

Iota Gamma Directory Conversion



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CONFIGURATION
MANAGEMENT

Working Group 4

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INTRODUCTION

To effectively manage a typical project, a coordinated Configuration Management (CM) Plan is needed. This plan would establish CM roles and responsibilities and describe how the project team will track, implement, and communicate configuration items (CIs) and changes throughout the project lifecycle. In the case of the Iota Gamma Directory Conversion (“IGDC”) project, the team is small and all members will play multiple roles to improve efficiency and efficacy. The project is currently a new implementation; so, there is no consequence to any existing configuration. Any configuration management will be incorporated into change management, the remainder of this document is just a formality.

ROLES AND RESPONSIBILITIES

The following roles and responsibilities are applicable to the IGDC project:

CONFIGURATION CONTROL BOARD (CCB)

The CCB is comprised of the IGDC Project Sponsor, Project Manager, and the Lead team member for the configuration item (CI) under consideration. The CCB is responsible for the following:

- Review and approve/reject configuration change requests
- Ensure all approved changes are added to the configuration management database (CMDB)
- Seeking clarification on any CIs as required

PROJECT SPONSOR

The Project Sponsor is responsible for:

- Providing approval for any issues requiring additional scope, time, or cost

PROJECT MANAGER (ALSO CONFIGURATION MANAGER)

The Project Manager is responsible for:

- Overall responsibility for all CM activities related to the IGDC project
- Identification of CIs
- Providing configuration standards and templates to the project team
- Providing any required configuration training
- All communication of CM activities to project stakeholders
- Participation in CCB meetings

- Re-baselining, if necessary, any items affected by CM changes
- Overall management of the CM Log

LEAD ENGINEERS

All identified CIs will be assigned to a member of Working Group 4 (“WG4”) who will operate as Lead Engineer. The assigned lead team member is responsible for:

- Developing the change request
- Ensuring all change requests comply with organizational templates and standards prior to the CCB
- Identification of CIs

CONFIGURATION CONTROL

The IGDC project will use a standardized configuration control process throughout the project lifecycle to ensure all CIs are handled in a consistent manner and any approved changes are fully checked regarding impact and communicated to stakeholders. Due to the time and staffing constraints of this project, Configuration Management will be incorporated into the change management process. As Changes are evaluated and approved, the corresponding CIs will be identified by WG4, and the Project Manager will assign a CI name and the CI will be entered into the CM log with a description of the change/edit annotated in the CM log.

It is imperative that for any software changes testing is conducted to validate any changes made. The Lead Engineer assigned to the CI is responsible for ensuring that testing has been conducted, changes are entered the CM log, and that all changes/edits are saved properly into the CM Log. The Lead Engineer is also responsible for assigning new version numbers and CM Log status for any changes made.

The PM will work closely with the Lead Engineer to ensure that any relationships between CIs are taken into account and considered prior to clearance. Any configuration changes which are identified by the project team or stakeholders must be captured in a configuration change request (CCR) and submitted to the CCB. The CCB will review, analyze, and approve/deny the request based on the impact, scope, time, and cost of the proposed change. If the change is approved, the project requirements will be re-baselined (if necessary) and all changes will be communicated to the project team and stakeholders by the Project Manager. Denied CCRs may be resubmitted with additional or new information for re-consideration by the CCB.

CONFIGURATION MANAGEMENT LOG

The CM Log will be the centralized repository for all configuration information for the IGDC project. This log will be tied to change requests since the application is a new installation and there is no revision history to consider. The log will be maintained on the Google Drive and access to the CM log will be granted as follows:

- 1) Full read and write access will be granted to the Project Manager, and all WG4 team members.
- 2) Read only access will be granted to the Project Sponsor and all other stakeholders. This access will allow these individuals to view all CIs and CI data but they will not be authorized to make any changes. If these individuals identify the need for a change or edit they will notify the PM who will review the notification and provide feedback.

The CM Log will provide assurance that members of the project team are always working off of the latest version of software, data, and documentation. However, it is important to maintain the history of these assets throughout the project lifecycle. As these assets are changed and updated, the Lead Engineer of the CI's assigned focus group will be responsible for updating the status of the CI and providing new revision numbering.

CONFIGURATION STATUS ACCOUNTING

It is important that for the Iota Gamma Directory Conversion project, the Project Sponsor can review configuration status at any given time. The Project Manager will also submit monthly status reports, to include configuration status. These reports will consist of the following information as part of the configuration status section:

- 1) Change requests
 - a. Aging - How long change requests have been open
 - b. Distribution – number of change requests submitted by owner/group
 - c. Trending – what area(s) are approved changes occurring in
- 2) Version Control
 - a. Software
 - b. Hardware
 - c. Data
 - d. Documentation

- 3) Build Reporting
 - a. Files
 - b. CI relationships
 - c. Incorporated Changes

- 4) Audits
 - a. Physical Configuration
 - b. Functional Configuration

Prior to any new software releases, the CM will work with each Lead Engineer to ensure all CIs are updated with latest release versions.

CONFIGURATION AUDITS

Configuration audits will be an ongoing part of the IGDC project lifecycle. The purpose of the configuration audit is to ensure all team members are following the established procedures and processes for configuration management. Project audits for the IGDC project will occur prior to any major software release or at the Project Manager or Sponsor's discretion if they determine the need for one. As part of the configuration audit the CM will perform the following tasks:

- 1) Establish an audit environment in the CMDB
- 2) The CM will copy all the latest software, data, and document versions into the audit environment
- 3) The CM will ensure all versions are correctly numbered and that version control has been performed properly
- 4) The CM will analyze historical versions and timestamps of all software, data, and documents to ensure all changes/edits were properly recorded and captured
- 5) The CM will copy latest software versions and conduct software testing to ensure requirements are being met
- 6) The CM will ensure all required artifacts are present and current in the CMDB
- 7) The CM will ensure all approved CCRs have been incorporated into the project and are recorded in the CMDB

Once the audit has been performed, the CM will compile his/her audit findings. For each finding, the CM must work with the Project Manager/Team to identify the corrective action(s) necessary to resolve the discrepancy and assign responsibility for each corrective action.

Upon completion of the project audit and findings, the CM will note all discrepancies and compile a report to be presented to the Project Manager and Sponsor.

SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

Shelly Worrell
Project Sponsor

Date: _____