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FINAL

UNCLASSIFIED

Configuration Management Database (CMDB)

Software User's Manual

Version 2.2

November 6, 2001

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1. SCOPE

1.1 IDENTIFICATION

This Software User's Manual (SUM) provides users with an orientation to the Configuration Management Database (CMDB) Version 2.1.

1.2 SYSTEM OVERVIEW

The following paragraphs provide a high level overview of the CMDB. This includes a summary of the history of the CMDB and the general purpose of the system.

The CMDB automates Configuration Management (CM) processes originally implemented under the Common User Baseline for the Intelligence Community (CUBIC) program. These processes have evolved over more than twenty years of use and promote communication between program management and software users to improve the decision making process and enable the efficient allocation of program resources. The CUBIC methodology has been customized and tailored for use by several communities including the Air Force (AF), the Defense Intelligence Agency (DIA) and the MASINT Requirements Office (MRO). In addition, CUBIC processes are used by all the Unified and Specified Commands and software users at hundreds of locations throughout the Department of Defense (DOD).

The CMDB provides "cradle to grave" life cycle support and insight into supported applications in order to control change and assist in the production of the highest quality software products possible. This is accomplished, in part, through status accounting for requirements identification, documentation management, problem reporting for operational software, Action Items (AIs), Multiple Application Problems (MAPs), Test Findings (TFs), and other key data. CM recognized the need to provide immediate access to this critical information for its users, which include:

- Program Managers (PMs)
- Contracted Software Developers
- Testing Facilities [e.g. Joint Integration Test Facility (JITF)]
- Executive Agents

The CMDB was developed by the Air Force Research Laboratory (AFRL) Information Handling Branch (IFEB) under the direction of the former 497IOG at Bolling Air Force Base (AFB) (now the AC2ISRC/A2). This was done to respond to the lack of a commercially available tool that supported core CUBIC methods. Version 1.0 was activated in January 1999 and incremental releases have been made available since that time. Version 2.1 provides major enhancements to the original baseline as dictated by documented user requirements.

1.3 SYSTEM CONFIGURATION

The CMDB is a relational database with a web browser front-end. There are two servers; one on the Internet containing only Unclassified information, and the other on Intelink containing both Classified and Unclassified information. Classified information is processed exclusively through JWICS.

The information on the two servers is synchronized nightly through Oracle scripts. The JWICS server contains a consolidation of both JWICS and Internet information. Whereas, the Internet server contains a consolidation of both JWICS and Internet unclassified information only.

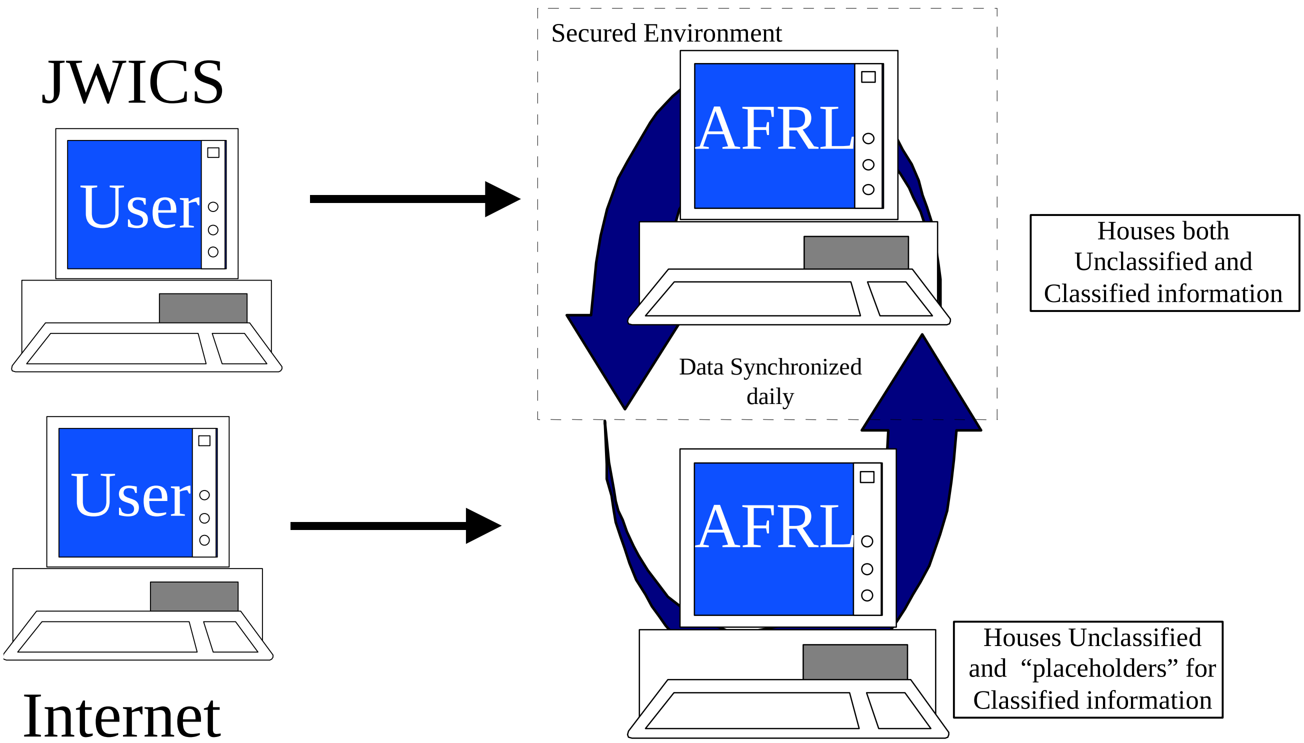


Figure 1-1System Configuration

1.4 DOCUMENT OVERVIEW

This section summarizes the purpose and contents of this SUM.

1.4.1 Purpose

This document will provide users with a fundamental understanding of the CMDB Version 2.1 and instructions to execute CMDB functions. This document emphasizes terminology (such as field definitions) and component functionality with the inclusion of step-by-step directions (such as how to enter a Problem Report [PR]) for each of the CMDB user roles.

The presentation of the material in Sections 8 through 12 assumes familiarity with Sections 1-7

This document has been written for individuals with a working knowledge of Internet browsers.

1.4.2 How To Use This Document

Because different users have different needs and permissions, this guide is divided into instructional sections based on user role. The sections of this document align with the following CMDB user roles:

- Site User
- Program Manager (PM)/Program Management Office (PMO)
- Software Developer
- Joint Integration Test Facility (JITF)/Joint Interoperability Test Center (JITC)/Security Tester

A description of each of these roles is provided in Section 1.4.3. This section should be reviewed in order to determine your user role and corresponding section of this manual dedicated to it.

There are certain CMDB concepts that will not change across user roles. These Common Features of the CMDB will be covered in Section 4. This section should be reviewed by all CMDB users in order to gain an understanding of the fundamentals of the CMDB before proceeding to the section aligned to user role. A special set of permissions exists for the user who is also the creator of new information in the CMDB, referred to as the Originator. CMDB users who will be submitting new records should also review Section 12 to review Originator privileges.

1.4.3 User Roles

Specialized access (such as Read, Add, Modify, or Delete) to various contents of the CMDB will be determined by the permissions granted to specific user roles. User roles are assigned by the PMO based on the user's need to know. The user roles are as follows:

- Site User – Site Users are users of an application (software) or program at a site. Site Users have the ability to submit and review (Unrestricted) PRs, Change Requests (CRs), Requirements, AIs, Document Review Reports (DRRs), Notes and Place (address) information. Test Findings (TFs) of approved applications can also be reviewed if they are Unrestricted. Site users will have read privilege for other sections of the CMDB.
- Developer – A role of Developer is assigned to the person who is participating in the development of a software program. A program may be a complete system, software only, or documentation only. Developers are allowed to submit Workplans, PR/CRs, Requirements, AIs, DRRs, Developer Statuses, Notes and Place (address) information. For the remaining sections of the CMDB a developer will have read access.
- Program Manager – A PM role will be assigned to all individuals within the PMO. PMs are allowed to submit and update PR/CRs, AIs, DRRs, Library records, PM/CM Statuses and Notes, as well as update Place (address) information. PMs can review PR/CRs, Requirements, AIs , DRRs upon submission into the CMDB, while they are still restricted.

- Tester – A tester is a user who performs formal testing of an application. A tester has the same privileges as a Site User with the additional ability to submit and access TFs.
- Originator – The Originator, or creator, of any information within the CMDB will be assigned an additional set of permissions. These permissions will allow the user to interact with (read or modify and submit Originator Statuses) any information that they originally created.

1.4.4 Contents

The following describes the contents and organization:

1. Section 1 identifies the CMDB, provides an overview of the system, describes the system configuration, provides an overview of the document and lists the hardware and software requirements.
2. Section 2 lists documents that are referenced in the SUM.
3. Section 3 describes the components of the CMDB.
4. Section 4 provides directions on those features/functions utilized by all CMDB users, regardless of role type.
5. Section 5 provides information on user assistance and problem reporting.
6. Section 6 contains information on how to apply for a CMDB account.
7. Section 7 explains the process of logging into the CMDB.
8. Section 8 provides directions specific to the role of the Site User.
9. Section 9 provides directions specific to the role of the PM, or PMO.
10. Section 10 provides directions specific to the role of the Developer.
11. Section 11 provides directions specific to the role of the JITF/JITC/Security Tester.
12. Section 12 provides directions/privileges specific to the role of the Originator.
13. Section 13 describes errors and provides information on problem recovery.
14. Section 14 lists definitions used in this SUM.
15. Section 15 lists acronyms used in this SUM.
16. Appendix A lists the field definitions found in the forms that are used to accomplish the functions covered in this SUM.

1.5 DOCUMENT CONVENTIONS

Throughout the document, the following items will be denoted by:

Field Names	Boldface type
Data Entry (Prompt commands and Database buttons)	Boldface and Italic type
<u>Screen and Menu Section Names</u>	Boldface and Underlined type

1.6 REQUIREMENTS

1.6.1 Requirements for Server

1.6.1.1 Hardware Requirements

The hardware requirements needed to run CMDB are any 250 mhz (or faster) personal computer (PC) with a 13 gig (or more) hard drive, a CD-ROM and network connectivity.

1.6.1.2 Software Requirements

To install CMDB the following is required: Windows NT 4.0 with Service PACK5 for the Operating System, Oracle 8.1.6.0 for the Database Server, Oracle Application Server 4.0.8.1 for the Web Server, and Netscape 4.5 (or higher).

1.6.2 Client Requirements

1.6.2.1 Hardware Requirements

The hardware requirements for accessing the CMDB are any PC, Macintosh, Sun Workstation, Digital Unix, or any other systems with the capability of running Internet Explorer 4.0, or Netscape 4.0 and above.

1.6.2.2 Software Requirements

To access the CMDB, Internet Explorer 4.0 and above, Netscape Navigator 4.0 and above, or any web browser capable of using frames can be used. To enable the Help functionality, JavaScript must be enabled. In Netscape Navigator, the memory cache must be set to a minimum of 5000Kbytes to retain data when using the browsers Back feature. Directions for changing the memory cache are as follows:

1. Open Netscape Navigator and select Edit from the main toolbar.
2. Select Preferences.
3. Locate the Category menu on the left side of the pop up window and expand the Advanced category by clicking the + button.
4. From the expanded menu select Cache. The current Cache settings will be displayed on the right. Type in a number 5000 or higher in the Memory Cache field.
5. Select OK.

2. REFERENCED DOCUMENTS

The following documents are referenced within the main body of the document. Each document is listed by the document's title, date of publication, and document number.

- Common User Baseline for the Intelligence Community (CUBIC) Configuration Management Plan, November 5, 1999, (99-2.0-CMP-11 99-00).
- Configuration Management System Software Specification, October 26, 2000, (96-SSS/CMDB-09 00).

3. COMPONENTS

This section provides a description of the basic areas and tools in CMDB 2.1. Refer to the applicable CMDB User Role section of this manual (e.g. a user of an application at a site should refer to Section 8, Site User) for detailed directions on how to accomplish specific tasks. CMDB User Roles are determined by the PMO of the supported programs. Section 1.4.3 provides definitions of each of the CMDB User Roles.

3.1 MAIN MENU

The Main Menu is the menu found in the frame on the left side of the screen after logging into the CMDB. This menu is the primary navigation tool of the database. At any time, a user can select any of the options in this menu, which will remain present on the screen at all times. The options a user will view in this menu will depend on the user's role and access permissions. Each of the options on the Main Menu will be covered in this manual.

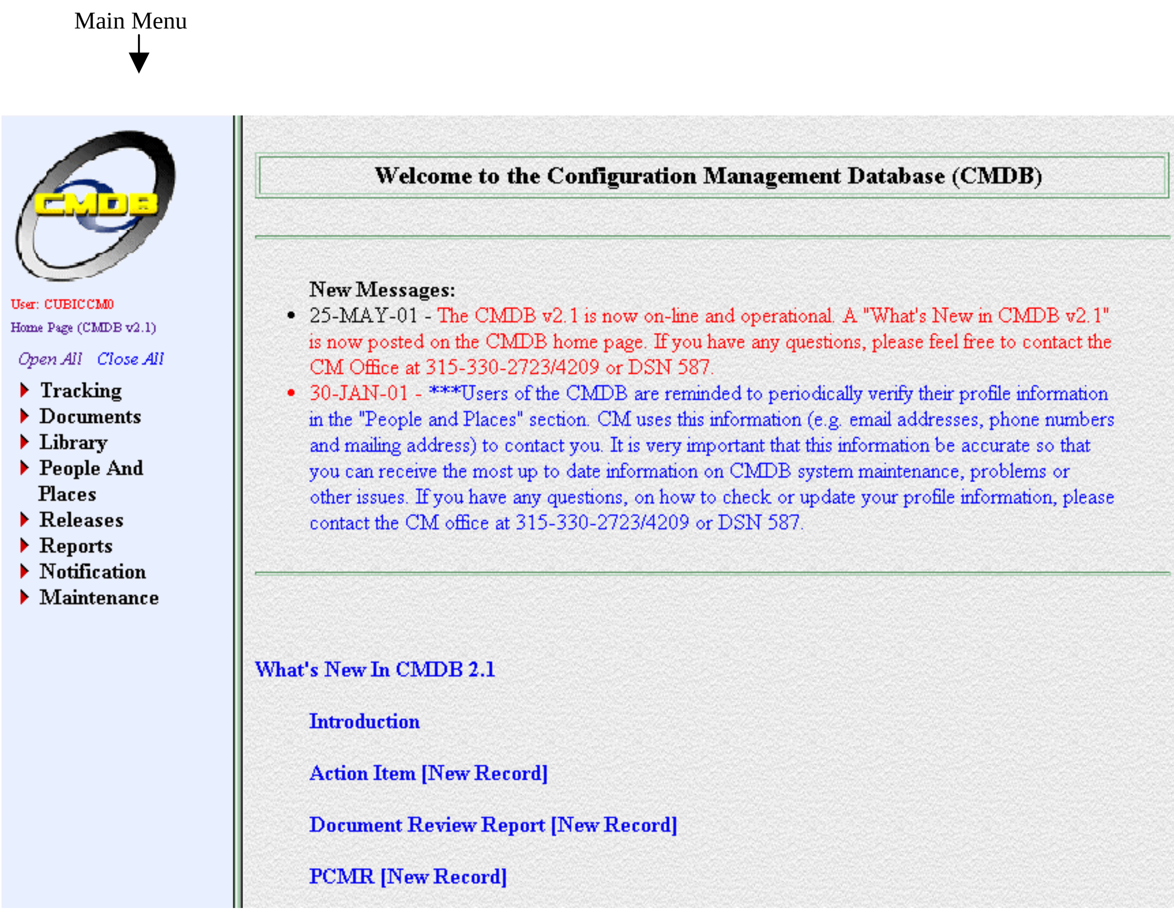


Figure 3-1 Main Menu

3.2 RESULTS FRAME

The results of any query performed in the CMDB will be displayed in a frame referred to as the results frame. After performing a query, this frame will be located on the upper portion of your screen, above the form that was used to perform the query, and will list the results in the form of hot links which, when selected, will display that record onscreen.

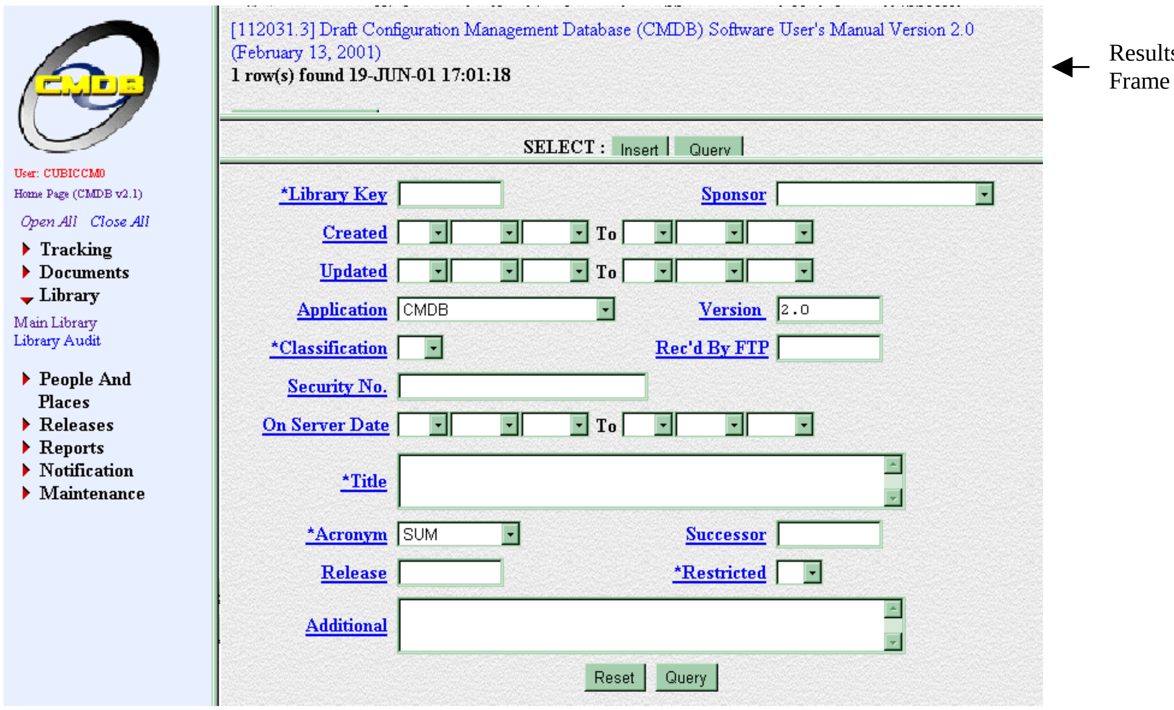


Figure 3-2 Results Frame

3.3 BUTTONS

Functionality within the CMDB will be accomplished through the use of buttons. These buttons will vary from screen to screen based on roles and permissions. Below is a list of buttons and functionality that will be used throughout the CMDB. They are listed by the functional area they are used in, beginning with those buttons common to more than one area of the CMDB.

3.3.1 Common Buttons

Add Note - The ***Add Note*** action will open the Note frame and allow entry of a new Note record.

Cancel - The ***Cancel*** action will abort the record and close the frame without storing any changes to the record.

Print - The ***Print*** action will format a record in a one-page layout that will display the complete text that the record contains. In cases where there is extensive text, there may be more than one page.

Print w/Note(s)* –** The ***Print w/Note(s) action will format a record in a one-page layout that will display the complete text that the record contains, including all Notes that are associated with it. In cases where there is extensive text, there may be more than one page.

Query - The ***Query*** action will allow the user to search for records based upon the data entered in the fields on the screen.

Save - The ***Save*** action will allow the user to store new information in the database, e.g., Save New Distribution, or Save New Report, etc.

Submit - The ***Submit*** action will enter the new data into the CMDB.

Update - When selected, ***Update*** will save any changes made to a record.

View - The ***View*** action will alert the user that at least one type of that record has been entered and can be viewed by selecting this button, (e.g., View Notes, view Status etc.).

3.3.2 Library Buttons

Add Status - The ***Add Status*** action will open the Status frame and allow entry of a status record to a Library record.

ADRN - The ***ADRN*** action will open another frame and display the Advanced Documentation Revision Notice (ADRN) form.

Attributes - The ***Attributes*** action will open the Attributes frame and allow the display or entry of new information (e.g. location and number of copies) for a Library record.

Documentation - The ***Documentation*** action will open the Documentation frame and allow the entry of document information for a Library record. For any Library Item, only one of two buttons, Documentation or Software can be selected.

Loaned* -** The ***Loaned action will open another frame and display the Library Loans form to track items that have been borrowed from the Library.

Software - The ***Software*** action will open the Software frame and allow the entry of software information for a Library record. For any Library Item, only one of two buttons, Documentation or Software can be selected.

3.3.3 Notification Buttons

App. Sort - The ***App. Sort*** action will sort the list of items in the Notifications alphabetically by the application each record is associated with.

Date Time Sort (Latest on Top) - The ***Date Time Sort (Latest on Top)*** action will sort the list of items in the Notifications by Date with the most recently submitted item at the top of the list.

Delete Notifications Checked - The ***Delete Notifications Checked)*** action will delete the items from the Notifications that have been selected by clicking on the checkbox found along side of each record.

Delete The Range - The ***Delete The Range*** action will delete the range of Notifications that the CMDB user types into the blank field found next to this button.

Item Sort -The ***Item Sort*** action will sort the list of records in the Notifications alphabetically by record type.

Reason Sort - The ***Reason Sort*** action will sort the list of items in the Notifications alphabetically by the reason for each Notification.

Title Sort - The ***Title Sort*** action will sort the list of items in the Notifications alphabetically by the title of each Notification.

3.3.4 Release Buttons

Release Items - The ***Release Items*** action will open a frame that will list all of the release items associated with a Release.

Submit Item - The ***Submit Item*** action will open a frame that will allow you to add a Library record to a Release.

3.3.5 Reports Buttons

Continue - The ***Continue*** action will prompt the next consecutive screen to be completed when creating an AdHoc Report.

Create New Report - The ***Create New Report*** action will prompt the **Choose Columns to Be Displayed** screen after selecting a type of report from the pull-down list in AdHoc Reports.

Delimiters - The ***Delimiters*** action will bring up the report in an HyperText Markup Language (HTML) file that can be copied and pasted into another application.

Filter Report (too many rows?) - The ***Filter Report (too many rows?)*** action allows further filtering to narrow the results generated in an AdHoc report.

New Filtered Report - The ***New Filtered Report*** action will filter the results of an AdHoc Report after completing the **And** clause on the **<u>Filter Results Further</u>** screen. Refer to (***Filter Report (too many rows?)***.

To Report - The ***To Report*** action will allow the user to bring up the report created on the screen.

3.3.6 Tracking Buttons

Attach PCMR - The ***Attach PCMR*** action will associate the currently displayed Workplan to the selected Problem Report, Change Request, Multiple Application Problem, or Requirement (PCMR) after selecting ***Submit for Other PCMRs***. See ***Submit for Other PCMRs.***

Create WP - The ***Create WP*** action will prompt the display of theWorkplan form used by Developer to submit a new Workplan for the associated PCMR record.

Create Additional WP For (PCMR#) - The ***Create Additional WP For (PCMR#)*** action will prompt the display of a Workplan form used by Developer to submit (up to two) additional Workplan for the associated PCMR record.

Get Off Hotlist - The ***Get Off Hotlist*** action will remove the record from the Hotlist to cancel future system Notifications on updates when they are no longer wanted.

Get On Hotlist - The ***Get On Hotlist*** action will add the record to the Hotlist which will prompt system Notifications when updates are made to it.

Initiate MAP - The ***Initiate MAP*** action will open another frame allowing the user to forward the current PCMR to another Program Office for review.

Print All - The ***Print All*** action will format a list of records generated as a result of a query for printing.

Print All w/Notes - The ***Print All w/Notes*** action will format a list of records generated as a result of a query for printing with the inclusion of the associated Notes.

Reset - The ***Reset*** button will remove any edits made to a record except all auto-filled information. A user may submit one new record, click back to the input record frame, choose the ***Reset*** button, and enter another new record with the same auto-filled information as the previously submitted finding.

Submit for Other PCMRs - Selecting ***Submit for Other PCMRs*** will prompt a frame below the Workplan that will allow the Developer to select an additional PCMR record and attach the currently displayed Workplan to it. See ***Attach PCMR***.

XREF - The ***XREF*** action will query for any cross-reference to the selected record and list them in the results list in the Results frame for viewing. Only CM will have the capability to enter cross-references. Should a user need to request a cross-reference to be added contact CM or add a note for a cross-reference to be implemented.

3.4 TRACKING

Tracking supports all life cycle activities for logging, tracking and monitoring **Action Items** (AIs), **Change Requests** (CRs), **Document Review Reports** (DRRs), **Multiple Application Problems** (MAPs), **Problem Reports** (PRs), **Requirements** (REQ), and **Workplans**. Definitions for each of the items managed by the Tracking area of the CMDB are:

- An AI is the management tool used to track required activities that are of interest at the program level.
- A CR is a new requirement or enhancement to a program.
- A DRR is used to coordinate and track changes to program documentation.
- A MAP coordinates changes affecting multiple programs.
- A PR describes a software deficiency where the software does not function as documented by program requirements.
- A REQ is a program level specification for future development efforts.
- A WorkPlan is a document that identifies the estimated level of effort required to implement a software fix or change.

3.5 MANDATORY FIELDS

When submitting new records for inclusion in the CMDB, there are some fields that must be completed. An asterisk (*) will be present in front of the field name to denote that it is a mandatory field.

3.6 STATUS FIELD

Status fields are found within each of the **Tracking** forms and are used to reflect the current standing of a record in its life cycle from the perspective of each of the involved individuals (i.e. Developer, Assignee, Originator, and CM/PM). Statuses are displayed by **Current Status** and **Status History.**

3.7 RESTRICTED FIELD

Restricted is a field found in each of the **Tracking** forms (except **Workplan**) that allows the PMO the ability to review items and use discretion as to which items will be accessible by the general user community. Each new **Tracking** record will automatically be Restricted upon entry into the CMDB. Only the Originator of a record (and CM/PM) has the ability to view that record while it is Restricted.

3.8 NOTES

Notes is a field that allows CMDB users to enter/review additional comments on Tracking items, excluding Test Findings. They are used to submit information relevant to a particular item. The CMDB user may choose the type of note that corresponds to the information that the Note will contain. The types of notes that can be added are: Concurrence, Financial, Historical, Informational, Workaround, or Other.

3.9 DOCUMENTS

This is the section where any online documents are listed. The CMDB user will view only the documents of his or her approved applications. Not all of the CMDB supported applications currently offer online documentation.

3.10 LIBRARY

The **Library** component contains records of all of the program documentation and media related to an application. The contents of the library contain hardcopy, softcopy, and on-line documentation as well as software. There are two sections under Library, the **Main Library** and **Library Audit**.

The **Main Library** is used to catalog Program documentation and software maintained by CM.

Information such as document title, number, version and classification used to identify each item is found here. Each library record contains **Library Attributes** which displays information such as the location of that item (where it is stored), whether it is a hardcopy, softcopy or online document, the number of copies, and if media, the title and type of media. **Library Documentation** or **Library Software** are also contained here and provide further information such as the contract and CDRL number, if hardcopy, or the operating system and developer number, if software.

The **Library Audit** is used to track the distribution of software and documentation to users at a particular site. The **Library Audit** will track whether the shipment is a full release of the application or a single item, such as a patch or update to a document. Additionally, **Library Audit** will record the site, user, shipment mode, received date, and for software, date installed.

3.11 PEOPLE AND PLACES

People and Places stores information related to sites, organizations, and points of contact. There are two components under **People and Places**: **Place** and **Users**.

The **Place** component contains the names and addresses of CMDB users' affiliated companies or sites of employment. Places are categorized by Organization, Site, Program Office or Developer. Each Place is assigned a Sponsor, or Site ID, which is a short code used to represent that Place and its specific location.

The **Users** component tracks the POC information (e.g. Sponsor, address, phone number, fax and e-mail address) of individual CMDB users. Each assigned application is listed on this form as well as the CMDB user's role applied to it. The **Users** form is also used by CMDB users to select the types of **Tracking** items for which they would like to receive system **Notification**.

3.12 RELEASE

The **Release** component lists what documentation and software comprises a release for an application.

3.13 NOTIFICATION/HOTLIST

The **Notification** component allows users to receive an automatic notification of new **Tracking** Records of their choice. The **Hotlist** is a list of records individually selected by the CMDB user to receive CMDB system Notifications when they are updated.

3.14 REPORTS

The **Reports** component allows users to extract, print or save information in the form of a consolidated report. There are two types of reports, **Standard** (pre-formatted) and **AdHoc** (user designed).

3.15 HELP

Each field name on the New Record and Query forms found under **Tracking** is a hotlink to help. Blue, underlined text is used to denote these hotlinks. Clicking directly on any field name will prompt a pop-up a screen containing a definition and brief description of that field. Assistance can also be found on the CMDB home page, which is displayed upon logging into the system. The hotlinks found here offer instruction on several CMDB functions, as well as definitions. You can return to the home page at any time during the session by selecting **Home Page** found on the upper portion of the CMDB Main Menu.

Note: Your browser's JavaScript feature must be enabled to use Help links.

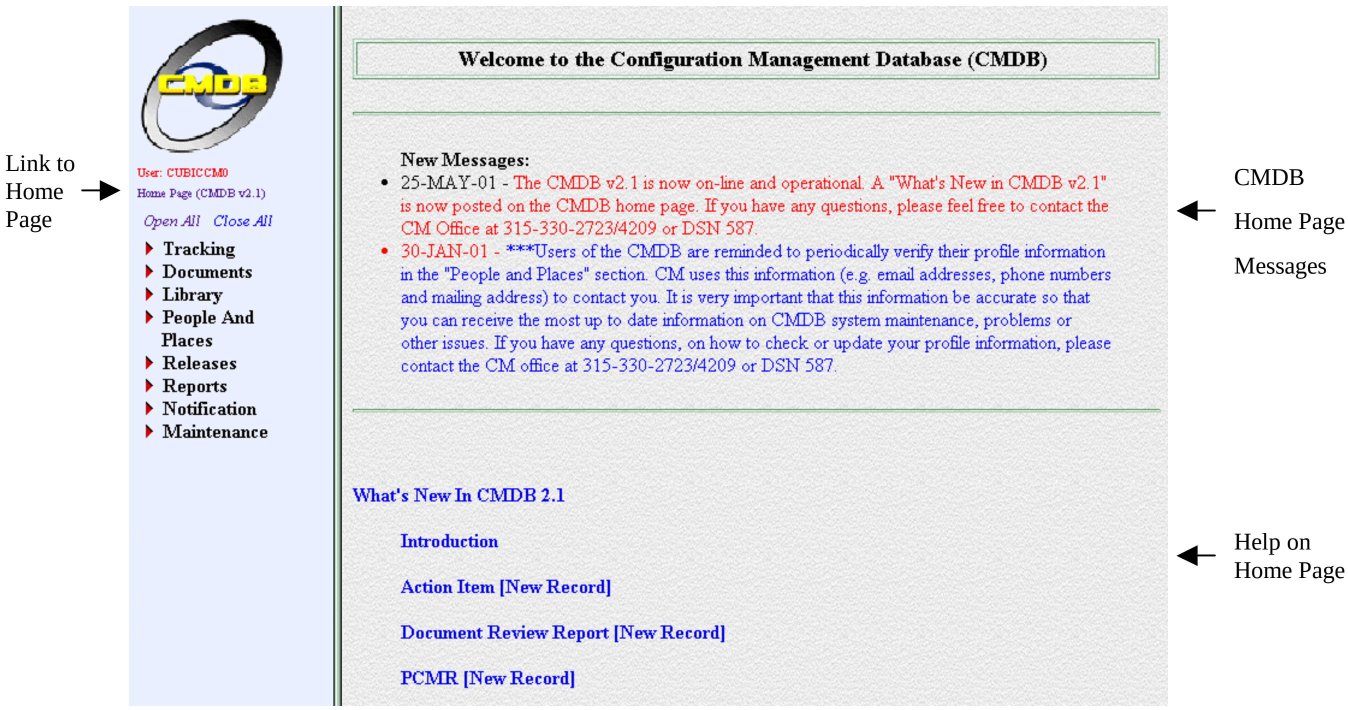


Figure 3-3 Home Page/Help

4. COMMON FEATURES

Certain areas/functions of the CMDB will be used by all of the CMDB user roles. This section provides direction on executing those functions common to all CMDB users.

4.1 SUBMITTING NEW RECORDS

Submitting new records for any of the items found under **Tracking** (i.e. AIs, DRRs, PR/CRs, MAPs , TFs) is accomplished through New Record forms. This type of form is designated by the words "New Record" found in parentheses at the end of the form name. To enter a new record for any of the **Tracking** items, select the corresponding form found under Tracking with the words "New Record" in parenthesis.

The New Record forms use a combination of free form and pull-down fields to enter information.

An asterisk (*) next to a field name indicates that the completion of that field is mandatory.

If submitting a new record through CMDB on JWICS/Intelink, the user must indicate the classification of the content being entered in each free form field. These fields will automatically be populated with ( ) empty parentheses brackets wherein user must enter either an "S" (Secret) or a "U" (Unclassified) to denote the classification of the content in that particular field. All other (pull-down or autofilled) fields will be considered unclassified. Each New Record form will also contain a mandatory **Classification** field that will be completed by selecting "S" or "U" from a pull-down menu to indicate the record's classification**.**

The ***Submit*** button is selected to add the record to the database upon completion of mandatory and optional fields. The user may also select the ***Reset*** button to clear the non-autofilled fields and begin again. Should the user want to clear all the fields, simply re-selecting the New Record form from the Main Menu will bring back another clean form. This can also be accomplished by clicking on the browser's ***Back*** button until the desired prompt screen is reached.

If all of the mandatory fields were not completed upon submitting the New Record, an error message will be displayed in the Results frame. The user will be able to view the error message to see which fields still need to be entered.

Note:

If you are submitting a record that is not a Tracking item, select the desired form type from the Main Menu. A prompt frame will be displayed giving the option to ***Query*** or ***Insert***. Select the ***Insert*** button. This will bring up the appropriate form for inserting a record. Complete the fields and select the ***Submit*** button located toward the bottom of the frame.

4.2 PERFORMING A QUERY

Performing a query for any of the items found under **Tracking** (i.e. AIs, DRRs, PR/CRs, MAPs, and TFs) is accomplished through Query forms. To query information, select the name of the desired item type from the Main Menu that contains the word "Query" in parentheses. This indicates a form designated specifically for querying. If performing a query for any other item outside of **Tracking**, select the form from the Main Menu that corresponds to the desired type of item. Options will then be presented for the query. The forms that are outside of the **Tracking** portion of the Main Menu will not be marked "(Query)". For example, to query information on a library document, **Main Library** would be selected from the **Library** section of the Main Menu. Directions on querying are provided for each type of record in the corresponding sections of this manual.

The Query forms use a combination of free form fields, list boxes, and pull-down lists to enter information. Figures 4.2-1 and 4.2-1 are examples of a list box and a pull-down field, respectively. Multiple items may be selected from the list box. The list boxes contain both up and down arrows to navigate through the items. The specific fields that offer this functionality are noted in the sections of this manual covering the individual query forms.

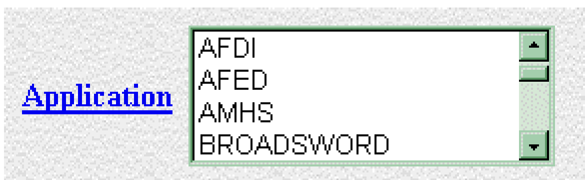


Figure 4-1 List Box

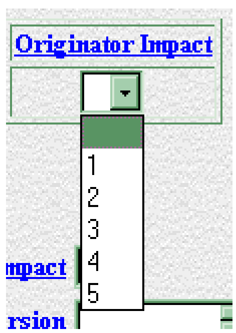


Figure 4-2 Pull Down List

To select multiple items from a list:

1. Left click on the arrows to navigate through the list. The up/down keys on the keyboard can also be used to navigate after clicking on an arrow.
2. To select an item, left click inside the box to highlight it.
3. Continue to navigate in the same fashion. To select the next item, hold down the Ctrl key on the keyboard while highlighting the item as described above. Multiple items may be selected, but the Ctrl key on the keyboard must be held down while simultaneously selecting each item.

4. The selected items will remain highlighted and can be reviewed by scrolling back through the list. An item can be de-selected by clicking on it again while holding down the Ctrl key.

If using a Unix Platform:

1. Left click in the field of interest.
2. Scroll through the items and click on an item to select it.
3. Continue to scroll through the list to select additional items by clicking on them.

Search criteria can be entered in any field or combination of fields. Queries may be narrowed or broadened depending on the amount of information given. For example, if the Application field is blank, the results will consist of ALL of the applications for which the user has permission to access meeting the search criteria (with the exception of Training, Miscellaneous Items, and CMDB). To include Training, Miscellaneous, or CMDB records in the query, those applications must be selected as a part of the search criteria. Performing a query with a blank application field will NOT include these applications.

A query may be performed using a partial date such as “FEB 2001,” or “2001.” However, when the search criteria includes a date range, complete dates must be provided. For example, the dates “JAN 2001” To “FEB 2001” would not be a proper range. To execute this query, the day, month and year fields must be completed as in Figure 4.2-3.

Figure 4-3 Date Range for Query

Enter the criteria of the search and select the ***Query*** button. Results of the query will be displayed in the Results frame at the top of the screen. The total number of results from a query and the date and time it was generated will be recorded at the bottom of the results listed in this frame. To view one of the items, select the result and the record will be displayed on the screen. To make additional queries, re-select the Main Menu link to refresh the screen, or use the browser’s ***Back*** functionality to return to the blank screen.

4.3 UPDATING RECORDS

The ability to update records is dependent on CMDB user role. Refer to the section of this manual that corresponds to the assigned user role.

4.4 SUBMITTING A STATUS RECORD

The ability to submit a status is dependent on CMDB user role. Refer to the section of this manual that corresponds to the assigned user role.

4.5 SUBMITTING AND VIEWING NOTES

Notes allow CMDB users to enter/review additional comments on **Tracking** items, excluding **TFs**. They are used to submit concurrence, financial, historical, informational, workaround, and any other information relevant to a particular item. For example, CMDB users often use notes to convey additional information such as, “This site concurs with this problem,” or to supply a workaround to a problem. In **AIs**, **Notes** can be used to report progress on a work task. This function allows all CMDB users to communicate and capture information that can be helpful in resolving a particular item.

4.5.1 Submitting a Note

Submitting a Note is accomplished by selecting ***Add Note*** for the record of interest.

To submit a Note:

1. Perform a query for and select the item of interest. Select the ***Add Note*** button located toward the bottom of the screen.
2. From the pull-down list, Select “Y” to **Restrict** access, or select “N” to allow other users to access and view the Note.
3. Select the **Type** (Concurrence, Financial, Historical, Informational, Workaround, or Other) of Note that corresponds to the information it will contain from the pull-down menu.
4. Enter the body (text) of the note in the **Text** field.
5. Select ***Submit Note*** to enter the Note, or select ***Cancel Note*** to cancel the Note from being entered.

A correct submittal will result in a message in the Results frame, “Note added Successfully.” However, if mandatory fields were missed, a pop-up screen with an error message will be displayed. The error message will contain information on what data is still required.

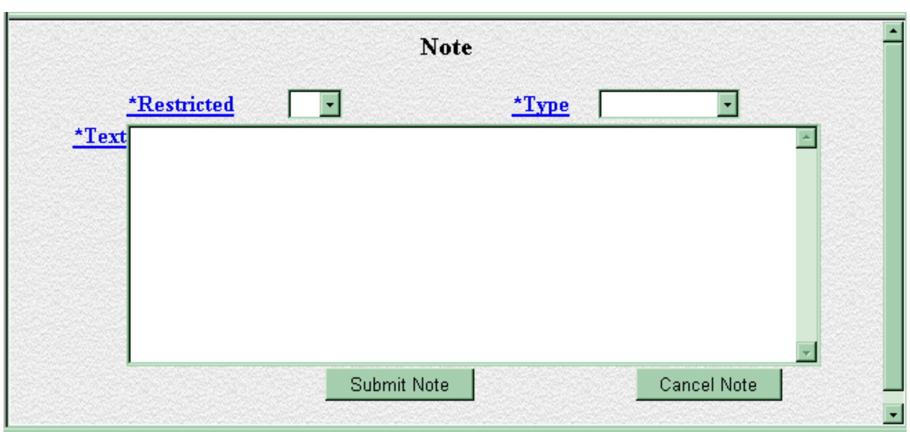


Figure 4-4 Note

4.5.2 Viewing Notes

Viewing a Note is accomplished by selecting the ***View Note(s)*** button found on the screen of the record of interest.

To view a Note:

1. Perform a query for and select the item of interest.
2. Select the **View Note(s)** button located toward the bottom of the screen. If a Note has not yet been added to this record, the **View Note(s)** button will not be present.
3. The Notes found for this item will be listed on your screen in the Results frame located toward the top of the screen. The Notes are listed by the date they were created and by type.
4. Select the Note of interest by clicking on it. The Note will be displayed in a frame in the lower portion of the screen.
5. To view another Note, simply select the desired link in the same manner.
6. To exit the note select the ***Cancel*** button, or use the ***Back*** button of the browser.

4.6 REPORTS

The **Reports** component allows users to extract, print or save information in the form of a consolidated report. There are two types of reports, **Standard** and **AdHoc.** Standard Reports display pre-formatted information; these cannot be tailored by the user. To use this option, select **Reports** from the Main Menu and then select **Standard**. The second type of report is called AdHoc. This option allows a user to design a report based on chosen criteria and format. To use this option, select **Reports** from the Main Menu and then select **AdHoc**.

4.6.1 Standard Reports

Standard reports allow the CMDB user to query the CMDB by selecting search values using pull-down lists for a series of pre-selected/pre-formatted search fields. Once **Standard** is chosen from under **Reports** in the Main Menu, a list of all of the pre-formatted standard reports available will be shown. The user will then select the Standard Report of choice and a new form will be brought up with the report information. Pull-down lists are used to make selections to complete the various fields such as Application, Version, etc. The type and number of fields will vary depending on the type of standard report you have chosen. After your selections have been completed, select ***To Report***. All of the CMDB user roles may access the standard reports.

4.6.2 AdHoc Reports

AdHoc reports allow the user to determine the report criteria. To create the report, the user must define the tables, fields and search criteria. A series of screens will be displayed prompting the user to select what data will be displayed, the order it will be displayed in, and the search criteria.

AdHoc reports can be saved to view at a later date, or to re-create the same report with different search values.

To create a new AdHoc Report:

1. Select **<u>AdHoc</u>** found under **<u>Reports</u>** on the Main Menu. The AdHoc Reports form will be displayed.
2. Select the type of report from the pull-down that correlates to type of information required. The types of reports are as follows:
   - AI Originator
   - DRR Originator
   - DRR/Library/ADRN
   - Library
   - Place Profiles
   - PCMR Originator
   - PCMR Workplan
   - Test Finding Report

After you select the report type, select ***Create New Report*** button. This will bring up the form called **<u>Choose Columns To Be Displayed On Report</u>**.

3. Choose the desired items that the report will display by selecting, or clicking on, the check boxes found after the appropriate field names (e.g. **Created** would display the date that record was entered into the CMDB). These are the column headings that you will see on the completed report. No more than twenty fields may be selected. When all the desired columns have been selected, select ***Continue*** found at the top of this form.
4. Next, the **<u>Column Display Sequence, Order By, and Alias</u>** form will be displayed. This screen is to further define the layout format of the report. The names of the columns selected for display are found here with three blank fields along side of them.
   a. The first field (from left to right) is used to number the Display Sequence. This is the order, from left to right, in which the columns on the report will be listed. To select the sequence that these columns will be displayed in, type a chronological number into the blank field along side each name. One through twenty will be the maximum number of columns since only twenty fields may be shown on one report. For example, suppose there are three column names identified Created, Updated, and Title. If it is preferred that the Title column be displayed on the AdHoc Report first (on the left most side of the report) then a “1” should be typed in the first blank field found along side of the word Title. To display the Created column after the Title column, the report creator would type in a “2” in the field next to the Created. Lastly,

a "3" typed along side of the word "Updated" would indicated that it should be the third column to be displayed on the report.

b. The second blank column found here, the ***Order By*** column, is used to establish the order by which the information will be sorted in the report's columns. The report can be sorted by a maximum of two fields. The number 1 should be selected next to the field name that the user would like the report to sort first, and 2 for the second field to be sorted. A user should choose only two fields for the sort. If left blank, the report will be sorted by the current order shown.

c. The third column on the **Column Display Sequence, Order By, and Alias** screen is the ***Alias*** column. The alias column will allow the user to type a different name/heading for each field or column within the report. If a new heading is not entered the field names will be displayed as shown.

d. Once all three columns are completed on the **Column Display Sequence, Order By, and Alias** screen, the ***Continue*** button should be selected to move to the next screen called **Enter Search Information**.

5. The **Enter Search Information** form is used to choose the information that will be displayed on the report.

   a. A user can choose up to three search criteria using the pulldowns from under each table heading. Only one item should be chosen per each row. The field names will be listed in alphabetical order from top to bottom.

   b. For each criterion, an Operator (such as equals (=), less than (<), etc.) should be chosen using the pulldown for that row.

   c. Data values for the search should then be typed in the **Search Value** field for each field that was chosen. Dates should be entered using the DD-MON-YR format. Search values will be case insensitive.

   d. AND/OR search clauses may be selected from the **AND/OR** pull-down lists located between the rows. The search will read from the top row to the bottom row, from left to right.

Note:

A report may use both the **AND** and the **OR** clause, however a search cannot be executed if the upper clause is an **OR** and the lower clause is an **AND**. All other combinations will be valid.

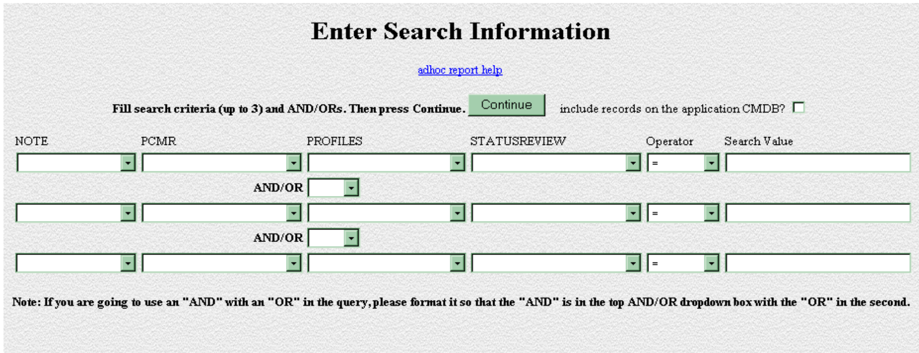


Figure 4-5 Enter Search Information Screen/AdHoc Report

6. If records for the application CMDB should be included in the search, the **Include CMDB Records?** checkbox should be selected. When the search criteria has been completed, select ***Continue***.
7. The **<u>Provide a Title For the Report</u>** form will now be displayed. If desired, a title for the report can be typed into the blank field found here. Select ***Continue***. The AdHoc report will be displayed with the number of rows displayed at the bottom of the report.
8. To further the filter the data, select ***Filter Report (too many rows?)*** located at the bottom of the screen. The **<u>Filter Results Further</u>** screen will be displayed. Using the pull-down lists, select a field and an Operator from the respective fields. Enter a **Search Value** and select ***New Filtered Report.*** The report will be displayed in a table format with the number of rows displayed at the bottom of the report. The user may continue to filter the report in this fashion to derive the exact information that is required.

The user may then print the report using the browser's print utility, save the report for future use, or show the delimiters of the report to be able to copy and paste the report into another application.

4.6.2.1 Save Report

After creating an AdHoc Report, the user may save it for future use.

To Save an AdHoc Report:

1. Generate an AdHoc report as described in section 4.6.2.
2. Scroll to the bottom of the report, enter a name for the report in the blank field and select ***Save Report***.
3. The saved report will now be available for future use in AdHoc Reports.

The saved report is accessed from the initial prompt screen in **<u>AdHoc Reports</u>** by selecting it from the pull-down list under **Choose a Previously Saved Report**. Selecting ***Previous Report*** will produce the exact report that was saved. Selecting the ***Previous Report (With New Search Values)*** button will produce the layout of the saved report, but will allow the user to modify the search values.

To save report results in a different application, such as Microsoft Word, select ***Show Delimiters*** button should be selected and then the browser's ***Select All*** and ***Copy*** functionality can be used to save a copy into memory and paste the report results into a different application, such as Microsoft Word.

4.6.2.2 Sample AdHoc Report

The directions below step through the completion of a typical AdHoc Report. This can be used, substituting the desired application, etc., to familiarize the user with the process of creating an AdHoc report.

This report will list the PR Title, PCMR Number, Type and (Originator) Login ID of all of the Open (not completed) PRs against the application of interest (e.g., CMDB).

1. Select **AdHoc** under the **Reports** option from the Main Menu.
2. Under **Create New Report Using the Following**, select **PCMR/Originator Report**.
3. Select ***Create New Report***.
4. Click in the following boxes from the PCMR column (second column): **PCMR_NO**, **TITLE, TYPES.**
5. Select **LOGIN_ID** from the Profiles column (third column).
6. Select ***Continue***.
7. Fill in the ***Column Display Sequence, Order And Alias*** screen as shown below.

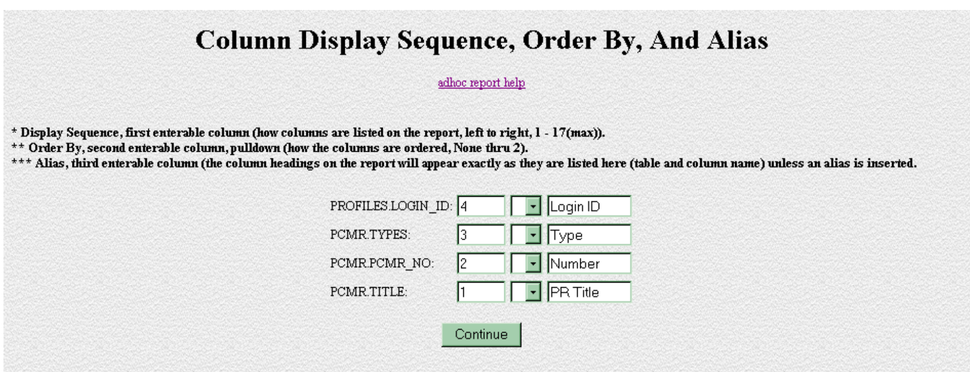


Figure 4-6 AdHoc Report Display Sequence, Order By And Alias

8. Fill in the **Enter Search Information** screen as shown below substituting the application of choice for CMDB if desired**.** If the search should include CMDB records, be sure to check the "**include records on the application CMDB?"** box.

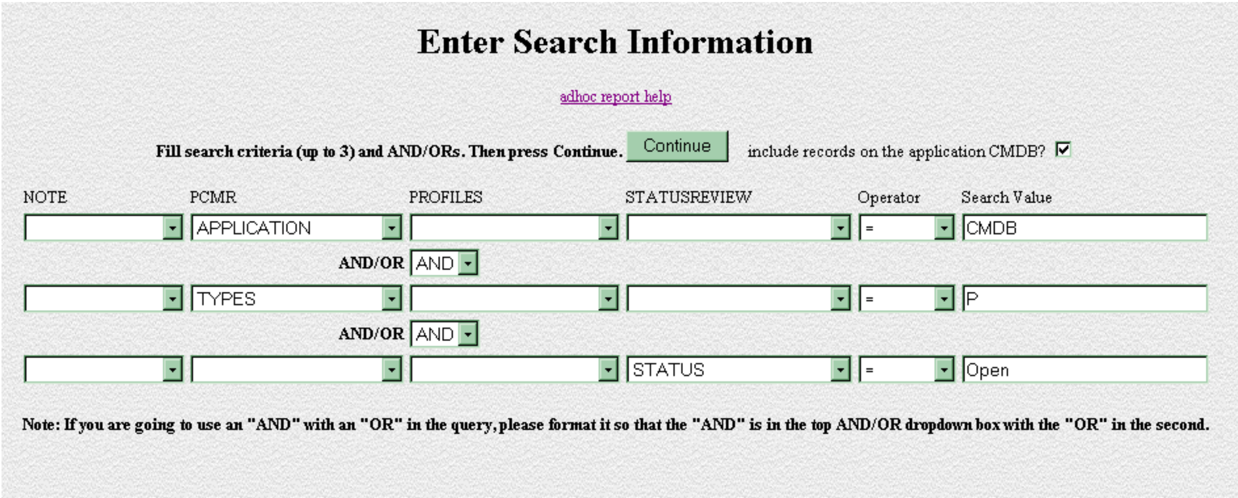


Figure 4-7 AdHoc Enter Search Information Form

9. Select ***Continue***.
10. The report will be displayed.

4.7 NOTIFICATION/HOTLIST

The **Notification** component allows users to receive an automatic CMDB system notification of new information of their choice.

Users have the ability to select specific items in the CMDB that are of particular interest to them and track them when new information is entered or existing information is modified. To select the types of new records to receive **Notification** on, follow the directions below.

1. Select **Users**, found under **People and Places**, from the Main Menu. This will bring up the **User Profile/Update** screen.
2. Using this form, perform a query for and select your own **User Profile** Information.
3. Located toward the bottom of this screen is the prompt, "**Check boxes below to receive system notification**." Below this the following fields with pull-down menus are displayed: **New AI**, **New DRR**, **New PCMR**, **New Test Finding**, and **New Workplan**. Place a check by left clicking the box next to those types of new records for which Notification is desired.
4. Select the ***Update*** button upon selection completion. Automatic system Notification will be provided when new records in the categories selected have been entered into the CMDB.

Note:

Records must be added to the CMDB User's **Hotlist** to receive **Notifications** when they are updated/modified.

A **Hotlist** is a list of records that the user selects to track. The **Hotlist** will prompt the CMDB to send notification to the user when any of the selected records has been updated. This Notification/Hotlist system allows the user to review new records when they are entered into the CMDB and select only those records of interest for tracking, eliminating excessive system **Notifications**.

To subscribe to a **Hotlist** follow the directions below:

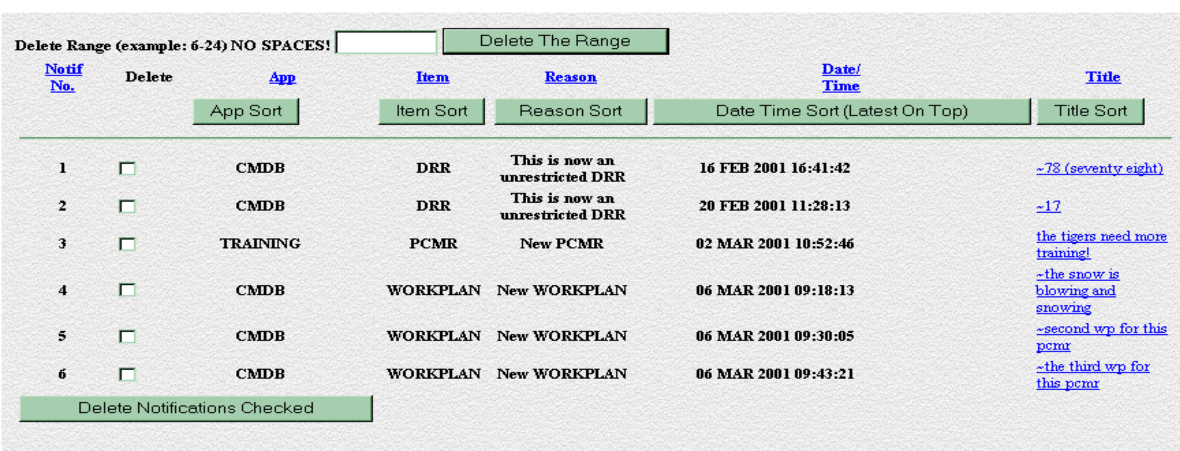
1. Scroll to the bottom of the screen of the queried record/item of interest.
2. Select the ***Get on Hotlist*** button. This will add that record to the Hotlist and notification will be provided anytime it is updated. If the ***Get on Hotlist*** button is not present in a particular record, then the item was previously selected for addition to the Hotlist.

4.7.1 Viewing Notifications

To view Notifications:

1. Select **Notification** from the Main menu of the CMDB.
2. A separate window will open containing Notifications. To ensure the prompt receipt of new Notifications, this screen is automatically refreshed every five minutes.
3. To review individual Notification records, simply select the title of the item of interest. The main CMBD browser will display the record that has been selected.

The list of Notifications can be sorted by selecting the desired button located below each column title. For example, to sort the items alphabetically by the name of the associated application, ***App Sort*** button would be selected. In Figure 4.7.1-1, the items have been sorted alphabetically (DRR records appear first, PCMR second, and Workplan last) by item type by selecting ***Item Sort***.



Delete Range (example: 6-24) NO SPACES! [ ] Delete The Range

Notif No.	Delete	App	Item	Reason	Date/ Time	Title
		App Sort	Item Sort	Reason Sort	Date Time Sort (Latest On Top)	Title Sort
1	☐	CMDB	DRR	This is now an unrestricted DRR	16 FEB 2001 16:41:42	~78 (seventy eight)
2	☐	CMDB	DRR	This is now an unrestricted DRR	20 FEB 2001 11:28:13	~17
3	☐	TRAINING	PCMR	New PCMR	02 MAR 2001 10:52:46	the tigers need more training!
4	☐	CMDB	WORKPLAN	New WORKPLAN	06 MAR 2001 09:18:13	~the snow is blowing and snowing
5	☐	CMDB	WORKPLAN	New WORKPLAN	06 MAR 2001 09:30:05	~second wp for this pcmr
6	☐	CMDB	WORKPLAN	New WORKPLAN	06 MAR 2001 09:43:21	~the third wp for this pcmr

Delete Notifications Checked

Figure 4-8 Notifications Display

4.7.2 Delete Notifications

Records are deleted from the list of Notifications in two ways.

To delete a range of Notification records:

1. Individual Notifications are numbered (at the left side of the screen) from the top of the list to the bottom beginning with "1". Determine the range of numbers for deletion.
2. Type the range in the blank field next to the words "**Delete Range (example: 6-24) NO SPACES!".** Use the format that is provided in the example noting that spaces should not be used.
3. Select ***Delete The Range***. The range of records will be deleted and the remaining items will be renumbered.

To delete individual or non-contiguous Notification records:

1. Select the record(s) desired for deletion by clicking on the checkbox(es) found next to the number of each record.
2. Scroll to the bottom of the list of Notifications and select ***Delete Notifications Checked***.
3. Each record that was checked will be deleted and the remaining items will be renumbered.

4.7.3 Viewing Hotlist

An individual CMDB User's **Hotlist** can be reviewed in a standard report.

To view a list of the items on the Hotlist:

1. Select **Standard Reports** found under **Reports** on the Main Menu.
2. A screen will be displayed listing all of the Standard Reports that are accessible as defined by the CMDB User Role. Under **Hotlistings** is a report entitled "Hotlist For (CMDB User's Login ID)". Select this link and a Hotlist Report will display all of the items on the Hotlist in columns listing the CMDB tracking number and the record type.
3. Clicking on the CMDB tracking number of any item listed in the report will prompt the display of that record. To return to the Hotlistings report, use the browser's ***Back*** functionality.

4.7.4 Unsubscribe from Hotlist

To remove an item from your Hotlist:

1. Display the record that you would like to remove by either:
   a. Perfoming a query using the appropriate (Query) form and selecting the item from the Results Frame, or
   b. Accessing your **Hotlistings** from **Standard Reports** as described in section 4.7.3 (above) and selecting the item of interest from the list.
2. Scroll toward the bottom of the displayed record and select ***Get off Hotlist***. The Results Frame will display the message "**You have been taken off our hotlist**," to indicate that the removal was successful.

4.8 PRINTING RECORDS

All CMDB records can be printed individually by using either the browser's print utility alone, or for **Tracking** records, by first selecting the ***Print*** button on the record of interest and then using the browser's print utility. A list of **Tracking** records can also be printed together by performing a query and selecting ***Print All*** found in the Results frame.

4.8.1 Printing a Tracking Record

The ***Print*** button is found toward the bottom of each **Tracking** record. Selecting ***Print*** will generate a one-page layout containing the complete text of that record.

1. Perform a query for and select the item of interest.
2. Scroll toward the bottom of the screen and select ***Print.*** The record will be formatted to one page. If the record contains a large amount of text, the layout may exceed one page. ***Or***, to include **Notes** in the formatted record, select ***Print w/Notes.*** The ***Print w/Notes*** button will generate a record formatted with the inclusion of all **Notes** that have been added to it. The **Notes** will be displayed toward the bottom of the record.
3. Use the browser's print utility to print the record; selecting the ***Print*** button alone will not prompt the system to print the record.

Note:

You may bypass using the CMDB ***Print*** functionality and use your browser alone to print the **Tracking** record. This will print the record as it appears on the screen and may result in incomplete text fields. To ensure that text from scrollable fields appears in its entirety, it is best to use the ***Print*** functionality before using the browser to print a record.

4.8.1.1 Printing a List of Records

The complete records of the results of a query can be printed in a contiguous list directly from the Results Frame.

1. Perform a query for the items of interest using the appropriate (Query) form found under **Tracking** on the Main Menu.
2. Scroll to the end of the list of results in the Results Frame.
3. Select ***Print All*** to format the list of records for printing, or select ***Print All w/Notes*** to include the notes that are associated with each record. The records will be formatted in a contiguous list with the end of each record denoted by a series of asterisks (*****) and the words, "End of Record."
4. Use the browser's print utility to print the record; selecting the ***Print All*** or the ***Print All w/Notes*** button alone will not prompt the system to print the record.

4.8.2 Printing Other Records

The CMDB ***Print*** functionality is not available for records outside of the **Tracking** area. To print records found outside of **Tracking**, follow the directions for printing other records below.

1. Perform a query for and select the item of interest.
2. Use the browser to print the record.

Note:

When printing a record, the browser will print only the frame that is currently active. Before using the browser to print a record, ensure that the desired frame has been selected by left clicking on it.

5. ERROR RECOVERY AND PROBLEM REPORTING

Errors will be displayed in the Results frame located at the top of the screen. Errors will contain informational messages that will identify the type of problem.

To recover from an error, either refresh the screen, or use the browser's Back feature to return to the previous screen. Re-selecting the desired form from the Main Menu will also clear an error however, this results in the need to re-enter all necessary information into the form. If an error is received that states, "**Error…Missing Value,"** then information that is required in order to submit a new record has been omitted. The error will identify which fields need to be completed. Either refresh the screen, or use the browser's **Back** functionality to return to the form, complete the missing information and re-submit that record.

If technical difficulties or assistance is required CM can be contacted at:

Commercial Phone: (315) 330-2723 OR (315) 330-4209

DSN: 587-2723/4209

For less immediate needs, CM can also be reached via e-mail at:

E-mail: cubic_cm@rl.af.mil

Intelink e-mail: cubic.cm@mail.rome.ic.gov

Reporting Problems:

PR/CRs against the CMDB can also be submitted via the CMDB through the PR/CR/MAP/REQ (New Record) form. Directions for submitting PCMRs are provided for each CMDB user role in the corresponding sections of this manual.

6. APPLYING FOR AN ACCOUNT

Applying for a CMDB account is done online by completing forms with personal profile information. Below are step-by-step directions to complete the process. Figure 6-1 displays the User Profile Input Screen used to accomplish this task..

1. Using a browser, type in the appropriate URL:

   Internet: https://cmdb.deepthought.rl.af.mil/new_user/new_profile.master

   Intelink: http://athens.rome.ic.gov/new_user/new_profile.master

OR

1. Access the Configuration Management Homepage to enter and submit your personal profile information. The CM Homepage is located at the following URL:

   Internet: “**http://www.if.afrl.af.mil/programs/cm/**”

2. Select the **CMDB** button from the menu on the left side of this page. Under “**New Users**,” select the link labeled, “**Profile**”. The application screen to complete Profile information will be displayed.

Note:

All mandatory fields marked by the asterisk (*) must be completed.

1. Select **Place of Work** from the pull-down menu and then the ***Select*** button. *If the appropriate place of work is not on the pull-down menu, follow Steps a-m, below before proceeding.*

   a. If the appropriate **Place of Work** is not on the pull-down menu, select “**Other**” from the pull-down menu and then ***Select***. The **Place and Address** form will be displayed. To insert the appropriate **Place of Work** into the CMDB, complete the fields in this form.

   b. Complete the **Affiliation/Company** field with your company’s name, using complete names instead of acronyms.

   c. Enter the acronym of the company/place in the **Description** field along with any appropriate additional information.

   d. Enter an abbreviation for the company in the **Sponsor field**.

   e. Type the company’s/organization’s address into the **Address** field.

   f. If applicable, type the name of the **Executive Manager**.

   g. Use the pull-down menu to select a **Place Type. Place Type** must be a Program Management Office (PMO) that subscribes to CM services, a Developer for a PMO, a Site affiliated with a PMO, or an Organization.

   h. Type in the **City** and **Zip Code** of the company/organization.

i. Use the pull-down menu to select the **State** where the company/organization is located.

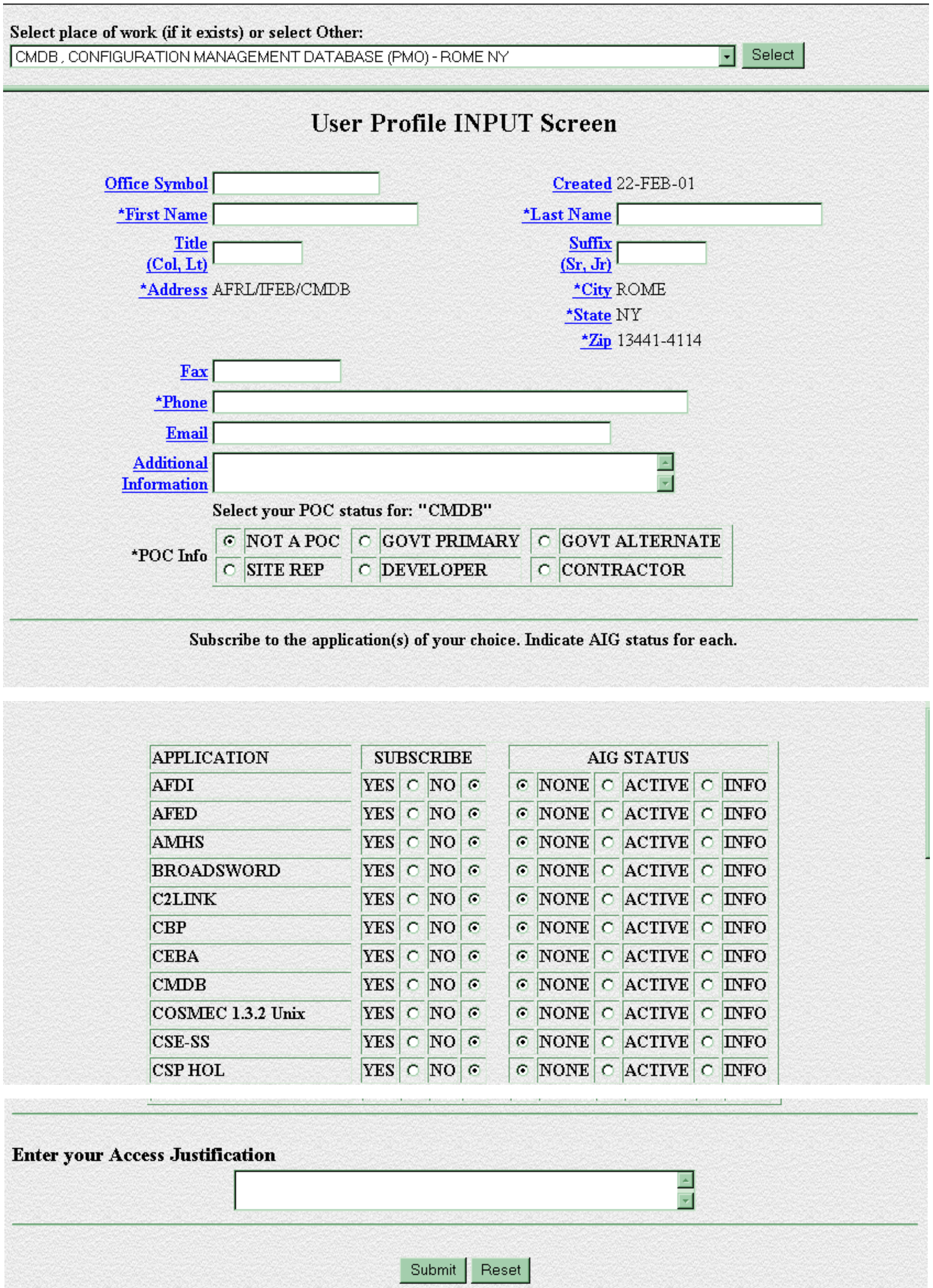
j. If the company/organization has a **DSN**, **Help Desk Information,** a **Genser Address,** or a **URL** provide this information in the respective fields.

k. Type in any **Additional Information** about the company into this field. This area should be used to indicate if an Intelink account is also required.

l. Select ***Submit*** found at the bottom of the screen when the information has been completed**.**

m. An error will be displayed if any mandatory fields are incomplete, which will provide instructions for completing and re-submitting the form. Upon successful submission, the **User Profile INPUT** screen will be displayed with a pre-populated address.

2. Fill out the **User Profile INPUT** screen. Type **First Name** and **Last Name** into the corresponding fields. .
3. Type all phone numbers that you wish to provide, including area code, DSN, extension and/or fax numbers, into the **Phone** field. .
4. Type in your unclassified and classified (if applicable) Email addresses into this field. .
5. Select the appropriate option for **POC Info** by clicking on the check box next to the appropriate description in the table. .
6. Select the **Application(s)** for which access is requested by selecting the check box next to the “YES” box in the **SUBSCRIBE** column. The default in the SUBSCRIBE column is “NO” requiring action only for those applications for which access is requested. .
7. For each application selected choose the appropriate **AIG Status**, “None” “Active” or “Info,” by selecting the corresponding check-box found beside each application in the **AIG Status** table. .
8. The prospective CMDB User is asked to provide an explanation of the work assignment that requires access to a particular program’s CM data. This information is entered in the **Access Justification** field. .
9. Select ***SUBMIT*** button. .
10. After a request for access is submitted, CM and the PMO of each application that the user has subscribed to, will receive notification of the request. Once PMO approval has been granted, CM will create an account with a unique login id and password. CM will then contact the user with this information. .



Select place of work (if it exists) or select Other:

CMDB , CONFIGURATION MANAGEMENT DATABASE (PMO) - ROME NY   Select

User Profile INPUT Screen

Office Symbol   Created 22-FEB-01

*First Name   *Last Name

Title (Col, Lt)   Suffix (Sr, Jr)

*Address AFRL/IFEB/CMDB   *City ROME

*State NY

*Zip 13441-4114

Fax

*Phone

Email

Additional Information

Select your POC status for: "CMDB"

*POC Info: NOT A POC | GOVT PRIMARY | GOVT ALTERNATE | SITE REP | DEVELOPER | CONTRACTOR

Subscribe to the application(s) of your choice. Indicate AIG status for each.

APPLICATION	SUBSCRIBE		AIG STATUS		
AFDI	YES	NO	NONE	ACTIVE	INFO
AFED	YES	NO	NONE	ACTIVE	INFO
AMHS	YES	NO	NONE	ACTIVE	INFO
BROADSWORD	YES	NO	NONE	ACTIVE	INFO
C2LINK	YES	NO	NONE	ACTIVE	INFO
CBP	YES	NO	NONE	ACTIVE	INFO
CEBA	YES	NO	NONE	ACTIVE	INFO
CMDB	YES	NO	NONE	ACTIVE	INFO
COSMEC 1.3.2 Unix	YES	NO	NONE	ACTIVE	INFO
CSE-SS	YES	NO	NONE	ACTIVE	INFO
CSP HOL	YES	NO	NONE	ACTIVE	INFO

Enter your Access Justification

Submit   Reset

Figure 6-1 User Profile Input Screen

7. SYSTEM ACCESS

Upon verbal notification by CM, the CMDB User has access to application data using a web browser at either the Internet and/or Intelink URL below:

Internet URL: “https://cmweb.deepthought.rl.af.mil/cm/cmdb_cm.master”

Intelink URL: “http://athens.rome.ic.gov/cm/cmdb_cm.master”

Note:

Access to the CMDB (Internet) is also available via the Configuration Management Homepage at the following URL:

“http://www.if.afrl.af.mil/programs/cm/”

1. Select the CMDB button from the menu on the left side of the page.
2. Under **Current Users** select the link that says **CMDB**. This will send you directly to the CMDB and a login prompt will be displayed.
3. Type the **Login ID** and **Password** into the respective fields.
4. If logging in for the first time, follow the directions provided by CM. After initial login, a prompt will request selection of a new password.
5. After submitting a correct Login ID and the new password, the CMDB Homepage will be displayed. Use the menu on the left side of the screen (Main Menu) to navigate.

8. SITE USER

The role of Site User is assigned to the user of an application at a site. Site Users have permission to view (query) and submit new AI, DRR, PR/CR/MAP/REQ, Note and Place records. The Site User can also query and view unrestricted TFs, and Library records information. Access privileges and rights apply only to the application(s) for which the CMDB user has been approved.

A CMDB user who submits any of the above items is considered the Originator of the entry. A special set of privileges apply to a Site User who is also the Originator of an item. If submitting items for inclusion in the CMDB, in addition to this section, also refer to section 12 of this manual to review these additional capabilities.

8.1 RESPONSIBILITIES OF THE SITE USER

The Site User should ensure that the User Profile (point of contact) information in the CMDB is accurate and updated as needed. CM should be notified if CMDB site address (Place) information requires updating. The Site User must also notify CM if leaving the associated program or if changing roles within the program. The Site User who is the Originator of a record in the CMDB is also responsible for updating the record, and/or submitting Originator status records as necessary (refer to section 12, Originator).

8.2 UPDATING RECORDS

Note:

The Site User has the ability to update only those records of which he/she is the Originator. For more information on Originator privileges, refer to section 12 of this manual.

8.3 STATUS

Statuses are used to display the current standing of a **Tracking** item in its life cycle. These are found toward the bottom of an individual record within a table called **Current Status**. This table displays the current standing of the record in its life cycle, the date the status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the involved role types with this privilege. The Site User has the ability to review Status records, but must be the Originator of a Tracking record in order to submit a status. Refer to Section 12 for more information on Originator privileges.

8.3.1 Viewing Statuses

AI, **DRR**, and **PCMR** forms display the most recent status information within a table called **Current Status**. This table displays the current standing of the record in its life cycle, the date the status was added, and the name of the person who added it. There are three status fields; one designated for each of the role types with the privilege to submit status information on that item. Below the **Current Status** table, there is also a table called **Status History** that displays any status records that were submitted prior to the current statuses.

To View AI, DRR, or PCMR Statuses:

1. Perform a query and select the item of interest.
2. The statuses will be displayed toward the bottom of the form as described above—no further action is necessary.

The **TF** form displays the current status of that item in a single field called **Status**. This field is located toward the bottom, right side of the form. The Site User can access only those Test Findings which are Unrestricted.

To View a Test Finding Status:

1. Perform a query and select the item of interest.
2. The status will be displayed toward the bottom of the form—no further action is necessary.

8.4 ACTION ITEM (AI)

An **AI** is the management tool used to track required activities that are of interest at the program level. A Site User or other individuals initiate an AI at a meeting by bringing it to the attention of the PMO. The AI is entered into the CMDB usually by a member of the PMO, but Site Users can also submit AIs directly through the CMDB. The AI is assigned to an individual, known as the Assignee.

8.4.1 Action Item (New Record)/Submitting Action Items

Submitting new AI records is accomplished through the **Action Item (New Record**) form.

1. Select **Action Item (New Record)** found under Tracking in the Main Menu.
2. **Originator And Site** information will be auto-filled in this field. However, if entering the AI for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select "Not Found" from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone Number** and **Site** in the respective fields. When the form is complete, select ***Submit***.
3. Select the **Assignee** and **Site**. If the name is not found select "Not Found" from the pull-down and proceed as described above.
4. The **Created** date will be auto-filled.
5. Fill in the **Suspense** date.
6. Select the **Application** that the AI is against from the pull-down menu.
7. Select the **Classification** of the AI. If on Internet CMDB, this will auto-fill to "U" for unclassified.
8. Type the **Title, Description, Source, Additional Information**, and **Disposition** into the respective free form fields.

9. An asterisk ***** by a field name indicates that the field must be completed to submit the AI. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the AI into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the frame that says, "Insert Successful" with a number to identify the AI and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

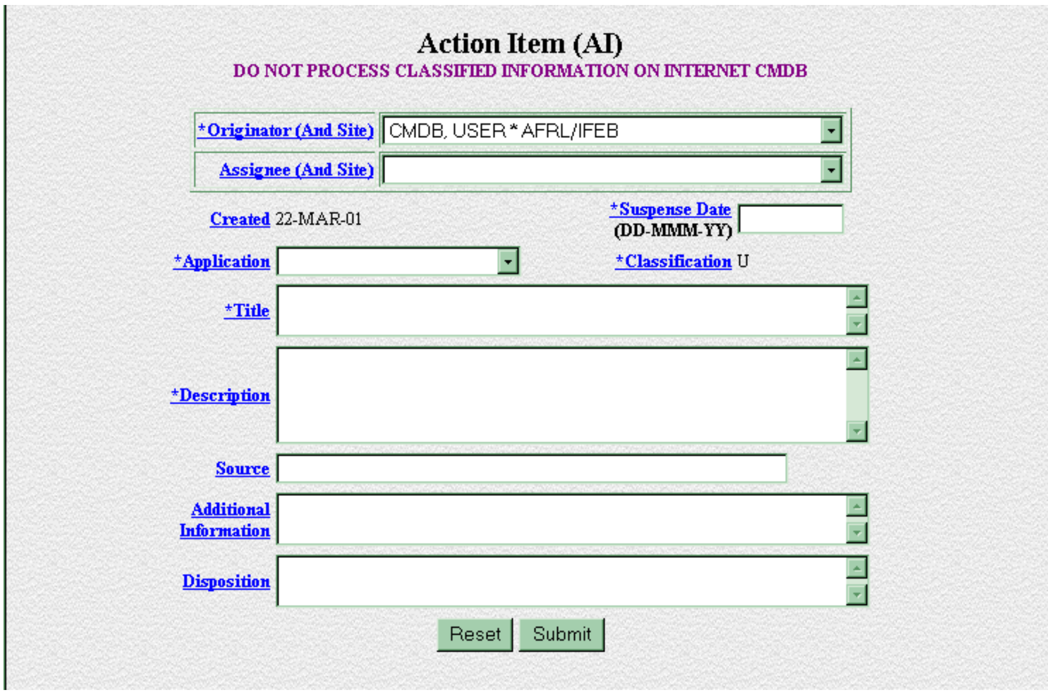


Figure 8-1 AI New Record

8.4.2 Action Item (Query)

Performing a query for an Action Item is accomplished through the **Action Item (Query)** form (Refer to Figure 8.4.2-1).

1. To query **Action Item** records, select **Action Item (Query)** found under **Tracking** on the Main Menu.

2. The **Action Item (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application, Originator Status**, **Assignee Status**, and **CM/PM Status**.

3. Select the ***Query*** button. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

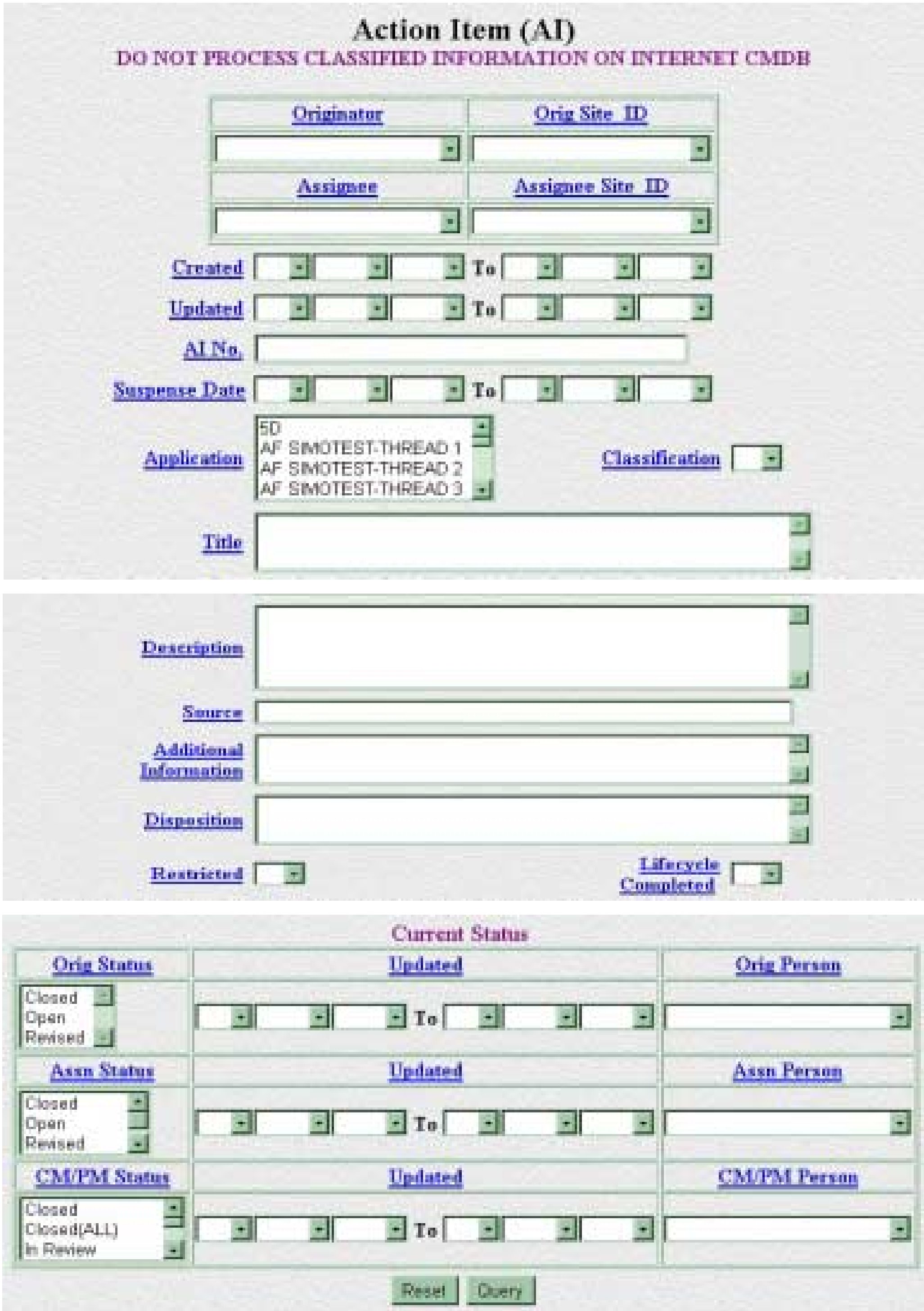


Figure 8-2 AI Query

8.5 DOCUMENT REVIEW REPORT (DRR)

The **Document Review Report** (DRR) is used to coordinate and track changes to program documentation. DRRs identify technical, editorial, informational or requirements issues that are unclear or incorrect in any type of documentation produced for supported applications.

8.5.1 Document Review Report (New Record)/Submitting New DRRs

1. Select **Document Review Report (New Record)** found under **Tracking** on the Main Menu**.** This will bring up the DRR form used for entering New DRRs into the CMDB.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on CMDB User login. However, if entering the DRR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the Originator's Last Name, First Name, Phone number and Site in the respective fields. Upon completion, select Submit.
3. Select the **Originator Impact** from the pull-down.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the document has been generated for from the pull-down.
6. Select the **Classification** of the DRR. If on Internet CMDB, this will auto-fill to "U" for unclassified.
7. Select the **Doc No., Acronym, Document Title** from the pull-down. If the pull-down does not contain the document, select "Not Found". Directions will then be provided to contact CM to request that the document be catalogued into the CMDB Library, as DRRs cannot be written against documentation not under CM control.
8. Type the **Page Number**, **Page Location, Description, Source, Additional Information** and **Disposition** into the respective free form fields.
9. Select the **Impact** from the pull-down menu.
10. An asterisk will indicate mandatory fields within the New Record form. These fields must be completed to submit the DRR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the DRR into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the frame that says, "Insert Successful" with a number to identify the DRR and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

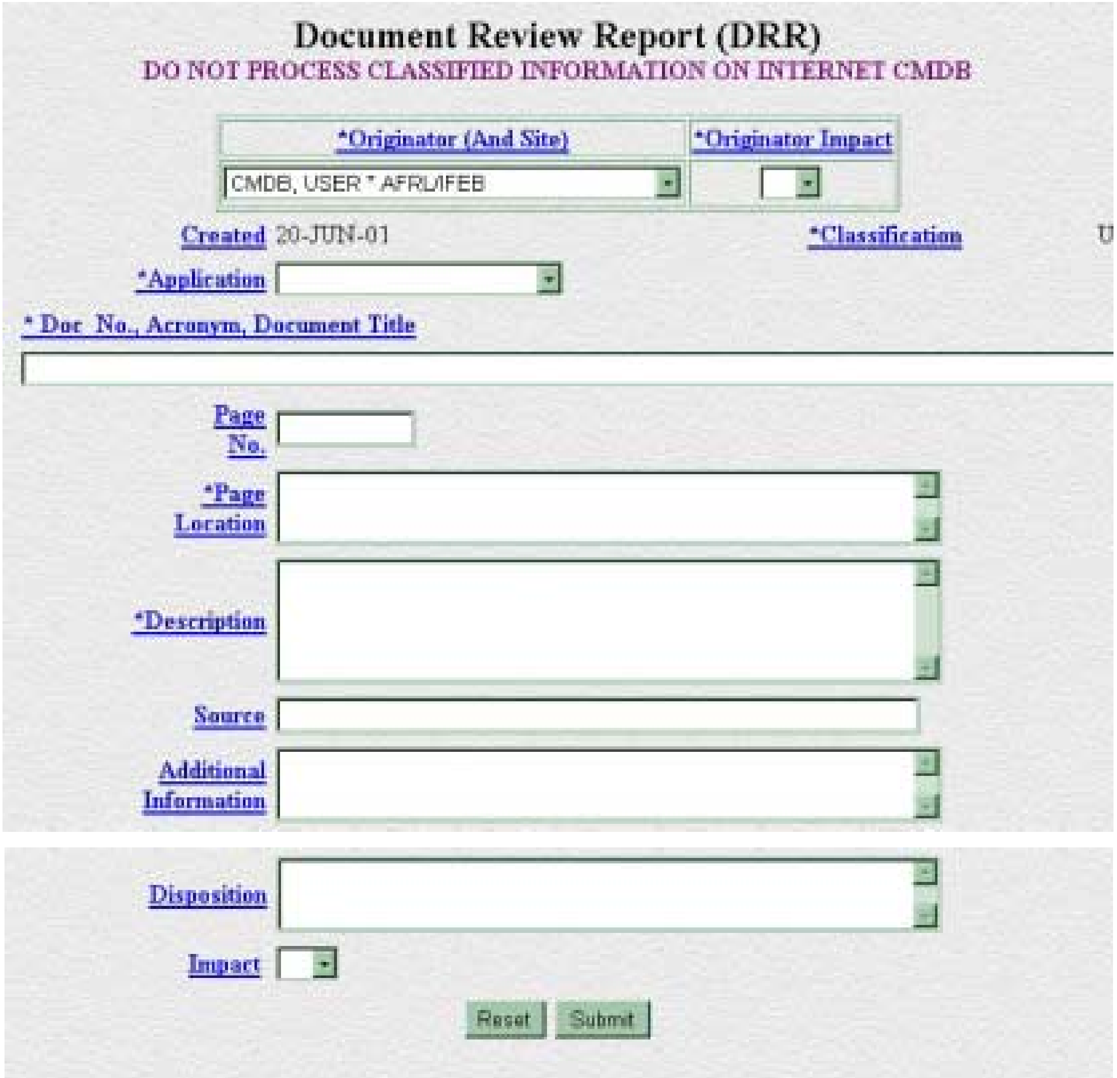


Figure 8-3 DRR New Record

8.5.2 Document Review Report (Query)

Performing a query for a DRR is accomplished through the **DRR (Query)** form.

1. To query DRR records, select **DRR (Query)** found under **Tracking** on the Main Menu.
2. The **DRR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application**, **Version**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the results.

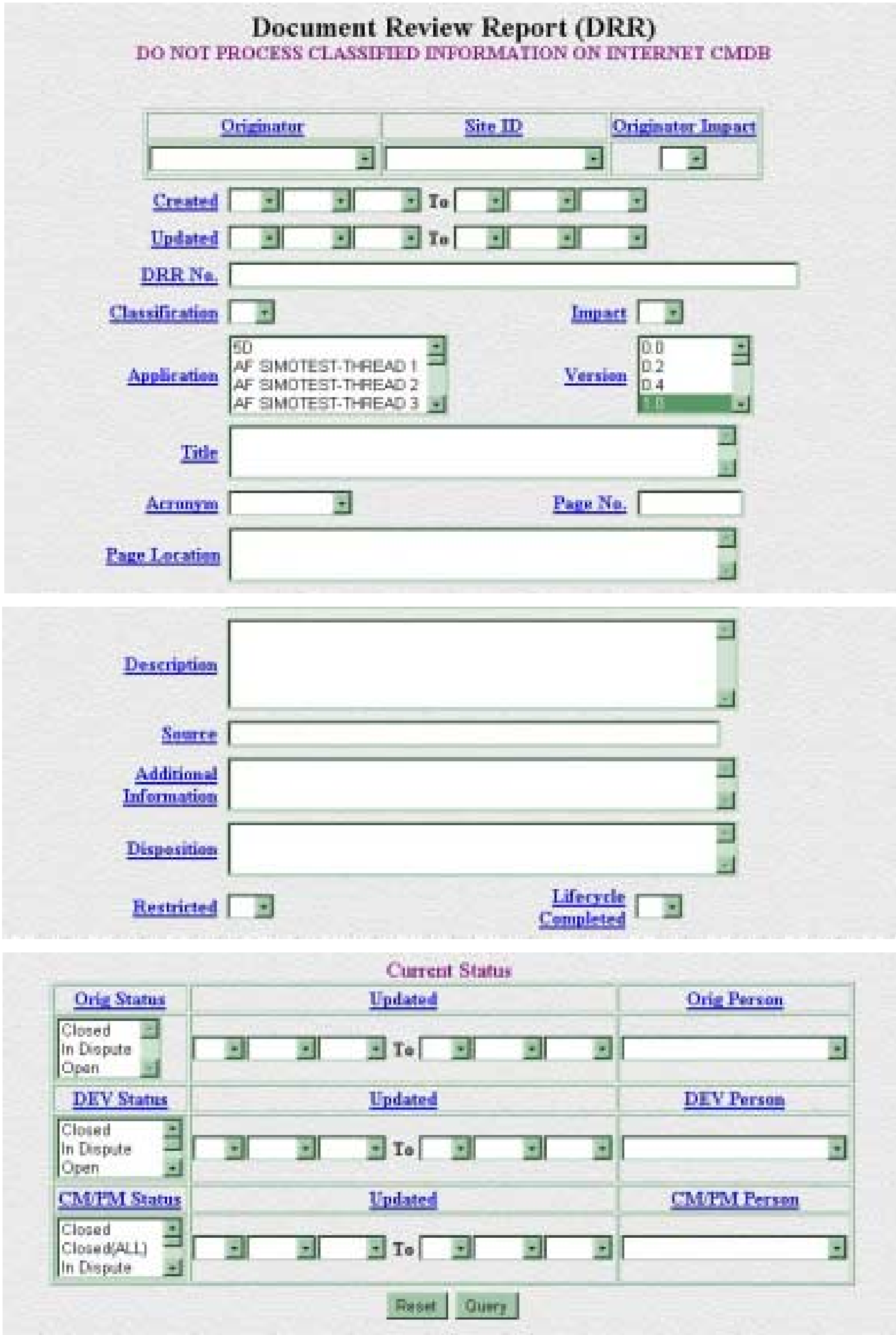


Figure 8-4 DRR Query

8.6 PROBLEM REPORT/CHANGE REQUEST/MULTIPLE APPLICATION PROBLEM/REQUIREMENT

The **Problem Report/Change Request/Multiple Application Problem/Requirement (PR/CR/MAP/REQ or PCMR)** is the management tool used to track, evaluate, verify, and approve or disapprove problems with baselined applications.

8.6.1 PR/CR/MAP/REQ (New Record)/Submitting PCMRs

The PR/CR/MAP/REQ (New Record) form is used for submitting new PCMRs into the CMDB.

1. Select **PR/CR/MAP/REQ (New Record)** found under **Tracking** in the Main Menu.
2. Select **Originator And Site** from the pull-down menu. The CMDB User's name will be auto-filled in this field. However, if entering the PCMR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the Originator's Last Name, First Name, Phone number and Site in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down menu.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the PCMR is against from the pull-down menu.
6. Select the **Version** of the application that the PCMR is against from the pull-down menu.
7. Select the **Operating System** from the pull-down menu.
8. Select the **Type** of record that being entered from the pull-down menu.
9. Type the **Affected Organization** into the free form fields.
10. Select the **Test Phase** from the pull-down menu.
11. Type in the **Functional Area, Title, Description, Source** and **Additional Information** into the free form fields.
12. An asterisk * by a field name indicates that the field must be completed to submit the PCMR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

Figure 8-5 PCMR New Record

8.6.2 PR/CR/MAP/REQ (Query)

Performing a Query for PCMR records is accomplished through the **PR/CR/MAP/REQ (Query)** form.

1. To query PCMR records, select **PR/CR/MAP/Req (Query)** found under **Tracking** on the Main Menu.
2. The **PCMR (Query)** screen will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Impact**, **Application**, **Version**, **Type**, **Originator Status**, **Developer Status** and **CM/PM Status**
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

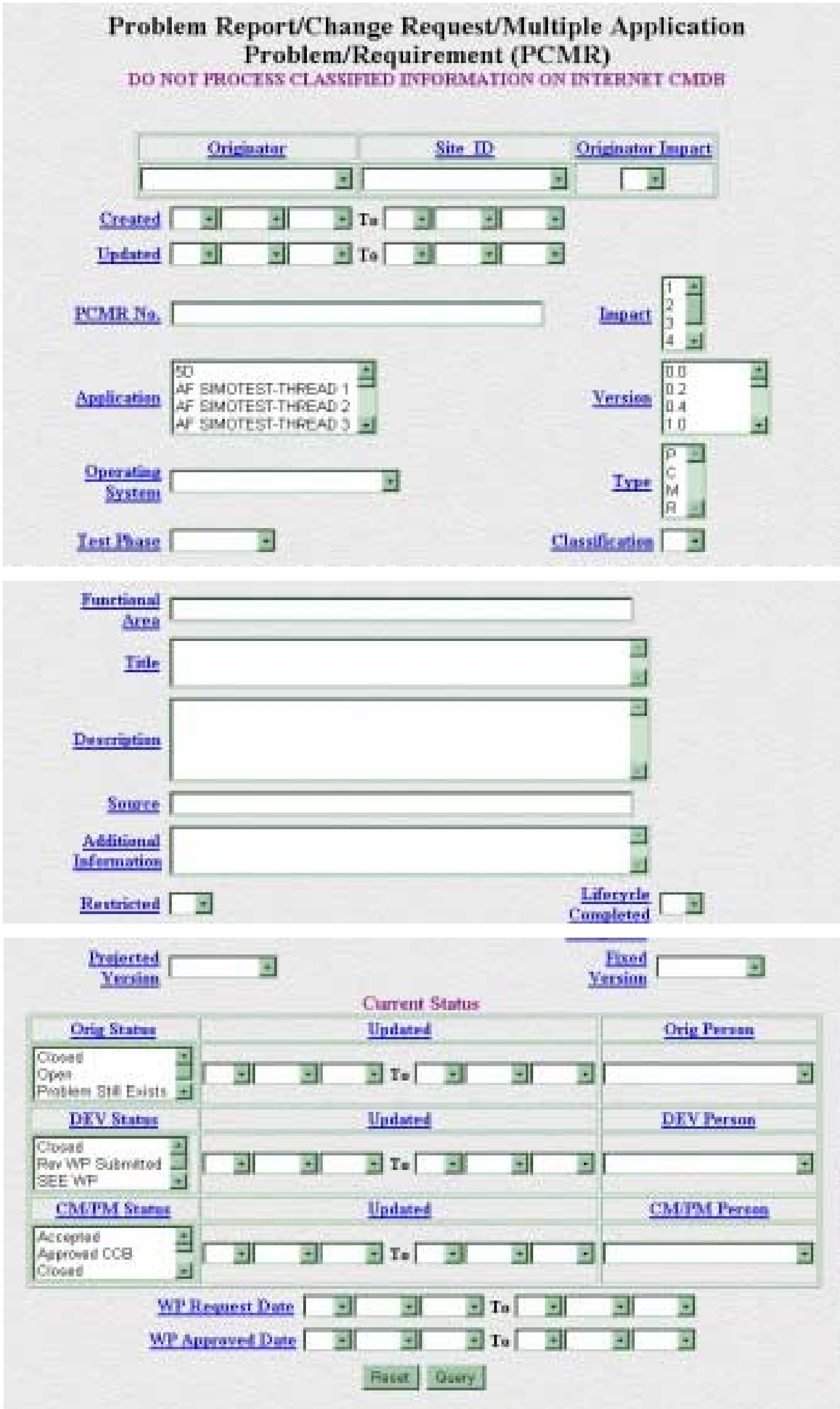


Figure 8-6 PCMR Query

8.7 LIBRARY

The Library is the management tool used to catalogue program documentation and software maintained by CM. In addition, Advanced Document Revision Notices (ADRNs) are also maintained here. An ADRN is a change that has been made to a final document. The actual items in the library may be hardcopy or softcopy documents, or software. There are two sections under Library, the **Main Library** and **Library Audit**.

8.7.1 Main Library Query

The User can search for document information in a section of the CMDB called the **Main Library** found on the Main Menu under the heading **Library**.

1. Locate **Library** on the Main Menu and select **Main Library**.
2. On the main screen in the upper frame, select ***Query*** and the library query form will be displayed. Enter known search criteria in desired field or fields. Queries may be narrowed or broadened depending on the amount of information given (Refer to Section 4.2, Performing Queries).
3. Scroll to the bottom of the form and select the ***Query*** button.
4. Results of the query will be displayed in the Results frame. The total number of results from a query will be recorded at the bottom of the results list in this frame.
5. To view the item of interest, select the result and the library record will be displayed.
6. Queries may be modified and re-queried or brought back to a blank query screen by selecting the Query button in the upper frame.

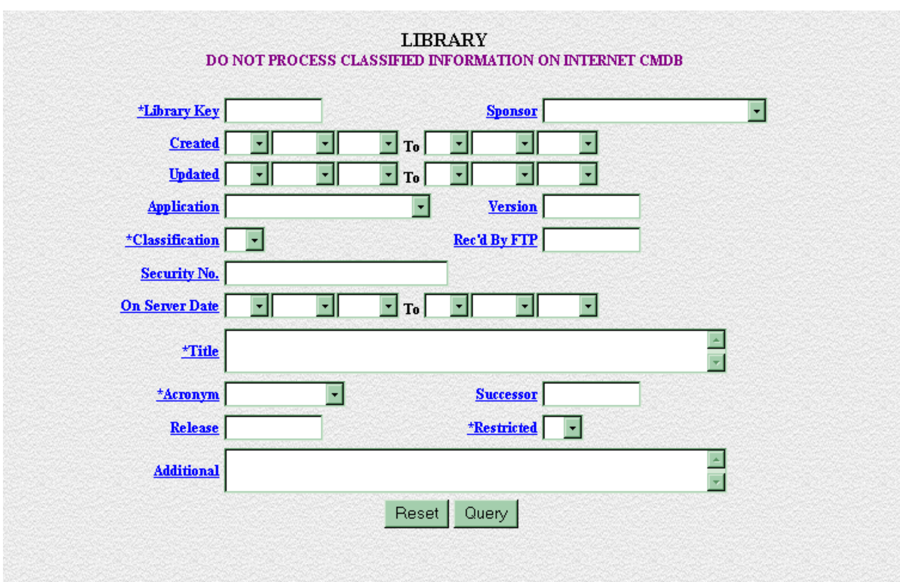


Figure 8-7 Library Query

8.7.2 Library Audit

The **Library Audit** form is the management tool used to track the distribution of software and documentation to users at a particular site. The Library Audit tracks whether the shipment is a full release of the application or a single item, such as a patch or update to a document. Additionally, Library Audit tracks the site, user, shipment mode, received date, and for software, date installed.

8.7.2.1 Library Audit Query

Performing a query for a Library Audit record is accomplished through the **Library Audit** form.

1. Select **Library Audit** located under **Library** in the Main Menu.
2. Select **Single Item** or **Release** and then ***Submit.***
3. Select an **Application** from the pull-down menu and select the ***Select App*** button.
4. Select a **Version** from the pull-down menu and select the ***Select Version*** button. The **Library Audit** form will be displayed.
5. Enter the criteria of the search and select the ***Query*** button located toward the bottom the screen. Search criteria may be entered in any field.
6. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

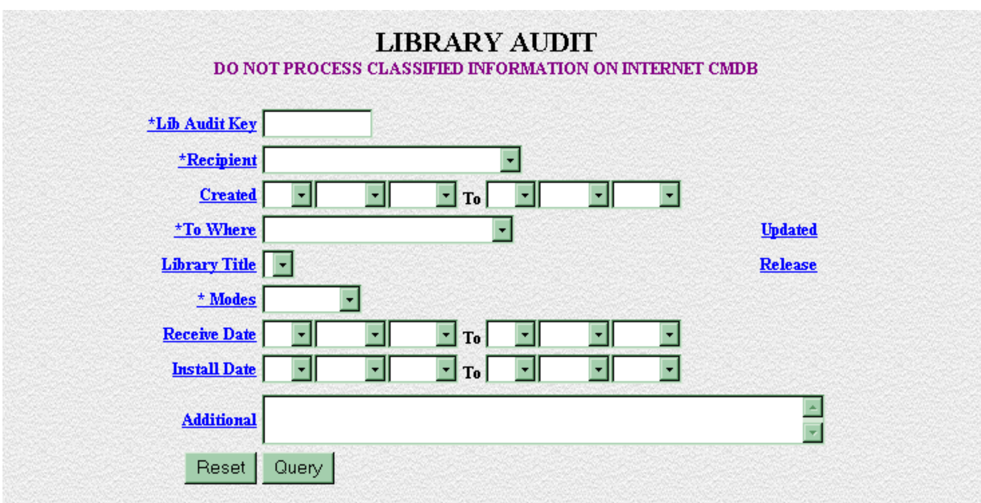

LIBRARY AUDIT
DO NOT PROCESS CLASSIFIED INFORMATION ON INTERNET CMDB
*Lib Audit Key
*Recipient
Created To
*To Where
Updated
Library Title
Release
* Modes
Receive Date To
Install Date To
Additional
Reset Query

Figure 8-8 Library Audit Query

8.8 PEOPLE AND PLACES / POINTS OF CONTACT

People and Places stores information related sites, organizations, and Points of Contact (POC). The main components that fall under **People and Places** are; **Place**, **Users** and **Change Password**.

8.8.1 Place

The **Place** form is the management tool used to track organization/site address information. In the **Place and Address** form Users may perform a query for and view Place information.

8.8.1.1 Place And Address Query

Performing a query for place and address information is accomplished through the **Place and Address** form.

1. Select **Place** found under **People And Places** on the Main Menu. The **Place and Address** form will be displayed.
2. Enter the criteria of the search and select the ***Query*** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

8.8.2 Users/Updating User Profiles

Users is the tool used to manage CMDB user profile information. Users can view and update their own profile information.

Updating a User Profile is accomplished through the **Users** form located under **People And Places** in the Main Menu.

To update a User Profile:

1. Select **Users** located on the Main Menu under **People And Places.**
2. Perform a query for your own profile by selecting ***Query.*** It is not necessary to provide any search criteria.
3. Select your name from the results frame. The **User Profile Query/Update** form containing current profile information will be displayed.
4. Modify the fields as necessary. Select ***Update.***

8.8.3 Change Password

Change Password is used to modify the CMDB user's password used when logging into the CMDB.

1. Select **Change Password** located on the Main Menu under **People And Places** subheading **Users**.
2. The login ID of the CMDB user currently logged in will be displayed at the top of the screen. Below this, the password requirements are listed. Enter a password that meets these requirements in the **New Password** field.
3. Type the New Password again in the **Confirm Password Field**.

4. Select ***Change*** to submit the new password, or select ***Clear*** to bring both fields back to blank.

8.9 RELEASES

The **Releases** component is the management tool used to track program Release information and related items. Selecting the ***Release Items*** button found on this form will open the **Release Items** table that lists the documentation and/or media that are associated with the release. The Site User has the ability to query **Releases** information.

8.9.1 Releases Query

Performing a Query for **Releases** records is accomplished through the **Releases** form.

1. Select **Releases** found under the heading **Releases** on the Main Menu.
2. A prompt frame will be displayed. Select ***Query*** from this frame.
3. The **Releases** form will be displayed. Enter the criteria of the search and select the **Query** button. Search criteria can be entered in any field.
4. The results of the query will be listed in the Results frame. Select the item of interest from the result list.
5. The ***Release Items*** button is found toward the bottom of the **Releases** form. Selecting ***Release Items*** will open the **Release Items** frame containing documentation and/or media that are associated with the release. To exit the **Release Items** frame use the browser's ***Back*** button, or select ***Cancel Item*** found toward the bottom of the form.

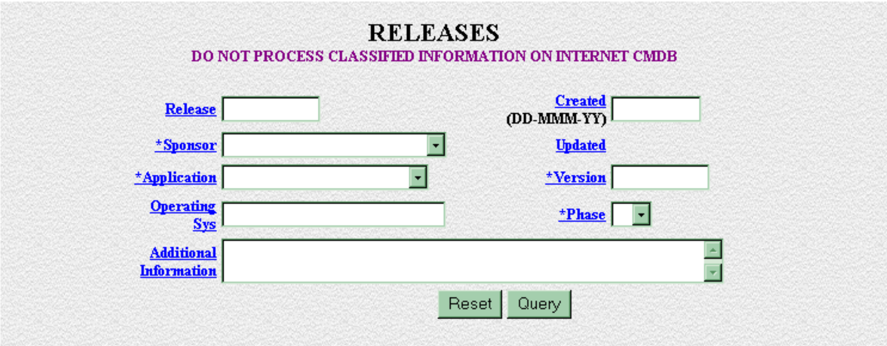


Figure 8-9 Releases Query

9. PROGRAM MANAGEMENT OFFICE

A Program Manager (PM) role will be assigned to all individuals working within the program office. The PM has the ability to query and submit new AI, PR/CR/MAP/REQ , DRR, Note, Place and Library records. The PM can also view Workplan and User records. Access privileges and rights apply only to the application(s) for which the CMDB user has been approved.

A PM who submits a PCMR, or a DRR is considered the Originator of that entry. A PM who takes on this additional role also has the ability to submit an Originator Status to that record. If submitting items for inclusion in the CMDB, Section 12 of this manual should be referenced to review this additional capability.

9.1 RESPONSIBILITIES OF THE PROGRAM MANAGEMENT OFFICE

In addition to providing research and development for software, the PMO is also responsible for all aspects of CM for the program. All PRs/CRs/Requirements, DRRs, program documentation, AIs, user profiles, and software release information are logged and monitored using the CMDB, which provides automated tracking. The PMO is responsible for reviewing all records for completeness and accuracy and for modifying them as needed. The PMO should also appoint a CMDB user who will act as a POC for and receive Notification on MAPs when they occur. CM should be notified of this in order to record it in the CMDB. The PMO also provides Quality Assurance (QA), ensuring that software and documentation conform to established technical and functional requirements, including all aspects of testing, development and operational software.

9.2 UPDATING RECORDS

The PM has the ability to modify all of the Tracking items' updateable fields with the following exceptions: TF, and Workplan.

To update a record:

1. Perform a query for and select the item of interest.
2. Make the desired modifications to the fields and/or status within the record.
3. Scroll toward the bottom of the screen.
4. Select the ***Update*** button.

A message listing the item's tracking number followed by, "Update Successful" and a date/time stamp will be displayed at the top of the record to indicate that the update was successful.

Consecutive updates may be made to a record by following steps 2-4 above. It is not necessary to refresh the screen in between updates.

9.3 PM/CM STATUS

Statuses are used to display the current standing of a **<u>Tracking</u>** item in its life cycle. These are found toward the bottom of an individual record within the **Current Status** table. This table displays the current standing of the record in its life cycle, the date the status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the role types with this privilege. The PMO and CM share the ability to update the PM/CM Status of any **Tracking** item against the PM's application.

Below the **Current Status** table, there is also a table called **Status History** that displays any status records that were added prior to the current statuses.

To submit a Status record:

1. Perform a query for and select the item of interest.
2. Scroll toward the bottom of the form and locate the **Current Status** table. Use the pull-down menu found under either **PM/CM Status,** or (if the PM user is the Assignee of an Action Item) **Assignee Status** to select the desired status.
3. Select ***Update*** found below the table to submit the status.

9.4 ACTION ITEMS (AI)

The **Action Item** (AI) is the management tool used to track required activities that are of interest at the program level. A Site User or other individuals initiate an AI at a meeting by bringing it to the attention of the PMO. The AI is entered into the CMDB usually by a member of the PMO.The AI is assigned to an individual, known as the Assignee. Only the Originator of the AI, the PM, Test Organization and CM may modify AI records.

9.4.1 Action Item (New Record)/Submitting Action Items

Submitting new AI records is accomplished through the **Action Item (New Record**) form.

1. Select **Action Item (New Record)** found under **Tracking** in the Main Menu.
2. **Originator And Site** information will be auto-filled in this field, however, if entering the AI for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select "**Not Found**" from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone Number** and **Site** in the respective fields. When the form is complete, select ***Submit***.
3. Select the **Assignee** and **Site**. If the name is not found select "Not Found" from the pull-down and proceed as described above.
4. The **Created** date will be auto-filled.
5. Fill in the **Suspense** date.
6. Select the **Application** that the AI is against from the pull-down menu.
7. Select the **Classification** of the AI. If on Internet CMDB, this will auto-fill to "U" for unclassified.
8. Type the **Title, Description, Source, Additional Information**, and **Disposition** into the respective free form fields.

9. An asterisk***** by a field name indicates that the field must be completed to submit the AI. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the AI into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, "Insert Successful" with a number to identify the AI and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

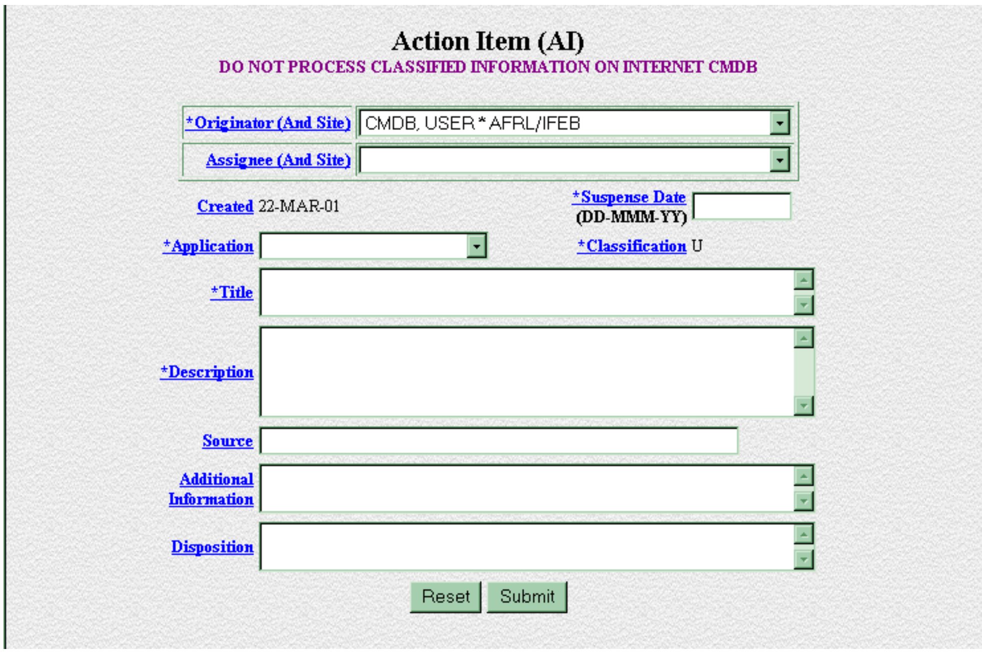


Figure 9-1 AI New Record

9.4.2 Action Item (Query)

Performing a query for an Action Item is accomplished through the **<u>Action Item (Query)</u>** form (Refer to Figure 9.4.2-1).

1. To query **<u>Action Item</u>** records, select **<u>Action Item (Query)</u>** found under **<u>Tracking</u>** on the Main Menu.

2. The **<u>Action Item (Query)</u>** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application, Originator Status**, **Assignee Status**, and **CM/PM Status**.

3. Select the ***Query*** button. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

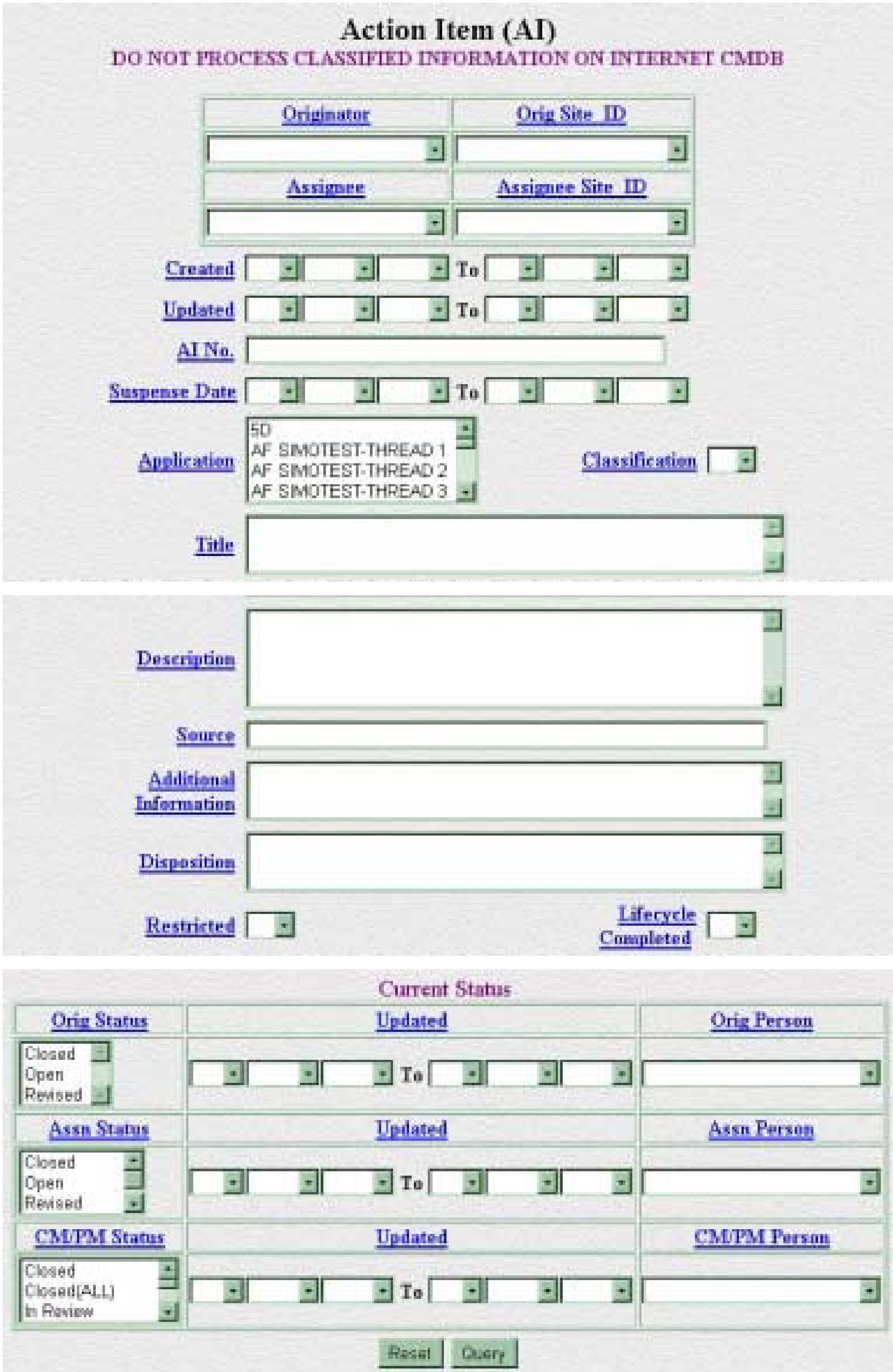


Figure 9-2 AI Query

9.5 DOCUMENT REVIEW REPORT (DRR)

The **Document Review Report** (DRR) is used to coordinate and track changes to program documentation. DRRs identify technical, editorial, informational or requirements issues that are unclear or incorrect in any type of documentation produced for supported applications.

9.5.1 Document Review Report (New Record)/Submitting New DRRs

1. Select **Document Review Report (New Record)** found under **Tracking** on the Main Menu This will bring up the DRR form used for entering New DRRs into the CMDB.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in, however, if entering the DRR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the Originator's Last Name, First Name, Phone number and Site in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the document is against from the pull-down.
6. Select the **Classification** of the DRR. If on Internet CMDB, this will auto-fill to "U" for unclassified.
7. Select the **Doc No., Acronym, Document Title** from the pull-down. If the pull-down does not contain the document, select Not Found. Directions will then be provided to contact CM to request that the document be catalogued into the CMDB Library, as DRRs cannot be written against documentation not under CM control.
8. Type the **Page Number**, **Page Location, Description, Source, Additional Information** and **Disposition** into the respective free form fields.
9. An asterisk* will indicate mandatory fields within the New Record form. These fields must be completed to submit the DRR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the DRR into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, "Insert Successful" with a number to identify the DRR and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

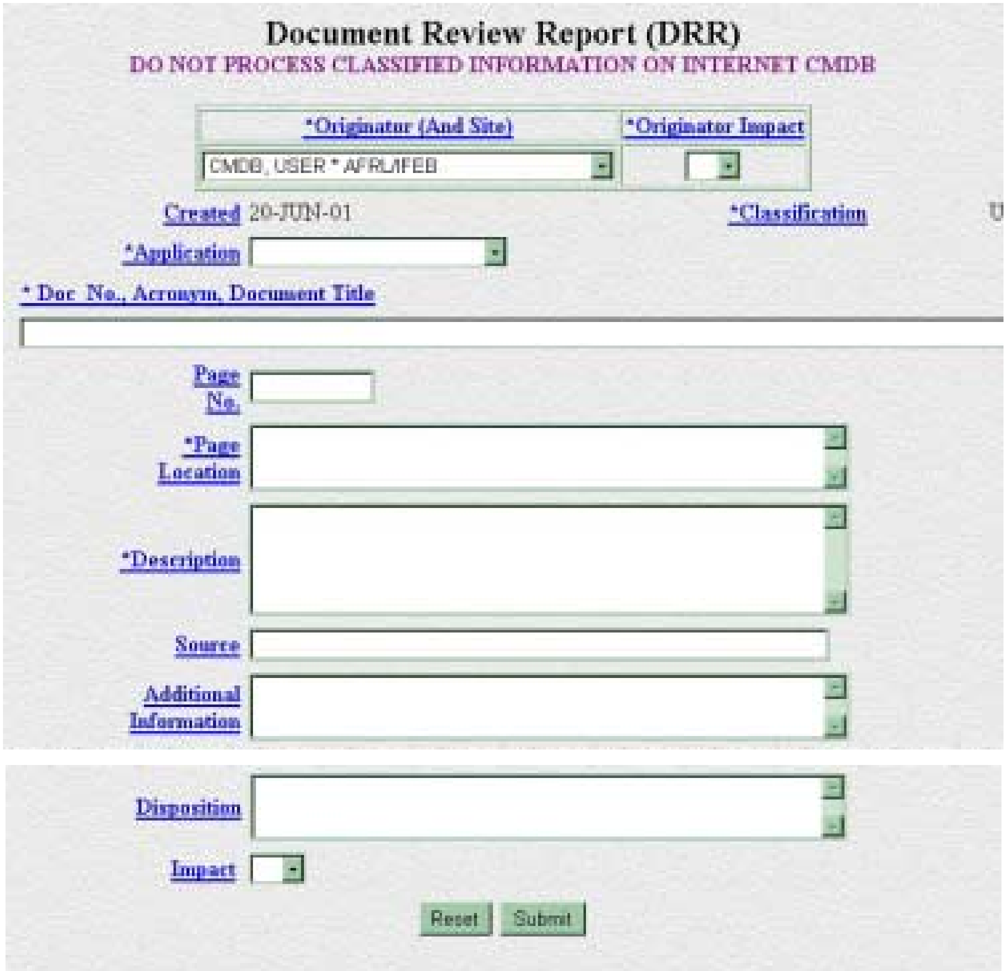


Figure 9-3 DRR New Record

9.5.2 Document Review Report (Query)

Performing a query for a DRR is accomplished through the **DRR (Query)** form.

1. To query DRR records, select **DRR (Query)** found under **Tracking** on the Main Menu.
2. The **DRR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application**, **Version**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the results.

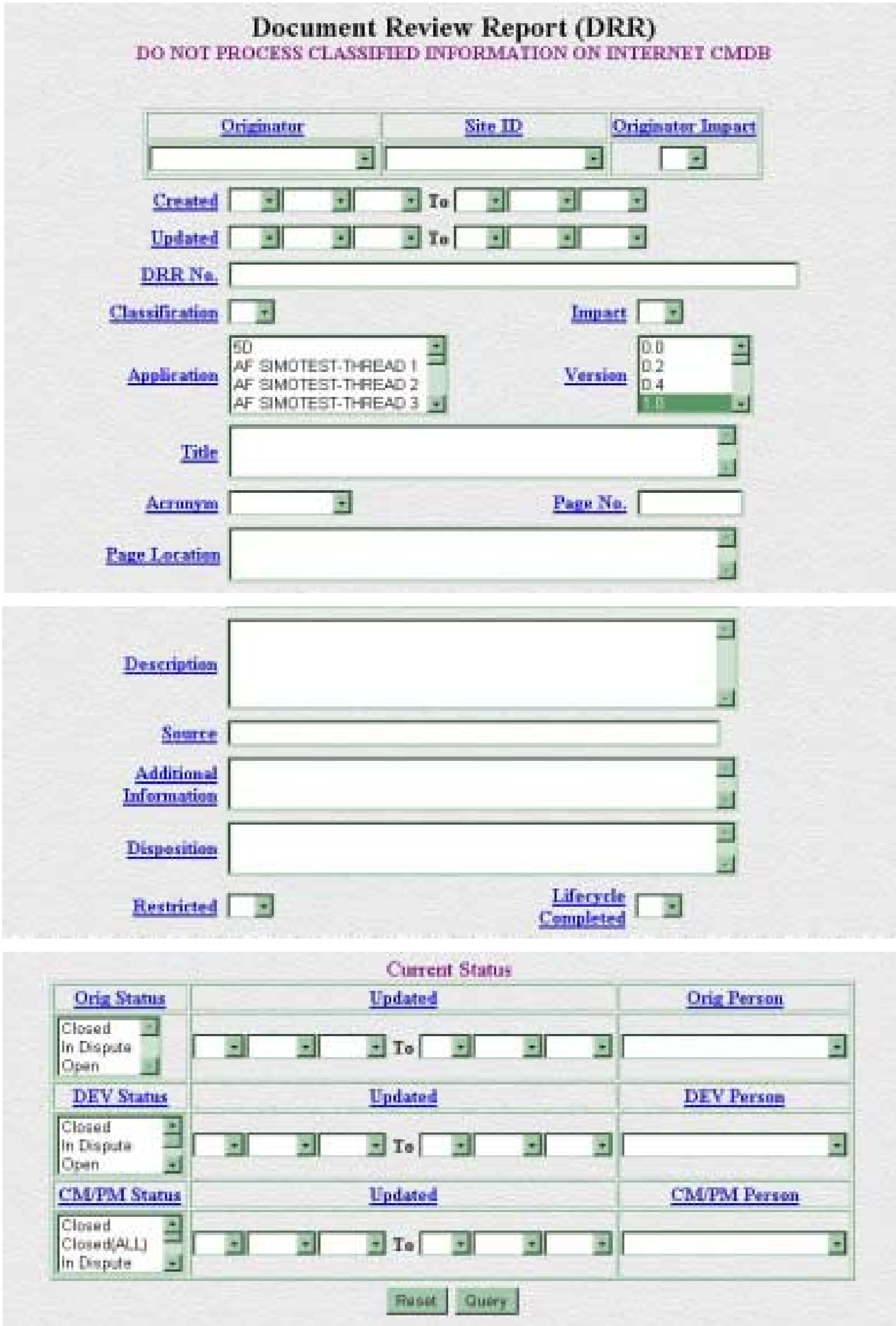


Figure 9-4 DRR Query

9.6 PROBLEM REPORT/CHANGE REQUEST/MULTIPLE APPLICATION PROBLEM/REQUIREMENT

The **Problem Report/Change Request/Multiple Application Problem/Requirement (PR/CR/MAP/REQ or PCMR)** is the management tool used to track, evaluate, verify, and approve or disapprove problems with baselined applications.

9.6.1 PR/CR/MAP/REQ (New Record)/Submitting PCMRs

The PR/CR/MAP/REQ (New Record) form is used for submitting new PCMRs into the CMDB.

1. Select **PR/CR/MAP/REQ (New Record)** found under Tracking in the Main Menu.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the PCMR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the Originator's Last Name, First Name, Phone number and Site in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down menu.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the PCMR is against from the pull-down menu.
6. Select the **Version** of the application that the PCMR is against from the pull-down menu.
7. Select the **Operating System** from the pull-down menu.
8. Select the **Type** of record that you are entering form the pull-down menu.
9. Select the **Test Phase** from the pull-down menu.
10. Type in the **Functional Area, Title, Description, Source** and **Additional Information** into the free form fields.
11. An asterisk * by a field name indicates that the field must be completed to submit the PCMR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

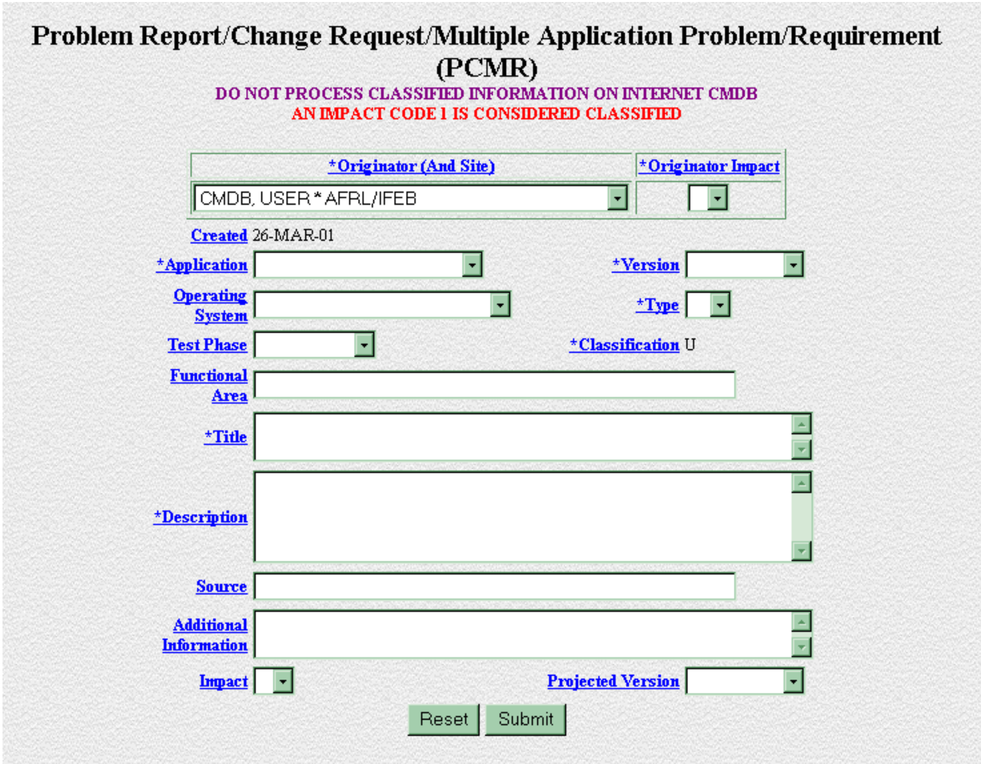


Figure 9-5 PCMR New Record

9.6.2 PR/CR/MAP/REQ (Query)

Performing a Query for PCMR records is accomplished through the **PR/CR/MAP/REQ (Query)** form.

1. To query PCMR records, select **PR/CR/MAP/Req (Query)** found under **Tracking** on the Main Menu.
2. The **PCMR (Query)** screen will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Impact**, **Application**, **Version**, **Type**, **Originator Status**, **Developer Status** and **CM/PM Status**
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

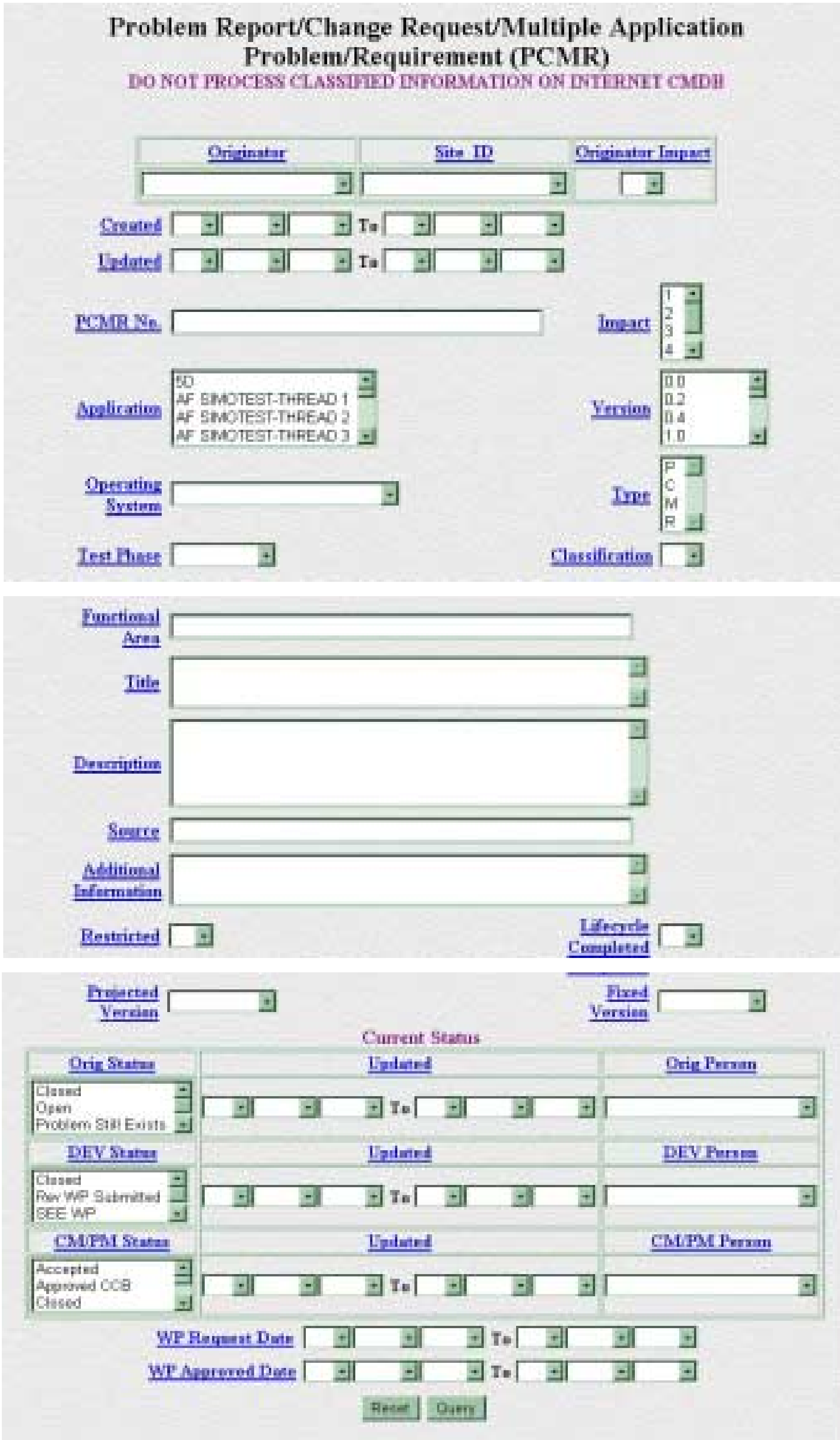


Figure 9-6 PCMR Query

9.7 WORKPLAN

Workplan is the management tool used to track, evaluate, verify, and approve or disapprove the estimated level of effort required to implement a software fix or change.

9.7.1 Workplan (Query)

Performing a query for a **Workplan** is accomplished through the **Workplan (Query)** form located under **Tracking** on the Main Menu (Refer to Figure 9.7.1-1).

1. To view **Workplan** records, select **Workplan (Query)** found under **Tracking** in the Main Menu.
2. The **Workplan (Query)** screen will be displayed. Enter the criteria of the search and select the ***Query*** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the Results frame. Select the item of interest from the result list.

Note:

Workplans can also be accessed by performing a Query and selecting the related PCMR (using the **PR/CR/MAP/REQ(Query)** form) and then selecting the **Related Workplan** number found at the top of the **PCMR** form.

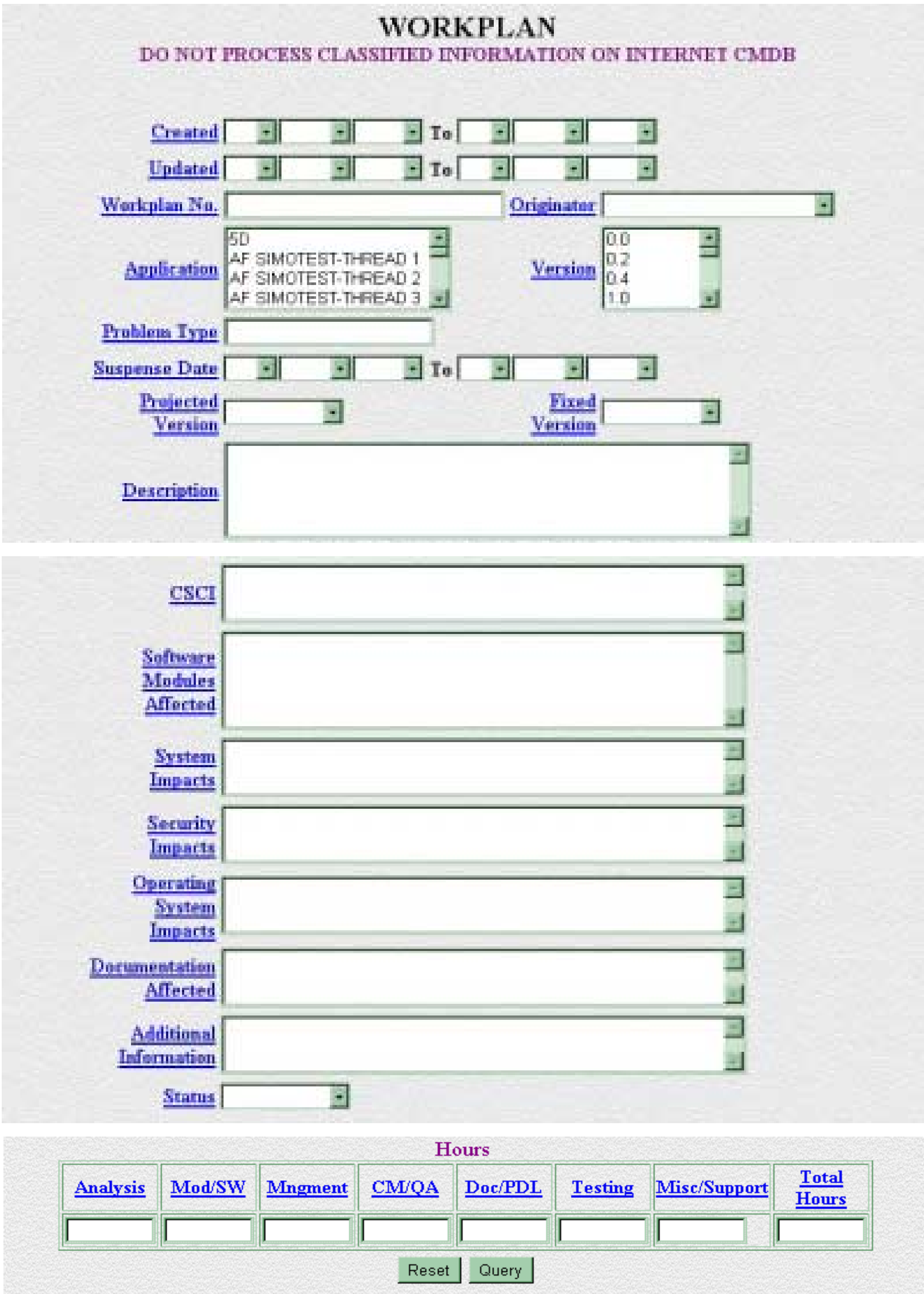


Figure 9-7 Workplan Query

9.8 LIBRARY

The Library is the management tool used to catalogue program documentation and software maintained by CM. In addition, Advanced Document Revision Notices (ADRNs) are also maintained here. An ADRN is a change that has been made to a final document. The actual items in the library may be hardcopy or softcopy documents, or software. There are two sections under Library, the **Main Library** and **Library Audit**.

9.8.1 Main Library

The **Main Library** is used to catalog Program documentation and software maintained by CM.

Information such as document title, number, version and classification used to identify each item is found here. Each library record contains **Library Attributes** which displays information such as the location of that item (where it is stored), whether it is a hardcopy, softcopy or online document, the number of copies, and if media, the title and type of media. **Library Documentation** or **Library Software** are also contained here and provide further information such as the contract and CDRL number, if hardcopy, or the operating system and developer number, if software.

The ***Attributes*** button is found toward the bottom of the Library form. Selecting this button will prompt the **Library Attributes** screen. This screen will identify the library record's characteristics, such as the location of that item (where it is stored), whether it is a hardcopy, softcopy or online document, the number of copies, and if media, the title and type of media.

There will be two Library type buttons found on the **Library** form, ***Documentation*** or ***Software,*** which will prompt the associated Library screens (**Library Documentation** or **Library Software**). The **Library Documentation** screen will identify the document characteristics. From the **Library Documentation** screen the user will be able to ***Update Documentation*** into the Library record.

The ***Software*** button will prompt the **Library Software** screen. The **Library Software** screen will identify the software characteristics. From the **Library Software** screen the user will be able to ***Update Software*** information into the Library record.

9.8.2 Main Library Insert Record

The PM has the ability to submit new records into the **Library**. Submitting new **Library** records is accomplished through the **Main Library** form.

To submit new Library records:

1. Before submitting a new Library record a query must be performed to ensure that the item has not already been logged into the CMDB Library. For Instructions on how to query a Library record, see Section 9.8.3, Searching for and Viewing Library Records.
2. Select **Main Library** found under **Library** on the Main Menu.
3. Choose ***Insert*** from the prompt frame.
4. Select an **Application** from the pull-down menu and select ***Get Version.***

5. Select a version from the pull-down menu and select ***Continue.*** The **Main Library** form used for submitting new records will be displayed (Figure 9.8.2-1 Main Library Insert).

6. Fill in all mandatory information using pull-down menus and free form fields and select ***Submit.***

A **Main Library** record entry must be entered for each item. For example, if one CD contains two documents and one software item, then a total of three Main Library records must be entered. Multi-volume documents should be entered as one document, listing each individual volume name in the **Additional** field.

1. Upon **Library** record submission, the user must then perform a query for that item (by selecting **Main Library** from the Main Menu and then selecting ***Query***) in order to add the **Attributes** and **Software** or **Documentation** information.

2. Once the item is selected, the ***Attributes***, ***Loaned***, ***Software***, ***Documentation***, ***Add Notes***, and ***Add Status*** buttons will be displayed toward the bottom of the form (Figure 9.8.2-2). The ***Attributes*** and ***Documentation*** or ***Software*** information must be completed.

3. Select the ***Attributes*** button. A frame will open in the lower portion of the screen. Fill in the required information and submit the record by selecting the ***Update Attributes*** button (Figure 9.8.2-3).

4. From the Library record form, select either ***Documentation*** or ***Software,*** depending on the type of item submitted. A frame will open in the lower portion of the screen containing the appropriate form. Fill in the required information and submit the record by selecting the appropriate ***Update*** button.

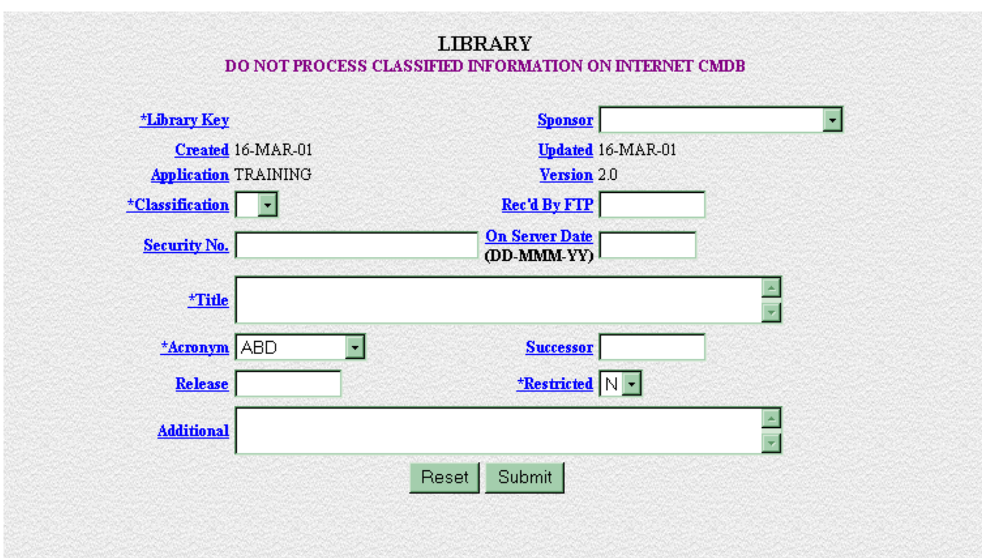


Figure 9-8 Library Submit Record Form

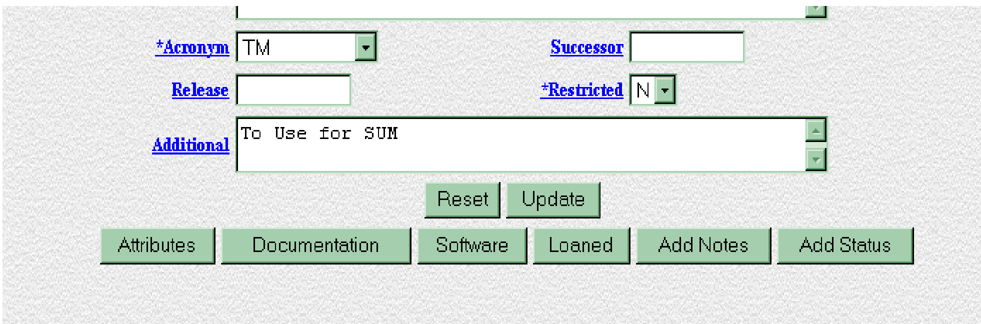


Figure 9-9 Library Buttons

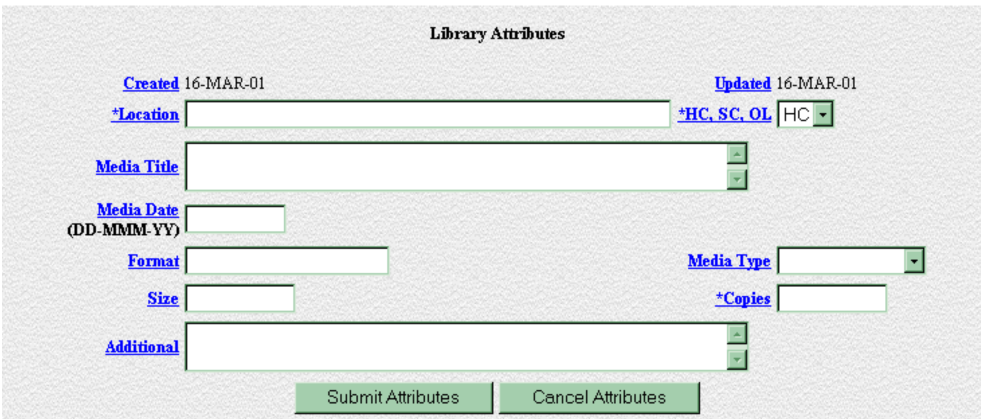


Figure 9-10 Library Attributes

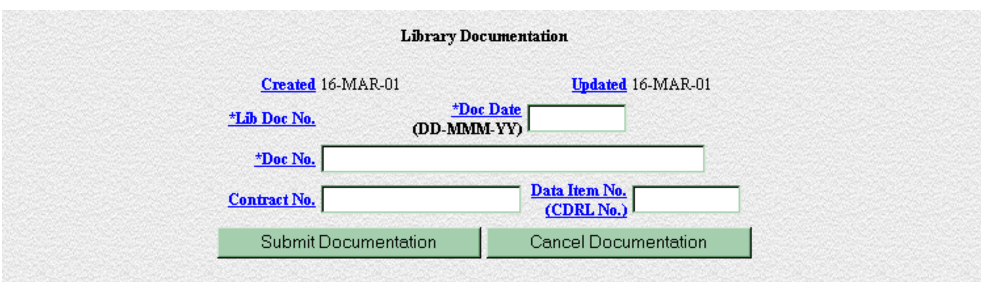


Figure 9-11 Library Documentation

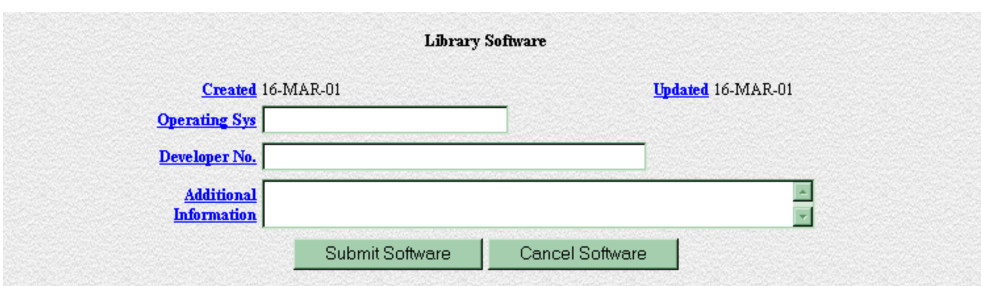


Figure 9-12 Library Software

9.8.3 Main Library Query

The user can search for document information in a section of the CMDB called the **Main Library** found on the Main Menu under the heading **Library**.

1. Locate **Library** on the Main Menu and select **Main Library**.
2. On the main screen in the upper frame, select ***Query*** and the library query form will be displayed. Enter known search criteria in desired field or fields.
3. Scroll to the bottom of the form and select the ***Query*** button.
4. Results of the query will be displayed in the Results frame. The total number of results from a query will be recorded at the bottom of the results list in this frame.
5. To view the item of interest, select the result and the library record will be displayed.
6. Queries may be modified and re-queried or brought back to a blank query screen by selecting the Query button in the upper frame.

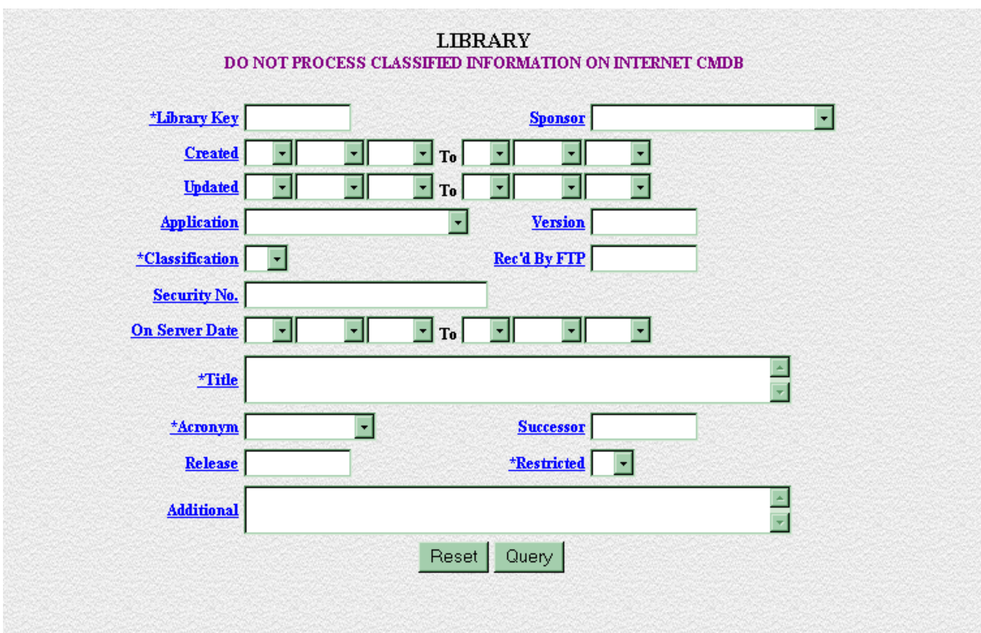


Figure 9-13 Library Query

9.8.4 Library Audit

The **Library Audit** form is the management tool used to track the distribution of software and documentation to users at a particular site. The Library Audit tracks whether the shipment is a full release of the application or a single item, such as a patch or update to a document. Additionally, Library audit tracks the site, user, shipment mode, received date, and for software, date installed.

9.8.4.1 Library Audit Query

Performing a query for a Library Audit record is accomplished through the **Library Audit** form.

1. Select **Library Audit** located under **Library** in the Main Menu.
2. Select **Single Item** or **Release** and select ***Submit.***
3. Select an **Application** from the pull-down menu and select the ***Select App*** button.
4. Select a **Version** from the pull-down menu and select the ***Select Version*** button. The **Library Audit** form will be displayed.
5. Enter the criteria of the search and select the ***Query*** button located toward the bottom the screen. Search criteria may be entered in any field.
6. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

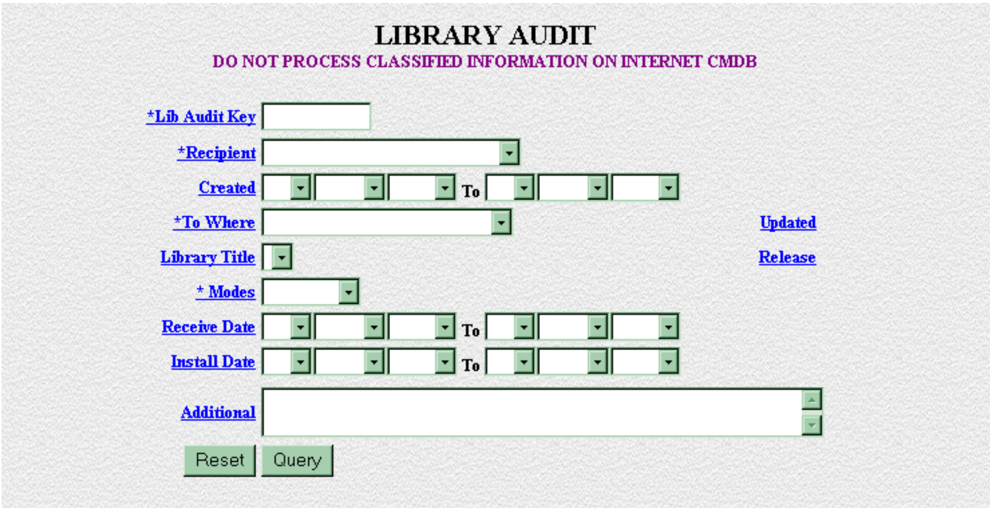


Figure 9-14 Library Audit Query

9.9 PEOPLE AND PLACES/ POINTS OF CONTACT

People And Places stores information related to sites, organizations, and POCs. The components that fall under **People and Places** are; **Place**, and **Users** and **Change Password**.

9.9.1 Place

The **Place** screen is the management tool used to track organization/site address information. In the **Place and Address** form PMs may perform a query for and view **Place** information.

9.9.1.1 Place (Address) Query

Performing a query for place and address information is accomplished through the **Place and Address** form.

1. Select **Place** found under **People And Places** on the Main Menu. The **Place and Address** form will be displayed.
2. Enter the criteria of the search and select the ***Query*** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

9.9.2 Users/User Profile

Users is the tool used to manage CMDB user profile information. A PM can view the profile information of the individuals with CMDB access to their program, as well as view and update their own individual profiles.

9.9.2.1 Updating User Profile

Updating User Profile is accomplished through the **Users** form located under **People And Places** in the Main Menu.

To update Your User Profile:

1. Select **Users** located on the Main Menu under **People And Places.**
2. Perform a query for your own profile by typing your name or login ID in the appropriate fields and selecting ***Query.***
3. Select your name from the results frame. The **User Profile Query/Update** form containing current profile information will be displayed.
4. Modify the fields as necessary. Select ***Update.***

9.9.2.2 Performing a Query for User Profiles

Performing a query for User Profiles is accomplished through the **Users** form. The PMO can view the Profile information of those CMDB users with access to their program.

To view profile information of application users:

1. Select **Users** located on the Main Menu under **People And Places.**
2. Type the known search criteria into the appropriate fields and select ***Query.***
3. The result(s) will be displayed in the Results frame on the screen. Select the desired result.

Note:

The PMO has the unique ability to perform a single query resulting in a list of ALL of the CMDB users with access to their application. This is done by omitting step number two above (leaving the Users form blank) and selecting ***Query***. The results frame will list the name of every CMDB user with access to program information.

9.9.3 Change Password

Change Password is used to modify the CMDB user's password used when logging into the CMDB.

1. Select **Change Password** located on the Main Menu under **People And Places** subheading **Users**.
2. The login ID of the CMDB user currently logged in will be displayed at the top of the screen. Below this, the password requirements are listed. Enter a password that meets these requirements in the **New Password** field.
3. Type the New Password again in the **Confirm Password Field**.
4. Select ***Change*** to submit the new password, or select ***Clear*** to bring both fields back to blank.

9.10 RELEASES/SOFTWARE RELEASE INFORMATION

The **Releases** component is the management tool used to track program Release information and the related items. Selecting the ***Release Items*** button found on this form will open the **Release Items** table that will list the documentation and/or media that are associated with the release. The PMO has the ability to both query and submit **Releases** information.

9.10.1 Submitting Release Records

Submitting a new Release record is accomplished through the **Releases** form.

To submit a new Release record:

1. Select **Releases** found under **Releases** on the Main Menu.
2. Select ***Insert*** from the prompt frame.
3. **Select an Application** from the pull-down menu and select ***Continue.***
4. **Select a Version** from the pull-down menu and select ***Continue.***
5. Select a **Sponsor** and a **Phase** [D (Development), O (Operational), or F (Future)] from the respective pull-down menus.
6. Type the **Operating Sys** (system), and **Additional Information** into the respective free form fields.
7. When information is complete, select ***Submit*** found toward the bottom of the form. If the submittal is successful, a number to identify the Release will be displayed in the upper frame. If there are individual items that must be added to the Release see the instructions below.

To submit Release items for inclusion in a Release record:

1. To submit individual Release Items for a Release, first perform a query for the desired **Release** and select it (Refer to section 9.10.2, Releases Query).

2. Select the ***Release Items*** button located toward the bottom of the **Releases** form. This will prompt the **Release Items** frame to be displayed.
3. Release Items must be entered and submitted one item at a time. Enter the CMDB **Library** number of the first Release Item.
4. Use the pull-down menu to select the **Item Type**.
5. Type the **Patch No.**, **Title**, and **Additional Information** into the respective free form fields.
6. When the form is complete, select ***Submit Item***.

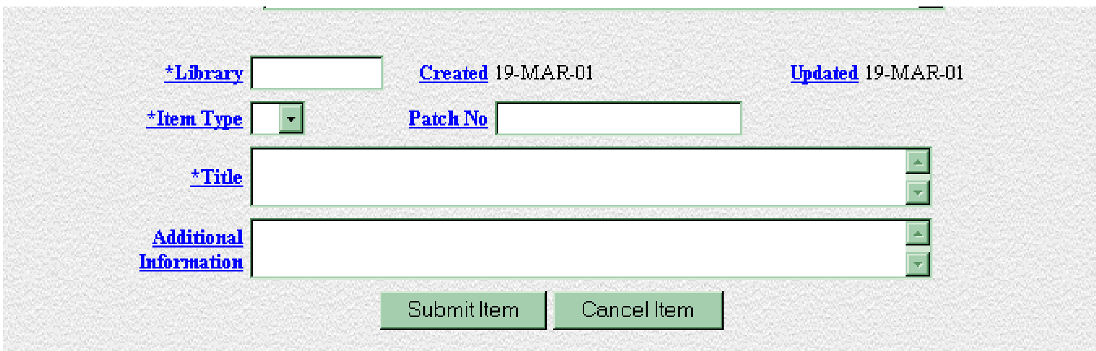


Figure 9-15 Release Items Submit Form

9.10.2 Releases Query

Performing a Query for **Releases** records is accomplished through the **Releases** form.

1. Select **Releases** found under the heading **Releases** on the Main Menu.
2. A prompt frame will be displayed. Select ***Query*** from this frame.
3. The **Releases** form will be displayed. Enter the criteria of the search and select the **Query** button. Search criteria may be entered in any field.
4. The results of the query will be listed in the Results frame. Select the item of interest from the result list.
5. The ***Release Items*** button is found toward the bottom of the **Releases** form. Selecting ***Release Items*** will open the **Release Items** frame containing documentation and/or media that are associated with the release. To exit the **Release Items** frame use the browser's ***Back*** button or select ***Cancel Item*** found toward the bottom of the form.

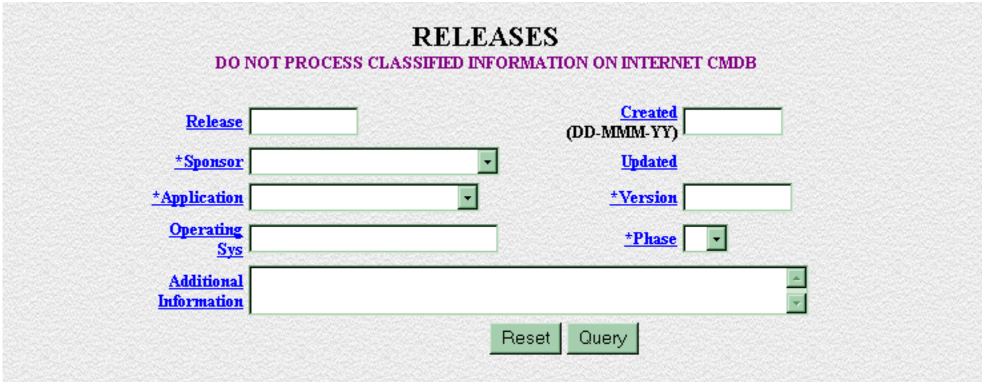


Figure 9-16 Releases Query

10. DEVELOPER

A role of Developer is assigned to the person who is participating in the development/coding of a software program. A program may be a complete system, software only, or documentation only. Developers can submit PCMRs and Workplans, add or review Notes and Statuses and view Place Address information. Access privileges and rights apply only to the application(s) for which the CMDB user has been approved.

A Developer submitting any of the above items is considered the Originator of that item. A special set of privileges applies to a Developer who is also the Originator of an item. If submitting items for inclusion in the CMDB, in addition to this section, refer to section 12 of this manual to review these additional capabilities.

10.1 RESPONSIBILITIES OF THE DEVELOPER

The development contractor has the responsibility to notify CM of any changes or updates to user/site information based upon data provided by site representatives, help desk activities, or other methods. CM user site information should be reviewed prior to the distribution of any software release directly from the developer's site. CM should be notified of such software distributions. All information to maintain Release records can be submitted via softcopy or hardcopy.

It is the developer's responsibility to review and respond to CM/PM PCMR updates/ statuses (such as WP Requested) and to submit Developer statuses to these items.

10.2 UPDATING RECORDS

Note:

A Developer has the ability to update only those records of which he/she is the Originator. For more information on Originator privileges, see Section 12, Originator.

To update a record:

1. Perform a query for and select the item of interest.
2. Make the desired modifications to the fields and/or status within the record.
3. Scroll toward the bottom of the screen.
4. Select the ***Update*** button.

A message listing the item's tracking number followed by, "Update Successful" and a date/time stamp will be displayed at the top of the record to indicate that the update was successful.

Consecutive updates may be made to a record by following steps 2-4 above. It is not necessary to refresh the screen in between updates.

10.3 DEVELOPER STATUS

The developer has the ability to submit the **Developer Status** to **PCMR** and **DRR** records. The Developer can also submit an Originator status for any **Tracking** item of which he/she is the Originator. Refer to Section 12 for more information on Originator privileges.

Statuses are used to display the current standing of a Tracking item in its life cycle. These are found toward the bottom of an individual record within a table labeled **Current Status**. This table displays the current standing of the record in its life cycle, the date the status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the role types with this privilege. Below the **Current Status** table, there is also a table called **Status History** that displays any status records that were added prior to the current statuses.

To submit a Status record:

1. Perform a query for and select the item of interest.
2. Scroll toward the bottom of the form and locate the **Current Status** table.
3. Use the pull-down menu found under **DEV Status** to select the desired status.
4. Select ***Update*** found below the table to submit the status.

10.4 ACTION ITEMS

An **AI** is the management tool used to track required activities that are of interest at the program level. The AI is entered into the CMDB usually by a member of the PMO, although anyone with access to the CMDB can initiate an AI. The AI is assigned to an individual, known as the Assignee.

10.4.1 Action Item (New Record)/Submitting Action Items

Submitting new Action Items (AIs) is accomplished through the **Action Item (New Record)** form.

1. Select **Action Item (New Record)** found under **Tracking** in the Main Menu.
2. **Originator And Site** information will be auto-filled in this field based on the user log-in. However, if entering the AI for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select "**Not Found**" from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone Number** and **Site** in the respective fields. When the form is complete, select ***Submit***.
3. Select the **Assignee** and **Site**. If the name is not found select "Not Found" from the pull-down and proceed as described above.
4. The **Created** date will be auto-filled.
5. Fill in the **Suspense** date.
6. Select the **Application** that the AI is against from the pull-down menu.

7. Select the **Classification** of the AI. If on Internet CMDB, this will auto-fill to “U” for unclassified.
8. Type the **Title, Description, Source, Additional Information**, and **Disposition** into the respective free form fields.
9. An asterisk ***** by a field name indicates that the field must be completed to submit the AI. Any optional field may be completed at the user’s discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the AI into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, “Insert Successful” with a number to identify the AI and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

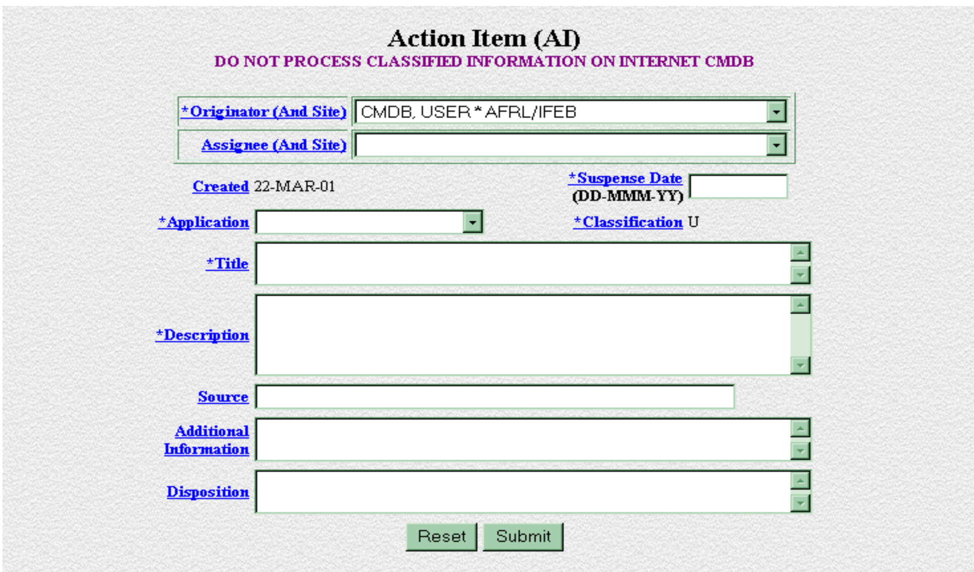


Figure 10-1 AI New Record

10.4.2 Action Item (Query)

Performing a query for an Action Item is accomplished through the **Action Item (Query)** form.

1. To query **Action Item** records, select **Action Item (Query)** found under **Tracking** on the Main Menu.
2. The **Action Item (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application, Originator Status**, **Assignee Status**, and **CM/PM Status**.
3. Select the ***Query*** button. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

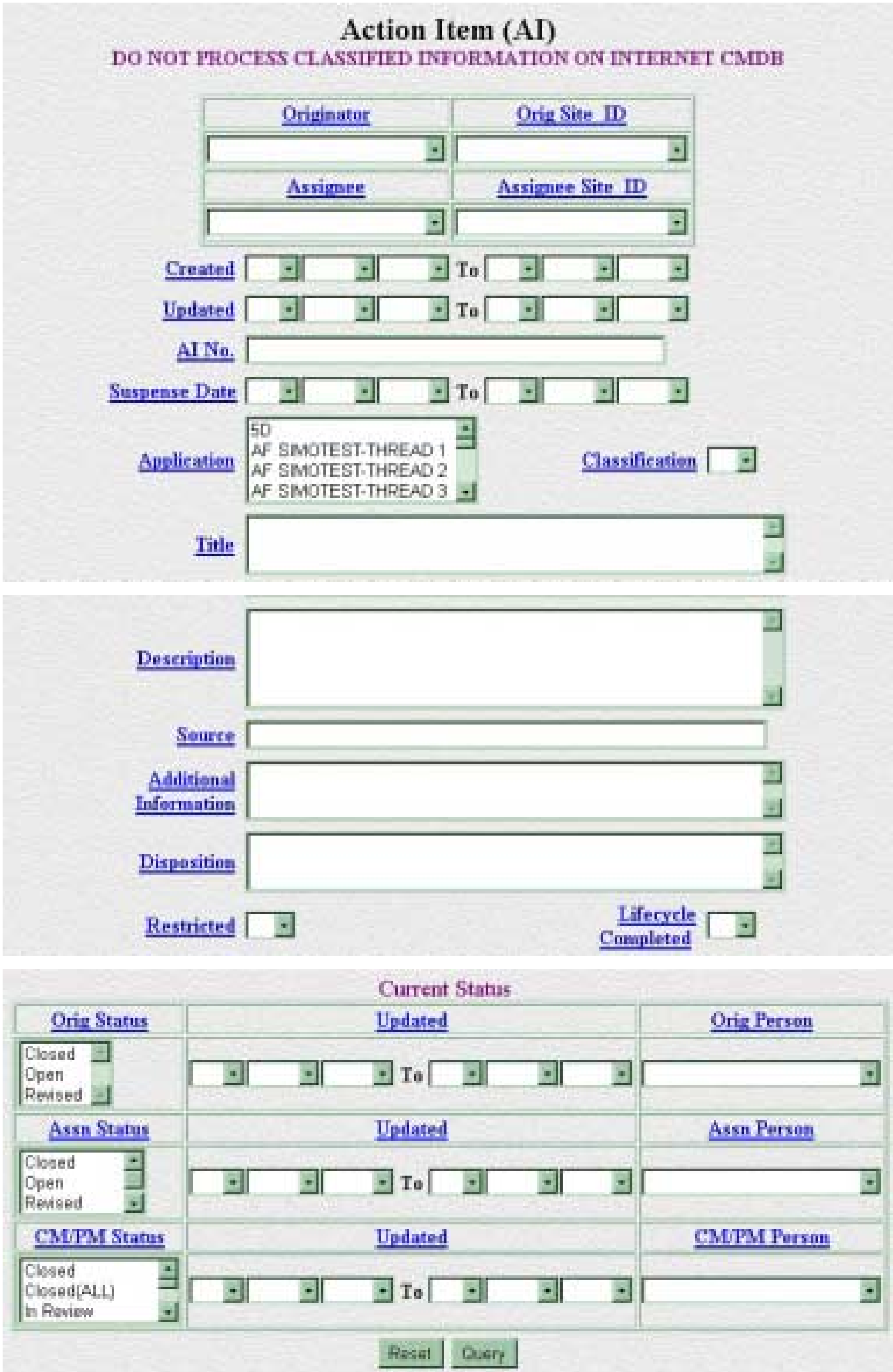


Figure 10-2 AI Query

10.5 DOCUMENT REVIEW REPORT

The **Document Review Report** (DRR) is used to coordinate and track changes to program documentation. DRRs identify technical, editorial, informational or requirements issues that are unclear or incorrect in any type of documentation produced for supported applications.

10.5.1 Document Review Report (New Record)/Submitting New DRRs

1. Select **Document Review Report (New Record)** found under **Tracking** on the Main Menu**.** This will bring up the DRR form used for entering New DRRs into the CMDB.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the DRR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone number** and **Site** in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the document is against from the pull-down.
6. Select the **Classification** of the DRR. If on Internet CMDB, this will auto-fill to "U" for unclassified.
7. Select the **Doc No., Acronym, Document Title** from the pull-down. If the pull-down does not contain the document, select Not Found. Directions will then be provided to contact CM to request that the document be catalogued into the CMDB Library, as DRRs cannot be written against documentation not under CM control.
8. Type the **Page Number**, **Page Location, Description, Source, Additional Information** and **Disposition** into the respective free form fields.
9. An asterisk will indicate mandatory fields within the New Record form. These fields must be completed to submit the DRR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the DRR into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, "Insert Successful" with a number to identify the DRR and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

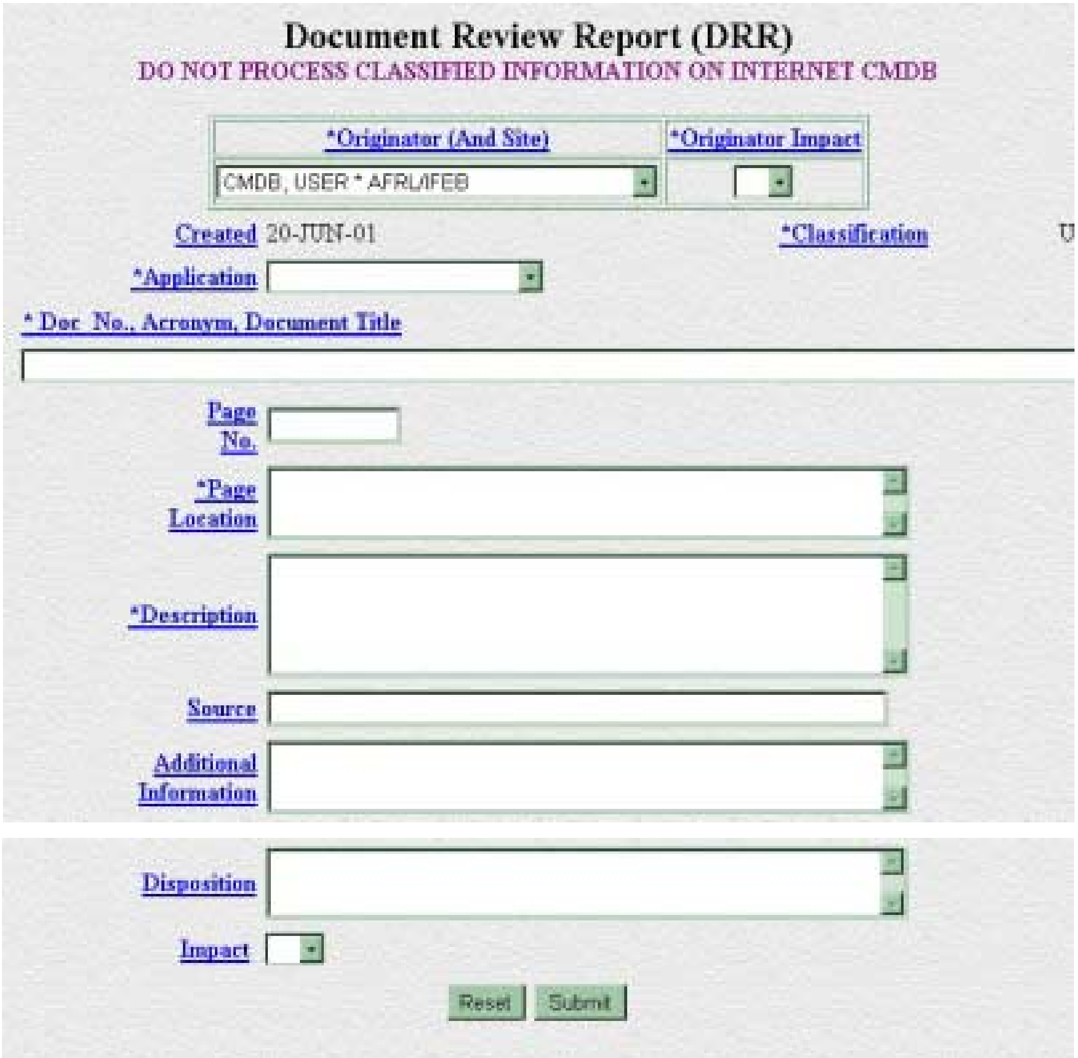


Figure 10-3 DRR New Record

10.5.2 Document Review Report (Query)

Performing a query for a DRR is accomplished through the **DRR (Query)** form (Refer to Figure 10.5.2-1).

1. To query DRR records, select **DRR (Query)** found under **Tracking** on the Main Menu.
2. The **DRR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application**, **Version**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the results.

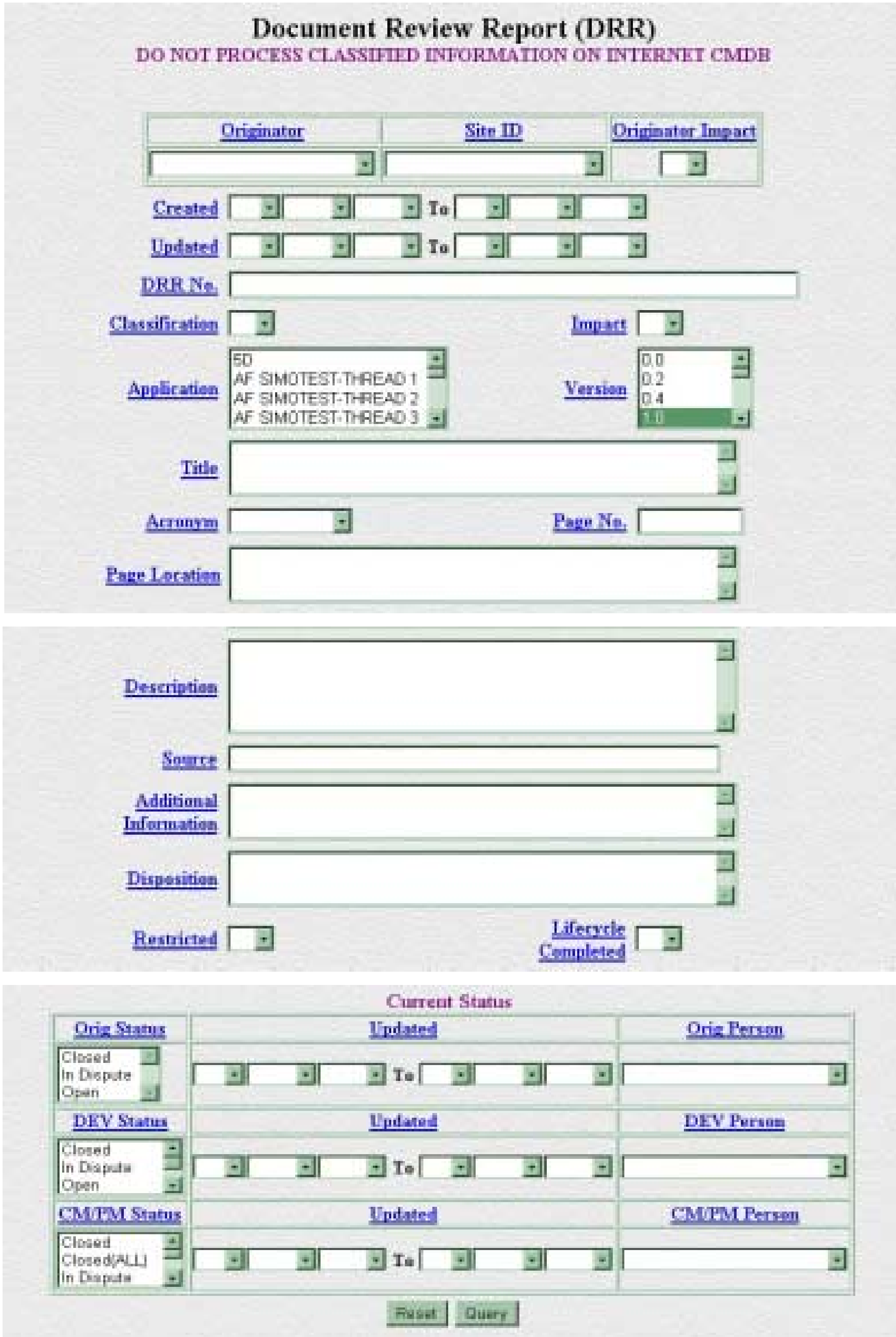


Figure 10-4 DRR Query

10.6 PROBLEM REPORT/CHANGE REQUEST/MULTIPLE APPLICATION PROBLEM/REQUIREMENT

The **Problem Report/Change Request/Multiple Application Problem/Requirement (PR/CR/MAP/REQ or PCMR)** is the management tool used to track, evaluate, verify, and approve or disapprove problems with baselined applications.

10.6.1 PR/CR/MAP/REQ (New Record)/Submitting PCMRs

The PR/CR/MAP/REQ (New Record) form is used for submitting new PCMRs into the CMDB.

1. Select **PR/CR/MAP/REQ (New Record)** found under **Tracking** in the Main Menu.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the PCMR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select Not Found from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone number** and **Site** in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down menu.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the PCMR is against from the pull-down menu.
6. Select the **Version** of the application that the PCMR is against from the pull-down menu.
7. Select the **Operating System** from the pull-down menu.
8. Select the **Type** of record that you are entering form the pull-down menu.
9. Select the **Test Phase** from the pull-down menu.
10. Type in the **Functional Area, Title, Description, Source** and **Additional Information** into the free form fields.
11. An asterisk ***** by a field name indicates that the field must be completed to submit the PCMR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

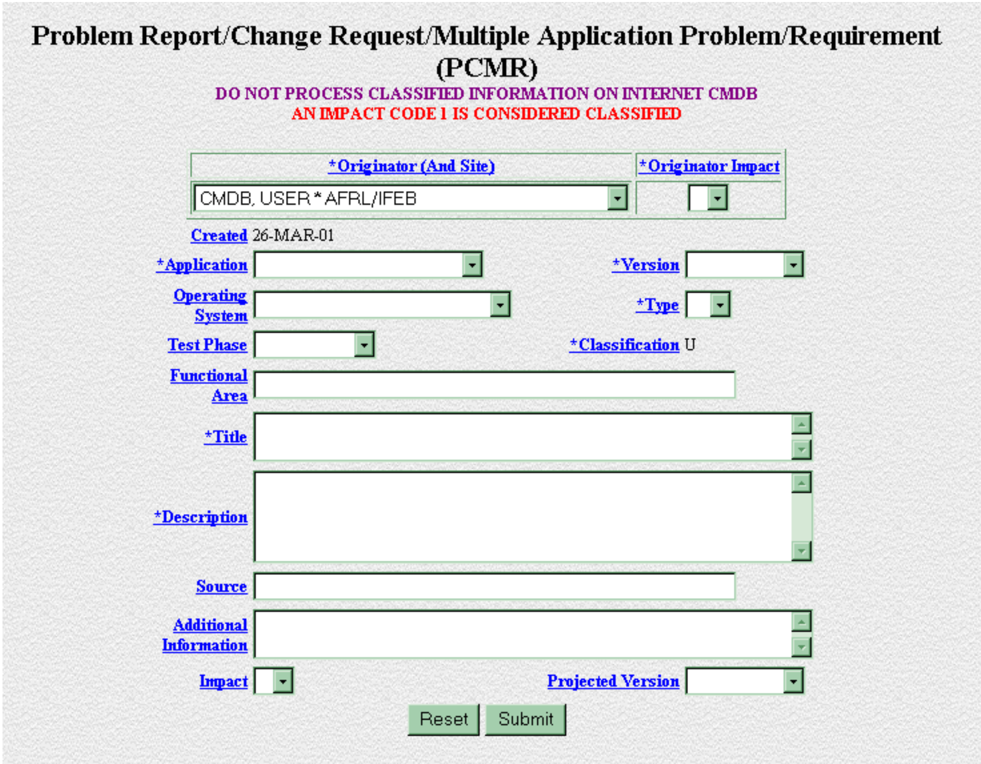


Figure 10-5 PCMR New Record

10.6.2 PR/CR/MAP/REQ (Query)

Performing a Query for PCMR records is accomplished through the **PR/CR/MAP/REQ (Query)** form.

1. To query PCMR records, select **PR/CR/MAP/Req (Query)** found under **Tracking** on the Main Menu.
2. The **PCMR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Impact**, **Application**, **Version**, **Type**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

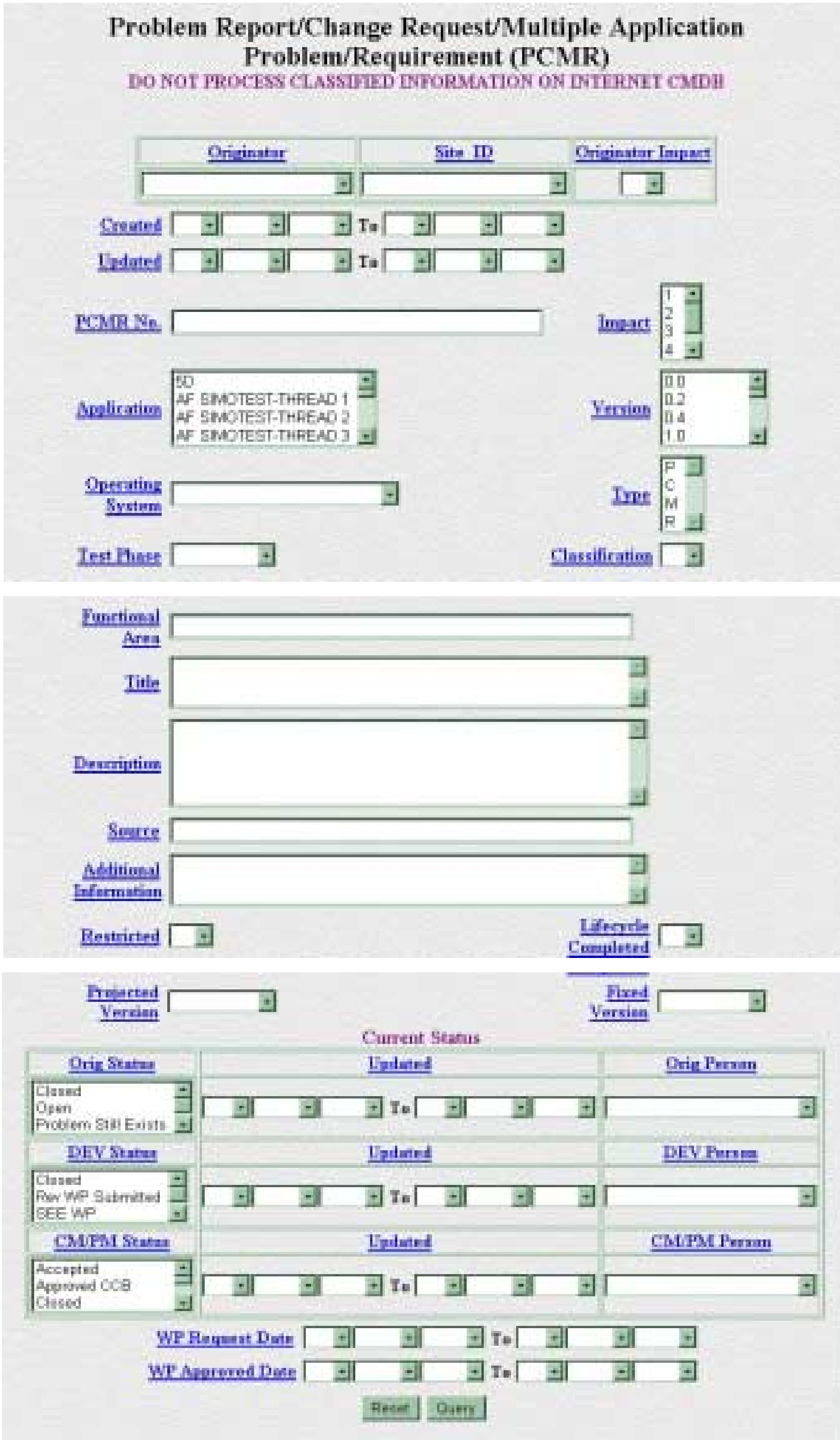


Figure 10-6 PCMR Query

10.7 WORKPLAN

Workplan is the management tool used to track, evaluate, verify, and approve or disapprove the estimated level of effort required to implement a software fix or change.

10.7.1 Create Workplan

The Developer has the ability to submit and track up to three separate Workplans for each **PCMR** record. Submitting the first Workplan for a PCMR is accomplished via the **PCMR** form. To enter the new **Workplan** record the developer must first perform a query for and select the item of interest using the **PR/CR/MAP/REQ (Query)** form found under **Tracking** in the Main Menu. The ***Create WP*** button will prompt the display of the **Workplan** form used to submit the Workplan. Submitting a Workplan is the formal response to the Status update (by a CM/PM role) of "**WP Requested**" in the PCMR.

To submit an additional Workplan for the same PCMR, a query is performed for the PCMR's most recently submitted **Workplan** record either by using the **Workplan (Query)** form, or by using the **PCMR(Query)** form and selecting the **Related WP(s**) link at the top of the **PCMR** form. When two or more Workplans have been submitted for the same PCMR, the CM/PM status will say, "SEE WP." This will indicate that the Developer should refer to the individual Workplan to review its current status. A link for each Workplan will be found at the top of the related PCMR. Likewise, each Workplan will also display links to its Related Workplans.

To submit a Workplan:

1. Select **PR/CR/MAP/REQ (Query)** found under **Tracking** in the Main Menu.
2. Perform a query for and select the PCMR of interest.
3. Select the ***Create WP*** button found toward the bottom of this screen. If no button is found, then CM or PM has not yet added the "WP Requested" status to this record. The developer should coordinate with the PMO/CM.
4. The **Workplan** form will be displayed. The **Created** date and **Application** fields will be auto-filled. Originator information, based on the user log-in, will also automatically be displayed in the **Originator** field. If submitting the Workplan for another developer, select the correct **Originator's** name from the pull-down menu.
5. Select the **Projected Version** from the pull-down menu.
6. Type the corresponding information into the following fields: **Problem Type**, **Suspense (date)**, **Description**, **CSCI**, **Software Modules Affected**, **System Impacts**, **Security Impact**, **Operating System Impacts**, **Documentation Affected**, and **Additional Information**.
7. Locate the **Hours** table toward the bottom of the form. Type in the appropriate number of hours as applied to each of the following fields: **Analysis**, **Mod/SW**, **Mngment**, **CM/QA**, **Doc/PDL**, **Testing**, **Misc/Support**.

8. An asterisk * by a field name indicates that it must be completed to submit the **Workplan**. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

The ***Submit*** button will enter the Workplan into the CMDB for review by the PM. A correct submittal will result in a message in the upper portion of the **Workplan** that says, "Insert Successful" with a number to identify the Workplan and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

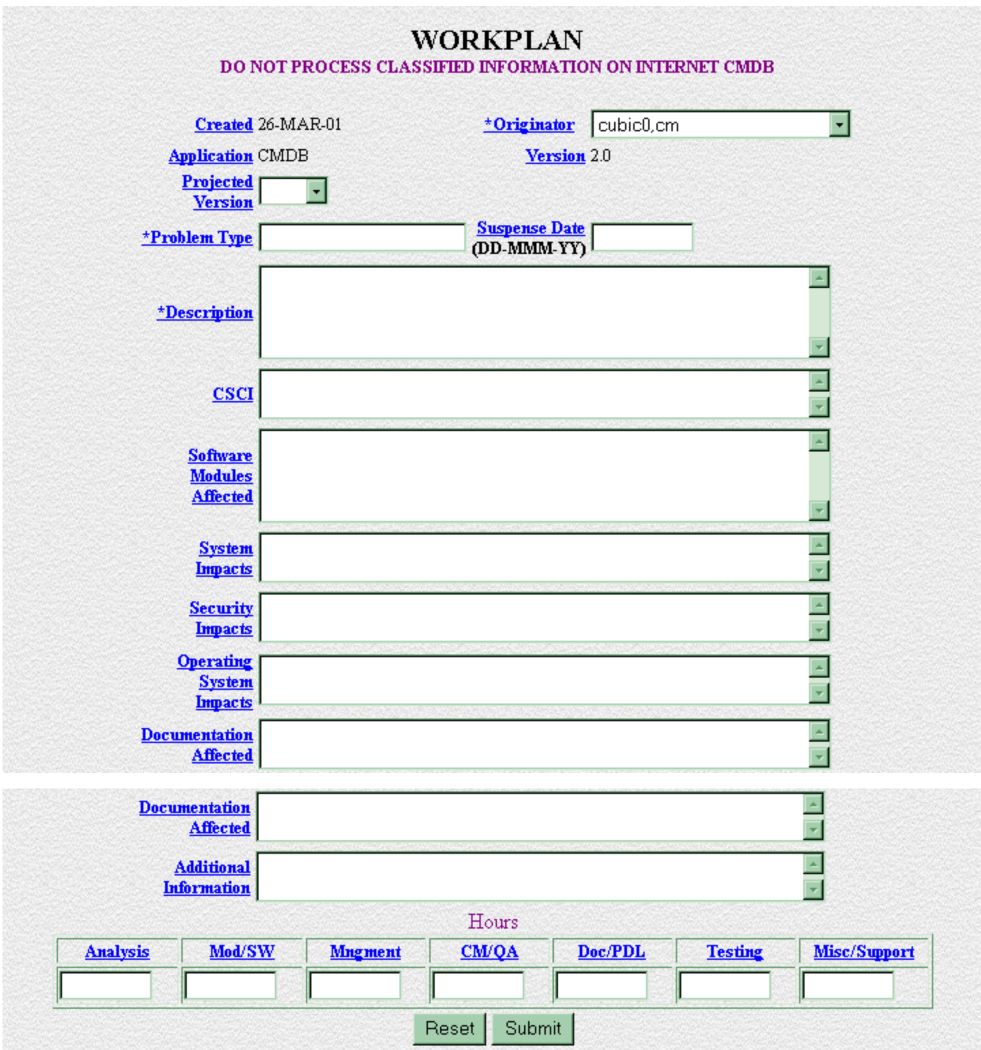


Figure 10-7 Create Workplan

10.7.2 Create Additional Workplan

Submitting a second or third Workplan for a PCMR is accomplished through the PCMR's preceding **Workplan**.

To submit an additional Workplan:

1. Select **<u>Workplan (Query)</u>** located under **<u>Tracking</u>** on the Main Menu.

2. Perform a query for and select the most recently submitted (preceding) Workplan for the PCMR. If creating a second Workplan, then the first Workplan for that PCMR should be selected. Creating the third Workplan for a PCMR would be accomplished through its second Workplan.

Note:

Workplans can also be accessed by performing a query for and selecting the related PCMR (using the **<u>PR/CR/MAP/REQ(Query)</u>** form) and then selecting the **Related Workplan(s)** number found at the top of the **<u>PCMR</u>** form. Likewise, links to the **Related Workplan(s)** will also be provided at the top of each **<u>Workplan</u>** form.

1. Scroll to the bottom of the **<u>Workplan</u>** form and select ***Create Additional WP (for PCMR#)*** as picture below in Figure 10.7.2-1.

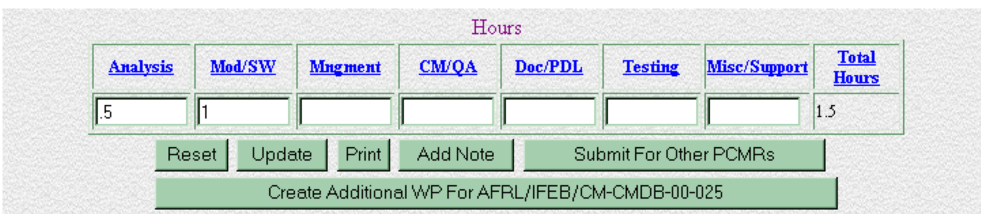


Figure 10-8 Create Additional Workplan Button

2. The **<u>Workplan</u>** form will be displayed. The **Created** date and **Application** fields will be auto-filled. Originator information, based on the user log-in, will also automatically be displayed in the **Originator** field. If submitting the Workplan for another developer, select the correct **Originator's** name from the pull-down menu.

3. Select the **Projected Version** from the pull-down menu.

4. Type the corresponding information into the following fields: **Problem Type**, **Suspense (date)**, **Description**, **CSCI**, **Software Modules Affected**, **System Impacts**, **Security Impact**, **Operating System Impacts**, **Documentation Affected**, and **Additional Information.**

5. Locate the **Hours** table toward the bottom of the form. Type in the appropriate number of hours as applied to each of the following fields: **Analysis**, **Mod/SW**, **Mngment**, **CM/QA**, **Doc/PDL**, **Testing**, **Misc/Support**.

6. An asterisk (*) by a field name indicates that it must be completed to submit the **<u>Workplan</u>**. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

The ***Submit*** button will enter the Workplan into the CMDB for review by the PM. A correct submittal will result in a message in the upper portion of the Workplan that says, "Insert Successful" with a number to identify the Workplan and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

The Developer may then view, add information, or submit the Workplan against another PCMR by selecting the appropriate button and filling in the required information. The ***Submit for Other PCMRs*** button will open another frame on the **Workplan** screen. This screen will allow the user to forward the current Workplan to another PCMR associated with it. The ***Attach PCMR*** button will associate this Workplan to the chosen PCMR.

10.7.3 Workplan (Query)

Performing a query for a Workplan is accomplished through the **Workplan (Query)** form.

1. To query Workplan records, select **Workplan (Query)** found under **Tracking** in the Main Menu.
2. The **Workplan (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from **Application** field.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

Note:

Workplans can also be accessed by performing a query and selecting the related PCMR (using the **PR/CR/MAP/REQ(Query)** form) and then selecting the **Related Workplan** number found at the top of the **PCMR** form.

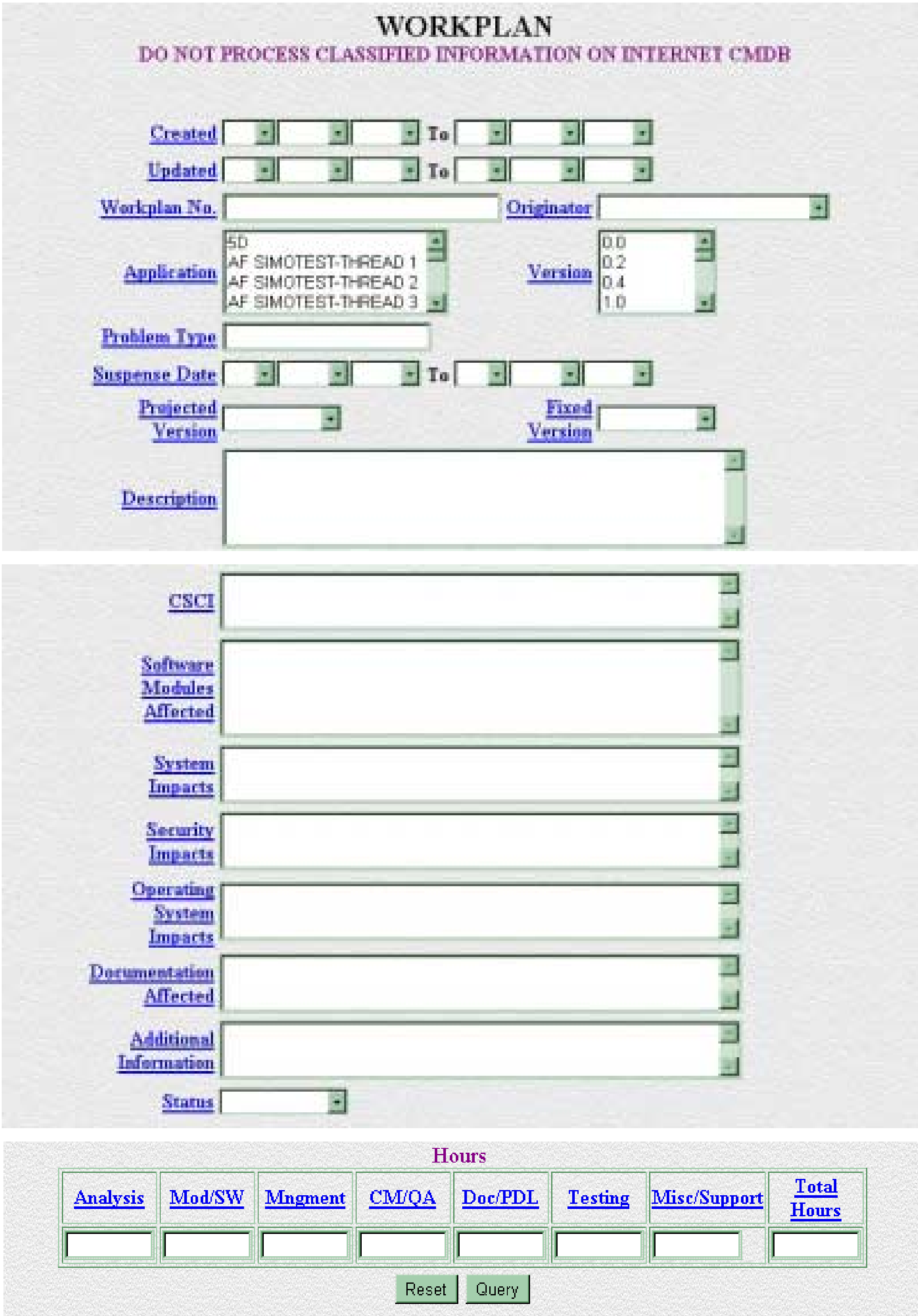


Figure 10-9 Workplan Query

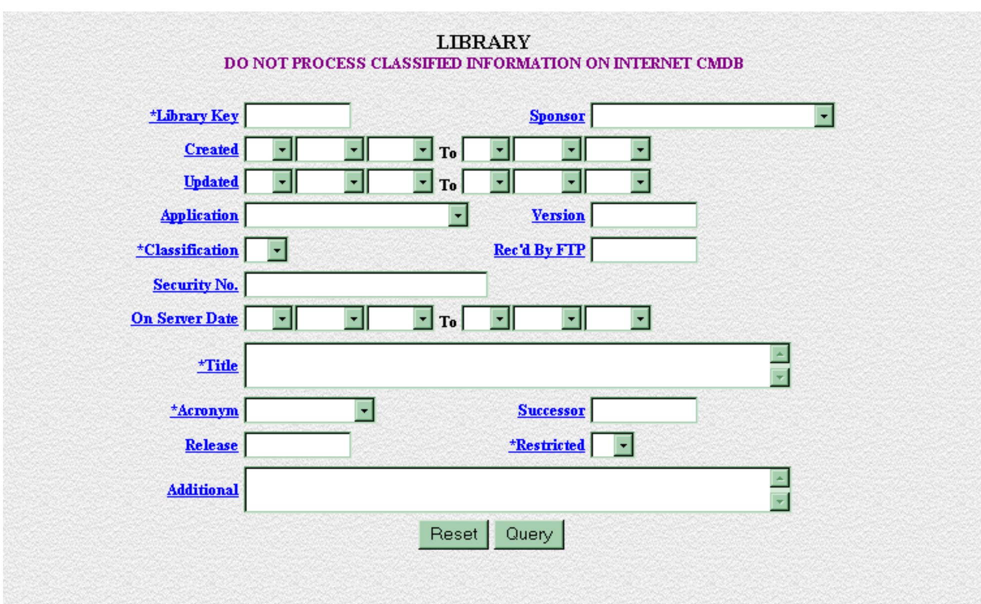
10.8 LIBRARY

The Library is the management tool used to catalogue program documentation and software maintained by CM. In addition, Advanced Document Revision Notices (ADRNs) are also maintained here. An ADRN is a change that has been made to a final document. The actual items in the library may be hardcopy, softcopy, on-line documentation as well as software. There are two sections under Library, the **Main Library** and **Library Audit**.

10.8.1 Main Library Query

The developer can search for document information in a section of the CMDB called the **Main Library** found on the Main Menu under the heading **Library**.

1) Locate **Library** on the Main Menu and select **Main Library**.
2) On the main screen in the upper frame, select ***Query*** and the library query form will be displayed. Enter known search criteria in desired field or fields. Queries may be narrowed or broadened depending on the amount of information given (Refer to Section 4.2, Performing Queries).
3) Scroll to the bottom of the form and select the ***Query*** button.
4) Results of the query will be displayed in the top frame. The total number of results from a query will be recorded at the bottom of the results list in this frame.
5) To view the item of interest, select the result and the library record will be displayed on the screen.
6) Queries may be modified and re-queried or brought back to a blank query screen by selecting the Query button in the upper frame.


LIBRARY
DO NOT PROCESS CLASSIFIED INFORMATION ON INTERNET CMDB

*Library Key
Sponsor
Created To
Updated To
Application
Version
*Classification
Rec'd By FTP
Security No.
On Server Date To
*Title
*Acronym
Successor
Release
*Restricted
Additional
Reset Query

Figure 10-10 Library Query

10.8.2 Library Audit

The **Library Audit** form is the management tool used to track the distribution of software and documentation to users at a particular site. The Library Audit tracks whether the shipment is a full release of the application or a single item, such as a patch or update to a document. Additionally, Library audit tracks the site, user, shipment mode, received date, and for software, date installed.

10.8.2.1 Library Audit Query

Performing a query for a Library Audit record is accomplished through the **Library Audit** form.

1. Select **Library Audit** located under **Library** in the Main Menu.
2. Select **Single Item** or **Release** and select ***Submit.***
3. Select an **Application** from the pull-down menu and select the ***Select App*** button.
4. Select a **Version** from the pull-down menu and select the ***Select Version*** button. The **Library Audit** form will be displayed.
5. Enter the criteria of the search and select the ***Query*** button located toward the bottom the screen. Search criteria may be entered in any field.
6. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

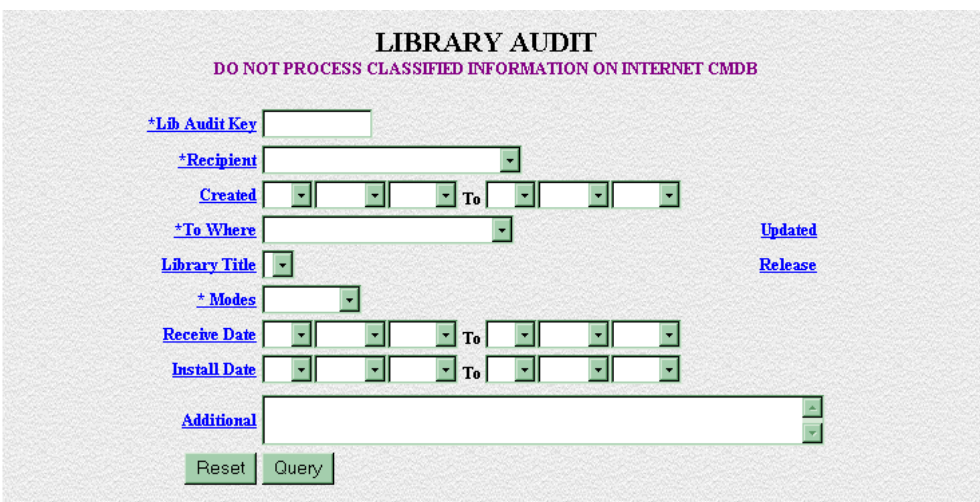


Figure 10-11 Library Audit Query

10.9 PEOPLE AND PLACES / POINTS OF CONTACT

People and Places stores information related to sites, organizations, and points of contact. The main components that fall under **People and Places** are; **Place**, **Users**, and **Change Password.**

10.9.1 Place

The **Place** form is the management tool used to track organization/site address information. In the **Place and Address** form Developer may perform a query for and view **Place** information.

10.9.1.1 Place and Address Query

Performing a query for place and address information is accomplished through the **Place and Address** form.

1. Select **Place** found under **People And Places** on the Main Menu. The **Place and Address** form will be displayed.
2. Enter the criteria of the search and select the ***Query*** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

10.9.2 Users/User Profile

Users is the tool used to manage CMDB user profile information. Developers can view and update their own profile information.

10.9.2.1 Updating User Profile

Updating a User Profile is accomplished through the **Users** form located under **People And Places** in the Main Menu.

To update your User Profile:

1. Select **Users** located on the Main Menu under **People And Places.**
2. Perform a query for your own profile by selecting ***Query.*** It is not necessary to provide any search criteria.
3. Select your name from the results frame. The **User Profile Query/Update** form containing your current profile information will be displayed.
4. Modify the fields as necessary. Select ***Update.***

10.9.3 Change Password

Change Password is used to modify the CMDB user's password used when logging into the CMDB.

1. Select **Change Password** located on the Main Menu under **People And Places** subheading **Users**.
2. The login ID of the CMDB user currently logged in will be displayed at the top of the screen. Below this, the password requirements are listed. Enter a password that meets these requirements in the **New Password** field.
3. Type the New Password again in the **Confirm Password Field**.

4. Select ***Change*** to submit the new password, or select ***Clear*** to bring both fields back to blank.

10.10 RELEASES/SOFTWARE RELEASE INFORMATION

The **Releases** component is the management tool used to track program Release information and the items contained therein. Selecting the ***Release Items*** button found on this form will open the **Release Items** table that lists the documentation and/or media that are associated with the release. The Developer has the ability to query this information.

10.10.1 Releases Query

Performing a Query for **Releases** records is accomplished through the **Releases** form.

1. Select **Releases** found under the heading **Releases** on the Main Menu.
2. A prompt frame will be displayed. Select ***Query*** from this frame.
3. The **Releases** form will be displayed. Enter the criteria of the search and select the **Query** button. Search criteria may be entered in any field.
4. The results of the query will be listed in the Results frame. Select the item of interest from the result list.

The ***Release Items*** button is found toward the bottom of the **Releases** form. Selecting ***Release Items*** will open the **Release Items** frame containing documentation and/or media that are associated with the release. To exit the **Release Items** frame use the browser's ***Back*** button or select ***Cancel Item*** found toward the bottom of the form.

11. JITF/JITC/ SECURITY TESTER

A tester is a user who performs testing of an application. A tester has the same privileges as a site User with the additional ability to view and submit Test Findings (TFs).

11.1 RESPONSIBILITIES OF THE TESTER

Testers are responsible for logging, tracking and monitoring TFs through their life cycle. TFs can be written against CM supported applications and applications that do not subscribe to any CM services and so are not supported by any of the other functions within the CMDB.

Testers can support various PMOs in documentation review. PMO sponsored testing and may generate PCMRs and DRRs. Testers are also responsible for periodically reviewing documentation provided to the CM library in support of testing and identifying obsolete documentation for destruction.

11.2 UPDATING RECORDS

Note:

The Tester has the ability to update any Test Finding Record. For all other Tracking items the Tester has the ability to update only those records of which he/she is the Originator. For more information on Originator privileges, see Section 12, Originator.

To update a record:

1. Perform a query for and select the item of interest.
2. Make the desired modifications to the fields and/or status within the record.
3. Scroll toward the bottom of the screen.
4. Select the ***Update*** button.

A message listing the item's tracking number followed by, "Update Successful" and a date/time stamp will be displayed at the top of the record to indicate that the update was successful.

Consecutive updates may be made to a record by following steps 2-4 above. It is not necessary to refresh the screen in between updates.

11.3 SUBMITTING A STATUS

A user must be the Originator of a **PCMR** or **DRR** item to add a status to it. To add a status to an **AI**, the user must be the Originator, or Assignee. Refer to Section 12 of this manual for more information on Originator privileges.

Statuses are used to display the current standing of a Tracking item in its life cycle. These are found toward the bottom of an individual record within a table called **Current Status**. This table displays the current standing of the record in its life cycle, the date the status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the role types with this privilege. Below the **Current Status** table, there is also a table called **Status History** that displays any status records that were added prior to the current statuses.

To submit a Status record:

1. Perform a query for and select the item of interest.
2. Scroll toward the bottom of the form and locate the **Current Status** table.
3. Use the pull-down menu found under the appropriate status (**Orig Status** (if you are the Originator)**,** or **Assignee Status** (if you are the Assignee of the Action Item) to select the desired status.
4. Select ***Update*** found below the table to submit the status.

11.4 ACTION ITEM (AI)

An **AI** is the management tool used to track required activities that are of interest at the program level. The AI is entered into the CMDB usually by a member of the PMO, although anyone with access to the CMDB can initiate an AI. The AI is assigned to an individual, known as the Assignee.

11.4.1 Action Item (New Record)/Submitting Action Items

Submitting new AI records is accomplished through the **Action Item (New Record**) form.

1. Select **Action Item (New Record)** found under **Tracking** in the Main Menu.
2. **Originator And Site** information will be auto-filled in this field based on the user log-in. However, if entering the AI for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select "**Not Found**" from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone Number** and **Site** in the respective fields. When the form is complete, select ***Submit***.
3. Select the Assignee and Site. If the name is not found select "Not Found" from the pull-down and proceed as described above.
4. The **Created** date will be auto-filled.
5. Fill in the **Suspense** date.
6. Select the **Application** that the AI is against from the pull-down menu.
7. Select the **Classification** of the AI. If on Internet CMDB, this will auto-fill to "U" for unclassified.
8. Type the **Title, Description, Source, Additional Information**, and **Disposition** into the respective free form fields.
9. An asterisk ***** by a field name indicates that the field must be completed to submit the AI. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the Action Item into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, "Insert Successful" with a number to identify the AI and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

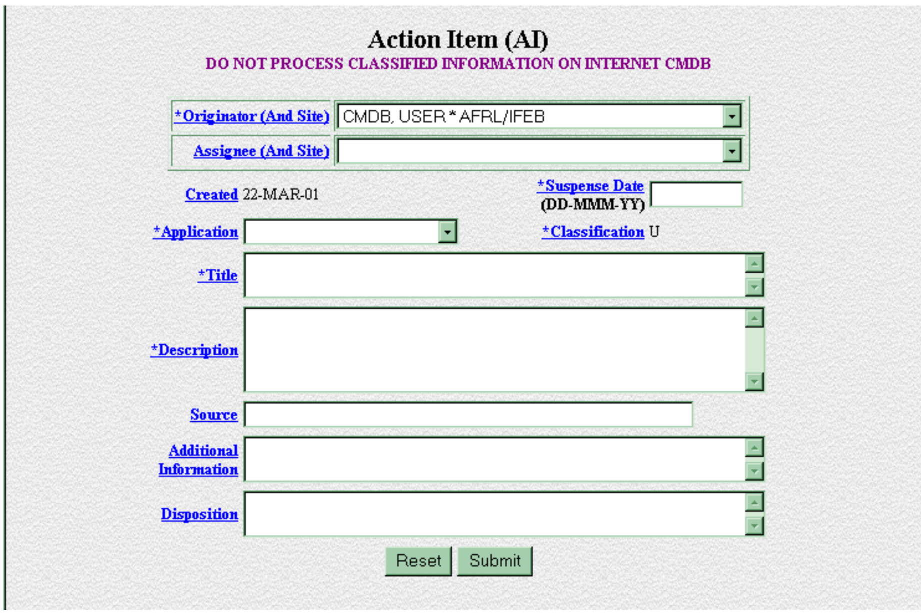


Figure 11-1 AI New Record

11.4.2 Action Item (Query)

Performing a query for an Action Item is accomplished through the **Action Item (Query)** form.

1. To query **Action Item** records, select **Action Item (Query)** found under **Tracking** on the Main Menu.
2. The **Action Item (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application, Originator Status**, **Assignee Status**, and **CM/PM Status**.
3. Select the ***Query*** button. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

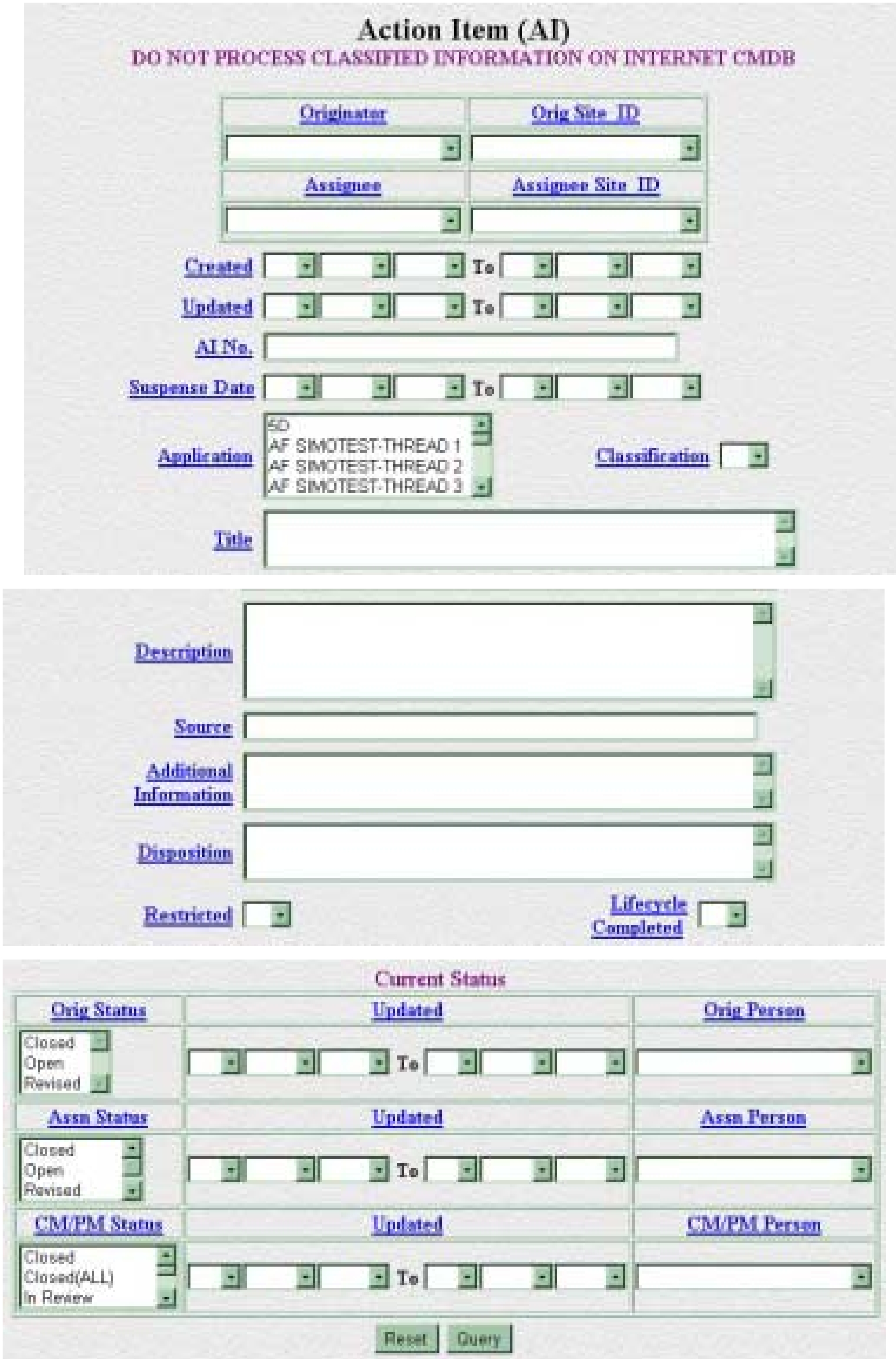


Figure 11-2 AI Query

11.5 DOCUMENT REVIEW REPORT

The **Document Review Report** (DRR) is used to coordinate and track changes to program documentation. DRRs identify technical, editorial, informational or requirements issues that are unclear or incorrect in any type of documentation produced for supported applications.

11.5.1 Document Review Report (New Record)/Submitting New DRRs

Submitting a DRR record is accomplished through the **Document Review Report (New Record)** form (refer to Figure 11.5.1-1).

1. Select **Document Review Report (New Record)** found under **Tracking** on the Main Menu**.** This will bring up the DRR form used for entering New DRRs into the CMDB.
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the DRR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select **Not Found**. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the **Originator's Last Name, First Name, Phone number** and **Site** in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the document is against from the pull-down.
6. Select the **Classification** of the DRR. If on Internet CMDB, this will auto-fill to "U" for unclassified.
7. Select the **Doc No., Acronym,** and **Document Title** from the pull-down. If the pull-down does not contain the document, select Not Found. Directions will then be provided to contact CM to request that the document be catalogued into the CMDB Library, as DRRs can only be written against documentation under CM control.
8. Type the **Page Number**, **Page Location, Description, Source, Additional Information** and **Disposition** into the respective free form fields.
9. An asterisk will indicate mandatory fields within the New Record form. These fields must be completed to submit the DRR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button.

The ***Submit*** button will enter the DRR into the CMDB for review by the PM and CM. A correct submittal will result in a message in the upper portion of the form that says, "Insert Successful" with a number to identify the DRR and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

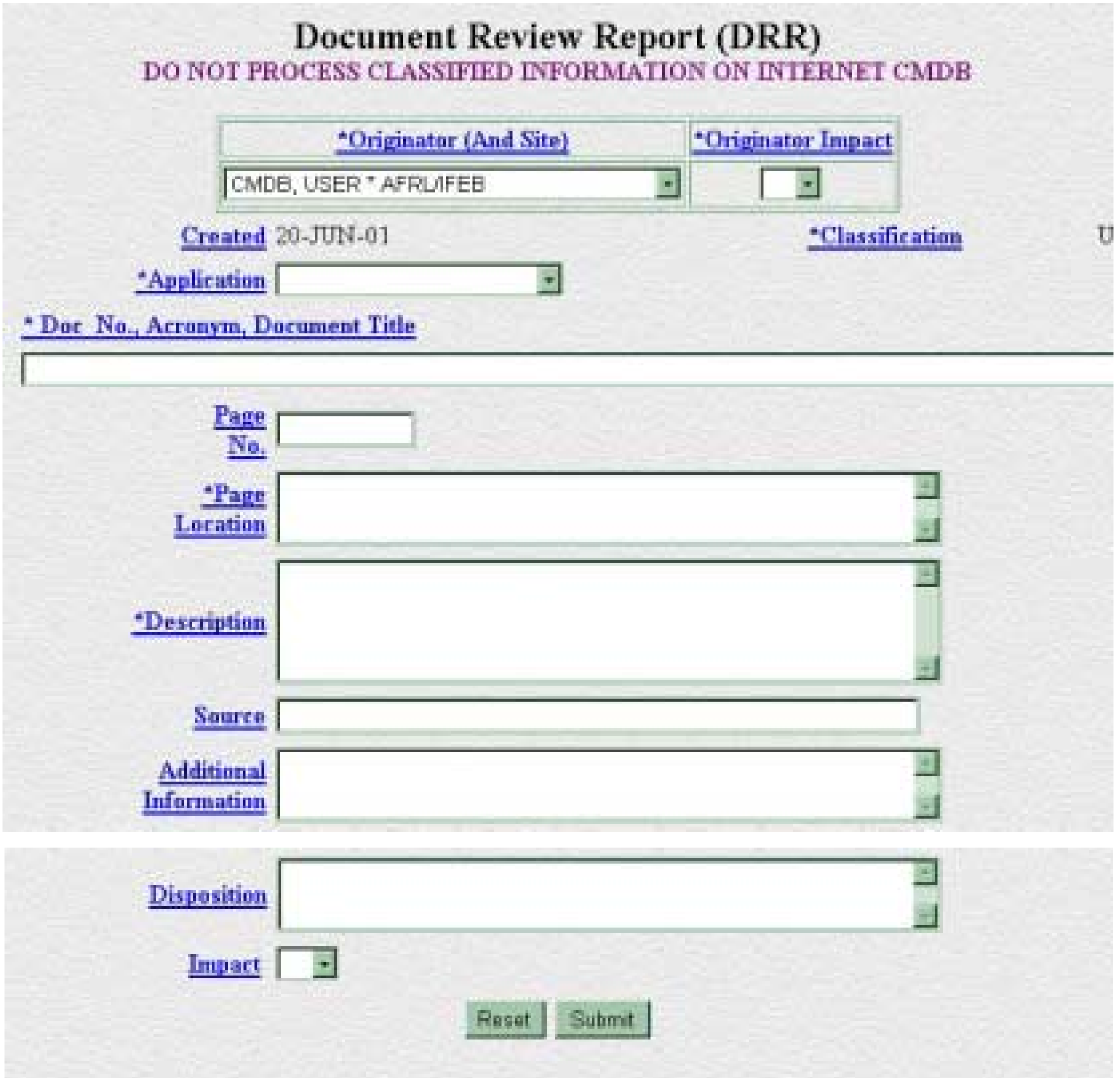


Figure 11-3 DRR New Record

11.5.2 Document Review Report (Query)

Performing a query for a DRR is accomplished through the **DRR (Query)** form.

1. To query DRR records, select **DRR (Query)** found under **Tracking** on the Main Menu.
2. The **DRR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application**, **Version**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the results.

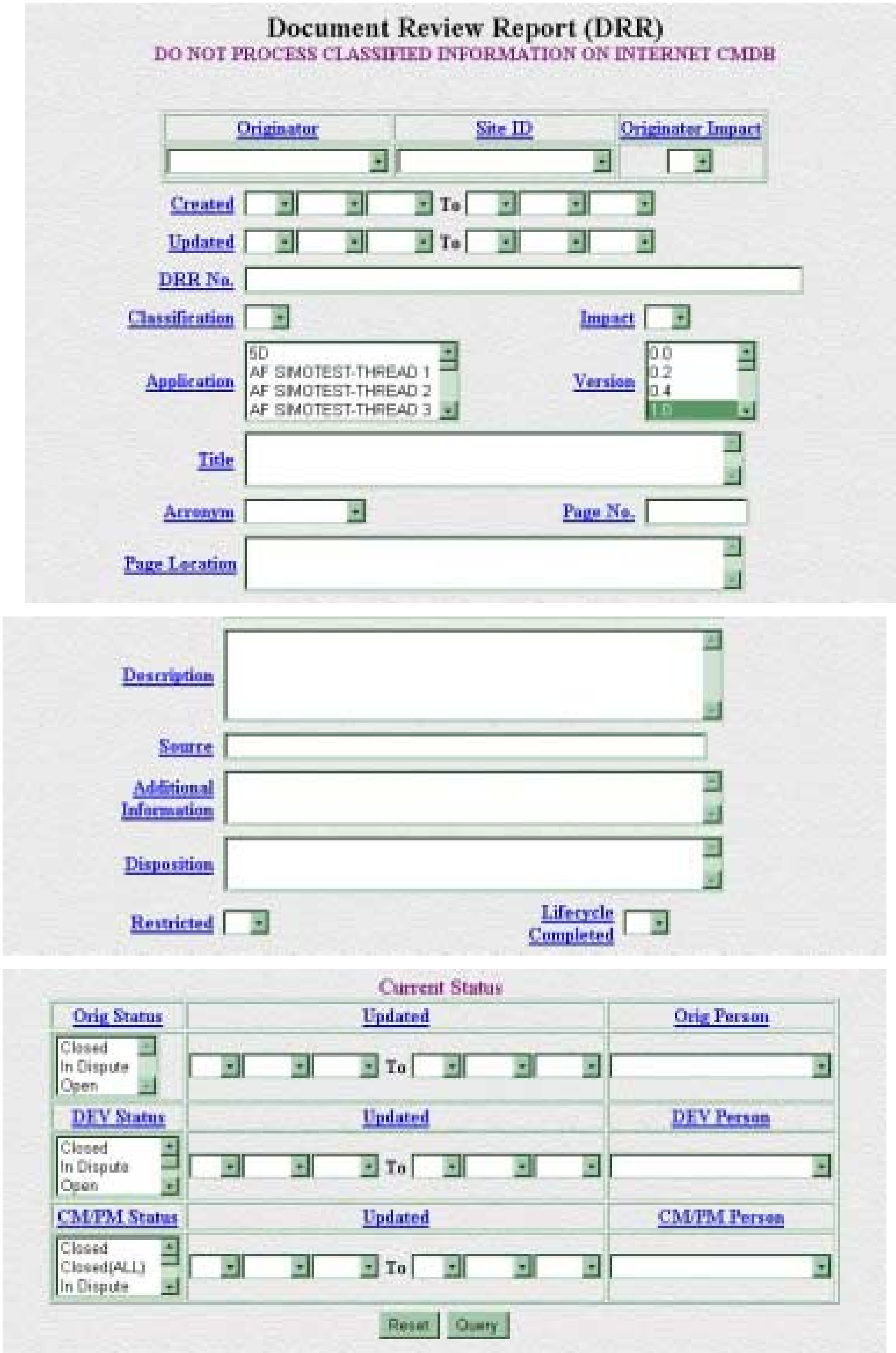


Figure 11-4 DRR Query

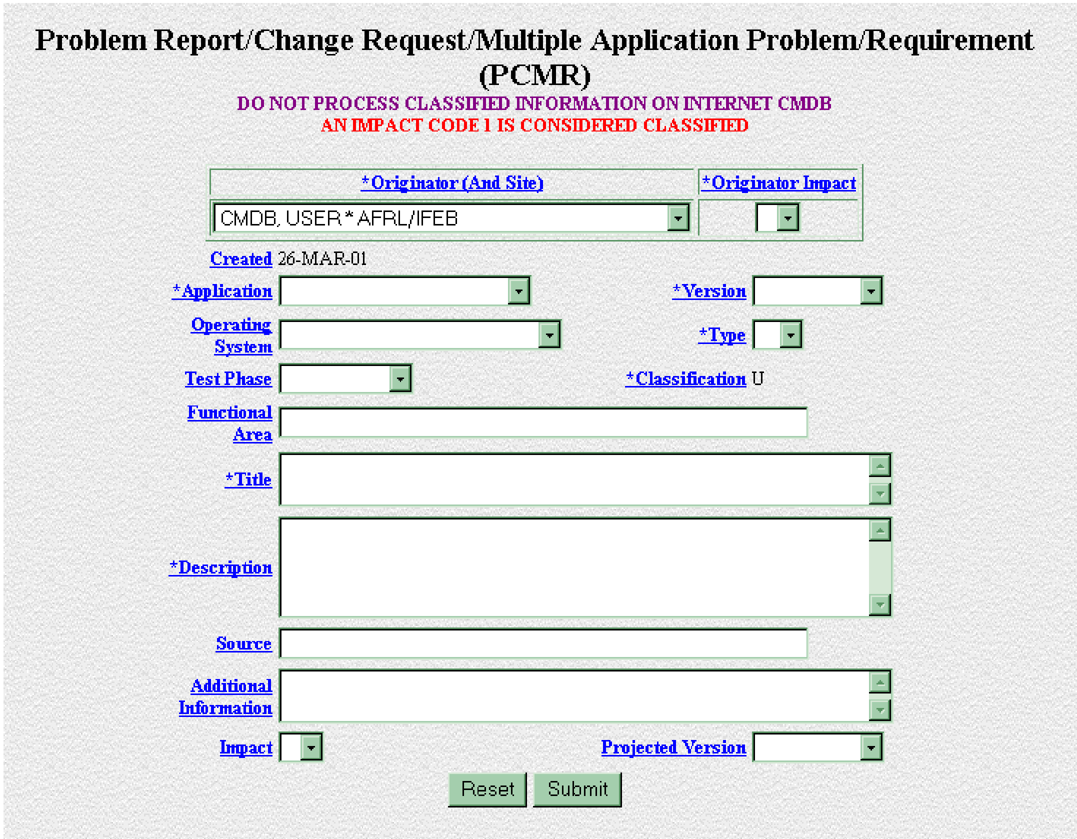
11.6 PROBLEM REPORT/CHANGE REQUEST/MULTIPLE APPLICATION PROBLEM/REQUIREMENT

The **Problem Report/Change Request/Multiple Application Problem/Requirement (PR/CR/MAP/REQ or PCMR)** is the management tool used to track, evaluate, verify, and approve or disapprove problems with baselined applications.

11.6.1 PR/CR/MAP/REQ (New Record)/Submitting PCMRs

The PR/CR/MAP/REQ (New Record) form is used for submitting new PCMRs into the CMDB.

1. Select **PR/CR/MAP/REQ (New Record)** found under **Tracking** in the Main Menu
2. Select **Originator And Site** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the PCMR for another individual, find the correct name and site of the Originator from the pull-down. If the name is not found, select **Not Found** from the pull-down. This will prompt a pop-up window containing a form to submit the profile information of the Originator. Enter the Originator's **Last Name, First Name, Phone number** and **Site** in the respective fields. When the form is complete, select Submit.
3. Select the **Originator Impact** from the pull-down menu.
4. The **Created** date will be auto-filled.
5. Select the **Application** that the PCMR is against from the pull-down menu.
6. Select the **Version** of the application that the PCMR is against from the pull-down menu.
7. Select the **Operating System** from the pull-down menu.
8. Select the **Type** of record that you are entering form the pull-down menu.
9. Select the **Test Phase** from the pull-down menu.
10. Type in the **Functional Area, Title, Description, Source** and **Additional Information** into the free form fields.
11. An asterisk * by the field name indicates that the field must be completed to submit the PCMR. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button located at the bottom of the form.



Problem Report/Change Request/Multiple Application Problem/Requirement (PCMR)

DO NOT PROCESS CLASSIFIED INFORMATION ON INTERNET CMDB

AN IMPACT CODE 1 IS CONSIDERED CLASSIFIED

*Originator (And Site) — CMDB, USER * AFRL/IFEB

*Originator Impact

Created 26-MAR-01

*Application

*Version

Operating System

*Type

Test Phase

*Classification U

Functional Area

*Title

*Description

Source

Additional Information

Impact

Projected Version

Reset Submit

Figure 11-5 PCMR New Record

11.6.2 PR/CR/MAP/REQ (Query)

Performing a Query for PCMR records is accomplished through the **PR/CR/MAP/REQ (Query)** form.

1. To query PCMR records, select **PR/CR/MAP/Req (Query)** found under **Tracking** on the Main Menu.
2. The **PCMR (Query)** form will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Impact**, **Application**, **Version**, **Type**, **Originator Status**, **Developer Status** and **CM/PM Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

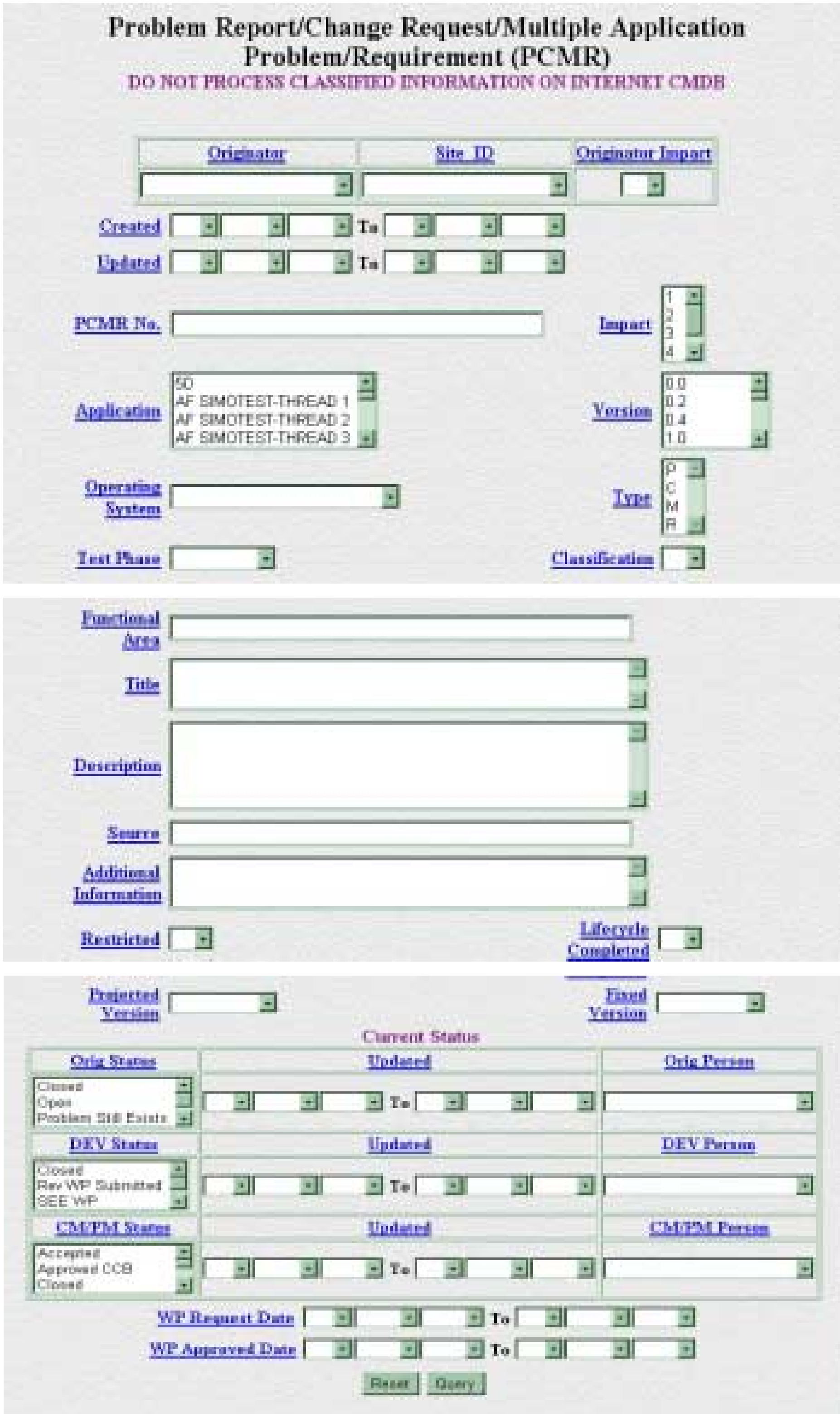


Figure 11-6 - PCMR Query

11.7 TEST FINDING (TF)

The Test Finding (TF) is the management tool used to review, and modify all problems discovered as a result of formal testing such as the Joint Integration Test Facility (JITF), Security, and Joint Interoperability Test Center (JITC). TFs can be against an application's documentation or software. The TFs will only be viewable to the Test Organization and CM until the Test Organization publishes a final test report and unrestricts access to the records.

11.7.1 Test Finding (New Record)/Submitting Test Findings

Submitting new TFs into the CMDB is accomplished through the **Test Finding (New Record)** form.

1. The **Created** date will be auto-filled when the form is generated.
2. Select **Test Finding (New Record)** found under **Tracking** in the Main Menu.
3. Select **Originator** from the pull-down menu. Originator information will be auto-filled in this field based on the user log-in. However, if entering the TF for another individual, find the correct name of the Originator from the pull-down.
4. Select the **Operating System** from the pull-down menu.
5. Select the **Type** (Document or Software) of TF that you are entering from the pull-down menu.
6. Select the **Application** that the TF is against from the pull-down menu.
7. Select the **Classification** from the pull-down menu. If on Internet CMDB, this will default to "U" for unclassified.
8. Select the **Impact** from the pull-down menu to denote the severity of the TF.
9. Select the **Version** of the application that the TF is against from the pull-down menu.
10. Type in the **Title** into the free form field.
11. Select the **Library Key, Doc Date, Document Title** from the pull-down menu.
12. Type in the **Description** into the free form field.
13. If this is a TF against a document, type the **Section** (exact location and paragraph) and **Page No.** (page number) of the document that needs to be addressed into the respective fields.
14. Type in the **Requirements** that are applicable to this TF.
15. Type in the **Tracking No**. from the NoteTaker record.
16. Select the **Fixed Version** from the pull-down menu.
17. An asterisk * indicates mandatory fields within the New Record form. These fields must be completed to submit the TF. Any optional field may be completed at the user's discretion. Once the form is completed, select the ***Submit*** button located at the bottom of the form.

A correct submittal will result in a message in the upper portion of the form that says, “Insert Successful” with a number to identify the TF and a date/time stamp. However, if mandatory fields were missed, an error message will be displayed. The error message will contain information on data still required.

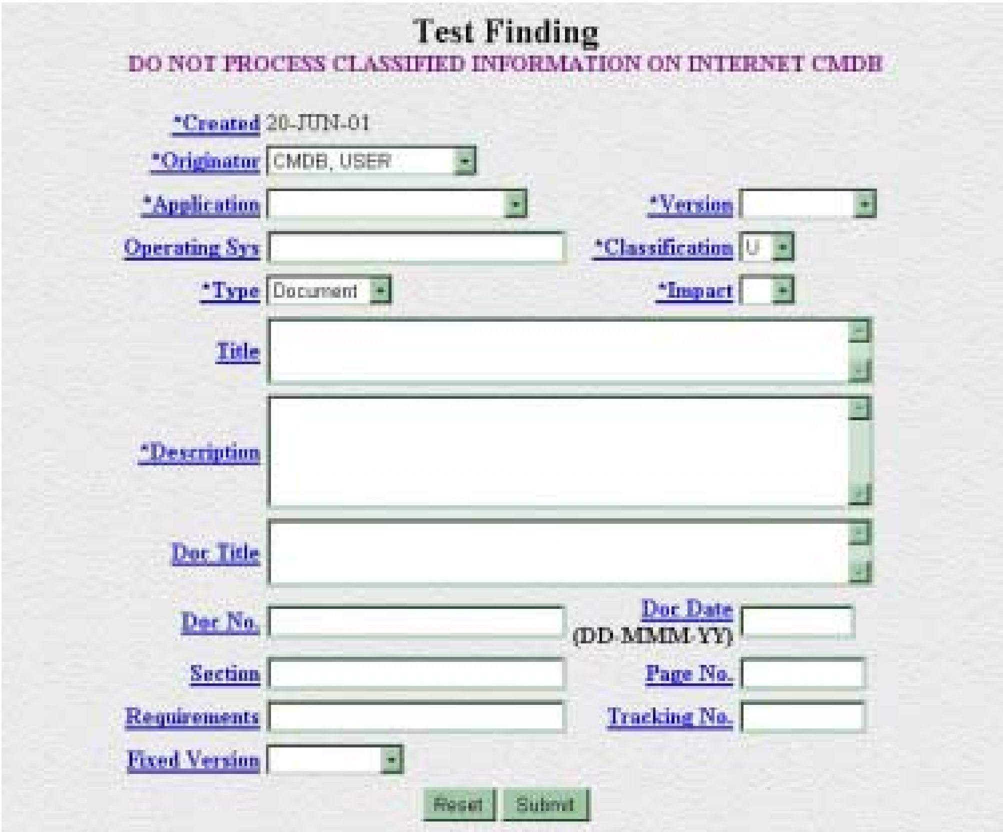


Figure 11-7 Test Finding New Record

11.7.2 Test Findings (Query)

Performing a query for a TF is accomplished through the **Test Finding (Query)** form.

1. To query Test Finding records, select **Test Finding (Query)** found under **Tracking** on the Main Menu.
2. The **Test Finding (Query)** screen will be displayed. Enter and/or select the criteria of the search using any of the free form fields, list boxes, and pull-down lists. Multiple items may be selected from the following fields: **Application**, **Version**, **Impact** and **Status**.
3. Select ***Query***. The results of the query will be listed in the Results frame. Select the item of interest from the list of results.

Figure 11-8 Test Finding Query

11.8 LIBRARY

The **Library** is the management tool used to catalogue program documentation and software maintained by CM. In addition, Advanced Document Revision Notices (ADRNs) are also maintained here. An ADRN is a change that has been made to a final document. The actual items in the library may be hardcopy or softcopy documents, or software. There are two sections under **Library**, the **Main Library** and **Library Audit**.

11.8.1 Main Library Query

The User can search for document information in a section of the CMDB called the **Main Library** found on the Main Menu under the heading **Library**.

1. Locate **Library** on the Main Menu and select **Main Library**.
2. On the main screen in the upper frame, select ***Query*** and the library query form will be displayed. Enter known search criteria in desired field or fields. Queries may be narrowed or broadened depending on the amount of information given (Refer to Section 4.2, Performing Queries).
3. Scroll to the bottom of the form and select the ***Query*** button.
4. Results of the query will be displayed in the Results frame. The total number of results from a query will be recorded at the bottom of the results list in this frame.
5. To view the item of interest, select the result and the library record will be displayed on the screen.
6. Queries may be modified and re-queried or brought back to a blank query screen by selecting the Query button in the upper frame.

11.8.2 Library Audit

The **Library Audit** form is the management tool used to track the distribution of software and documentation to users at a particular site. The Library Audit tracks whether the shipment is a full release of the application or a single item, such as a patch or update to a document. Additionally, Library audit tracks the site, user, shipment mode, received date, and for software, date installed.

11.8.2.1 Library Audit Query

Performing a query for a Library Audit record is accomplished through the **Library Audit** form.

1. Select **Library Audit** located under **Library** in the Main Menu.
2. Select **Single Item** or **Release** and select ***Submit.***
3. Select an **Application** from the pull-down menu and select the ***Select App*** button.
4. Select a **Version** from the pull-down menu and select the ***Select Version*** button. The **Library Audit** form will be displayed.

11.9 PEOPLE AND PLACES / POINTS OF CONTACT

People and Places stores information related to sites, organizations, and points of contact. The main components that fall under People and Places are; **Place**, and **Users** and **Change Password**.

11.9.1 Place

The **Place** form is the management tool used to track organization/site address information. In the **Place and Address** form users may perform a query for and view Place information.

11.9.1.1 Place and Address Query

Performing a query for place and address information is accomplished through the **Place and Address** form.

1. Select **Place** found under **People And Places** on the Main Menu. The **Place and Address** form will be displayed.
2. Enter the criteria of the search and select the ***Query*** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the Results frame. Select the item of interest from the results list.

11.9.2 Users/Updating Your User Profile

Users is the tool used to manage CMDB user profile information. Users can view and update their own profile information.

Updating your User Profile is accomplished through the **Users** form located under **People And Places** in the Main Menu.

To update the User Profile:

1. Select **Users** located on the Main Menu under **People And Places.**
2. Perform a query for your own profile by selecting ***Query.*** It is not necessary to provide any search criteria.
3. Select your name from the results frame. The **User Profile Query/Update** form containing your current profile information will be displayed.
4. Modify the fields as necessary. Select ***Update.***

11.9.3 Change Password

Change Password is used to modify the CMDB user's password used when logging into the CMDB.

1. Select **Change Password** located on the Main Menu under **People And Places** subheading **Users**.
2. The login ID of the CMDB user currently logged in will be displayed at the top of the screen. Below this, the password requirements are listed. Enter a password that meets these requirements in the **New Password** field.
3. Type the New Password again in the **Confirm Password Field**.
4. Select ***Change*** to submit the new password, or select ***Clear*** to bring both fields back to blank.

11.10 RELEASES

The **Releases** component is the management tool used to track program Release information and related items. Selecting the ***Release Items*** button found on this form will open the **Release Items** table that lists the documentation and/or media that are associated with the release. The User has the ability to query **Releases** information.

11.10.1 Releases Query

Performing a Query for **Releases** records is accomplished through the **Releases** form.

1. Select **Releases** found under the heading **Releases** on the Main Menu.
2. A prompt frame will be displayed. Select ***Query*** from this frame.
3. The **Releases** form will be displayed. Enter the criteria of the search and select the **Query** button. Search criteria may be entered in any field.
4. The results of the query will be listed in the Results frame. Select the item of interest from the result list.
5. The ***Release Items*** button is found toward the bottom of the **Releases** form. Selecting ***Release Items*** will open the **Release Items** frame containing documentation and/or media that are associated with the release. To exit the **Release Items** frame use the browser's ***Back*** button or select ***Cancel Item*** found toward the bottom of the form.

12. ORIGINATOR

The person who submits a new **Tracking** record is referred to as its Originator. A special set of permissions exists when a user is also the Originator of a record. These permissions will allow the user to interact with (read or modify) any information that they originally created.

12.1 RESPONSIBILITIES OF THE ORIGINATOR

Only the Originator of a **Tracking** item may modify/update it (CM and PM roles have this privilege as well, however, beyond these roles this privilege is only extended to the Originator). When submitting a new record for inclusion in the CMDB, the Originator should be sure to provide accurate and complete information. The Originator is also responsible for updating the record, and/or submitting Originator status records as necessary. When PRs/CRs are incorporated into a release the fix should be verified by the site or it should be noted if the PRs/CRs are still valid.

12.2 ORIGINATOR PRIVILEGES

Following are the additional permissions that a user will be granted for those records for which he/she is the Originator.

12.2.1 Updating Records

The Originator of a PCMR, DRR or AI record has the ability to update all modifiable fields of that record.

To update a record:

1. Perform a query for and select the item of interest.
2. Make the desired modifications to the fields and/or status within the record.
3. Scroll toward the bottom of the screen.
4. Select the ***Update*** button.

A message listing the item's tracking number followed by, "Update Successful" and a date/time stamp will be displayed at the top of the record to indicate that the update was successful.

Consecutive updates may be made to a record by following steps 2-4 above. It is not necessary to refresh the screen in between updates.

12.2.2 Viewing Restricted Records

Restricted is a field found in each of the **Tracking** forms (except **Workplan**) that allows the PMO the ability to review items and use discretion as to which items will be accessible by the general user community. Each new **Tracking** record will automatically be Restricted upon entry into the CMDB. Only the Originator of a record and CM/PM has the ability to view that record while it is Restricted. Until the record is reviewed and granted an Unrestricted status by CM/PM, no other user is able to access it. This special permission allows the Originator the ability to review the newly submitted record for accuracy.

To view a Restricted **Tracking** record, a query is performed using the appropriate (Query) form. Only the Originator, CM and the PM of the affected application can view Restricted records.

1. Select the (Query) form found under **Tracking** that corresponds with the type of record you are searching for.
2. Enter the criteria of the search and select the **Query** button. Search criteria may be entered in any field.
3. The results of the query will be listed in the results frame. Select the item of interest from the results list.

12.2.3 Originator Status

The Originator of an **AI**, **PCMR** or **DRR** record has the ability to submit an **Originator Status** to that record.

To Submit an Originator Status:

1. Perform a query for and select the item of interest.
2. Scroll toward the bottom of the form and locate the **Current Status** table.
3. Use the pull-down menu found under **Orig (Originator) Status** to select the desired status.
4. Select ***Update*** found below the table to submit the status.

13. TROUBLESHOOTING

Troubleshooting will help to qualify a problem as a true database problem, rather than operator error or a training issue. If a problem is encountered with the database functionality, such as a required button is not available, or a search did not produce the results sought for, reference these tips before submitting a PR against the CMDB. The tips are categorized by area of functionality.

1. Submitting a New Tracking Record

   Problem:

   When trying to submit a new Tracking record the following error appears in the Results frame: **ERROR... Missing Value**.

   Mandatory information was omitted. Read the error to identify which fields were left blank, complete the form and re-submit it.

   Problem:

   When submitting a new record, the version the item is against is not found on the pull-down list.

   Solution:

   The version needs to be entered into the CMDB by a CM Administrator, contact CM.

2. Help

   Problem:

   The **Help** hotlinks are not working.

   Solution:

   Check to see if JavaScript is enabled in the browser.

3. Hotlist

   Problem:

   The ***Add to Hotlist*** button is not present.

   Solution:

   This item has already been added to the Hotlist.

14. DEFINITIONS

Action Item (AI) is the management tool used to track required activities that are of interest at the program level.

Advanced Document Revision Notice (ADRN) is a change that has been made to a final document.

Change Request (CR) is a new requirement or enhancement that is not part of the baselined software requirements.

Configuration Management (CM) is a process for developing and maintaining software by improving accountability, reproducibility, traceability, and coordination.

Configuration Management Database (CMDB) is an automated status accounting tool used to record and report information related to CM.

Document Review Report (DRR) is used to coordinate and track changes to program documentation. DRRs identify technical, editorial, informational or requirements issues that are unclear or incorrect in any type of documentation produced for supported applications.

Multiple Application Process (MAP) is a mechanism used to coordinate changes between applications when a PR or CR affects multiple programs.

Notification is a CMDB system generated notice of new and/or updated records.

PCMR is a Problem Report, Change Request, Multiple Application Problem, or Requirement record.

Program Management Office (PMO) is the office responsible for the development of the software in terms of cost, schedule, technical performance, and supportability according to collected requirements. The PMO is responsible for directing the development contractor to ensure adequate testing of the application to minimize the number of errors experienced by users.

Problem Report (PR) is a report describing a software deficiency whereby the software does not function as documented by program requirements.

Release is the documentation and software of an application for a specific version of the software.

Requirement (REQ) is a program level specification for future development efforts.

Tracking is the integral component of the CMDB that encompasses AIs, CRs, DRRs, MAPs, PRs, Requirements, and Workplans. Tracking is the area of the CMDB where new data is both entered and queried.

Workplan is a document that identifies the estimated level of effort required to implement a software fix or change.

15. ACRONYMS

ADRN	Advanced Document Revision Notice
AFRL	Air Force Research Laboratory
AI	Action Item
CDRL	Contract Data Requirement List
CR	Change Request
CM	Configuration Management
CMDB	Configuration Management Data Base
CUBIC	Common User Baseline for the Intelligence Community
DIA	Defense Intelligence Agency
DRR	Document Review Report
HTML	HyperText Markup Language
IFEB	Information Handling Branch
JITC	Joint Interoperability Test Center
JITF	Joint Integration Test Facility
JWICS	Joint Worldwide Intelligence Communication System
MAP	Multiple Application Problem
MRO	MASINT Requirements Office
PC	Personal Computer
PCMR	Problem Report/Change Request/Multiple Application Problem/Requirement
PM	Program Manager
PMO	Program Management Office
PR	Problem Report
QA	Quality Assurance
REQ	Requirement
SUM	Software User’s Manual
TF	Test Finding
URL	Universal Resource Locator
WP	Workplan

Appendix A Terminology of Form Fields

A-1 Action Item

The terminology of the fields that the **Action Item** forms contain is described below:

A. **Originator** - The name (last name first) of the Originator of the AI.

B. **Assignee** - The name (last name first) of the person assigned to work the AI.

C. **Originator Site id** - The code (also called source) of the place of work of the person submitting the AI.

D. **Assignee Site id** - The code (also called source) of the place of work of the person that is assigned to work the AI.

E. **Originator (And Site)** - The name (last name first) and the abbreviated name for the place of work of the person who submitted the AI.

F. **Assignee (And Site)** - The name (last name first) and the abbreviated name for the place of work of the person assigned to work the AI.

G. **Created** - The date this record was created.

H. **Updated** - The date this record was last modified.

I. **AI Number** - The unique sequence number identifying the Action Item. The number identifies the Application-Last name of Originator-Year-Sequence number. For example, the AI Number CMDB-Smith-01-002 would indicate that the application involved is CMDB, the Originator's last name is Smith and that it was the second AI against CMDB for the year 2001.

J. **Suspense Date** - The date on or by which the AI must be satisfied or closed.

K. **Application** - The acronym of the application the AI is against.

L. **Classification** - The classification of the AI: U=Unclassified, S=Secret.

M. **Title -** Short phrase or sentence stating the action required.

N. **Description** -A free form field for the text detailing the AI.

O. **Source** - The meeting or event where the AI originated.

P. **Additional Information -** A free form field for adding any other relevant information.

Q. **Disposition** - A description of the action taken on the item.

R. **Restricted** - Restricts access to keep private (Yes) or allow regular access (No).

S. **Lifecycle Completed -** Status of the Action in its life cycle. "N" indicates the Action is still Active or Open. "Y" indicates the Action has been Completed or Closed by all appropriate roles.

T. **Current Status** - A table that displays the current standing of the AI in its life cycle. There are three fields for submitting statuses; one designated for each of the role types with this privilege. The three status fields and their additional corresponding fields are the defined below:

   1. **Orig Status** - Used exclusively by the Originator of the AI to reflect the current status from the Originator's standpoint. To the right of the Orig Status you will find a field called **Updated** which displays the date that the current status was last added or updated. Located to the far right in the table is **Orig Person**, a field that displays the Originator's name.

   2. **Assignee Status -** Used exclusively by the Assignee to reflect the current status from the Assignee standpoint. To the right of the **Assignee Status** you will find a field called **Updated** which displays the date that the current status was last added or updated by the Assignee. Located to the far right in the table is **Assignee Person**, a field that displays the Assignee's name.

   3. **CM/PM Status** - Used exclusively by CM or PM to reflect the current status from the program management standpoint. To the right of the **Orig Status** you will find a field called **Updated** which displays the date that the current status was last added or updated. Located to the far right in the table is **CM/PM Person**, a field that displays the name of the CM or PM person who added the status.

U. **Status Review** - A history of the statuses assigned to the AI that pre-dated the statuses most recently (current statuses) assigned to it. The Status Review displays the following information**:**

   1. **Person** -The person who assigned the status.

   2. **Generated** -The date the status was assigned.

   3. **Status** - The status that was assigned.

   4. **Role/Type** - The Role of the person who assigned the status.

A-2 Document Review Report

The terminology of the fields that the **<u>Document Review Report</u>** forms contain is described below:

A. **Originator (And Site)** - The name (last name first), and the abbreviated code (also called source) of the place of work of the person submitting the Document Review Report.

B. **Originator** - The name (last name first) of the person submitting the DRR.

C. **Site ID -** The code (also called source) of the place of work of the person submitting the DRR.

D. **Originator Impact -** The severity of the finding against the document. Impact values will be 1 to 3 (1 = Major Problem, 2 = a Minor Problem, 3= Irritant).

E. **Impact** - The Impact number assigned by the PMO after reviewing the DRR.

F. **Created** - The (auto-filled) date this record was created.

G. **Updated** - The date the DRR was last updated.

H. **Classification** - The classification of the input: U=Unclassified, S =Secret.

I. **Application** - The acronym of the application the DRR is against.

J. **Doc No., Acronym, Document Title** - The number assigned to the document. The number is usually provided on the document's cover page. The second item listed here is the acronym of the document type. Lastly, the title of the document is listed as it appears in the Library.

K. **Page No.** - The number of the page on which the problem was found.

L. **Page Location** - The location on the page, e.g., Section, paragraph, object, where the problem is found.

M. **Description** - A free form field for the text detailing the DRR.

N. **Source** - Optional reference to track where, when or how the finding was initiated.

O. **Additional Information –** A free form field for adding any information that is relevant to the DRR.

P. **Disposition** - A description of the action taken on the item.

Q. **DRR No.** - The unique sequence number identifying the DRR. The form for the DRR No. is application-version, acronym/document date-sequence number.

R. **Version** - The version of the application that the DRR is against.

S. **Title** - Title of the document.

T. **ID No.** - The identification number of the document.

U. **Acronym –** The acronym of the type of document.

V. **Lifecycle Completed** - Status of the DRR in its life cycle. "N" indicates the DRR is still Active or Open. "Y" indicates the DRR has been Completed or Closed by all appropriate roles.

W. **Current Status** - A table with the DRR form that displays the current standing of the DRR in its life cycle, the date this status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the role types with this privilege. The three status fields and their additional corresponding fields are the defined below:

   1. **Orig Status** - Used exclusively by the Originator of the PCMR to reflect the current status from the Originator's standpoint. To the right of the Orig Status you will find a field called **Updated** which displays the date that the current status was last added or

updated. Located to the far right in the table is **Orig Person**, a field that displays the Originator's name.

2. **DEV Status** - Used exclusively by the Developer to reflect the current status from the development standpoint. To the right of the **DEV Status** you will find a field called **Updated** which displays the date that the current status was last added or updated by the developer. Located to the far right in the table is **DEV Person**, a field that displays the Developer's name.

3. **CM/PM Status** - Used exclusively by CM or PM to reflect the current status from the program management standpoint. To the right of the **Orig Status** you will find **Updated**, a field that displays the date that the current status was last added or updated. Located to the far right in the table is **CM/PM Person**, a field that displays the name of the CM or PM person who added the status.

X. **Status Review** - A history of the statuses assigned to the DRR that pre-dated the statuses most recently (current statuses) assigned to it. If there were no statuses entered prior to the current statuses, then the Status field will display the message, "No Status Records Found." The Status Review displays the following information:

1. **Person –** The person who assigned the status.
2. **Generated –** The date the status was assigned.
3. **Status –** The status that was assigned.
4. **Role/Type –** The role of the person who assigned the status.

A-3 PR/CR/MAP/REQ

The terminology of the fields that the **PR/CR/MAP/REQ** forms contain is described below:

A. **Site ID** - The code (also called source) of the place of work of the person submitting the PCMR.

B. **Originator** - The name (last name first) of the person submitting the PCMR.

C. **Originator Impact** - The severity of the PCMR. Impact values will be 1 to 5. Due to security discussions with DIA and 497th IG, all Impact Code 1 PCMR's and all Security Vulnerabilities regardless of Impact Code are considered SECRET in classification and must be submitted via the Intelink side of the CMDB. The Impact codes are described as follows:

1. **Impact 1** - a) Prevent the accomplishment of an essential capability. b) Jeopardize safety, security, or other requirement designated "critical".
2. **Impact 2** - a) Adversely affect the accomplishment of an essential capability and no work around solution is known. b) Adversely affect technical, cost, or schedule risks to the project or to life cycle support of the system, and no work-around solution is known.

3. **Impact 3** - a) Adversely affect the accomplishment of an essential capability but a work-around solution is known. b) Adversely affect technical, cost, or schedule risks to the project or to life cycle support of the system, but a work-around solution is known.
4. **Impact 4** - a) Result in user/operator inconvenience or annoyance but does not affect a required operational or mission-essential capability. b) Result in inconvenience or annoyance for development or maintenance personnel but does not prevent the accomplishment of the responsibilities of those personnel.
5. **Impact 5** - Any other effect.

D. **Created** - The (auto-filled) date this record was created.

E. **Application** - The acronym of the application that the PCMR is against.

F. **Version** - The version of the application the PCMR is against.

G. **Operating System** - Operating system the PCMR was found against.

H. **Type** - The type of software finding (P= Problem Report, C= Change Request, M= Multiple Application Problem, R= Requirement).

I. **Test Phase** - Test phase where the problem was found.

J. **Classification** - The classification of the input: U=Unclassified, S=Secret.

K. **Functional Area -** The functional area is where the PCMR can be grouped. An example is print, database or imagery.

L. **Title -** Short phrase or sentence summarizing the problem.

M. **Description** - A free form field for the text detailing the PCMR.

N. **Source -** Optional reference to track where, when or how the finding was initiated.

O. **Additional Information** - A free form field for adding any other relevant information.

P. **Updated -** The date the record was last modified.

Q. **PCMR No**. - The unique system generated number used to identify PCMRs. The format for the number is: Site ID-application-year-sequence# (the sequence # counts PCMRs against an application by year).

R. **Impact** - The Impact number assigned by the PMO after reviewing the PCMR. See Originator Impact for a list of Impact definitions.

S. **Restricted** - Restricts access to keep private (yes) or allow regular access (no).

T. **Lifecycle Completed** - Status of the Action in its life cycle. “N” indicates the PCMR is still active or Open. “Y” indicates the PCMR has been Completed or Closed by all appropriate roles.

U. **Projected Version -** The projected version field is where the PM can input the version that the fix is expected to be implemented in.

V. **Fixed Version** - The fixed version is the version in which the fix or the change was implemented.

W. **Current Status** - A table that displays the current standing of the PCMR in its life cycle, the date this status was added, and the name of the person who added it. There are three fields for submitting statuses; one designated for each of the role types with this privilege. The three status fields and their additional corresponding fields are the defined below:

   1. **Orig Status** - Used exclusively by the Originator of the PCMR to reflect the current status from the Originator's standpoint. To the right of the Orig Status you will find a field called **Updated** which displays the date that the current status was last added or updated. Located to the far right in the table is **Orig Person**, a field that displays the Originator's name.

   2. **DEV Status -** Used exclusively by the Developer to reflect the current status from the development standpoint. To the right of the **DEV Status** you will find **Updated,** a field that displays the date that the current status was last added or updated by the developer. Located to the far right in the table is **DEV Person**, a field that displays the Developer's name.

   3. **CM/PM Status** - Used exclusively by CM or PM to reflect the current status from the program management standpoint. To the right of the **Orig Status** you will find **Updated** a field that displays the date that the current status was last added or updated. Located to the far right in the table is **CM/PM Person**, a field that displays the name of the CM or PM person who added the status.

X. **Status Review** - A history of the statuses assigned to the PCMR that pre-date the statuses most recently (current statuses) assigned to it. The Status Review displays the following information:

   1. **Person –** The person who assigned the status.

   2. **Generated –** The date the status was assigned.

   3. **Status –** The status that was assigned.

   4. **Role/Type –** The Role of the person who assigned the status.

A-4 Test Finding

The terminology of fields that the **<u>Test Finding</u>** screens contain is described below:

A. **Test Finding Key** - The unique sequence key identifying the Test Finding record.

B. **Originator** -The name (last name first) of the person submitting the TF.

C. **Created** - The date this record was created.

D. **Updated** - The date the record was last modified.

E. **Application** - The acronym of the application that the TF is against.

F. **Version** - The version of the application the TF is against.

G. **Operating System** - Operating system the TF was found against.

H. **Classification** - The classification of the input: U=Unclassified, S=Secret

I. **Type** - The type of test finding (Software or Document).

J. **Impact** - The severity of the TF. Impact values are 1 to 4 and are described as follows:

1. **Impact 1** - a) The application can not proceed in testing or operation. b) There is a security vulnerability in the application or site architecture that could be exploited by a general user. c) The application, another application or a component of the infrastructure is unable to operate properly. d) The level of effort of the site personnel to install, manage or use the mission application is excessively increased.

   If **no workaround exists** or the resolution requires an excessive amount of effort to implement, the finding should be assigned Impact 1.

2. **Impact 2** - a) There is a significant effect on the operation of either the application, another application or a component of the infrastructure. b) A security vulnerability in the application or site architecture is created that could be exploited by a general user, but only if the user is able to take advantage of other vulnerabilities or capabilities not typically available to him/her.

   The finding can temporarily be resolved by a workaround that is implemented as a change in procedure or configuration. The workaround requires expertise that is not expected to be found in general users.

3. **Impact 3** - a) The finding does not prevent the application from proceeding further in its testing or does not significantly affect the operation of the application, another application or a component of the infrastructure. b) The finding can be temporarily resolved by a workaround that is implemented as a change in procedure or configuration. The workaround doesn't require technical expertise that is not expected of the general user.

4. **Impact 4** - a) The finding does not prevent the application from proceeding further in its testing or does not significantly affect the operation of the application, another application or a component of the infrastructure. A workaround exists that doesn't require a significant amount of effort, or the finding can be left as is because the general user can still perform their mission functions.

K. **Title** - Short phrase or sentence summarizing the problem.

L. **Description** - The body or main text detailing the TF.

M. **Document Title** - Title of the document the TF is against.

N. **Doc No.** - The number assigned to the document. This number is usually provided on the document's cover page.

O. **Doc Date** - The date that the document was published.

P. **Section** - The exact location of the page in the document.

Q. **Page No.** - The number of the page on which the problem was found.

R. **Requirements** - Identifies applicable requirements that are linked to the Test Finding.

S. **Tracking No.** - The internal number (taken by the JITF from NoteTaker) used to keep track of and identify the Test Finding.

T. **Restricted** - Restricts access (Y) to all roles except Originator and CM/PM; or allows access to all CMDB Roles (N).

U. **Status** - The state of the Test Finding (Open, Closed, or Rescinded).

V. **Fixed Version** - The version in which the fix or the change was implemented.

A-5 Workplan

The terminology of each field that the **Workplan** screens contain is described below:

A. **Related PR/CR(s) –** Lists the number(s) of the PCMR(s) that the Workplan is applied against. The PCMR number is a hotlink to the actual PCMR record. If selected the PCMR that the Workplan was written for will be displayed.

B. **Created** - The date the Workplan record was created.

C. **Updated** - The date the Workplan was last updated.

D. **Workplan No.** - The unique number for the Workplan for this PCMR.

E. **Originator** - The name (last name first) of the person submitting the Workplan.

F. **Application** - The acronym of the application the Workplan is against

G. **Version** - The version of the application the Workplan is against.

H. **Projected Version** - The version that the fix is expected to be implemented in.

I. **Fixed Version -** The version in which the fix or change was implemented.

J. **Problem Type –** Type of record the Workplan is applied to (P= Problem Report, C= Change Request, M= Multiple Application Problem, and R= Requirement), or this can also be used to identify the root cause of the problem. Example: Design, coding and configuration.

K. **Suspense Date –** Date when the Workplan should be completed.

L. **Description** - A free form field for the text detailing the Workplan.

M. **CSCI –** Computer Software Configuration Item. States which CSCI's are affected.

N. **Software Modules Affected –** Modules changed due to the fix.

O. **System Impacts –** Impacts the Workplan fix may have on the system and interfacing applications.

P. **Security Impacts –** Security requirements, concerns, or changes.

Q. **Operating System Impacts –** Operating System functionality affected.

R. **Documentation Affected –** Documents that need to be updated as a result of implementing this fix.

S. **Additional Information -** A free form field to be used to add any other relevant information.

T. **Hours -** A table used to list each type of task involved in the fix along with the estimated number of hours needed to complete it. A description of each of the task fields found under **Hours** is below:

   1. **Analysis** - Research the developer performs to retrieve a scenario on how to correct a problem or implement a CR.
   2. **Mod/SW** - Modules and software that are involved in creating the Workplan to solve the problem or implement a CR.
   3. **Mngment** - A cost analysis or final review.
   4. **CM/QA** - Configuration Management / Quality Assurance to be sure that all software components are included and are of the proper quality.
   5. **Doc/PDL** - Documents that are updated as a result of the scenario created.
   6. **Testing** - Software and documentation verification that the scenario was implemented.
   7. **Misc/Support** - Any ad-hoc tasks deemed necessary in order to fulfill the scenario's implementation.
   8. **Total Hours** - Total estimated number of hours it will take to complete the fix.

A-6 Notes

The terminology of each field that is found in **<u>Notes</u>** is described below:

A. **Created** - The date this record was created (system generated).

B. **Type** - Type of Note added.

C. **Restricted** - Restricts access (**Y**) to all other roles except Originator and CM/PM; or allows access to all CMDB Roles (**N**).

D. **Originator Name -** The user name will automatically be pulled into the Note using the individual's login id.

E. **Text** - The free form text field where the note is typed.

A-7 Library

The terminology of each field that the **Library** screen contains is described below:

A. **Library Key** - The system generated identifier for the Library record.

B. **Created** - The date this record was created. This field is system generated.

C. **Sponsor** - Sponsoring agency for the application identified.

D. **Updated** - The date this Library record was last updated. This field is system generated.

E. **Application** - The application that the library item supports.

F. **Version** - The version of the application the library item supports.

G. **Classification** - The classification of the library item: U=Unclassified, S=Secret.

H. **Rec'd By FTP** - If item was received via an FTP transmission, this field will show the item number of what was received.

I. **Security No.** - Control number assigned to a classified library item.

J. **On Server Date** - Date this library item was placed on the server.

K. **Title** - Title of the library item.

L. **Acronym** - Acronym of the document type.

M. **Successor** - Library Key of a library item that supercedes the current library item.

N. **Release** - Identifies the release key that this library item is part of.

O. **Restricted** - Restricts access (Y) to all roles except Originator and CM/PM; or allows access to all CMDB Roles (N).

P. **Additional** - A free form field to be used without restrictions.

Q. **Status** - List of statuses (Archived, Removed or Superseded)assigned to this library item.

A-8 Library Documentation

The following fields will be tracked in the **Library Documentation** screen:

A. **Created** - Date this Library documentation record was created (system generated).

B. **Lib Doc No. –** CMDB system generated number identifying the document.

C. **Updated –** Date the Library Documentation record was updated (system generated).

D. **Document No. –** Number assigned to identify the document by the developer.

E. **Doc Date –** Date the document was published.

F. **Contract No. –** Number of the contract that was responsible for producing the document.

G. **Date Item No. (CDRL No.) –** CDRL number of the document for the contract.

A-9 Library Software

The following fields will be tracked in the **Library Software** screen:

A. **Created** - Date this Library Software record was created (system generated).

B. **Updated** - Date this Library Software record was last updated (system generated).

C. **Developer No.** - Tracking number assigned to the software by the developer.

D. **Operating Sys** - Operating system of the application.

E. **Additional Information** - Additional information or comments about the Software.

A-10 Library Audit

The terminology of each field that the **Library Audit** screen contains is described below:

A. **Lib Audit Key** - The unique identifier for the Library Audit record.

B. **Recipient** - Login id of the person receiving the library item.

C. **Created** - The date this record was created.

D. **To Where** - Acronym of the Place receiving the library item.

E. **Updated** - The date this Library Audit record was last updated.

F. **Library Title** - The title of the Library Item being sent.

G. **Release (App and Ver)** - The application and version the library item supports.

H. **Modes** - Method of shipment.

I. **Receive Date** -The date the item was received.

J. **Install Date -** Date the software was installed at the site.

K. **Additional -** Additional comments about the Audit record; or, for a release, the titles of the documentation and software sent.

A-11 Place and Address

The terminology of each field that the **Place and Address** form contains is described below:

A. **Created** - The date this record was created.

B. **Updated** - The date this place was last updated.

C. **Affiliation/Company** - Long name of the place.

D. **Description** - Description of the Place.

E. **Sponsor** - Shortname of the current Place.

F. **Executive Manager** - Shortname of the Place this current Place reports to.

G. **Address** - Four lines for the body of the address.

H. **Place Type** - Type of Place. Values to include Organization, Program Office, Site, and Developer.

I. **City** - City where the Place is located.

J. **State** - State where Place is. (This field will be a pulldown, and will contain Overseas Drop points.)

K. **Zip** - Zip code for the Place.

L. **Help Desk Information -** Information for Help Desk for this Place if applicable. Information such as Address and phone can be entered.

M. **Genser Address -** Plain Language Address for message trafficking for the Place.

N. **URL** - Internet address to the Place

O. **Additional Information** - A free form field to be used without restrictions

A-12 Releases

The terminology of the fields that the **Releases** forms contain is described below.

A. **Release -** The Release number associated with this record.

B. **Created** - The date this record was created.

C. **Sponsor** - Program responsible for the release.

D. **Updated** - The date this release was last updated.

E. **Application** - Application this release is against.

F. **Operating System** - Operating system for the application that this release applies to.

G. **Phase** - Identifies the ‘Phase’ of the Release. Permissible values are ‘D’ for Development; ‘O’ for Operational; and ‘F’ for Future.

A-13 Release Items

The terminology of the fields that the **Release Items** table contains is described below:

A. **Library** - One up number identifying the Library record key number this Release Item is from.

B. **Created** - The date this record was created (system generated).

C. **Updated** - Date this record was last updated.

D. **Item Type** - Identifies the type of Library item. Permissible values are ‘S’ for Software and ’D’ for Documentation.

E. **Patch No** - Patch number for this Release.

F. **Title** - Title of the Release Item.

G. **Additional Information** - Additional information or comments about the Release Item