



Configuration Management Awareness Presentation

**Student Financial Assistance
Configuration Management**

Agenda

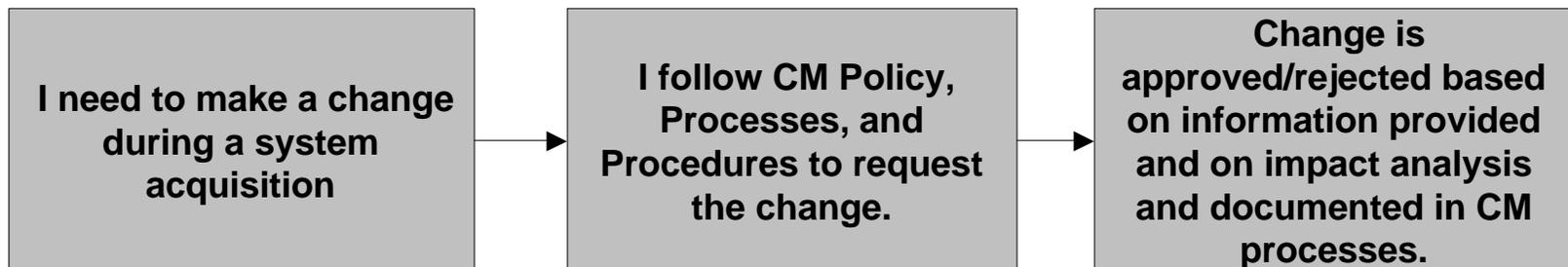
- **Configuration Management Definition**
- **Configuration Management Benefits**
- **Configuration Management Project Levels**
 - **Enterprise CM**
 - **Project CM**
- **Configuration Management Process in the SDLC**
- **Project Level Configuration Management Tasks**
- **Project Level Configuration Management Tools**
- **Deliverables and Summary**



CM Definition

Configuration Management (CM) is Change Control for System Acquisitions.

- CM is the process of identifying, organizing, and managing the integrity of critical work products as they evolve through the System Development Life Cycle (SDLC); this includes both software and non-software components.



- CM takes place at two different levels: Enterprise (SFA-wide) level and Project Level.

CM Benefits

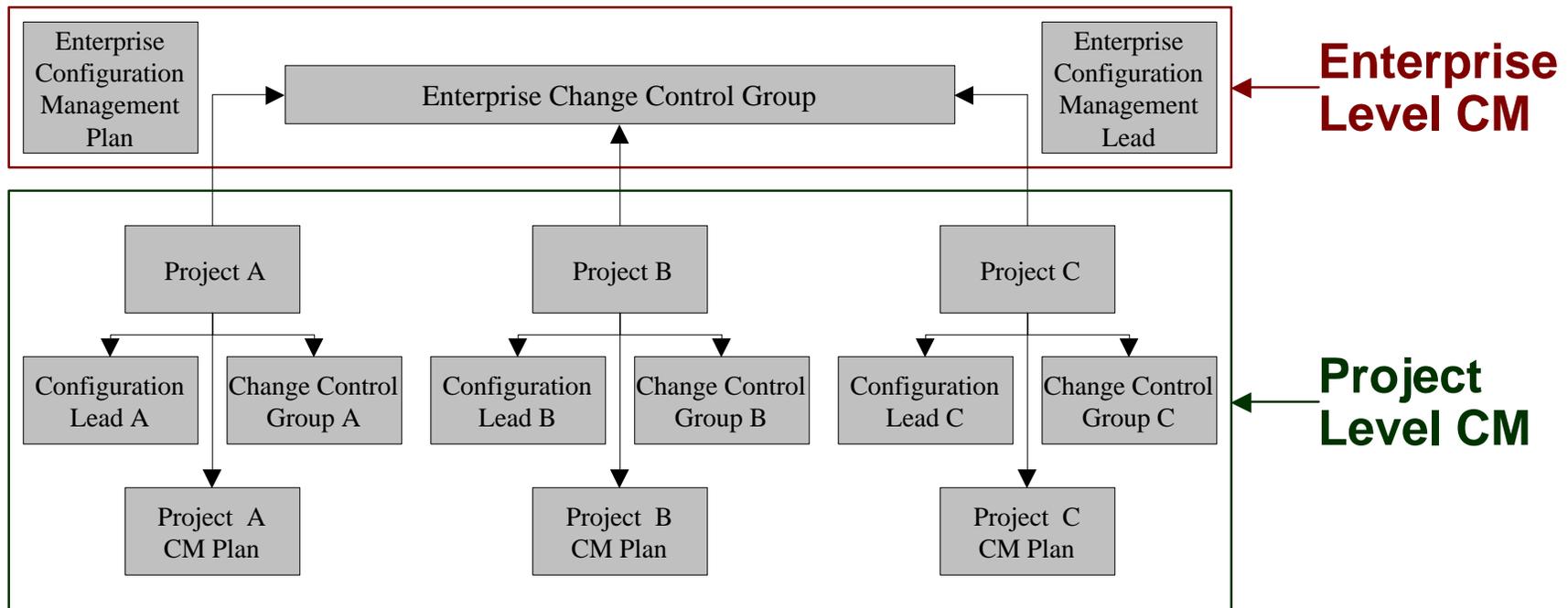
CM outlines the appropriate processes and procedures needed to help consistently track and monitor changes throughout the System Development Life Cycle (SDLC).

CM saves SFA and System Acquisition Projects time, money, and effort, while lowering risk of rework.

- Repeatable processes and procedures do not have to be reinvented
- Best Practices are established and shared among projects, thereby increasing efficiency and effectiveness.
- Time and money are better utilized during projects by not “reinventing the wheel” and referring to the Best Practices already developed.
- The amount of errors and rework is reduced by following a pre-approved process.
- CM assists SFA employees in maintaining organized and accurate data for their projects.

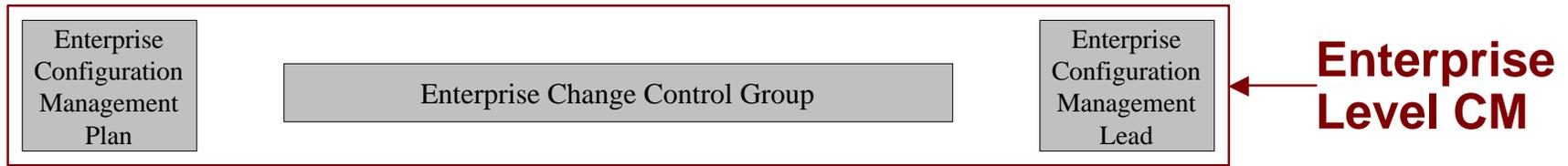
CM Project Levels

The Enterprise CM Change Control Group (CCG) is used when a change will impact multiple SFA projects. There is one Enterprise CM Plan, Enterprise CCG, and Enterprise CM Lead.



Enterprise CM

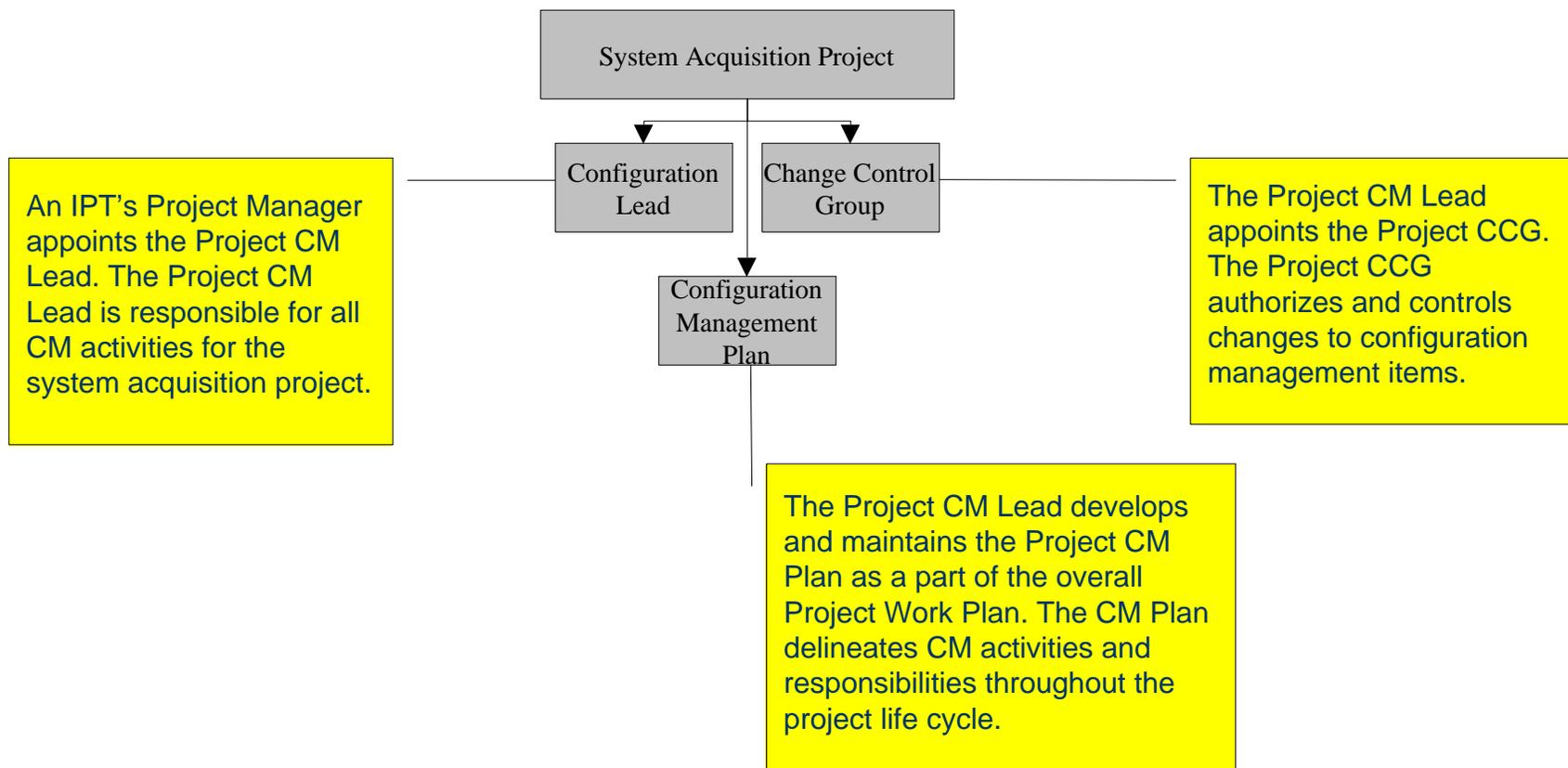
Enterprise CM is responsible for maintaining the processes and procedures surrounding development of project level CM.



- The Enterprise CM group is led by an Enterprise Configuration Lead. This is a permanent role within SFA. The Enterprise CM Lead is responsible for all SFA CM activities at the Enterprise Level.
- An Enterprise CM Plan is maintained by the Enterprise CM Lead and is updated on a regular basis.
- The Enterprise CCG will review requests from project CCGs when proposed changes affect other SFA projects.

Project CM

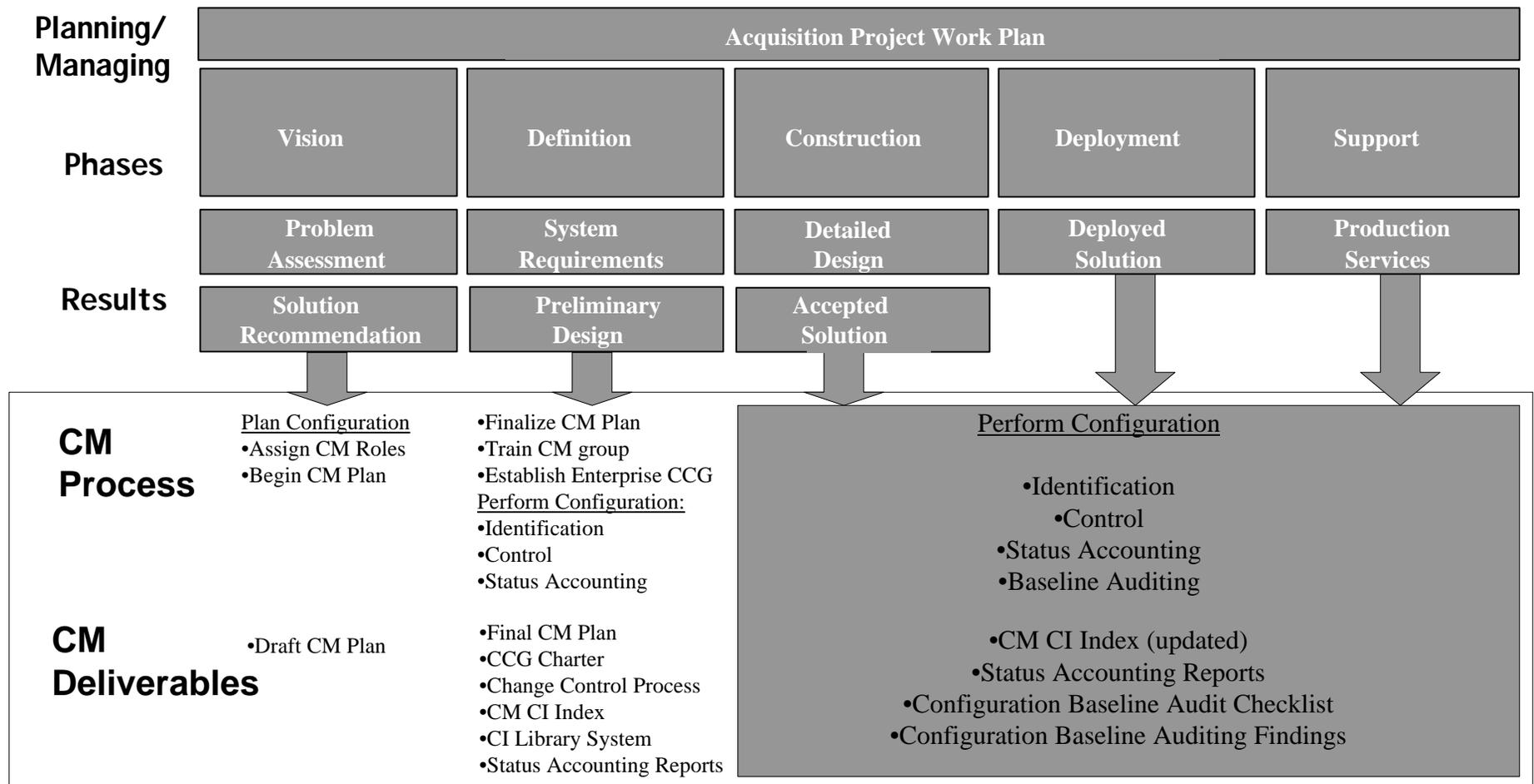
As documented in the CM Process Guide, there is one Enterprise CM Plan, Enterprise CCG, and Enterprise CM Lead, and there are multiple Project CM Plans, Project CCGs, and Project CM Leads.





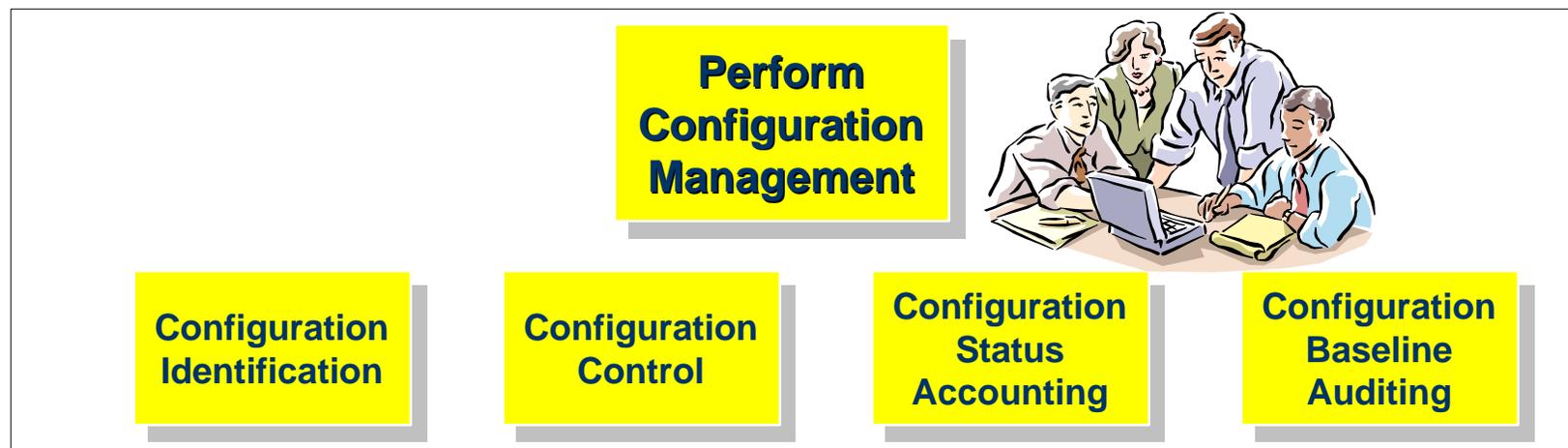
CM Process in the SDLC

The Project CM Lead is assigned at the beginning of the SDLC to monitor the CM activities performed throughout the SDLC.



Project Level CM Tasks

The CM Process Guide is the main support tool for the CM Process. The CM Process Guide Defines the following two phases: Planning and Performing.





Project Level CM Tasks



Plan Configuration Management

Assign CM Roles

Document CM Plan

Establish CCG

Train IPT in CM

An IPT's Project Manager appoints the Project CM Lead.

The Project CM Lead is responsible for ensuring the Project IPT is trained in how to use perform CM for that project.

The Project CM Lead develops and maintains the Project CM Plan.

The Project CM Lead appoints the Project CCG.



Project Level CM Tasks



Perform Configuration Management

Configuration Identification

Configuration Control

Configuration Status Accounting

Configuration Baseline Auditing

Identify what work product items need to be maintained under CM and establish a starting point for each stage of development.

All changes to configuration items are classified, documented, and stored.

Administratively track and report on all of the configuration items.

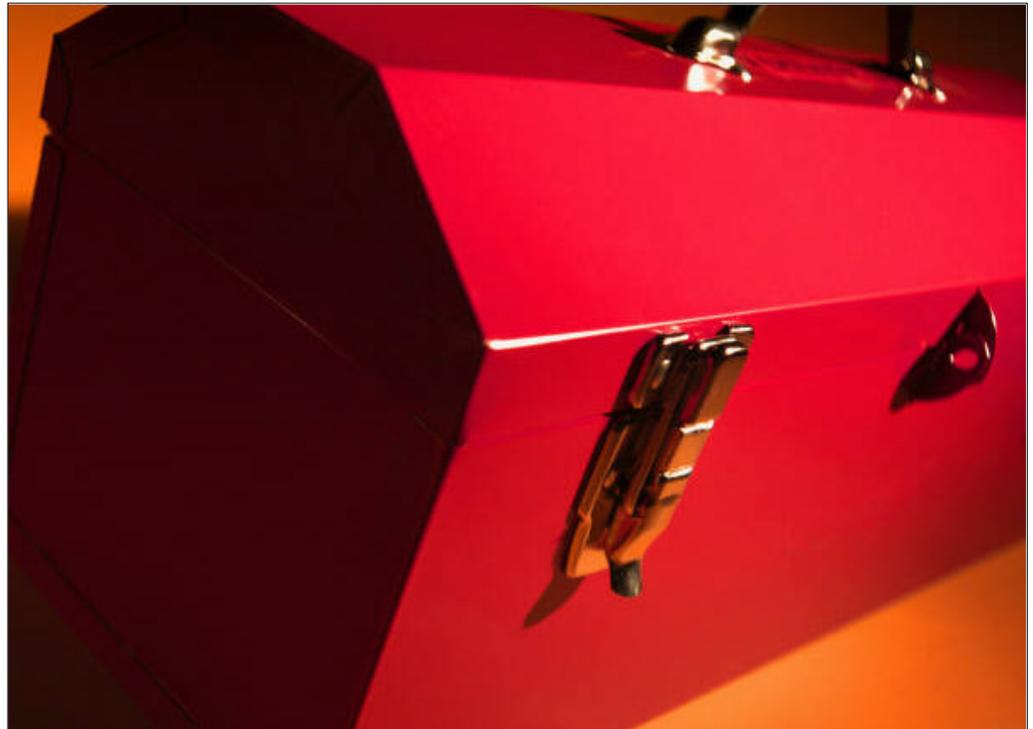
Ensure CM policies and procedures are followed.

Configuration Management Tools

The SDLC provides needed processes, procedures, job aids, templates, and samples to support best practices. Tools are provided to enable CM activity at both the project and the enterprise level.

CM Tools

- CM Policy – establishes roles and responsibilities
- **CM Process Guide – provides the steps required to implement CM across SFA**
- CM Plan Template – provides form for project CM plan
- CM Item Identification Index – provides form for what items need to go into CM
- CM Baseline Audit Checklist – provides form for conducting baseline audit



CM Deliverables and Summary

CM enables teams to track and monitor changes in a consistent manner throughout the project life cycle. This allows projects to save time and money on rework throughout the SDLC.

	CM Activity	Deliverables
	Plan Configuration Management	
Plan CM	Assign Configuration Management Roles	Project CM Lead Assigned
	Document Configuration Management Plan	Configuration Management Plan
	Establish Change Control Group	Change Control Group Charter
	Train Configuration Management	CM Project Resources are trained
	Perform Configuration Management Activities	
Perform CM	Configuration Identification and Baselineing	CM Plan Configuration Item Index Configuration Item Library System
	Configuration Control	Change Control Process
	Configuration Status Accounting	Appropriate Status Accounting Reports
	Configuration Auditing	Configuration Audit Checklist Configuration Audit Findings