

# PRINCE2™- Configuration Management Strategy

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## Revision History

Date of next revision:

Revision Date	Previous Revision Date	Summary of Changes	Changes Marked

## Approvals

This document requires the following approvals. A signed copy should be placed in the project files.

Name	Signature	Title	Date of Issue	Version

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## Overview

### Purpose

A Configuration Management Strategy is used to identify how, and by whom, the project's products will be controlled and protected. It answers the questions:

- How and where the project's products will be stored
- What storage and retrieval security will be put in place
- How the products and the various versions and variants of these will be identified
- How changes to products will be controlled
- Where responsibility for configuration management will lie.

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### Advice

*The Configuration Management Strategy is derived from the: The customer's quality expectations; Corporate configuration management system (e.g. any configuration management software in use or mandated by the user); Programme Quality Management Strategy and information management strategy (if applicable); The user's quality management system; The supplier's quality management system; Specific needs of the project's product(s) and environment; Project management team structure (to identify those with configuration management responsibilities) and Facilitated workshops and informal discussions.*

*A Configuration Management Strategy can take a number of formats, including: Stand-alone document or a section in the Project Initiation Document; Entry in a project management tool.*

*The following quality criteria should be observed:*

- *Responsibilities are clear and understood by both user and supplier*
- *The key identifier for the project's 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*

<Insert Project Name>

*the project's product will be transitioned) should be considered.*

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## Introduction

(States the purpose, objectives and scope, and identifies who is responsible for the strategy)

## 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, product security, handover procedures etc.), status accounting, and verification and audit.)

## 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 implementing.)

## Tools and Techniques

(Refers to 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)

## Records

(Definition of the composition and format of the Issue Register and Configuration Item Records))

## Reporting

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

## Timing of Configuration Management and Issue and Change Control Activities

(States when formal activities are to be undertaken, for example configuration audits)

## 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.)

## Scales for Priority and Severity

(For prioritizing requests for change and off-specifications and for determining the level of management that can make decisions on severity of issue.)