**Department of Veterans Affairs**

**Mental Health (MHLTH)**

**Clozapine Modernization**

**Product (System) Configuration Management Plan**



Department of Veterans Affairs

Office of Information and Technology (OIT)

**EPMO Configuration Management Team**

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Revision History

| **Date** | **Revision** | **Description** | **Author** |
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| 08/8/2018 | 1.12 | Updated dates; added documents locations; updated baselines details | Terrance Hardison |
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# Overview

|  |  |
| --- | --- |
| Product being modified: | Mental Health (MHLTH) |
| Project Name: | Clozapine Modernization |
| Technologies to be used: | Eclipse  Visual Studio 2017 |

## Scope

Configuration Items (CIs):

|  |  |  |
| --- | --- | --- |
| **Documentation / Source Code** | **Builds/Releases** | **Other** |
| Documentation | Product Baselines | Folder setup |
| Baseline | Release Packages | Timeline setup |
| Software (SW) |  | Release Plan setup |

Required Configuration Management Activities:

|  |  |  |  |
| --- | --- | --- | --- |
| **Documentation / Source Code** | **Change Management** | **Builds/Releases** | **Other** |
| * Create/Maintain CCM Repository * Create/Maintain CCM Documentation * Audit Project Documentation for Naming Standards * Identify/Document Configuration Items * Version/Baseline Management * Periodically review repositories for files that have been checked out for an extended period of time | * Perform Change Management * Audit Change Requests for Accuracy and Completeness * Create Queries, Reports and Metrics from CCM Tool, as needed | * Create/Maintain Streams and Baselines * Package and Release Documentation | * Develop/Maintain CCM Dashboards * Train/Advise Team Members on CCM Processes and Procedures * Provide First Line CCM Tools Support * Perform CCM Tool Access Management * Perform Audits |

## References

The following documents provide reference material for background information only. In case of conflict, the Office of Information and Technology documents is the guidance document otherwise; this Configuration Management Plan will take precedence. Contact the CCM team for instructions on how to obtain copies of the released version(s) of these documents.

* Office of Information and Technology VA Directive 6004 - Configuration, Change, and Release Management Programs
* Office of Information and Technology Configuration Management Process, Change Management Process and Release Management Process. Process Asset Library (PAL) (<http://DNS.URL/process/home.aspx>)
* Technical Reference Models (<http://DNS.URL/vdl/application.asp?appid=61>)
* Office of Information and Technology (OIT) End-User Documentation Standards
* 192-039 Interface Control Registration and Approval Document
* Displaying Sensitive Data Guide
* CM\_Doc\_Map
* VA Rational Tools Team Instructional Documentation (http://DNS.URL/communities/OSCTM/toolsmgmt/Rational%20Tools/Documents/Forms/AllItems.aspx)

## Acronyms

VA acronym list: <https://DNS.URL/acronyms/index.cfm>

CCM related acronyms: [CCM Acronym Table](http://DNS.URL/communities/app_dev/confmgmt/CM%20References%20and%20Documents/Change%20and%20Configuration%20Management%20Acronyms.docx)

## Glossary

VistA Infrastructure glossary: <http://DNS.URL/iss/glossary.asp>

# Configuration Management

## Responsibilities

Anyone developing or maintaining artifacts for this project is required to follow proper version control and change management procedures defined in the CCM Plan and work instructions.

| **Role** | **Name** | **CfM Responsibility** |
| --- | --- | --- |
| Product Owner | Dr. Kathleen M. Lysell | * Supports change management by defining and approving the content of the Product Backlog * Establishes the priority of work items |
| Scrum Master | Jennifer Gulick | * Defines the Timelines, Iterations and Plans for the project * Supports change management through Backlog Grooming * Manages project scope by facilitating Sprint Planning |
| Program Manager (PgmMgr)/  Project Management (PM) | VA PgmMgr:  Kristen Templet  VA PM:  Kristen Templet  Vendor PgmMgr:  Chad Hensley  Vendor PM:  Pam Price | * Ensures proper execution of the CCM Plan * Oversees the CCM process * Ensures team members have completed the training for the Rational Tools * Supports change management protocol defined by CCM * Works with Product Owner on Product Backlog * Identifies dependent projects * Establishes/revises list of required artifacts |
| Configuration Manager | Terrance Hardison  Matthew Humphreys (CfM Support) | * Educates project team members in CCM “best practices” * Establishes, promotes, and releases baselines * Works with the Enterprise Tools Team to create and administer the CCM tool environment * Performs or validates interim and final builds * Assist in preparing release package, release archives and Version Description Documents (VDD) * Accountable for instituting the established processes and reporting progress statistics based on change requests * Conducts CCM audits and necessary status accounting related to the product at scheduled milestones * Requests Jazz access removal or role changes for any team members who are incoming or removed from the project |
| Development Manager/Leads | Randy Poynter/ Mike Henderson | * Submits build/release requests * Coordinates development activities and assigns tasks * Ensures CCM Plan and work instructions are implemented and followed for all software, documentation, and/or any other components for which they are responsible * Ensures all developers work within the specified CCM process and related guidelines as specified in the CCM Plan and work instructions |
| Developers/System Administration/Functional/ Technical Analysts/DBAs/System Administration | Kathey English (DBA) | * Updates all assigned work items with accurate, detailed information * Maintains source code and documentation within the VA enterprise CCM tool * Apply links between artifacts as appropriate |
| Technical Writer | Jennifer Gulick | * Develops and maintains technical deliverable documentation within the VA enterprise CCM tool * Updates all assigned work items with accurate, detailed information |
| Software Quality Assurance Manager | Susan Tajili | * Ensures all SQA Analysts work within the CCM Plan and work instructions * Verifies that only CCM-approved deliverables are installed into the test environment(s) * Ensures that SQA Analysts are always testing from official CCM deliverables * Reviews status accounting related to the project * Reviews deliverable artifacts |
| Software Quality Assurance Analysts/Testing Analyst/Testing Service Analyst | Paul Crowson/ Erika Sarber | * Tests installed releases, as CCM provides releases from development * Updates work items assigned to them according to test activity results * Determines Pass/Fail for each work item scheduled for a release * Opens defect work items for any newly discovered problems during testing * Apply links between artifacts as appropriate |
| Release Manager/Implementation Team/EVS/Operations Team/Deployment Team-Enterprise Product Support (EPS) | TBD | * Coordinates the release and deployment of software to the existing sites and the newly activated sites following CCM Plan and work instructions |

## ****Tools Identification and Location****

|  |  |  |  |
| --- | --- | --- | --- |
| **Tools / Version** | **If VA Enterprise:** | **If NOT VA Enterprise:** | **Waiver?** |
| Change Management | Jazz Project(s):  MHLTH (CM)  Team Area(s):  Clozapine   * MOD | Is it inside VA firewall?  Physical server location:  Company/Bldg/City/State  Server name:  Contact person for access:  Name/Phone/email  Are there plans to migrate data to VA Enterprise Tool?  If yes, when? |  |
| Source  Management | Jazz Project(s):  MHLTH (CM)  Team Area(s):  Clozapine   * MOD | Is it inside VA firewall?  Physical server location:  Company/Bldg/City/State  Server name:  Contact person for access:  Name/Phone/email  Are there plans to migrate data to VA Enterprise Tool?  If yes, when? |  |
| Documentation  Management | Jazz Project(s):  MHLTH (CM)  Team Area(s):  Clozapine   * MOD | Is it inside VA firewall?  Physical server location:  Company/Bldg/City/State  Server name:  Contact person for access:  Name/Phone/email  Are there plans to migrate data to VA Enterprise Tool?  If yes, when? |  |
| Build Management | Jazz Project(s):  MHLTH (CM)  Team Area(s):  Clozapine Modernization   * MHLTH\_MOD\_CLOZ\_MOD\_SRC | Development is occurring in Visual Studio and then being uploaded to Rational |  |
| Test Management | Jazz Project(s):  MHLTH (QM)  Team Area(s):  Clozapine   * RUCL |  |  |
| Requirements Management | Jazz Project(s):  MHLTH (RM)  Team Area(s):  Clozapine   * RUCL |  |  |

## ****Interface/Dependency Management****

Projects must be aware of how changes affect other products. This interactive nature may occur as an interface or a dependency. An interface is a shared boundary through which information is exchanged; whereas a dependency occurs when one product relies on information from another product. This project interfaces with or is dependent upon products listed in the table below and will require coordination between the teams to exchange information and code changes throughout the development lifecycle. This will facilitate a smoother release and minimize risks for each of the projects. The configuration managers from the teams will facilitate all exchanges to track and manage artifacts entering or leaving this project. The table below identifies all interfaces, dependencies and associated information:

|  |  |  |  |
| --- | --- | --- | --- |
| **Product Name / Version #** | **Interface (I) or**  **Dependency (D)** | **Project**  **Manager** | **Configuration**  **Manager** |
| **ADD CURRENT VERSION of the Registry here for each monthly report**  CLOZ\_MOD\_REG\_0.x.x.x | I | Kristen Templet | Ursula Wilson / Terrance Hardison |

## CCM Implementation

The Configuration Manager will be engaged with the project from the planning stage through to project closeout to provide complete lifecycle support.

### CCM Environment Planning and Setup

Configuration Managers collaborate with Project Managers to identify the products to be modified during the development cycle and document the configuration items. The Configuration Manager uses this information and prepares the CCM environment by:

* + Identifying and obtaining access to the appropriate CCM repositories
  + Requesting an isolated area within the CCM repositories for project development
  + Submitting access requests with the appropriate roles for project team members
  + Creating development, integration and baseline streams as appropriate
  + Populating the streams with the appropriate baselines to create the foundation from which development will begin
  + Creating specific identifiers for use in change records to uniquely identify the project and any specific elements within the project
  + Collaborating with the Scrum Master to map change records to specific backlogs or sprint plans
  + Creating work instructions to identify processes and assist the team in proper use of the CCM tools
  + Creating CM Plan

### Development Support

Configuration Managers work with all members of the project team during the development/project lifecycle. They provide team specific training on CCM processes and use of the CCM tools. They provide first line CCM tools support. They stay informed on any CCM tool changes or maintenance and keep the team informed to minimize impacts on deadlines. They also provide support that is specific to certain roles.

Developers:

* + Assist with code merges between streams
  + Coordinate developers and CCM tools support to implement build tools such as BuildForge
  + Apply baselines immediately following build completion
  + Validate appropriate change record status through the use of queries and dashboards

SQA:

* + Identify changes between builds to assist with testing scope by following baseline processes
  + Assist with linking capabilities between change records, test artifacts and requirements
  + Incorporate linking validation through use of queries and dashboards

### Release Preparation

Configuration Managers are responsible for packaging and documenting releases:

* + Verify baselines to identify the artifacts that comprise the release
  + Finalize the Version Description Document that has been continuously updated with each build that was promoted outside of the development team’s integration test environment. The VDD now contains all changes made since the previous release.
  + Bundle the artifacts and perform the handoff to the appropriate parties

### Project Closeout

The Configuration Manager will work with the PM to perform the following tasks prior to the end of the project:

* + Update all change records and promote through to completion
  + Make sure no artifacts are checked out in source control
  + Make sure that no artifacts are locked to prevent updates in source control
  + Archive anything that is project specific and will not be reused by a future project
  + Request Jazz access removal or role changes for any team members who will no longer be working on the project
  + Determine if the development project area should be archived
  + Assist team members in removing any work areas used during the development process that will not be used in the future

# Configuration Identification

This project will maintain standard naming conventions for all CIs created. VA standards that have been identified will be followed, such as for end user documentation and MUMPS patches. Where no VA standards are defined, the project will define the naming convention used.

## Naming Conventions

|  |  |  |
| --- | --- | --- |
| **Artifact Type** | **Format** | **Comment** |
| **Main**  **Timeline** | MHLTH\_CLOZ\_MOD (Project Timeline) | Project (Product) level Main Timeline |
| **Additional**  **Timelines** | NA | Timeline associated with Clozapine Team Area |
| **Increment**  **Iterations**  **Build Iterations (VIP)**  **Sprint Iterations**  **Sprint Iterations**  **Continued** | MHLTH\_CLOZ\_MOD\_Build\_1  MHLTH\_CLOZ\_MOD\_Build\_2  MHLTH\_CLOZ\_MOD\_Build\_3  MHLTH\_CLOZ\_MOD\_Build\_4  MHLTH\_CLOZ\_MOD\_Build\_5 (optional tasks)  MHLTH\_CLOZ\_MOD\_Build\_6 (optional tasks)  MHLTH\_CLOZ\_MOD\_B1\_Sprint\_0  MHLTH\_CLOZ\_MOD\_B1\_Sprint\_1  MHLTH\_CLOZ\_MOD\_B1\_Sprint\_2  MHLTH\_CLOZ\_MOD\_B1\_Sprint\_3  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_4  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_5  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_6  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_7  MHLTH\_CLOZ\_MOD\_B3\_Sprint\_8  MHLTH\_CLOZ\_MOD\_B3\_Sprint\_9  MHLTH\_CLOZ\_MOD\_B3\_Sprint\_10  MHLTH\_CLOZ\_MOD\_B3\_Sprint\_11  MHLTH\_CLOZ\_MOD\_B4\_Sprint\_12  MHLTH\_CLOZ\_MOD\_B4\_Sprint\_13  MHLTH\_CLOZ\_MOD\_B4\_Sprint\_14  MHLTH\_CLOZ\_MOD\_B4\_Sprint\_15  MHLTH\_CLOZ\_MOD\_B5\_Sprint\_16  MHLTH\_CLOZ\_MOD\_B5\_Sprint\_17  MHLTH\_CLOZ\_MOD\_B5\_Sprint\_18  MHLTH\_CLOZ\_MOD\_B5\_Sprint\_19  MHLTH\_CLOZ\_MOD\_B6\_Sprint\_20  MHLTH\_CLOZ\_MOD\_B6\_Sprint\_21  MHLTH\_CLOZ\_MOD\_B6\_Sprint\_22  MHLTH\_CLOZ\_MOD\_B6\_Sprint\_23 | Increment Iterations/Build Iterations/Sprint Iterations were set up in Rational to be in sync with the Cloud development sprints |
| **Plans** | MHLTH\_CLOZ\_MOD\_B2\_Sprint\_4  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_5  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_6  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_7  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_8  MHLTH\_CLOZ\_MOD\_B2\_Sprint\_9 | This project does not involve software development in the Rational Tool. The Release Plan is the only plan used. |

|  |  |  |
| --- | --- | --- |
| **Artifact Type** | **Format** | **Comment** |
| **Documents** | Clozapine\_MOD\_Version\_Description\_Document.docx |  |
| **Release Candidates** | None at this time |  |
| **Baselines** | **Update at the end of each Sprint:**  MHLTH\_CLOZ\_MOD\_SRC (\*4: MHLTH\_CLOZ\_MOD\_REG\_0\_2\_7\_4) | Pull this information from the Eclipse tool |

## Configuration Control (Version and Baseline Management)

### Source Code – N/A for Infrastructure

This project will be modifying artifacts developed in <MUMPS, Java, Delphi, .net, Java Script, SQL, etc>.

While MUMPS development occurs and patches are created in VistA development accounts, a copy of the MUMPS code will be stored in the MUMPS\_src component within the appropriate VA CfM repositories.

All non-MUMPS source code will be managed/controlled utilizing the VA enterprise CfM tools. For new development, the CfMgr will collaborate with the developers and the Enterprise Tools Team to determine the proper component structure. Modifications to an existing code base will occur on a development stream populated with the baseline that reflects the appropriate starting code base. All changes will be associated with a change record that will be used to apply the changes back to the development stream.

### Documentation

All project related documents will be managed/controlled using the VA standard directory structure in the designated document repository. All project documentation will adhere to VA policy on protection of VA security and VA architecture content, desensitization of patient data content, FOIA content redaction restrictions, 508 accessibility standards, and documentation standards where applicable. The CM\_Doc\_Map will be used to determine the location of each document within the directory structure.

### Environment – N/A for Infrastructure

The project will utilize a number of servers for development, testing and user acceptance tests (UAT). While MUMPS development occurs within a VistA account, development of non-MUMPS patches will occur on the developers’ machine and undergo initial testing once deployed to a server.

|  |  |  |
| --- | --- | --- |
| **Clozapine Environments – N/A** | | |
| **Development** | **SQA** | **UAT** |
| N/A | N/A | N/A |

The development environments will be kept up-to-date with nationally released patches but will otherwise be an uncontrolled environment. This allows developers maximum flexibility.

The SQA and UAT environments will be rigorously configuration controlled to ensure that testing occurs against known baselines. The environments will be updated routinely with nationally released patches, and all patches loaded into the environment(s) that are still under development will be recorded as part of the baseline.

## Change Management

### Story and Task Management

This project will use the agile methodology to manage the development lifecycle. As such, change management will be accomplished through agile practices and ceremonies:

* Product Owner defines, approves and prioritizes requirements
* Scrum Team collaborates with Product Owner for requirements elaboration
* Detailed requirements are defined as Stories and placed into a Product Backlog (Backlog Grooming)
* The Scrum Master leads sprint planning sessions with Scrum Team to determine scope for upcoming sprint, stories are selected and moved into the Sprint Plan
* Scrum Team creates tasks linked to the stories to define the work to be accomplished during the sprint
* End of sprint ceremonies review with the Product Owner what was accomplished
* Planning for next sprint occurs

Consistent with agile, requirements can change, be refined or reprioritized by the Product Owner at any time. The Product Owner must approve any changes initiated by the Scrum Team.

### Defect Management

Defects are logged and linked to their associated requirement and to the test case verifying the fix. Defects can be identified and logged by anyone. New defects will be reviewed during the Scrum meeting. If a defect crashes the system or prevents testing from proceeding, it will be assigned a severity 1 or 2 and will be repaired immediately. If the defect repair affects the team’s ability to complete scheduled work for the sprint, the Product Owner will be consulted. A decision will be made to either prolong the sprint or move unfinished work to a future sprint. Non-critical defects will be placed in the backlog and scheduled for repair in a future sprint.

### Risk/Issue Management

VA’s Enterprise Risk Management Office (ERMO) defines the processes for risk and issue management. Information can be found in the Process Asset Library (PAL) within the Quality, Privacy and Risk Framework. VA’s enterprise change and configuration management tool will be used to log and manage issues and risks. Issues that require changes to the product will be logged and tracked as tasks.

## Status Accounting

This project will use the VA enterprise CCM tool’s query, report and dashboard functionality for status accounting.

### Dashboards

The VA enterprise CCM tool contains numerous widgets to reflect the status of requirements, development and testing. This project will leverage those capabilities to provide real-time data on Risk, Issue, Story, Task and Defect status; sprint progress; workload; project burn up and burn down; and testing status. The dashboard will be visible to anyone listed as a member of the development project’s team area.

### Queries

The configuration manager will create a set of shared queries to extract data to be exported to a spreadsheet and shared outside of the CCM tool. The queries will provide summary information on stories, tasks, defects, issues and risks. A CfMgr can run queries at regular intervals and provide results to management on a routine basis.

|  |  |
| --- | --- |
| **Name of Shared Query** | **Purpose** |
| Create queries as needed or requested | As needed. |

### General Status Reports

Based on project need, reports are generated out of the VA enterprise CCM tool. Standard report templates were created by the tools support team and will be leveraged as necessary. New reports are created if existing templates do not satisfy the project’s needs.

|  |  |
| --- | --- |
| **Name of Report** | **Purpose** |
| Reports created as needed. |  |

## Configuration Audits and Reviews

This project will perform audits and reviews to ensure the integrity of the product throughout the development process. Such audits and reviews will vary in complexity and formality.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Audit/Review Type** | **Description** | **Purpose** | **Performed By** | **Frequency** |
| VDD | Content review | Verify functionality | Dev Mgr | Each release |
| VDD | Validate against data in CCM tool | Verify accuracy | CfMgr | Each release |
| Build – N/A for Infrastructure | Validate planned changes are reflected in baseline | Verify baseline integrity | CfMgr | Each build to be promoted to SQA |
| SQA Environment – N/A for Infrastructure | \*Document last time nationally released patches were applied to environment  \*Identify test patches by test version  \*Cite any unique configuration settings required | Verify configuration and baseline against which testing will occur | SQA Mgr | Each time the baseline changes |

## Release Management

Release Management within CCM maps to Development Build Promotion Management as to not be confused with OIT Release Management. A release is defined as the grouping of objects physical or electronic along with all the supporting media (documentation) necessary to satisfy a given set of requirements.

This project will create release packages for a variety of reasons throughout the development lifecycle. Although they are release packages that will be promoted, these packages will not be official Releases until OIT Release Management has verified the package has been placed into production. OIT Release Management determines the methods of packaging and the rules concerning management of a release.

### Electronic Release Package – N/A for Infrastructure

The electronic release package will contain executable(s), installation scripts, user guide, installation documentation, and any required supporting software on electronic media. The executable is generated from a baseline. The electronic production release package media will be labeled with an identification number, descriptive name, and release date. A soft copy of the VDD will be generated and sent with the electronic product as part of the release package.

### Version Description Document

The Version Description Document (VDD) describes the documentation, media used in producing the deliverable, and the contents of the release package (both physical and functional). The VDD will be produced when the first build is promoted to the first testing environment outside of the development team’s integration test environment and modified with each promotion to other environments. This project will use the latest VA approved VDD template.

## Training

Access to the CCM toolset requires completion of training within TMS. All project team members will complete the required training prior to requesting access. Any subsequent training will be conducted / facilitated by the Project Manager, Development Manager and or the CCM Team for each VA product.

## CCM Backup and Disaster Recovery Plans

Data stored in the VA enterprise CCM tools are backed up on a regular basis. The servers are located in the Hines datacenter, and the VA Rational Tools Team monitors and manages the backups. This project team will ensure that its data is backed up by checking artifacts into the tool daily and updating work items consistently. Any need to restore data will be coordinated with the VA Rational Tools Team. As an additional method of recovery, this project will apply baselines and snapshots at frequent intervals to provide a more easily accessible restore point.

Template Revision History

| Date | Version | Description | Author |
| --- | --- | --- | --- |
| May 2017 | 2.7 | Rewritten to make concise and address CCM within the Agile methodology | EPMO\_CCMO |
| November 2012 | 2.6 | Additional updates to current guidelines for Section 508 conformance | Process Management |
| August 2012 | 2.5 | Additional updates for Section 508 conformance | Process Management |
| June 2012 | 2.4 | Updated to current ProPath documentation standards and edited for Section 508 conformance | Process Management |
| May 2012 | 2.3 | Corrected numbering formatting for paragraph 5.1.2 and later paragraphs, and updated Table of Contents and document version/date from 2.2/ June 13, 2011 to 2.3/ May 23, 2012 | Process Management |
| June 2011 | 0.4 | Updated per ProPath meeting for Change, Configuration, and Release Management the week of May 16th, 2011 | Process Management |
| January 2011 | 0.3 | Updated Role and Responsibilities table | SCM Committee |
| August 2009 | 0.2 | Draft – SCM Committee Updates | SCM Committee |
| June 2009 | 0.1 | Draft – SCM Committee Updates | SCM Committee |