Configuration Management Plan

Revision 1.0

Nov 11st, 2019

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# Versioning

Each release (internal or external) must attached a version number, as well as a snapshot of the software for future rollback.

Decision on version number should reference to [Schema Versioning](https://semver.org/).

# Change Management

When change is introduced from client or staff or external feedbacks, PM will assess its duration, cost and impact on the timeline. Then project manager will discuss with the lead developer to verify their assessment.

Another factor during the priority evaluation is risk, we would give a higher priority to tasks that persist a higher risk level respectively. Because the sooner we address them the faster we can mitigate them with the minimum loss of resources later on.

Once the change is properly evaluated, project manager will decide the introduction of the change. If introduced, that will be closely monitor through the development process, ensure the scope of that change remain within expectations.

# Backtracking

If the change needs to be made is urgent, such as severe bug, or mis configuration of environment. The system will rollback (backtracking) to its stable state. Then redeploy to its latest state once the bug is resolved and tested.

# Change Control Plan

## Change request process flow requirements

|  |  |
| --- | --- |
| Step | Description |
| Generate CR | A submitter completes a CR Form and sends the completed form to the Business Analyst Manager |
| Log CR Status | The CR Log is automatically created after the CR form submission. The CR’s status is updated throughout the CR process as needed. |
| Evaluate CR | Project personnel review the CR and provide an estimated level of effort to process, and develop a proposed solution for the suggested change |
| Authorize | Approval to move forward with incorporating the suggested change into the project/product |
| Implement | If approved, make the necessary adjustments to carry out the requested change and communicate CR status to the submitter and other stakeholders |

## Change request from a change management log

|  |  |
| --- | --- |
| Element | Description |
| Date | The date the CR was created |
| CR# | Generated automatically by the CR form submission system |
| Title | A brief description of the change request |
| Description | Description of the desired change, the impact, or benefits of a change should also be described |
| Submitter | Name of the person completing the CR Form and who can answer questions regarding the suggested change |
| Phone | Phone number of the submitter |
| E-Mail | Email of the submitter |
| Product | The product that the suggested change is for |
| Version | The product version that the suggested change is for |
| Priority | A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low). Verified by the Business Analyst Manager. |

## Evaluating and authorizing change requests

Change requests are evaluated and assigned one or more of the following change types:

|  |  |
| --- | --- |
| Type | Description |
| Scope | Change affecting scope |
| Time | Change affecting time |
| Duration | Change affecting duration |
| Cost | Change affecting cost |
| Resources | Change affecting resources |
| Deliverables | Change affecting deliverables |
| Product | Change affecting product |
| Processes | Change affecting process |
| Quality | Change affecting quality |

Change requests are evaluated and assigned one of the following status types:

|  |  |
| --- | --- |
| Status | Description |
| Open | Entered/Open but not yet approved or assigned |
| Work in Progress | CR approved, assigned, and work is progressing |
| In Review | CR work is completed and in final review prior to testing |
| Testing | CR work has been reviewed and is being tested |
| Closed | CR work is complete, has passed all tests, and updates have been released. |

## Change control board

A Change Control Board has power and assists in approving or rejecting changes to the project baselines.

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact | Description |
| Project Sponsor | Shady Mohammed |  | Approves changes to the scope and provides whatever additional funds those changes require |
| Project Manager | Matheus Schaly |  | Approves all changes except scope |
| Business Analyst Manager | James Smith |  | Helps resolve issues and change request. Follows up the change requests. |
| Development Manager | John Doe |  | Helps resolve issues and change request |
| Steering Committee | Shady Mohammed,  Matheus Schaly,  Wen-Jung Chen,  Jack Wu,  Simon Fu |  | Helps resolve issues and change request |

## Change requests responsibilities

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Contact | Description |
| Business Analyst Manager | James Smith |  | Informs project manager about change requests. Helps resolve issues and change request. Follows up the change requests. |
| Project Manager | Matheus Schaly |  | Approves all changes except scope |
| Project Sponsor | Shady Mohammed |  | Approves changes to the scope and provides whatever additional funds those changes require |