

Appendix M

Configuration and Data Management Plan Template

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Definitions

Note that a configuration and data management plan (CDMP) should be structured to allow for discrete sections that address the configuration management (CM) topics identified in *Sections 1 through 6* below, which also give guidance on content.

1. Introduction

A CDMP should include an introductory section that provides general information. The following topics are typically addressed in such a section:

- Provide the purpose and scope of the CDMP
- Describe the product and configuration items (CIs) to which the plan applies
- Provide a schedule for guidance on timelines of important configuration management (CM) activities
- Describe CM tools (e.g. information technology)
- Identify related documents (e.g., CM plans from suppliers, etc.)
- List the relevant documents and their interrelationships

2. Policies

The CDMP should detail the CM policies that have been agreed to with the customer or suppliers. This should provide the basis for CM activities within the contract, such as:

- Policies on the practice of CM and related management activities
- The organization, responsibilities and authorities of relevant interested parties
- Qualification and training
- Selection criteria for CIs
- Report frequency, distribution, and control, both internal and external, and terminology

3. Configuration Identification

The CDMP should detail:

- Family trees of CIs, specifications, and other documentation
- Numbering conventions used for specifications, drawings, concessions, and changes
- Identification method for revision status
- Established configuration baselines, schedules, and product configuration information
- Use and allocation of serial numbers or other traceable identification
- Release procedures for product configuration information

4. Change Control

The CDMP should detail:

- The relationship of the dispositioning authority (i.e., configuration control board) of the organization with that of other parties
- Procedures for the control of changes prior to the establishment of a contractual configuration baseline
- Methods for processing changes, including customer- or supplier-initiated changes, and concessions

5. Configuration Status Accounting

The CDMP should detail:

- Methods for collecting, recording, processing, and maintaining the data that are necessary for producing configuration status accounting (CSA) records
- Content and format definitions for all CSA reports

6. Configuration Audits

The CDMP should detail:

- Audits to be conducted and their occurrence within project schedules
- Configuration audit procedures to be used
- Authorities of relevant parties, both internal and external, and an audit report format definition

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