

PROGRAM MANAGER PROJECT DEVELOPMENT CM CHECKLIST

NOTE: Consider all steps and deliverables mandatory unless otherwise noted

<p><u>BLOCK #1 REQUIREMENTS DOCUMENTS</u></p> <p>PM: Describe your requirements in one of the following formats --</p> <ul style="list-style-type: none"> <input type="checkbox"/> Statement of Work <input type="checkbox"/> Statement of Objectives <input type="checkbox"/> Requirements Change (SCR) <input type="checkbox"/> Task Order <input type="checkbox"/> Problem Report <p>PM: You must start this document now.</p> <ul style="list-style-type: none"> <input type="checkbox"/> SSAA (Required if system is used by external customers) 	<p><u>DOCUMENTATION INITIATION</u></p> <p>Contractor Deliverables to PM:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Operational Concept Design <input type="checkbox"/> WBS <p>NOTE: All documents are to be considered living documents and will be updated along the process</p>
<p><u>BLOCK #2</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Decision-(CCB go to 2a) CCB -- ALL SCRs and PRs are processed through the CCB on existing systems. TOs (in place of SCRs) that add, change, or remove functionality of a system must follow the CCB route. Installation of COTS products must be scheduled through the CCB. Upgrades to existing executive Software (operating system, database management system, communications, etc.) must be scheduled through the CCB. <input type="checkbox"/> Decision-(PDB go to 2b) PDB -- ALL requests for/purchases of New Hardware must follow the PDB route. Any New systems to be developed where there is no legacy system in place must be presented to the PDB. New concepts are presented to ensure ALL impacts are covered prior to assignment of the project to a contractor. Any purchases of New Software must go through the PDB. 	
<p><u>BLOCK #2A (CCB)</u></p> <p><u>WALKTHROUGH</u></p> <p>PM: Required to hold walkthrough with representatives from each area listed --></p> <p>PM: Prior to walkthrough:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Call DLIS-S & Reserve Room 1-3-4 <input type="checkbox"/> Notify all Attendees - E-mail to IMPACT-EX <p>PM: Hold walkthrough:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hold Meeting <input type="checkbox"/> Reach Consensus <p>PM: Post walkthrough actions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update Requirements <input type="checkbox"/> Coordinate with all Attendees <input type="checkbox"/> Determine Impact (880's or Equiv.) <input type="checkbox"/> Milestones or Coordinate as Required <p>PM: Send CCB agenda item to SCA mailbox for inclusion in the next CCB agenda</p> <ul style="list-style-type: none"> <input type="checkbox"/> Include in CCB agenda <input type="checkbox"/> Present to CCB for discussion <input type="checkbox"/> Receive CCB Approval 	<p><u>REQUIRED ATTENDEES TO WALKTHROUGH</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Program/Project Manager <input type="checkbox"/> Information Assurance <input type="checkbox"/> Access Control <input type="checkbox"/> Software Quality Assurance <input type="checkbox"/> Software Configuration Management <input type="checkbox"/> Hardware Configuration Management <input type="checkbox"/> Information Technology Team <input type="checkbox"/> Quality Assurance Testing <input type="checkbox"/> Contractor Developer <input type="checkbox"/> Contractor System Administrator <input type="checkbox"/> Contractor Database Administrator <input type="checkbox"/> Any External Participants <input type="checkbox"/> COR/COTR <input type="checkbox"/> DLIS Customer Service <input type="checkbox"/> DLIS Training <input type="checkbox"/> Customer <input type="checkbox"/> Other _____ <p><u>DELIVERABLES</u></p> <p>PM: Collect and provide to BA for review</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update SSAA <i>(PM develop/BA review)</i> <input type="checkbox"/> Security Plan <i>(PM develop/BA review)</i> <input type="checkbox"/> CM Plan* <i>(Contractor develop/DLIS CM review)</i> <p>*Template available from DLIS CM</p>

<p><u>BLOCK #2b (PDB)</u></p> <p>PM: Prepare for PDB presentation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Request inclusion in agenda two weeks prior to meeting. <input type="checkbox"/> DLIS Form 1840 required with all info provided <input type="checkbox"/> Requirements document required <input type="checkbox"/> E-mail DLIS Form 1840 & requirements document to supervisor <input type="checkbox"/> PM Supervisor e-mail approval with form & requirements to ConfigMgmt-DLSC-B mailbox <input type="checkbox"/> Present to PDB as scheduled <p>PDB Voting</p> <p><input type="checkbox"/> Approved:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contractor Assigned <input type="checkbox"/> PM Continue to Walkthrough Step <p><input type="checkbox"/> Disapproved:</p> <p><input type="checkbox"/> Reason: _____</p> <p><input type="checkbox"/> Process Stops Here</p> <p><input type="checkbox"/> Tabled:</p> <p><input type="checkbox"/> Reason: _____</p> <p><input type="checkbox"/> Corrective Action: _____</p> <p><input type="checkbox"/> PM Return to Block 1</p>	<p>PM: Prepare for PDB presentation</p> <p>PM: Indicate Requirements Document Type</p> <ul style="list-style-type: none"> <input type="checkbox"/> Statement of Work <input type="checkbox"/> Statement of Objectives <input type="checkbox"/> Requirements Change <input type="checkbox"/> Task Order <p>PM: Prepare PDB request form</p> <ul style="list-style-type: none"> <input type="checkbox"/> DLSC Form 1840
<p><u>WALKTHROUGH (PDB)</u></p> <p>PM: Required to hold walkthrough with representatives from each area listed --></p> <p>PM: Prior to walkthrough:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Call DLIS-S & Reserve Room 1-3-4 <input type="checkbox"/> Notify all Attendees - E-mail to IMPACT-EX <p>PM: Hold walkthrough:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hold Meeting <input type="checkbox"/> Reach Consensus <input type="checkbox"/> Document meeting minutes <p>PM: Post walkthrough actions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update Requirements <input type="checkbox"/> Coordinate with all Attendees <input type="checkbox"/> Determine Impact (880's or Equiv.) <input type="checkbox"/> Milestones or Coordinate as Required 	<p><u>REQUIRED ATTENDEES TO WALKTHROUGH</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Program/Project Manager <input type="checkbox"/> Information Assurance <input type="checkbox"/> Access Control <input type="checkbox"/> Software Quality Assurance <input type="checkbox"/> Software Configuration Management <input type="checkbox"/> Hardware Configuration Management <input type="checkbox"/> Information Technology Team <input type="checkbox"/> Quality Assurance Testing <input type="checkbox"/> Contractor Developer <input type="checkbox"/> Contractor System Administrator <input type="checkbox"/> Contractor Database Administrator <input type="checkbox"/> Any External Participants <input type="checkbox"/> COR/COTR <input type="checkbox"/> DLIS Customer Service <input type="checkbox"/> DLIS Training <input type="checkbox"/> Customer <input type="checkbox"/> Other _____
<p><u>BLOCK 3 REQUIREMENTS FINALIZATION/APPROVAL</u></p>	
<p>From Block 2a:</p> <p>System Change Administrator:</p> <ul style="list-style-type: none"> <input type="checkbox"/> FFM Approval (As Applicable) <input type="checkbox"/> S/A Coordination (As Applicable) <input type="checkbox"/> HQ Final Approval (As Applicable) <input type="checkbox"/> Provide response to PM <input type="checkbox"/> Continue to Block 4 	<p>From Block 2b:</p> <p>PM:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Finalize Requirements <input type="checkbox"/> Publicize Requirements <input type="checkbox"/> Establish Contractor contacts <input type="checkbox"/> Host Contractor Meeting <input type="checkbox"/> Provide Contractor Security Information <input type="checkbox"/> Acquire Contractor Accesses <input type="checkbox"/> Continue to Block 4

<p><u>BLOCK #4 DEVELOPMENT</u></p> <p>PM: All Block 4 actions REQUIRED --</p> <p><input type="checkbox"/> Hold IPR's (Minimum Monthly) with ALL impacted</p> <p><input type="checkbox"/> Continue Doc Development</p> <p>Provide draft doc to all impacted</p> <p><input type="checkbox"/> Impacted Functionals</p> <p><input type="checkbox"/> ConfigMgmt-DLSC-B</p> <p><input type="checkbox"/> SCA</p> <p><input type="checkbox"/> DLIS Security</p> <p><input type="checkbox"/> DLIS-BB Testing</p> <p><input type="checkbox"/> Other</p> <p>ALL Web Projects MUST:</p> <p><input type="checkbox"/> Coordinate with DLIS Web Master</p> <p><input type="checkbox"/> Ensure compliance with DLIS Standards</p> <p>Hold Access Control Meeting</p> <p><input type="checkbox"/> Invite impacted participants</p> <p><input type="checkbox"/> Access Control Policy Development</p> <p><input type="checkbox"/> Turnover from Developer to DLIS</p> <p style="text-align: center;">Milestone 1 Completed</p>	<p><u>CONTRACTED DELIVERABLES</u></p> <p>PM: Collect and provide to DLIS-BA Contractor- developed unless noted</p> <table border="0"> <tr> <td style="vertical-align: top;">New Update</td> <td><input type="checkbox"/></td> <td>Requirements Matrix (<i>Contractor</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Update WBS (<i>PM</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>SSS* (<i>unless included in SSDD</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>STP*</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>SSDD*</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>SIP*</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>SUM*</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>DLIS System User Guide</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>SSAA (<i>PM</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Security Plan (<i>PM</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>CM Plan</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Licenses</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Hardware</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Move Sheets</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Developers STP Results & Reports</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Access Control Policy (<i>IA authorized rep</i>)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Volume ____ Procedures (Update FLIS Procedures)</td> </tr> <tr> <td></td> <td><input type="checkbox"/></td> <td>Other</td> </tr> </table> <p style="text-align: center;">*J-STD-016 Documents</p>	New Update	<input type="checkbox"/>	Requirements Matrix (<i>Contractor</i>)		<input type="checkbox"/>	Update WBS (<i>PM</i>)		<input type="checkbox"/>	SSS* (<i>unless included in SSDD</i>)		<input type="checkbox"/>	STP*		<input type="checkbox"/>	SSDD*		<input type="checkbox"/>	SIP*		<input type="checkbox"/>	SUM*		<input type="checkbox"/>	DLIS System User Guide		<input type="checkbox"/>	SSAA (<i>PM</i>)		<input type="checkbox"/>	Security Plan (<i>PM</i>)		<input type="checkbox"/>	CM Plan		<input type="checkbox"/>	Licenses		<input type="checkbox"/>	Hardware		<input type="checkbox"/>	Move Sheets		<input type="checkbox"/>	Developers STP Results & Reports		<input type="checkbox"/>	Access Control Policy (<i>IA authorized rep</i>)		<input type="checkbox"/>	Volume ____ Procedures (Update FLIS Procedures)		<input type="checkbox"/>	Other
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<p><u>BLOCK #5 FUNCTIONAL & IA</u></p> <p><input type="checkbox"/> Environments (<i>CM responsibility</i>)</p> <p><input type="checkbox"/> CM Setup Environment</p> <p><input type="checkbox"/> DB Environment</p> <p><input type="checkbox"/> IA Environment</p> <p><input type="checkbox"/> Harvest or Otherwise</p> <p><input type="checkbox"/> Testing (<i>PM coordinate schedule</i>)</p> <p><input type="checkbox"/> Functional Acceptance Test</p> <p><input type="checkbox"/> IA Review/Test</p> <p><input type="checkbox"/> Webmaster Review and Test</p> <p><input type="checkbox"/> Determine if IATO or Accreditation (<i>PM/IA</i>)</p> <p><input type="checkbox"/> Perform FRAP</p> <p><input type="checkbox"/> Perform ST&E</p> <p><input type="checkbox"/> Harvest & Move Sheet Approvals</p> <p><input type="checkbox"/> Functional</p> <p><input type="checkbox"/> IA</p> <p><input type="checkbox"/> Webmaster</p> <p style="text-align: center;">Milestone 2 Completed</p>	<p><u>DLIS DELIVERABLES</u></p> <p>PM: Collect and provide to DLIS-BA</p> <p><input type="checkbox"/> J-STD-016 Documents</p> <p><input type="checkbox"/> Access Control Policy</p> <p><input type="checkbox"/> Test Plans, Results & Reports</p> <p><input type="checkbox"/> Functional</p> <p><input type="checkbox"/> IA</p> <p><input type="checkbox"/> Webmaster</p> <p><input type="checkbox"/> Move Sheet(s) with signatures from:</p> <p><input type="checkbox"/> Functional</p> <p><input type="checkbox"/> IA</p> <p><input type="checkbox"/> Webmaster</p> <p><input type="checkbox"/> Draft SSAA Document</p>																																																						
<p><u>BLOCK #6 CM ACCEPTANCE</u></p> <p>Baselines established -- no further changes without authorization</p> <table border="0"> <tr> <td><input type="checkbox"/> Source Code</td> <td><input type="checkbox"/> CM Plan</td> </tr> <tr> <td><input type="checkbox"/> Executables</td> <td><input type="checkbox"/> J-STD-016 Documentation</td> </tr> <tr> <td><input type="checkbox"/> Supporting Software</td> <td><input type="checkbox"/> Version Control in place</td> </tr> <tr> <td><input type="checkbox"/> Hardware</td> <td><input type="checkbox"/></td> </tr> </table>		<input type="checkbox"/> Source Code	<input type="checkbox"/> CM Plan	<input type="checkbox"/> Executables	<input type="checkbox"/> J-STD-016 Documentation	<input type="checkbox"/> Supporting Software	<input type="checkbox"/> Version Control in place	<input type="checkbox"/> Hardware	<input type="checkbox"/>																																														
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<p><u>BLOCK #7 ASSURANCE TESTING</u></p> <p>CM/IA/QA Responsibilities</p> <p><input type="checkbox"/> Environments (<i>CM responsibility</i>)</p> <ul style="list-style-type: none"> <input type="checkbox"/> CM Setup Environment <input type="checkbox"/> DB Environment <input type="checkbox"/> IA Environment <input type="checkbox"/> Harvest or Otherwise <p><input type="checkbox"/> Testing (<i>DLIS-BB coordinate schedule</i>)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assurance <input type="checkbox"/> Interface <input type="checkbox"/> Integration <input type="checkbox"/> Regression <input type="checkbox"/> Customer <p><input type="checkbox"/> Harvest & Move Sheet Approvals</p> <ul style="list-style-type: none"> <input type="checkbox"/> QA <input type="checkbox"/> IA <p style="color: green;"><i>Milestone 3 Completed</i></p>	<p><u>DELIVERABLES</u></p> <p><i>DLIS-BB: Collect and provide to Doc Center</i></p> <p><input type="checkbox"/> Test Results & Reports</p> <ul style="list-style-type: none"> <input type="checkbox"/> Developmental <input type="checkbox"/> Functional <input type="checkbox"/> Assurance <input type="checkbox"/> Interface <input type="checkbox"/> Webmaster <input type="checkbox"/> Integration <p><input type="checkbox"/> J-STD-016 Testing Documentation</p> <p><input type="checkbox"/> Final SSAA Document</p>
<p><u>BLOCK #8 PRODUCTION RELEASE</u></p> <p>CM Responsibilities:</p> <p><input type="checkbox"/> Environments (<i>CM responsibility</i>)</p> <ul style="list-style-type: none"> <input type="checkbox"/> CM Setup Environment <input type="checkbox"/> DB Environment <input type="checkbox"/> IA Environment <input type="checkbox"/> Harvest or Otherwise <p><input type="checkbox"/> Pre Release Actions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Verify IATO/Accreditation in place <input type="checkbox"/> Pre-Notification <input type="checkbox"/> Stage release modules <input type="checkbox"/> Schedule Jobs <input type="checkbox"/> Ensure DBA work completed <p><input type="checkbox"/> Execute Release</p> <p><input type="checkbox"/> Post Release Actions</p> <ul style="list-style-type: none"> <input type="checkbox"/> PM verification of production <input type="checkbox"/> Post-Notification <p style="color: green;"><i>Milestone 4 Completed</i></p>	<p><u>DELIVERABLES</u></p> <p><i>CM/PM: Ensure following provided to Documentation Center</i></p> <p><input type="checkbox"/> FINAL IA DOCS DITSCAP</p> <ul style="list-style-type: none"> <input type="checkbox"/> Interim Authority to Operate (IATO) OR <input type="checkbox"/> Accreditation Package (SSAA and Letter to DAA) <p><input type="checkbox"/> Final J-STD-016 Documentation</p> <p><input type="checkbox"/> Final Testing Documentation</p> <p><input type="checkbox"/> Move sheet with all signatures</p>
<p><u>BLOCK #9 DOCUMENT CENTER</u></p> <p><i>DLIS Documentation Center Verification:</i></p> <p><input type="checkbox"/> All Documents - J-STD-016, Move Sheet, DITSCAP, All Test Results</p>	

ACRONYNS - ABBREVIATIONS

CCB	Configuration Control Board
CM	Configuration Management
COR	Contract Officer Representative
COTR	Contract Officer Technical Representative
DB	Data Base
DBA	Data Base Administrator
DITSCAP	DoD Information Technology Security Certification and Accreditation Process
FRAP	Functional Risk Assessment Process
HQ	Headquarters
IA	Information Assurance
IATO	Interim Authority to Operate
IPR	In-Process Review
QA	Quality Assurance
PDB	Project Development Board
PM	Program (Project) Manager
S/A	Service/Agency
SCA	System Change Administrator
SCR	System Change Request
SOO	Statement of Objectives
SOW	Statement of Work
SSAA	Systems Security Authorization Agreement
SSDD	System/Subsystem Design Description
SSS	System/Subsystem Specifications
ST&E	System Test & Evaluation
STP	Software Test Plan
SUM	Software Users Manual
SIP	Software Installation Plan
TO	Task Order
WBS	Work Breakdown Structure
OCD	Operational Concept Design
880	DLSC Form

MILESTONE 1: DEVELOPMENT

REQUIREMENTS FOR MILESTONE 1: It is recommended that an IPR be held at least once a month until the project is implemented. PM should schedule and invite those who are impacted. These IPRs are designed to determine if the development activity has correctly interpreted the requirements, determine testing needs, bring up any schedule issues and make changes as necessary. Deviation must be coordinated with those impacted. Major deviations must be submitted to DLIS-BA SCA for coordination and if required additional approval.

When Milestone 1 is complete, the development organization initiates a move sheet/migration form and turns over all deliverables to the Program Manager.

MILESTONE 2: FUNCTIONAL AND INFORMATION ASSURANCE TESTS

REQUIREMENTS FOR MILESTONE 2: PM prepares and/or updates procedures manuals and all other documentation as required. After receiving required deliverables/documentation from the developer, the PM ensures all other areas impacted receive applicable parts of package. PM coordinates with DLIS Security and Web Master (if Web project) during this same time. PM and each impacted area prepare functional test plans. PM leads the acceptance test, coordinating the test. All problems are documents along with their resolution on the test plans. Upon successful completion, test results are signed by tester(s) and PM.

When Milestone 2 is complete, the PM signs the move sheet/migration form and turns over all deliverables/documentation to the DLIS-BA SCA for turn over to QA testing.

MILESTONE 3: ASSURANCE TESTING

REQUIREMENTS FOR MILESTONE 3: DLIS-BB writes Standard Test Plan for assurance test and performs test. Upon successful completion, forwards documentation package to the SCA with signature verifying successful test. As required integration testing of all components will be performed unless waived by PM.

When Milestone 3 is complete, the QA tester(s) signs the move sheet/migration form and turns over all documentation/deliverables to the DLIS-BA SCA.

MILESTONE 4: IMPLEMENTATION

The SCA notifies the CM shop and/or authorized agent and the PM that the project is ready to move to production. The CM shop, or other as authorized agent, moves the project to the production environment. The CM shop, or authorized agent, notifies the SCA and the PM that the project is in production. All documentation is forwarded to the DLIS Documentation Center.