

Configuration Management II Users Groups

CMII '99

The 12th annual CMII Conference

Hotel Wyndham, Montreal, Quebec, Canada

May 23-26th, 1999

Many thanks to the presenters, tutorial and workshop leaders, exhibitors, and attendees who made CMII '99 the premier configuration management event of 1999!

Co-Hosted by

- Arizona State University
- Bombardier Inc
- CMII Users Group Headquarters
- Eastern Canada CMII Users Group
- Institute of Configuration Management
- LGS Group
- MERANT

Summary Agenda

Sunday May 23, 1999

1-5 PM Registration

6-8 PM Reception

Monday May 24, 1999

7:30 AM Registration & Help Desk

8:00-8:15 Introductions

by Craig Senior, LGS Group

8:15-9:15 **CMII Awareness**

by Steve Easterbrook, Institute of Configuration Management

9:15-9:45 **CMII to the Next Level**

by Vince Guess, President, Institute of Configuration Management

9:45-10:15 **Faster, Better, Cheaper...**

by Barry Calogero, Executive VP of Business Development, Robbins-Gioia

10:15-10:30 **Break**

10:30-11:00 **CM in a Globally Integrated Manufacturing Environment**

by Jim Fleming, Senior Technical Advisor Product Definition, Cummins Engine

11:00-11:30 **Software CM is More Than CASE Tools**

by Patrick Walsh, Software Corporate Quality Network, Intel

11:30-12:00 **Keynote - Realizing The Vision: CM In Consulting**

by Mr. Francois Geoffrion, Senior Vice President of Corporate Development, LGS Group

12:00-1:15 **Luncheon**

1:15-1:45 **CMII Automated Systems Demos - Part 1 of 2**

by Sean McGillen, Expert Strategies

1:45-2:30 **Tutorials (see appendix 2) or Exhibitors (see appendix 1)**

Attendees choice

2:30-2:45 **Break**

2:45-4:00 **Workshops (see appendix 3) or Exhibitors (see appendix 1)**

Attendees choice

4:00-5:00 **Exhibitors**

Tuesday May 25, 1999

7:30 AM Registration & Help Desk

8:00-8:05 Introductions

by Craig Senior, LGS Group

8:05-8:30 Status of CMII Pilot Program at Delphi/Delco Electronics

by Bill Gilbert, Configuration Manager of the CM Competency Program,
Delphi/Delco Electronics

8:30-9:00 CM: The Basis for Total Life Cycle Management in an ERP System

by Norman Scobie, Product Management, SAP

9:00-9:30 Implementing CMII in Municipal Government

by Anne Irwin & Dan Bertuzzi, Systems Integration Informatics Services Branch,
City of Ottawa

9:30-10:00 Use CMII for Software that Meets Expectations

by Peter L. Smith, Software Engineering Quality Analyst, Boeing Commercial
Airplane Group

10:00-10:15 Break

10:15-10:45 Product Identification by Information Sets

by Frank Reid, Chief Engineer, Global PDM, Johnson Controls Automotive
Systems Group

**10:45-11:15 Managing Change During Research & Development and How
Everyone Benefits** by Lisa Hellerud, Guidant/CPI

11:15-12:00 Keynote -The Relevance of CM for Bombardier Future Growth

by Ms. Ingeborg Rittweiler, Vice-President Six Sigma, Bombardier Inc.

12:00-1:15 Luncheon

1:15-1:45 CMII Automated Systems Demos - Part 2 of 2

by Sean McGillen, Expert Strategies

1:45-2:30 **Tutorials (see appendix 2) or Exhibitors (see appendix 1)**

Attendees choice

2:30-2:45 **Break**

2:45-4:00 **Workshops (see appendix 3) or Exhibitors (see appendix 1)**

4:00-5:00 **Exhibitors**

Wednesday May 26, 1999

7:30 AM **Registration & Help Desk**

8:00-8:05 **Introductions**

by Craig Senior, LGS Group

8:05-8:25 **CMII in the UK**

by Stuart Allan, Center Director, ICMUK

8:25-8:45 **University Report**

by Phil Wolfe, College of Engineering; Industrial and Manufacturing Systems Engineering, Arizona State University

8:45-9:15 **Expanding CMII to Other Functional Areas**

by Doug Shelburne, Manager, CM Systems, Framatome

9:15-9:45 **So You Want To Switch PDM Software?**

by David Allen, Manager of Engineering Services, Autoliv Inc

9:45-10:00 **Break**

10:00-10:30 **CMII...Best Commercial Practice**

by Janet C. Rivers, Computer Specialist/CM, Headquarters, U.S. Special Operations Command

10:30-11:00 **CMII: Starting Out**

by Doug Sprague, Configuration Control Specialist, Pitney-Bowes

11:00-11:30 Using CMII Principles for Object Oriented C/S Projects

by Guido Weischedel, ESM Software GMBH

11:30-12:00 Risk Management and the Role of CM

by Rick St. Germain, Director, Business Transformation Services, LGS Group

12:00-1:15 Luncheon

1:15-1:45 CM and Legal Requirements

by William Deringer, Systems Engineer, Systems Technology Associates

1:45-2:05 Main Hall Exhibitor Presentation - MERANT

2:05-2:25 Main Hall Exhibitor Presentation - CMstat

2:25-2:45 Main Hall Exhibitor Presentation - Auto trol Technology

2:45-3:30 Workshop Results

3:30-3:45 Awards were given to Sandra Bauer and Thomas Robinson, founders of the NW CMIIUG... and to Kim Bates, President of the Minneapolis CMIIUG... and to Craig Senior, President of the Eastern Canada CMIIUG for the outstanding work they have all done in establishing their respective Users Groups as the three largest CMIIUGs in the world. Congratulations!

3:45-4:00 Closing Remarks & Conference Close

CMII `99 Detailed Agenda

Sunday May 23, 1999

1-5 PM Registration

Workshop and Tutorial sign-up

6-8 PM Evening Reception

For all conference attendees in Room Alfred Rouleau A

Other **Amphitheatre**

Some exhibitors may be set up on Sunday afternoon, please check at the Amphitheatre. See Appendix 1 for Exhibitor information.

Monday May 24, 1999

7:30 AM

Registration & Help Desk

8:00-8:15 Opening Remarks

Mr. Craig Senior, CMIIC and Conference Emcee

LGS Group

8:15-9:15 CMII Awareness

Mr. Steve Easterbrook, BS Cornell University, MBA, CMIIC, Certified CMII Lead Assessor

The Institute of Configuration Management

The CMII Awareness session is an overview of how CMII fits into the activity of running a business. For those CM Professionals not familiar with CMII, this overview will aid in understanding a more effective and efficient approach to CM as practiced by CMII professionals. For those with CMII certification, the overview will provide an update of CMII principles previously learned and is of great value in introducing CMII principles to your management.

9:15-9:45 CMII to the Next Level

Mr. Vince Guess, BSME, MBA, CMIIC

President of the Institute of Configuration Management

This presentation deals with new directions in CMII methodology as well as new partnerships forged with industry. Interest in CMII has never been greater and this presentation will provide you the opportunity to learn what will be expected from CM professionals as we head into the 21st century.

9:45-10:15 Faster, Better, Cheaper...

Mr. Barry Calogero, MBA, Executive Vice President of Business Development

Robbins-Gioia

The automotive industry's race to become more competitive, has forced many changes that typify the challenges in the way Project Management and Configuration Management must ultimately focus on issues. The development life cycle continues to be shortened. Related component parts are often at different phases within the life cycle. Relationships both within an organization and within the overall industry often move between the vertical and horizontal structure. In outlining these critical issues, Barry Calogero proposes the need for an event versus time driven management orientation to effectively address these complex program management interrelationships--A structured business method for -- Faster, Better, Cheaper.

10:15-10:30 Break

10:30-11:00 CM in a Globally Integrated Manufacturing Environment

Mr. Jim Fleming, BSME, CMIIC, Senior Technical Advisor Product Definition

Cummins Engine Co.

Cummins Engine Co., Inc. operates in a business environment where multiple design centers specify products which are produced at multiple manufacturing centers (wholly owned, joint ventures and licensees) in a many-to-many relationship. Some specifications are shared among different product families. Marketing and service also must coordinate their work globally with the release of new and revised product specifications. Presented are some fundamental principles that must be followed to manage product configurations successfully in this environment.

11:00-11:30 Software CM is More Than CASE Tools

Mr. Patrick Walsh, Software Corporate Quality Network

Intel

The CM process for software is more than CASE tools. It includes processes for assuring requirements are met, development efforts are under control, and for effectively and efficiently managing change through initiation through implementation. The process also includes making business decisions which can often dictate success or failure in a rapidly changing market place. Mr. Walsh will discuss the true scope of CM in this fast moving environment.

11:30-12:00 Keynote - Realizing The Vision: CM In Consulting

Mr. Francois Geoffrion, Senior Vice President of Corporate Development

LGS Group

Mr. Geoffrion will discuss the consultant's role in helping clients deal with business issues and how CMII principles play a key role in identifying and implementing effective solutions.

12:00-1:15 Luncheon

1:15-1:45 CMII Automated Systems Demos - Part 1 of 2

Mr. Sean McGillen, CMII, Expert Strategies

If you are considering purchasing a Product Data Management System, an MRP or ERP system, or have a system that just isn't functioning as you expected, you won't want to miss these demonstrations on the true potential of "CM" software, when properly structured. "Marrying CMII process with technology is an on-going effort at the Institute of Configuration Management and Arizona State University. As a result, the Institute of Configuration Management, and its affiliates, developed these demonstration modules. During this presentation, attendees will witness the exciting potential of automation, when the CMII process is properly integrated into automated systems. The presentation consists of two parts. Part 1 will be presented on Monday, and Part 2, on Tuesday. Conference attendees should be present for both parts. If you are a PDM, ERP software vendor, this is your opportunity to explore additional functionality that your system needs to be CMII "compliant".

1:45-2:30 Tutorials or Exhibitors

Attendees choice, see Appendix 1 or 2

2:30-2:45 Break

2:45-4:00 Workshops or Exhibitors

Attendees choice, see Appendix 1 or 3

4:00-5:00 Exhibitors

See Appendix 1

Tuesday May 25, 1999

7:30 AM Registration & Help Desk

8:00-8:05 Opening Remarks

Mr. Craig Senior, CMIIC and Conference Emcee

LGS Group

8:05-8:30 Status of CMII Pilot Program at Delphi/Delco Electronics

Mr. Bill Gilbert, CMIIC, Configuration Manager of the CM Competency Program

Delphi Delco Electronics Systems

Delphi/Delco, one of the largest producers of automotive electronics, is currently implementing a CMII pilot program. Mr. Gilbert will discuss the current status of that program.

8:30-9:00 CM: The Basis for Total Life Cycle Management in an ERP System

Mr. Norman Scobie, BSc MBCS CEng, Product Management

IBU Aerospace and Defense / Engineering and Construction, SAP Germany

SAP provides an ERP solution that covers the product life-cycle from cradle to grave. The presentation will look at the issues that have to be dealt with, when a focus on CM and CMII requirements is introduced into such an ERP system . Major issues to be looked at will be; achieving a total product view when dealing with master data of different data types and controlling them as sets of product data across the life-cycle; distribution of product data in a global environment and the inevitable discussion on what baselining could mean in a distributed ERP environment.

9:00-9:30 Implementing CMII in Municipal Government

Ms. Anne Irwin, CMIIC and Mr. Dan Bertuzzi

Systems Integration Informatics Services Branch, The City of Ottawa

The City of Ottawa faces one of its greatest information technology challenges as it addresses the year 2000 problem. Both a problem and an opportunity, the year 2000 has forced the Informatics Services Branch to examine its own internal processes and address long standing deficiencies. Given the unprecedented number of new technology projects underway at the same time, the need to document and control the software development life cycle has become critical from both an operational and legal perspective. This requirement is being addressed through the implementation of the CMII methodology. The risk of

implementing CM amidst the "war zone" of the year 2000 effort has required careful planning and the appropriate strategy.

9:30-10:00 Use CMII for Software that Meets Expectations

Mr. Peter L. Smith, BA Harvard University, CMIIC, Software Engineering Quality Analyst, Boeing Commercial Airplane Group

Software engineering is less mature than other engineering disciplines, and is still developing standard methods and processes. CMII, Software Development Life Cycle (SDLC), and SEI/CMM methods are complimentary, and can enhance software quality if used in synergistic ways. Mr. Smith will show how software projects can use key CMII techniques, together with these other methods, to reliably develop software that enhances the overall contribution of information systems to the enterprise.

10:00-10:15 Break

10:15-10:45 Product Identification by Information Sets

Mr. Frank Reid, BS, CMIIC, Chief Engineer Global PDM

Johnson Controls Automotive Systems Group

In the new approaches to CM, the entire set of information linked to an item is required to make proper business decisions. But how do we identify and manage these comprehensive information data sets? In his presentation, Mr. Reid will discuss methodologies he is putting in place to assure the proper information sets are identified and known to all who need to know. He will also discuss how he is structuring the PDM tool to accomplish these goals.

10:45-11:15 Managing Change During Research & Development and How Everyone Benefits

Ms. Lisa Hellerud, AA, BA, CMIIC

Guidant/CPI

You've heard it before... "We don't want or need CM during development". In this presentation Ms. Hellerud will discuss the benefits of CM during this phase of the life cycle and how it has been welcomed by the design professionals in her company. She will also discuss how CM, properly implemented during this phase, is paramount in meeting Guidant's regulatory obligations.

11:15-12:00 Keynote- The Relevance of CM for Bombardier Future Growth

Ms. Ingeborg Rittweiler, Vice-President Six Sigma

Bombardier Inc.

Ms. Rittweiler will discuss CM at Bombardier Inc. and it's role as a value-added process.

12:00-1:15 Luncheon

1:15-1:45 CMII Automated Systems Demos - Part 2 of 2

Mr. Sean McGillen, CMIIC, Expert Strategies

If you are considering purchasing a Product Data Management System, an MRP or ERP system, or have a system that just isn't functioning as you expected, you won't want to miss these demonstrations on the true potential of CM software, when properly structured. "Marrying" CMII process with technology is an on-going effort at the Institute of Configuration Management and Arizona State University. As a result, the Institute of Configuration Management, and it's affiliates, developed these demonstration modules. During this presentation, attendees will witness the exciting potential of automation, when the CMII process is properly integrated into automated systems. The presentation consists of two parts. Part 1 will be presented on Monday, and Part 2 on Tuesday. Conference attendees should be present for both parts. If you are a PDM, ERP software vendor, this is your opportunity to explore additional functionality that your system needs to be CMII "compliant".

1:45-2:30 Tutorials or Exhibitors

Attendees choice, see Appendix 1 or 2

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2:45-4:00 Workshops or Exhibitors

Attendees choice, see Appendix 1 or 3

4:00-5:00 Exhibitors

See Appendix 1

Wednesday May 26, 1999

7:30 AM Registration & Help Desk

8:00-8:05 Opening Remarks

Mr. Craig Senior, CMIIC and Conference Emcee

LGS Group

8:05-8:25 CMII in the UK

Mr. Stuart Allan, Center Director

ICMUK

In this presentation Mr. Allan will provide an update on the status of CMII implementation in United Kingdom corporations and organizations.

8:25-8:45 University Report

Professor Phil Wolfe

College of Engineering; Industrial and Manufacturing Systems Engineering, Arizona State University

The subject of this presentation will be ASU's on-going effort in merging CM process improvement with today's automated systems.

8:45-9:15 Expanding CMII to Other Functional Areas

Mr. Doug Shelburne, BS, CMIIC, Manager CM Systems, Framatome Cogema Fuels and President of the Blue Ridge CMIIUG

Over the past five years Mr. Shelburne has been expanding the scope of CM throughout his organization. In this presentation he will discuss the successes he has had in implementing CM into other functional areas and the "power" CMII has contributed to that success. He will also discuss CM metrics in place that provide management with the feedback they need to better manage their departments.

9:15-9:45 So You Want To Switch PDM Software?

Mr. David Allen, BSME, MBA, CMIIC, Manager of Engineering Services

Autoliv Inc.

Although many companies are trying to just get a PDM software in place, what happens when your company determines that it is time to change PDM systems? This is what happened to Morton International when they merged with a

competitor of equal size (Autoliv Inc.). This presentation will look at the problems encountered and solutions achieved as they moved to a new PDM system after successfully running in one for 6 years. The presentation will focus on problems encountered, issues resolved, changes to their CM processes, adjustments to a more global approach, and lessons learned that can be applied to both first-time and second-time implementation efforts.

9:45-10:00 Break

10:00-10:30 CMII... Best Commercial Practice

Ms. Janet C. Rivers, CCM, CMIIIC, Computer Specialist/Configuration Management

Headquarters,

United States Special Operations Command

The US Government wants to adopt best commercial practices for Configuration Management. But what are they? In this presentation, Ms. Rivers will discuss her vision on how the CMII approach best fits the needs of her government organization.

10:30-11:00 CMII: Starting Out

Mr. Doug Sprague, CMIIIC, Configuration Control Specialist, Systems Engineering

Pitney-Bowes

Mr. Sprague will discuss his efforts in implementing CM at Pitney-Bowes. He will discuss how his initial efforts were prioritized and how he went about gaining management support for CM Process Improvements.

11:00-11:30 Using CMII Principles for Object Oriented C/S Projects

Mr. Guido Weischedel, President ESM Software

ESM Software GmbH

Mr. Weischedel will discuss the results of his company's study that addresses how the CMII principles can best be applied in software engineering. This presentation will address: how source code should be treated within the CMII model (as a product or document)?, how the physical item hierarchy has to be structured for a software project to be managed, the definition of the smallest reusable units, the representation of classes used with several items, the aspect

of externally purchased software (like libraries) whether libraries should be treated as primary or secondary items? and, how the three-tier work breakdown structure can be used within a software project.

11:30-12:00 Risk Management and the Role of CM

Mr. Rick St. Germain, BEng in Chemical Engineering, CMIIC, Certified CMII Lead Assessor, Director of LGS' Business Transformation Services

LGS Group

CM provides a solid technical process foundation for managing your company's products and services. But the real challenge lies in aligning business processes to take advantage of what CM has to offer. CMII does this. Rick will discuss the merits and the challenges in implementing CMII from the business process perspective, using practical examples and illustrations from his consulting practices in a scenario context.

12:00-1:15 Luncheon

1:15-1:45 CM and Legal Requirements

Mr. William Deringer, CMIIC, JD, Systems Engineer

Systems Technology Associates

I. Overview of a killer tornado. A discussion of the May 3, 1999, Oklahoma City tornado event. This single storm damaged or destroyed over 10,000 structures. Mr. Deringer will briefly describe the Oklahoma and Kansas NEXRAD weather radar network and will discuss the significance of configuration management in support of this system. He will also provide details on the damage, storm track, and other information on what is likely the single largest tornado event ever to strike a metropolitan area.

II. The origin of liability. "***Malum non habet efficientem, sed deficientem, causam.***" An evil has not an efficient, but a deficient, cause. Could it be that the best legal education is ICM's CMII certification course? This presentation will be a legal primer on the basis of individual and organizational liability. The broad concepts presented will be, for the most part, based on English Common Law concepts, the law merchant, and on various "model" laws; they are generally applicable to most Western legal systems. The presentation will cover liabilities and remedies arising in contract and tort as well as liability for criminal and quasi-criminal acts and omissions. Distinguishing *malum per se* from *malum prohibitum* actions will also be discussed. In conclusion, Mr. Deringer will briefly discuss the United States' "Federal Sentencing Guidelines" and why he would rather have a CMII compliant program in place than Perry Mason's defense once its too late.

Mr. Deringer is a system's engineer, attorney, and CMII graduate. He is currently the NEXRAD Deputy Program Manager for System Technology Associates (STA) and has over twenty year's experience in engineering and configuration management. Bill also maintains a general practice law office and regularly practices in the areas of business and financial litigation. Bill has recently joined the ICM corps of instructors.

1:45-2:05 MERANT (Exhibitor presentation) presented to the general audience, in the main hall

2:05-2:25 CMstat (Exhibitor presentation) presented to the general audience, in the main hall

2:25-2:45 Auto-trol Technology (Exhibitor presentation) presented to the general audience, in the main hall

2:45-3:30 Workshop Results - presented to the general audience, in the main hall

3:30-4:00 Awards, Closing Remarks & Conference Close

Awards were given to Sandra Bauer and Thomas Robinson, founders of the NW CMIUG... and to Kim Bates, President of the Minneapolis CMIUG... and to Craig Senior, President of the Eastern Canada CMIUG for the outstanding work they have all done in establishing their respective Users Groups as the three largest CMIUGs in the world. Congratulations!

Appendix 1

Exhibitors (PDM, CASE, Service Providers etc.)

Auto-trol Technology

"Auto-trol Technology® is a major international developer and integrator of documentation, information, process, and network asset management software for manufacturing and other contemporary business. Auto-trol is a full service provider, supplying software, integration and consulting services, training, and software support. It's web-enabled CENTRA 2000 product suite is an EDM/PDM Configuration Management solution with Change Management, Workflow and Full Text Retrieval. KONFIG is advanced software for documenting and managing enterprise-wide data, voice and video networks in addition to performing asset and inventory management."

CMstat the Configuration Management Company.

"CMstat Corporation, founded in 1986, is a leading developer and provider of comprehensive configuration management solutions for large electronics manufacturers, aerospace firms and other discrete manufacturers...The company's suite of configuration management software and consulting services ensure reliable and immediate access to mission-critical product data and asset information to ensure the successful development and performance of complex technical products."

IMPACT Technical Services, providing industry solutions for CM.

LGS Group

"LGS Group Inc. (LGS) is a leading international information technology and management consulting firm. Since LGS was first founded in Montreal in 1979, there have been tremendous changes in information technology. Since the beginning, LGS' success has been based on skilled technical knowledge coupled with a futuristic insight into emerging technologies. Objectives-To be recognized and sought out as the best "Agents of Change" because of the soundness of our recommendations; the relevance of our solutions; our technical expertise; our uncompromising search for excellence; our concern for the impact on people."

MERANT (formerly INTERSOLV and Micro Focus)

PVCS and more."MERANT is the leading supplier of Enterprise Application Development solutions, providing the people, products and processes to create solutions that help customers accelerate the development, delivery and integration of applications in today's multi-platform computing environments. MERANT enables organizations to transform their enterprise applications for the changing technology and business requirements of the e-business environment, manage the application development process, and provide integrated data connectivity across the enterprise, from the mainframe to the Internet."

Robbins-Gioia

Since 1980, Robbins-Gioia, Inc has provided proven program management solutions to government agencies and Fortune 500 companies. As the leader in the program management industry, Robbins-Gioia helps organizations around the world apply Structured Business Methods to manage complex, high risk, programs successfully.

Appendix 2

Configuration Management Tutorials

1:45 - 2:30 PM (Choose one for Monday and another for Tuesday)

(T1) Process Improvement Planning

Instructor: Randall Omlie, Institute of Configuration Management (BA, MBA, CMIIC, Certified CMII Lead Assessor)

Randall is a lecturer, and consultant for the Institute of Configuration Management .

The focus of this tutorial is to learn a methodology for transitioning from existing CM processes to improved CM processes. Attendees will learn how to identify areas of improvement and create a formal process improvement plan.

(T2) ISO Quality Standards and the Role of CM, including an Update on the ISO Standards

Instructor: Clayton Jensen, Jutland Associates (BME, IRCA ISO 9000, QS-9000, Lead Auditor & Instructor, CMIIC)

The focus of this tutorial is to learn the role of CMII in ISO Quality and CM standards. Attendees will also learn about updates to the ISO Quality and CM standards that may impact them when the new versions are released in the near future.

(T3) Effectivities versus Effective Date

Instructor: Mark Fica, Institute of Configuration Management (CMIIC)

Effectivity can be a controversial subject. The focus of this tutorial is to present the latest thinking on effectivity. Attendees will learn the advantages and disadvantages of various approaches to determining, and stating, effectivity. Anyone attending this tutorial will have a solid understanding of what effectivity is and what approaches work best.

(T4) Software Architecture and Linkages

Instructor: Leo Clark, Institute of Configuration Management (BS, CMIIC)

This tutorial focuses on methodologies for structuring software, identifying and linking appropriate information and using all this for managing software projects throughout the software lifecycle. Described will be an approach that is becoming best practice among software CM practitioners.

(T5) How CM Relates to Legal Liabilities

Instructor: Jim Provencher, Lawyer (J.D.)

In this tutorial, Mr. Provencher will discuss how a properly documented and followed CM process can reduce legal liabilities. Student will learn the role CM plays in Contract and Tort laws.

(T6) Validation of Documents

Instructor: Jerry Pyka, Configuration Management Solutions (BS, MS, CMIIC)

Validation of documents should require getting the right, value-added signatures. In many environments this is not happening. The integrity of the document and its application is linked to a company's validation process. In this tutorial the CMII approach to validation will be presented.

Appendix 3

Configuration Management Workshops

2:45 - 4:00 PM (Choose one for Monday and another for Tuesday)

(W1) Metrics for the CM Manager

Workshop Facilitator: Patrick Binckly, Bombardier Transport (CMIIC). With an experience of more than 10 years in the CM field, he is in the process of being a recognized CMII Lead Assessor.

Metrics are used to evaluate how good or how bad we can be. They are great tools to justify our manpower loading and to highlight the advantages of the CM process. This workshop goal will be to identify which metrics shall be used to measure program/project performance.

(W2) Selling CM to Upper Management

Workshop Facilitator: Ross Simpson, LGS Group, Ottawa (BA, Honours B. Commerce, CMIIC)

Graduates of the CMII courses are universally enthusiastic about the merits of using sound CM processes in their companies and workplace. On Monday morning, however, reality sets in and the long process of "enlightenment" of fellow workers begins. This workshop creates a forum for discussing strategies to demonstrate the business value of the CMII process to upper management in their terms so that those in leadership positions become the CMII "champions".

Only then can the benefits of CMII be integrated into the very fabric of the organization's business processes from the top down.

(W3) CMII and the Software Capability Maturity Model (SEI/SW-CMM)

Workshop Facilitator: Peter L. Smith, Software Engineering Quality Analyst, Boeing Commercial Airplane Group (BA Harvard University, CMIIC)

Attendees will discuss relationships among these two world-class methods, and document their conclusions starting with questions like these:

Are they opposed, unrelated, consistent, or complementary? How can organizations use CMII principles and processes to advance up the SW-CMM hierarchy? Should, or how should, CMII change to better address issues of process maturity and evolution?

(W4) CM Self Assessment

Workshop Facilitator: Steven Easterbrook, Institute of Configuration Management (BS, MBA, CMIIC, CMII Lead Assessor)

Attendees will develop a matrix of requirements needed to properly assess the effectiveness and efficiency of their current CM process. Mandatory vs. non-mandatory (but nice to have for efficiency purposes) requirements will be differentiated.

(W5) Implementation of CM Improvement Plan

Workshop Facilitator: Rob Horne, Institute of Configuration Management (BSEEE, CMIIC)

Attendees will discuss methods for proposing, evaluating, and implementing CM process improvements into their organizations.

(W6) PDM Evaluation with CMII Emphasis

Workshop Facilitator: Jerry Pyka, Configuration Management Solutions (BS, MS, CMIIC)

Attendees will discuss what functionality is required to make a PDM tool "CMII" compliant. Their findings will be made available to all PDM vendors interested.
