

HOW TO USE THIS TEMPLATE:

Introduction

The template reflects the steps set out in the PRINCE2 Method and is designed to prompt the Project Manager and help in the creation of the Configuration Management Strategy. There is also a Product Description for the Configuration Management Strategy at Appendix A of the PRINCE2 Manual.

Loading the file

This template has been produced using Microsoft Word 2003. To use it, load up the file directly from the directory and starting from page 1 follow the prompts (in [...] brackets).

Deleting the [...] text

When the template is complete, the whole Configuration Management Strategy document can be printed and approved.

Prior to printing, you should delete all [...] prompt text.

Saving the Configuration Management Strategy document under its own name

Save the Configuration Management Strategy document by selecting the "SAVE-AS" command; this will avoid overwriting the standard template. You must specify your own Project Directory.

Once your Configuration Management Strategy is complete check the document against the following Quality Criteria:

- Responsibilities are clear and understood by both user and supplier
- The key identifier for the project product(s) is defined
- The method and circumstances of version control are clear
- The strategy provides the Project Manager with all the product information required
- The corporate or programme strategy for configuration management has been considered
- The retrieval system will produce all required information in an accurate, timely and usable manner

- The project files provide the information necessary for any audit requirements
- The project files provide the historical records required to support any lessons
- The chosen Configuration Management Strategy is appropriate for the size and nature of the project
- Resources are in place to administer the chosen method of configuration management
- The requirements of the operational group (or similar group to whom the project product will be transitioned) should be considered.

PROJECT DOCUMENTATION

CONFIGURATION MANAGEMENT STRATEGY

Project:

Release:

Date:

PRINCE2

Author:

Owner:

Client:

Document Ref:

Version No:

1 Configuration Management Strategy History

1.1 Document Location

This document is only valid on the day it was printed.

The source of the document will be found at this location – *[insert folder structure]*

1.2 Revision History

Date of this revision:

Date of next revision:

Revision date	Previous revision date	Summary of Changes	Changes marked
		First issue	

1.3 Approvals

This document requires the following approvals.

Signed approval forms should be filed appropriately in the project filing system.

Name	Signature	Title	Date of Issue	Version

1.4 Distribution

This document has been distributed to:

Name	Title	Date of Issue	Version

2 Table of Contents

	Page
1 Configuration Management Strategy History	1
1.1 Document Location	1
1.2 Revision History	
1.3 Approvals	
1.4 Distribution	
2 Table of Contents	
3 Introduction	
4 Configuration Management Procedure	
5 Issue and Change Control Procedure	
6 Tools and Techniques	
7 Records	
8 Reporting	
9 Timings	
10 Roles and Responsibilities	
11 Scales for Priority and Severity	

3 Introduction

[The purpose, objectives, scope and responsibility of the strategy]

4 Configuration Management Procedure

[A description of (or reference to) the configuration management procedure to be used. Any variance from corporate or programme management standards should be highlighted, together with a justification for the variance. The procedure should cover activities such as: planning, identification, control (including storage/retrieval arrangements/security/product handover procedures), status accounting and verification and audit]

5 Issue and Change Control Procedure

[A description (or reference to) the issue and change control procedures to be used. Any variance from corporate or programme management standards should be highlighted, together with a justification for the variance. The procedure should cover activities such as: capturing, examining, proposing, deciding and implementation]

6 Tools and Techniques

[Any configuration management systems or tools to be used and any preference for techniques that may be used for each step in the configuration management procedure]

7 Records

[Definition of the composition and format of the Issue Register and Configuration Items Records]

8 Reporting

[Describes the composition and format of the reports (Issue Report, Product Status Account) that are to be produced, their purpose, timing and recipients. This should include reviewing the performance of the procedures]

9 Timings

[States when formal configuration management activities and issue and change control activities are to be undertaken, for example configuration audits]

10 Roles and Responsibilities

[Describes who will be responsible for what aspects of the procedures, including any corporate or programme management roles involved with the configuration management of the project's products. Describes whether a Change Authority and/or change budget will be established]

11 Scales for Priority and Severity

[For prioritising requests for change and off-specifications and for determining what level of management can make decisions on what severity of issue]