

## CONFIGURATION MANAGEMENT PLAN TEMPLATE

This template helps you to create a Configuration Management (CM) Plan that allows a formal structure to describe how configuration management will be managed to the project stakeholders. It lists the CM tools that will be used to endorse the success of the project. Configuration items (CI's) are all the documents and products that are required to administer and control the configuration management method used in a project. Day-to-day responsibility of configuration management is most effective when only a single person has sole responsibility.

The purpose of the [configuration management plan](#) is to identify, define, store and deliver all CI's required during the project. It also describes how this process will be controlled and the reports that will be produced. This template may need to be modified to reflect the culture of your organization and the particular nature of the project itself. This plan provides an outline of:

- Differences in expected standards and procedures that are required for this project. For each one a justification for the change must be given.
- Provide an explanation of the activities aims outlined in the plan.
- List of interrelated aspects or dependencies that this plan has with other projects.
- Describe the security measures being taken for all CI master copies

The configuration administrator may be a single individual or one of the responsibilities of a project team member. That person will decide whether or not a project document that needs to be distributed amongst the team represents a CI. The distribution process for CI's and the management of the central record for all such data are described in the plan.

<b>FRONT COVER</b>	<b>DESCRIPTION:</b> this page details the typical items found on the cover of configuration management (CM) plan. Amend its contents to reflect the needs of your specific project and organization's culture.
Displays a top-level summary of essential information relating to the Configuration Management Plan.	<ul style="list-style-type: none"> <li>• Author / Configuration Administrator is listed along with their contact details.</li> <li>• Project Name that this plan relates to.</li> <li>• Version of Configuration Management (CM) Plan             <ul style="list-style-type: none"> <li>– Version history will be shown in relevant appendix.</li> </ul> </li> <li>• Approval:             <ul style="list-style-type: none"> <li>– Lists the names and job titles of each person who has given approval and sign-off of this plan.</li> <li>– The date and version they have approved accompany their signature.</li> </ul> </li> <li>• Circulation List of who (name, location &amp; organization) has received stated version.</li> </ul>

**INTRODUCTION** – outlines the purpose of the CM plan and describes how it will document and communicate with its stakeholders. The section states how it will be manage and define the project structure and methodology for the areas listed below.

**CI identification, definition and baseline acceptance:**

**CI process for modifications & Releases:**

**CI Status Recording & Reporting:**

**CI Quality control process:**

**Control of storage, managing & delivery of CI's:**

**CONFIGURATION MANAGEMENT (CM)** – defines the methodology or approach recommended for the project and explains the rational behind this selection. It outlines the roles and responsibilities of those in the CM process including the procedures and organizational policies relevant to this process. The plan describes any impact these procedures may have on interactions with other organizations or projects. If appropriate it will detail any necessary training required for the CM tools and who should receive it.

**CM Methodology / System:**

**Current CM Tools:**

**New CM Tools to be purchased:**

**Training Requirements & Costings:**

**Roles & Responsibilities for CM:**

**CM Organization Chart**

**CM Interactions:**

External Organisations:

Other Projects:

**CONFIGURATION MANAGEMENT (CM) ACTIVITIES** – describes the process and reporting activities associated with CI's from inception through to closure of the project.

**CM Items:**

**Non CM Items:**

**Identification of Configuration** (*Id, Version, Release, Relationships, Changes & Baselines*):

**CI Life Cycle:**

**Control of CI's:**

**Reporting & Auditing of CI's:**

<b>Project Working Title:</b>		<b>Project Description:</b>		<b>Version:</b>
				<b>Date:</b>
<b>Project Sponsor:</b>	<b>Contact tel: email:</b>	<b>Plan Author:</b>	<b>Contact tel: email:</b>	<b>Organization:</b>
<b>CONFIGURATION MANAGEMENT PLAN APPROVAL</b>				
<b>Printed Name &amp; Job Title</b>	<b>Project Role</b>		<b>Signature</b>	<b>Date Approved</b>
	Project Sponsor			
	Project Manager			
<b>CIRCULATED TO:</b>				
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### APPENDIX A – VERSION HISTORY

This appendix records the version history of this plan. For each new and approved version the reasoning behind its creation are described below

Version Number	Name of Implementation Author	Date Revised	Approved by	Date Approved	Reasoning behind new version
1.0					

### APPENDIX B – GLOSSARY OF PROJECT TERMS

Each project uses standard acronyms and develops their own for the ease of communication. It is important to record them in this plan to ensure clarity of description and terminology is consistent in every communication.

Acronym / Term	Standard or Project Definition
PMO CI	Project Management Office Configuration Item

### APPENDIX C – DOCUMENTATION REFERENCES

Any professionally managed project has extensive documentation the purpose of this appendix is to record which documents (plus the version used, if applicable) have been used in the production of and in conjunction with of this plan.

CI No. & Version	Document	Author