*<Project Name>*

Configuration Management Plan

Version Date: <mm/dd/yyyy>

*Notes to the Author*

[This document is a template of a Configuration Management Plan document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.

* Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

**When using this template, the following steps are recommended:**

1. Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field document values. These angle brackets appear in both the body of the document and in headers and footers.

Update all fields throughout the document selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update each field individually by clicking on it and pressing F9.

These actions must be done separately for any fields contained with the document’s Header and Footer.

1. Modify boilerplate text as appropriate for the specific project.
2. To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.
3. To update the Table of Contents, go to “References” and select “Update entire table”.
4. Before submission of the first draft of this document, delete this instruction section “Notes to the Author” and all instructions to the author throughout the entire document.

VERSION HISTORY

[Provide information on how the development and distribution of the Configuration Management Plan will be controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **VersionNumber** | **Implemented****By** | **Revision****Date** | **Approved****By** | **Approval****Date** | **Description ofChange** |
| 1.0 | *<Author name>* | *<mm/dd/yy>* | *<name>* | *<mm/dd/yy>* | *<description of change>* |
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#

# Introduction

## Purpose of The Configuration Management Plan

[Provide the purpose of the Configuration Management Plan.]

The overall objective of a Configuration Management (CM) Plan is to document and inform project stakeholders about CM with the project, what CM tools will be used, and how they will be applied by the project to promote success. The <Project Name> CM Plan defines the project’s structure and methods for

* Identifying, defining, and baselining configuration items (CI)
* Controlling modifications and releases of CIs
* Reporting and recording status of CIs and any requested modifications
* Ensuring completeness, consistency, and correctness of CIs
* Controlling storage, handling, and delivery of the CIs

The intended audience of the CM Plan is the project manager, project team, project sponsor and any senior leaders whose support is needed to carry out configuration plans.

# Configuration Management

## Approach

[Identify the recommended CM approach (make or buy). Justify why one option was selected of the other. If purchasing a CM system, identify which system(s) were recommended as potential options and why one was chosen over the others.]

## Organization

[Identify items such as how CM activities will impact the organization, definition of roles and responsibilities for those involved the CM activities and those impacted by them, what organizational policies and procedures may be impacted, and any interfaces between other organizations that may impact the CM effort.]

## Training

[Identify the kind and amount of training necessary to bring the performing organization up to speed on what configuration management is, any tools used to perform CM activities, and what, if any, impact CM may have on how work is performed. This may include development team orientation, tools training, organizational awareness, etc.]

# Configuration Management Activities

## Configuration Items

[Identify what items will and will not be placed under CM.]

## Configuration Identification

[Define how configuration items will be identified throughout the CM/Project life cycle. This section should define identification schemas for information such as:

* Labeling and numbering documents and files
* Relationships between documents and files
* Addressing versions and releases
* Change Control Forms
* Various baselines for the project (product versioning)]

## Artifact Life Cycle

[Define the artifact life cycle for the different CIs under CM]

## Configuration Control

[Define how configuration items will be controlled throughout the CM/Project life cycle. This section should define procedures for items such as:

* Changing baselines
* Processing and managing change requests and Change Control Boards (CCBs)
* Communicating configuration status
* Performing configuration audits
* Building, testing, and debugging workspaces
* Who owns what product code and how to appropriately work with that code]

## Configuration Auditing/Reporting

[Define how configuration items will be tracked, measured, and reported.]

# Configuration Management Plan Approval

The undersigned acknowledge that they have reviewed the ***<Project Name>* Configuration Management Plan** and agree with the information presented within this document. Changes to this **Configuration Management Plan** will be coordinated with, and approved by, the undersigned, or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Owner, Project Manager (if identified), and any appropriate stakeholders. Add additional lines for signature as necessary.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Title** | **Role** | **Date** | **Signature** |
|  |  |  |  |  |
|  |  |  |  |  |
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APPENDIX A: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| *<Document Name and Version Number>* | *<Document description>* | *<URL or Network path where document is located>* |
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APPENDIX B: KEY TERMS

The following table provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *<Provide definition of term and acronyms used in this document.>* |
|  |  |
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