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Overview

Change Request Log



CVR/IT Consulting LLC

Introduction

The **Change Request Log** may be used to track the many change requests that commonly occur during a project. This template allows entry of:

- Change Request descriptive data
- Results of analysis
- Information related to approval / denial and changes to baselines

Features include:

- Mouse-over help in all column headings
- Includes most commonly used CR tracking information
- Track an unlimited number of CRs (i.e. to the limits of Excel)
- Preformatted for easy printing
- Customizable drop lists



Change Request Log Overview

PROJECT CHANGE REQUEST LOG																		
Instructions are below data area.																		
Project Name: <input type="text" value="Project Name Here"/>										Initial Baseline: <input type="text" value="Budget: \$10,000"/>								
Project Manager: <input type="text" value="Project Manager Name Here"/>										Subdate (Date): <input type="text" value="000"/>								
Change Identification						Change Analysis						Change Request Outcome						
Change Request No.	Change Description	Link to Change Request Form	Priority	Requested By	Status	Cost Impact	Schedule Impact	Scope or Quality Impact	Risk Impact	Business Value Impact	Other Impact	Approved or Denied	Date Approved or Denied	Adjusted Baseline [-/+]	Cost Adjusted	Proj Baseline Adjustments	Date Baseline Approved	Comments
148326	Put a short description of the request for change here.		Critical High Medium Low	John Smith	Closed	\$5,000.00	10 days	None	Minor Threat	None	None	Approved	5/22/2011	Subdate	\$500	10.0	7/3/2011	Sample entry
					Open				Significant			Pending Approval		Cost				
					On Hold				No Change			Approved		Scope				
					Withdrawn							Denied		Scope and Subdate				
					Closed							Denied		Cost, Subdate, RANGE	\$500	20.0		

- Log is not Change Request as it is reviewed. See **Red Status** tab for further instructions/information
- Enter Budget and Project Baseline Baseline date as close as it becomes available
- No VBA are approved, enter budget adjustments. See Remarks tab for summary of baseline changes
- To modify drop-down lists, see Control Block below the data area.
- Dependent worksheet to sort (e.g. is order of Priority)
- No password is required to Dependent worksheet, but they is protected to not request formulas
- Help is online including see to some is full help when you have searched data area in the top of "Index" at "Excel"
- See use change column with or add additional columns, but all column have max change size ("Index" at "Excel")

Control Block	
Change these values to modify contents of drop-down lists	
Priority	
Critical	
High	
Medium	
Low	
Idle	
Idle	
Idle	
Idle	
Status	
Pending	
Open	
On Hold	
Withdrawn	
Closed	
Idle	
Idle	
Idle	

This slide provides a birds eye view of the entire worksheet (with only a few data rows showing). Instructions are provided in the yellow row below the data area.



Entries in these tables (only two shown) control the content of drop lists in the worksheet.



Change Identification

PROJECT CHANGE REQUEST LOG

Instructions are below data area.

Project Name: Project Name Goes Here

Project Manager: Project Manager Name Goes Here

Change Identification

Change Request No.	Change Description	Link to <i>Change Request Form</i>	Priority	Requested By	Status
110326a	Put a short description of the request for change here		Critical	John Smith	Pending
			High		Open
			Medium		On Hold
			Low		Withdrawn
					Closed

CR status may be:
Pending - CR is received but not yet reviewed
Open - CR is under review
On Hold - review of the CR has been suspended until further notice
Withdrawn - the Requestor no longer wants or needs the change
Closed - CR is fully resolved

The Change Identification section captures basic descriptive data (CR number, description), as well as a link to the CR document and the source of the CR (Requested By). Priority is usually set when the CR is first recorded. Status may be updated at any time. All column heading contain mouse over help. Help for the Status column is shown.



Change Request Analysis

Change Analysis					
Cost Impact	Schedule Impact	Scope or Quality Impact	Risk Impact	Business Value Impact	Other Impact
\$5,000.00	10 days	None	Serious Threat	None	None
			Moderate Threat		
			Minor Threat		
			Significant Opportunity		
			Moderate Opportunity		
			Minor Opportunity		
			No Change		

Once the CR analysis is complete, information about expected impact of the CR on the project can be entered here. Impact is divided into several areas: Cost, Schedule, Scope/Quality, Risk and Business Value realization (i.e. the ultimate reason for doing the project). Impact outside of these areas can be entered into Other Impact.

Risk Impact has a drop list which contains the options shown in the figure. These can be customized.



Project Baselines

Initial Baselines

Budget: \$10,000

Schedule (Days): 100

Change Analysis

Cost Impact	Schedule Impact	Scope or Quality Impact	Risk Impact	Business Value Impact
\$5,000.00	10 days	None	Minor Threat	None
			Significant Opportunity	
			No Change	

The tool tracks all changes to project baselines, and provides a summary view of total change and current baseline. In support of this, Initial Baseline data are collected as shown in this figure (top). This is entered early in the project.

Change Request Outcome

Change Request Outcome						
Approve or Deny	Date Approved or Denied	Adjust Baseline(s)	Cost Adjustment	Proj Duration Adjustment (Days)	Date Baselines Adjusted	Comments
Approved	5/22/2011	Schedule	\$100	10.0	7/3/2011	Sample entry
Pending		Cost				
Approved		None				
Denied		Scope				
		Scope and Schedule				
Denied		Cost, Sched, Scope	\$300	20.0		

When the CR is approved or denied, relevant information can be entered here. In addition, if the CR results in changes to one or more project baselines, that may be entered as well. The Approve or Deny and Adjust Baseline columns have a drop list with options shown in the figure. These can be customized.



Summary of Baseline Adjustments

Budget Impact

Original Budget Baseline:	\$10,000	The budget baseline that management approved early in the project. It is best if this is set at the end of project planning
Adjustment to Baseline:	\$400	The total of all adjustments to the budget baseline that result from approved Change Requests.
New Budget Baseline:	\$10,400	The new budget baseline which is the total of the original baseline plus all adjustments.
Percent Change:	4.0%	Percent change in budget baseline.

Project Duration Impact

Original Project Duration Baseline:	100.0	The project duration baseline that management approved early in the project. It is best if this is set at the end of project planning
Adjustment to Baseline:	30.0	The total of all adjustments to the project duration baseline that result from approved Change Requests.
New Project Duration Baseline:	130.0	The new project duration baseline which is the total of the original baseline plus all adjustments.
Percent Change:	30.0%	Percent change in project duration baseline.

A special tab in the workbook presents a summary of all changes to project baselines as shown above. This table is preformatted for easy printing.



Summary

The **Change Request Log** can be an important part of your Change Control process. Track the impact of change in your project, and have ready at hand the answers to questions about why the project has not met initial baselines.

Change Request Log is part of a powerful Project Execution template set available at very low cost from this source:

http://www.cvr-it.com/PM_Templates/

Other templates in this set include:

- **Change Request Form**
- **Easy Earned Value**
- **Meeting Minutes**
- **Status Report**
- **Much more...**



About CVR/IT Consulting LLC

CVR/IT Consulting, established in 2002, provides guidance and support in the effective use of Project, Program, Portfolio Management and Business Analysis Technologies. The company provides professional consultation, training and tools in all matters related to Project Management and Business Analysis, such as:

- Implementation of governance structures and processes essential to effective Portfolio Management
- Establishment of a Project Management Office that finds its own success solely in the success of its customers
- Delivery of flexible, customized PM and BA Methodologies and tools
- Assessment of organizational project, program, portfolio management and business analysis practice
- Training (or re-training) of the project workforce
- Implementation of Organizational Change to make it all work



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