking on the totals area opens a report access panel. Here you will find icons to generate Pie and Gantt charts, tabular reports, speciality calendars, and to create new commitments of the selected type.



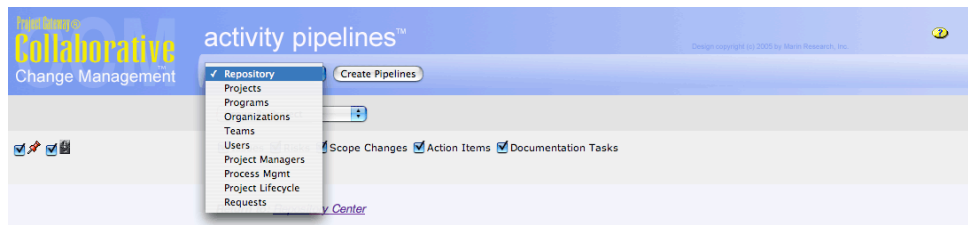
## RSS Insight To Go!

Every format of Activity Pipelines presentation is RSS enabled. That means you can just click the RSS icon to at the lower left corner of the pipeline presentation to subscribe from any RSS compatible newsreader or browser.

If you are a blog reader, you know the power of RSS to keep you aware of new information. So now you can get your project commitments along with the morning news!

## Selecting the Presentation Format

The Activity Pipelines Selector allows you to specify what you want to see in the pipelines presentation including the



selection of columns and row formats.

## Commitments Presentation Styles

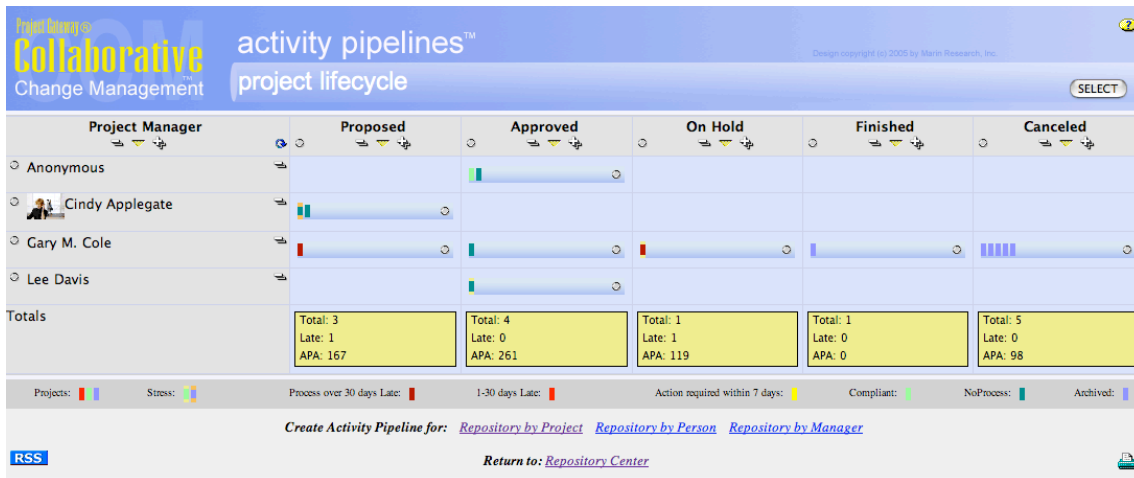
Columns are used to segregate different kinds of information. e.g. issues, risks, scope changes. etc. Colors show the status of each commitment.

- Repository. Shows all commitments for all projects grouped by person, manager, or project.
- Projects. Show commitments for a particular project, all the projects you manage, or projects selected as favorites.
- Programs. Show commitments for all the projects in a selected program.
- Project Managers. All commitments for projects reporting to a particular manager.
- Users. All commitments for a particular person.
- Teams. All commitments for members of a named team.
- Organizations. All commitments for people in a selected organization.

## Stage Presentation Styles

Here columns are used to represent the current state of projects or requests.

- Project Lifecycle. Shows the status of all projects, sorted by approval status.
- Process. Shows the projects in each stage of a selected process.
- Requests. Shows the stage and status of all requests.



## The Project Lifecycle Format

This sorts projects based upon their approval status and project manager.

Blocks represent individual projects. The columns are "proposed", "approved", "on hold", "canceled" and "finished" Rows group projects by project manager.

Color depicts the compliance of the project with the assigned process. If no process is assigned, then a "no process" color is applied as identified in the legend.

If the project has red or bomb indicators in its project dashboard display, the project block will have "stress stripes" added to it. When the project item is opened to show details, the dashboard and process deficiencies, if any, will be enumerated in a section labeled "Problems".

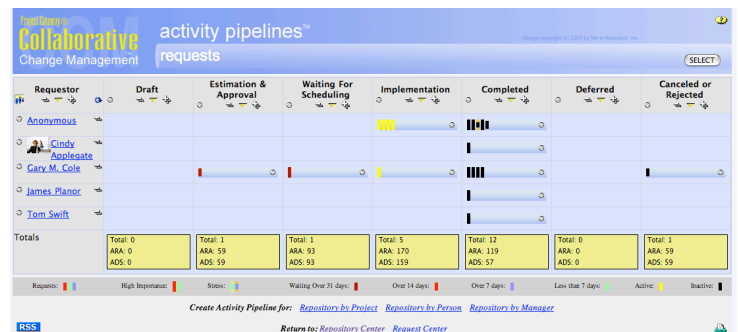
## The Process Format

This gives you a "birds eye" view of all of the projects that are being directed by the selected business process. Each stage of the process is shown as a column, and each project as a color block in that column.

Rows are used to group projects by project manager. You can use the row zoom icon (lens) to limit the presentation to those projects belonging to a single project manager.

## The Requests Format

This shows blocks representing individual requests. The columns are used to represent the stages of the request flow.



- *Draft.*
- *Estimation & Approval.*
- *Waiting for Scheduling.*
- *Implementation.*
- *Completed.*
- *Deferred.*
- *Canceled or Rejected.*

Rows are used to group requests by requester or assignee, Colors are used to depict 'time in state' so as to show stalled items.

The request blocks can be displayed so as to vary in width based upon the estimated hours required for that request.

## COMPONENTS

Collaborative Change Management consists of three Domino databases, documentation, and Marin Research, Inc. support services.

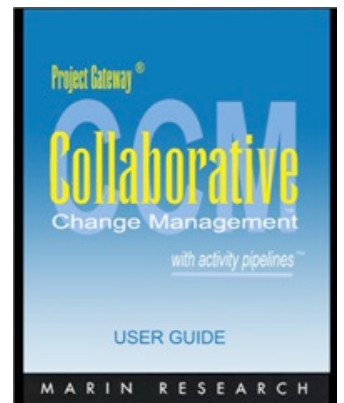
**Repository Center** This is the core of the system. Here you define your people, projects and processes. This database contains and manages your action items, issues, risks, scope changes, project documents, assets, and notes. It sends automatic reminders and drives workflows.

**Request Center** The request center application allows users to initiate new request for changes and services. It is possible to have several Request Center databases interacting with one Repository.

**Repository Archive.** This database collects the complete record of all of your completed or canceled projects, removing them from the Repository, but preserving them for management analysis.

**Documentation** Complete documentation is available in PDF format on our web site and in printed form from the Marin Research Online Store.

**Support** Collaborative Change Management is supported by Marin Research, Inc. Telephone and email support is provided for all aspects of the application on an annual basis.



**CCM and Project Gateway®** To many people, "project management" means task planning, critical path scheduling, and timesheet reporting. The full Project Gateway system provides an elaborate implementation of these functions. CCM is a subset of the full Project Gateway system. This means that you can begin using CCM but upgrade to add task management and time accounting features at any time without any disruption of ongoing work.

**CCM and Project Observatory®** One or many CCM Repositories can be integrated into a Project Observatory system.

## LOGICAL STRUCTURE

The CCM system uses a matrix model of organization defined by the system owner using profile forms.

**Projects.** A project provides a locus for grouping activities.

**Programs.** These provide a structure for grouping projects.

**Participants.** These represent the individuals using the system.

**Organizations.** These provide a structure for grouping participants.

**Teams.** These provide an 'ad hoc' way of assembling groups of participants across organizational boundaries.

## USER INTERACTION

**Menus and Navigators** The system menu provides access to all views and document creation. Additional navigation points are provided during web operation.

**Documents** A large variety of document types (issues, risks, projects, action items, etc.) are provided for recording commitments and associated data. Provision has been made for additional customer formats for project documents and requests.

**Views** Over 80 standard views provide direct access to documents. Specialized Dashboard Views provide high-level summarization of project and request status.

**Reports** The system generates a large number of reports in HTML format, most with extensive customization options.

**Gantt Charts** The system generates a variety of Gantt Charts showing activity and document timelines in PDF format.

**Activity Pipelines.** These highly interactive presentations provide deep visibility into the repository from every perspective.

**SpreadSheet Output** The system generates customizable, spreadsheet tables of issues, risks and scope changes.

**RSS Newsreader Output** The system generates customizable RSS Feeds for selected projects, announcements, and for all Activity Pipeline presentations.

**Calendar Output** The system generates customizable iCalendar Feeds for projects, program, participants, and organizations.

**Portal Panels** The system generates a variety of display panels designed for portals and small format devices.

**Cell Phone Reporting** The system provides a special action item reporting tool for users of advanced cellphones.

**Web Services** The system provides Web Service access for specific functions.

**Automated Reminders** The system sends email notifications of new assignments, required approvals, and overdue actions.

**Agents** The system maintains status information and drives workflows using server based agents.

## SYSTEM REQUIREMENTS

### SERVER

IBM Lotus Domino Server version 7, all platforms.

Version 6.5 is supported except for web services.

Typical operation requires less than 5GB storage.

### CLIENT

IBM Lotus Notes Client Version 6 or above. PC or Mac. (Some feature limitations on non-PC clients)

Web browser supporting CSS 2, including Internet Explorer 6, FireFox, Safari RSS, Opera.

Javascript and Java applets should be enabled for web operation.

Adobe Acrobat Reader 5 or later.

### LICENSING

The CCM application is licensed on a named user basis by Marin Research, Inc. The customer is responsible for limiting access to the licensed level.

### OPEN SOURCE

The entire code of the application is included within the database designs and may be modified by the user.

# MARIN RESEARCH, INC

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