*<Project Name>*

Operations and Maintenance Manual

*<mm/dd/yyyy>*

VERSION HISTORY

[Provide information on how the development and distribution of the Operations and Maintenance Manual was 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.]

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| **Version #** | **Implemented**  **By** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Reason** |
| 1.0 | *<Author name>* | *<mm/dd/yy>* | *<name>* | *<mm/dd/yy>* | *<reason>* |
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***Note to the Author***

[This document is a template of a **Operations and Maintenance Manual** 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 for your project document, it is recommended that you follow these steps:

1. Replace all text enclosed in angle brackets (e.g.,, <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):
   1. Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.
   2. Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.
   3. After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.
2. Modify boilerplate text as appropriate to the specific project.
3. 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.
4. To update the Table of Contents, go to “References” and choose the option- “Update entire table.”
5. Before submission of the first draft of this document, delete this “Notes to the Author” page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]

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# Introduction

## Purpose

[Enter information describing the intended use of the system or provide a reference to where it is stored.]

## Audience

[Enter information describing the audience for this document such as system administrators and operators, call-center personnel, etc or provide a reference to where it is stored.]

# System Description

## Key Features

[Enter information describing key features and functionality of the system or provide a reference to where it is stored.]

## Inventory

[Enter information describing the inventory of system files and devices or provide a reference to where it is stored.]

## Environment

[Enter information describing the hardware, software, operational activities, and other resources needed to perform actions described in this manual or provide a reference to where it is stored.]

## System Operations

[Enter information describing normal system operational usage and activities or provide a reference to where it is stored.]

## System Architecture

[Enter information describing the system, network, database, etc. architecture or provide a reference to where it is stored.]

# Application Installation

## First-Time Users

[Enter specific instructions that may be unique to first-time users of the system or provide a reference to where it is stored.]

## Access Controls

[Enter information describing required access controls and privileges necessary for proper system installation or provide a reference to where it is stored.]

## Installation

[Enter information describing specific installation procedures or provide a reference to where it is stored.]

## Configuration

[Enter information describing default and custom configuration, configuration options, and their associated definitions or provide a reference to where it is stored.]

## Starting the System

[Enter information describing how to properly start the system or provide a reference to where it is stored.]

## Stopping the System

[Enter information describing how to properly stop the system or provide a reference to where it is stored.]

## Suspending the System

[Enter information describing how to properly suspend the system or provide a reference to where it is stored.]

# System Usage

## Instructions

[Enter information describing proper usage of the system and system functionality or provide a reference to where it is stored.]

## Conventions and Error Messages

[Enter information describing specific system rules, error messages, and their associated definition or provide a reference to where it is stored.]

# sYSTEM mANAGEMENT

## Change Management

[Enter information describing the system’s change management process, any tools used to support it and mechanisms for related communications or provide a reference to where it is stored.]

## Configuration Management

[Enter information describing the system’s configuration management process, any tools used to support it, and mechanisms for related communications or provide a reference to where it is stored.]

## Release Management

[Enter information describing the system’s release management process, any tools used to support it, and mechanisms for related communications or provide a reference to where it is stored.]

## Security Administration

[Enter information about how to properly secure the system. Describe administrative options, messages, and their associated definitions or provide a reference to where it is stored.]

## System Administration

[Enter information about how to properly administer the system. Describe administrative options, messages, and their associated definitions or provide a reference to where it is stored.]

# sERVICE mANAGEMENT

[Enter information describing how system service will be managed or provide a reference to where it is stored.]

# Key Contacts

[Enter information describing key contacts and associated contact information or provide a reference to where it is stored.]

# Regulatory Requirements

[Enter information describing regulatory and policies compliance requirements or provide a reference to where it is stored.]

# FAQs

[Enter information requiring frequently asked questions and associated answers or provide a reference to where it is stored.]

# Operations and Maintenance Manual Approval

The undersigned acknowledge they have reviewed the *<Project Name>* **Operations and Maintenance Manual** and agree with the approach it presents. Changes to this **Operations and Maintenance Manual** 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 Steward, Implementation Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **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 and Version** | **Description** | **Location** |
| *<Document Name and Version Number>* | *[Provide description of the document]* | *<URL or Network path where document is located>* |

APPENDIX B: KEY TERMS

*[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.*

*http://intranet.cdc.gov/library/]*

The following table provides definitions for terms relevant to this document.

|  |  |
| --- | --- |
| **Term** | **Definition** |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |