Configuration management process

# Introduction

The purpose of this document is to set out in detail the [IT Department]process in the area of Configuration Management. As such, this document will represent an initial design for the enhancement of existing Configuration Management processes and will be updated on at least an annual basis thereafter

CM supports the management and control of project requirements and configurations. CM establishes and maintains the integrity of the products of a project throughout the project life cycle. CM involves identifying the configuration of products developed and delivered to the customer, systematically controlling changes to the configuration, and maintaining the traceability of the configuration.

# Configuration Management process



## Planning

The planning of configuration management will establish the following factors:

* The objectives to be achieved
* Resources to be allocated both for initial setup and for on-going operation of the process
* Tools to be used to identify, record, manage and report on configuration items
* Timescales
* Roles and responsibilities in the configuration management process

The plans will be managed via the service improvement process.

## Identification

The selection, identification and labeling of all Configuration Items which creates a parts list of every Configuration Item in the system. This covers the recording of information about Configuration Item's, including hardware and software versions, documentation, ownership and other unique identifiers. Configuration Items should be recorded at a level of detail justified by the business need, typically to the level of "independent change". This includes defining the relationships of the Configuration Items in the system

## Control

This gives the assurance that only authorized and identifiable CIs are accepted and recorded from receipt to disposal. It ensures that no CI is added, modified, replaced or removed without the appropriate controlling documentation. All CIs will be under Change Management control.

## Status accounting and Report

The Configuration management Group maintains a database of information used to produce Configuration Status Accounting reports. The Configuration Management Group documents the specifications for this database in the project Configuration management plan or Project Management Plan. The Configuration Management Manager with the Project Manager determines the appropriate media for archiving and accessing the Configuration Status Accounting database.

The Configuration Management Group receives change information to configuration items for entry into the database that supports Configuration Status Accounting reports.

The Configuration Management Group produces Configuration Status Accounting reports to provide visibility into the status of baselines.

The Configuration Management Group periodically distributes Configuration Status Accounting reports to address status and history of controlled products, approved identification numbers, library and baseline contents, Change Request implementation status, Configuration Control Board decisions, and deficiencies.

## Verification and audit

The reviews and audits that verify the physical existence of Configuration Items, and checks that they are correctly recorded in the Configuration Management Database and parts list. It includes the process of verifying Release Management and Configuration Management documentation before changes are made to the live environment.

# Role and Responsibility

|  |  |  |
| --- | --- | --- |
| No | Role | Responsibility |
| 1 | Process Manager | Responsible for the Configuration management process throughout project   * Gathers functional requirements, defines, and implements Configuration Management Process at a level to support project management. * Monitors, measures and improves the configuration management process to improve product and operations * Works with the Configuration management database (CMDB) Product “Owner” to ensure decisions related to tools and automation are supporting the Configuration management Process. In partnership with the Configuration management database (CMDB) Product Owner, provides oversight of any Configuration management database (CMDB) governance or decision groups. This includes Configuration management database (CMDB) data structure changes. * Defines procedures (such as audit and control procedures) required for the Configuration Management Process. * Identifies and documents integration points with other processes (such as Change Management) and works collaboratively to ensure appropriate hand-offs. Ensures that individual processes are not optimized at the expense of others. * Work with the users to identify and deliver appropriate training and other support. * Defines proper update schedules for all source data. * Determines what documentation is necessary for the Configuration management database (CMDB) and its CIs. |
| 2 | CI Owner | Responsible for ensuring the accuracy of any Configuration Items under their authority   * Responsible for data auditing and reconciliation (ensure completeness, accuracy, and timeliness) for a given CI or a group of CIs * Works with data users to identify and work thru any data issues * Determines who gets access to what data * Defines access type (read vs write) for user groups * Owns data within the Configuration management database( CMDB) for a given CI * Provides appropriate data documentation as defined by the process owner * Accountable to the Configuration Management Process Manager to ensure data is captured at the appropriate level to support the process |
| 3 | Configuration management database (CMDB) Data Source Owner | * Responsible for the overall care and feeding of the source system(s) * Responsible for working with CI Owner to identify and communicate changes to the source system(s) that will impact the CMDB data model to the CMDB Product Owner * Participates in developing the reconciliation rules when integrating data into the CMDB |