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| **CONFIGURATION MANAGEMENT CHECKLIST**  **Project/TDL/Task Order: Case Reference Guide (CRG) Knowledge Management System for Phase-II**  **Date: 04/22/23** |

1. **PROJECT/TDL INFORMATION:**

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| --- | --- | --- | --- | --- |
| **Project/TDL/ Task Order Name:** | CRG | Project ID #: |  | |
| **System Owner:** | Sharon Box | Contact email: | Sharon.Box@nara.gov | |
| **Program Manager** | Senthil Kumar Sadasivam | Contact email: | Senthil.Sadasivam@nara.gov | |
| **Project Manager:** | Sharmaine Anderson | Contact email: | Kenyetta.Haywood@nara.gov | |
| **Technical POC:** | Suguna Vellore | Contact email: | Suguna.Vellore@nara.gov | |
| **ISSO:** | N/A | Contact email: | N/A | |
| **COR:** | N/A as this is inhouse dev | Contact email: | N/A | |
| **Project Start Date:** |  | **Target End Date**: | |  |

1. **INTERVIEW INFORMATION:**

**Interviewers:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Office/Organization** | **Project Role** | **Contact Information** |
| Seema Dheman | IQ | CM Lead and Analyst | 202-413-8773 |
|  |  |  |  |
| **Interviewees:** |  |  |  |
| **Name** | **Organization** | **Project Role** | **Contact Information** |
| Sharmaine Anderson | IJ | Project Manager | Sharmain.Anderson@nara.gov |
|  |  |  |  |

1. **INTERVIEW QUESTIONS:**

*Note: Action Items will be listed at the end of the document.*

| **#** | **Questions** | **Project Manager/Team Response** | **CM Notes** |
| --- | --- | --- | --- |
|  | **General Information:**  Provide an overview or purpose of the project/TDL. | The National Personnel Records Center (NPRC) .requires a solution for storage and retrieval of  records currently stored on the Case Reference Guide (CRG) website. Various record formats are  stored on the CRG. This content will be migrated to the solution that is deployed through this  project. In addition, there is a need for collaborative writing and content authoring with an  approval workflow. This project will be executed in two phases.  **Phase 1**: The objective of this phase is to enable and configure existing Knowledge Management  features available in Salesforce and stand up the KM module for this requirement.- Phase I is completed  **Phase 2:** Data migration of existing CRG documents (3468 files at 2.16GB) to the Salesforce KM  platform, and data validation. | This is for Phase 2 which only involves Data migration. |
|  | What stage is this project in the NARA’s SDLC? (Planning, Design, Development, Implementation) | The Phase- I is in the production and Phase-II is in for Data Migration only. |  |
|  | Identify the name of the Vendor if any | N/A it’s an in-house development. |  |
|  | What methodology will be used for this project/TDL? (Agile, Waterfall) | The project will follow the Agile methodology |  |
|  | **Configuration Identification:**  What are the Configuration Items (CIs) (Documentation?  Hardware, and/or Software) Location of CIs (TP, PWS etc.) | All the Cis are listed in the TP. Only documents due are from Ops Readiness and Security Stage gates |  |
| 5a. | How are the CIs dispositioned? | All the deliverables will be posted on the google drive and are considered accepted as soon as those are posted. |  |
|  | Is this a FISMA Reported System? If yes then CM will contact Security team if NO then no action is needed. | It’s not a FISMA reported system. It’s hosted on ECRM platform which itself is FISMA compliant. |  |
|  | What Baselines are already in place at this point of the project? (concept, requirements, design, production) | The Production baseline is established for Phase-I and Phase-II is for data Migration only |  |
|  | Is there a Configuration Management Plan (CMP) already in place?  If yes, identify the CMP in use.  If no, develop the CMP. | It will follow the ECRM CMP |  |
|  | **Configuration Control:**  What Configuration Control processes are used? | It will follow the ECAB Process for the initial deployment or any infrastructure changes. For other changes it will follow the ECRM CCCB. |  |
| 9a. | Do you have a Configuration Control Board (CCB) in place and who are the key players? | Follow the ECRM CCB process and ECAB Process as appropriate |  |
| 9b. | How often is the CCB held? | Follow the ECRM CCB process and ECAB Process as appropriate |  |
| 9c. | Do you have a process for emergency fixes? | Follow the ECRM CCB process and ECAB Process as appropriate |  |
| 9d. | What kind of change management mechanism is being followed by your project (Change Request form, RFC, etc.) | It will use RFC to submit the change request. |  |
| 9e. | Is there an ISSO Impact Assessment? What is the procedure of conducting the impact assessment? | It will be part of the ECAB process. |  |
|  | **Configuration Status Accounting:**  What Configuration Status Accounting is being performed on your project? (CIL, CRR) | Configuration Item List (CIL) report will be published on bi-monthly basis. |  |
|  | How do you report the status of CIs? (closed, opened, accepted, or rejected within a period of time, with conditions, etc.) | CM team will produce the CIL report for this project deliverables vs Project Schedule. |  |
|  | **Configuration Audits:**  What Configuration Audits will be conducted as part of your project? | CIL report published on bi-monthly basis is an automatic audit on the deliverables |  |
| 12a. | Functional Configuration Audit (FCA)? (Y/N) | FCA is not required because phase II is only Data Migration |  |
| 12b. | Physical Configuration Audit (PCA)?  (Y/N) | PCA is not required because it’s a COTS product hosted in the ECRM Cloud and its only data migration |  |
| 12c. | Interim Audits? (internal CM audits) | Interim Audits are internal CM Audits, which are conducted as needed. |  |
|  | **CM Tools:**  What types of CM tools are being used by your project?  (e.g. PVCS as the repository, xxx as Change Management tool, etc. )? | PVCS VM for maintaining System baselines and contractual deliverable s and Service now for RFCs |  |
|  | **CM Training:**  What type of CM training is provided to the project personnel? | CM training in not required at this time. |  |
|  | **Test Management:**  Are there any Performance Requirements for this project? | There are no performance requirements |  |
|  | Do those Performance Requirements need to be tested by the IQ test team?  ***Note:*** *Project must be funded for performance environment setup and the development vendor must do the environment setup.* | N/A as per the response in line 15 |  |
|  | Are there any Section 508 requirements for this project? | N/A as this is hosted on the ECRM which is 508 compliant |  |
|  | Who will conduct the testing for Section 508? (Development Vendor, IQ Test Team, or both)?  What tools/method will be used  (e.g. JAWS/NVDA/WAVE/  Monsido)? | N/A as per the response in line 17 |  |
|  | **Release Management:**  Is Release Management required for this project? If Yes, the project will follow the Release Management Process. | The project will follow the RM process |  |

**Schedule-** The schedule will be posted on the Project Online tool.

1. **ACTION ITEMS:**

| **ID** | **Action** | **Assigned** | **Date Due** | **Response** |
| --- | --- | --- | --- | --- |
| 1 | Add this this instance to the ECRM CMP | Seema Dheman | 10/13/23 | Completed |
| 2 | Provide Start and End date for Phase-II | Sharmaine Anderson | 05/03/24 |  |
| 3 | Is statement listed in line item 5 correct | Sharmaine Anderson | 05/03/24 |  |
| 4 | Provide access to google drive where deliverables will be posted | Sharmaine Anderson | 05/03/24 |  |