

Project Management

Operation and Maintenance

Proper support of system activities is an integral part of maintaining consistent, ongoing operations. Information supporting operational activities can come from any number of sources but, consistent in their common support of operational continuity. The challenge for operations managers is to effectively unite and communicate this information in a form accommodating of the day-to-day operations environment. One approach that is commonly used is the creation and distribution of Operations and Maintenance (O&M) Manuals.

The Department of Health and Human Services (HHS) Enterprise Performance Life Cycle (EPLC) Framework defines an O&M Manual as a document for help desk support that clearly describes the business product that will be operating in the production environment and provides the operations and support staff with the information necessary to effectively handle routine production processing, ongoing maintenance, and identified problems, issues, and/or change requirements.

O&M Manual planning is one component of a much broader knowledge transfer process. Transferring knowledge is necessary to facilitate the transition of the project's product from the project stage into continuing operations. An O&M Manual contains information and strategies designed to guide operational stakeholders in the normal use and maintenance of the project's product. The manual(s) should be designed in a manner that facilitates actions and responses to anything that may arise during normal product operations and maintenance. The actual type(s) of manual(s) created, the information contained within them, their audience, and the defined stakeholder response(s) are derived from information inputs from areas such as:

- *Project Team* – O&M Manuals help transfer knowledge and lessons learned from the development and testing of the product, from the project team to the operations team
- *Operations Support Environment* – O&M Manuals document operational processes, tasks, and responsibilities associated with ongoing operations

and maintenance in the production environment

- *Operations Activities* – O&M Manuals save time and expense by reducing the mishandling of standard operational activities through the use of concise, documented, step-by-step instructions
- *Operations Training* – O&M Manuals can be used as training tools; empowering stakeholders to make decisions regarding basic system operations and maintenance that otherwise might be mishandled

Every O&M Manual is uniquely tailored to meet the specific needs of its purpose. It's not uncommon, especially for large complex systems, that multiple manuals be created for separate departments, job functions, activities, etc. Some common types of O&M Manuals include:

- Product installation and maintenance manuals
- System description, operations, backup, and recovery manuals
- Data and software administration manuals
- Human resources and personnel manuals
- Help desk support manuals
- User Manuals
- Emergency and safety manual
- Quick reference guide
- Job aids
- Run book

Regardless of what is documented an O&M Manual should be treated as a living document, remaining flexible to accommodate changes that will inevitably occur as the organization matures. O&M Manuals may include information on topics such as:

- Installation and configuration options and associated definitions
- System maintenance, updates, and upgrade policies, procedures, and schedules
- Proper and improper handling and maintenance of different types of equipment
- Database schema, network topology, and flowcharts used to illustrate items such as system designs, data communications, program logic, and the relationships between network nodes

- Instructions for opening/closing and starting/stopping applications, devices, and services under various conditions
- Procedures and sequences describing backup routines, media type, storage locations, and schedules
- Security controls for staff, facilities, infrastructure, and emergency response procedures
- Frequently asked questions and troubleshooting techniques for common issues
- Roles, responsibilities, and contact information for key personnel and support staff
- Other miscellaneous and/or relevant items

Best Practices

The following best practices are recommended for Operation & Maintenance Manual development:

- *Easy* – Create O&M manuals so that they can be read and understood by even individuals not familiar with the topic being documented
- *Accessibility* – Stakeholders should be able to quickly retrieve the latest version of any O&M manual from an agreed upon location such as a shared website
- *Jargon* – Avoid technical jargon and ambiguous acronyms whenever possible
- *Regulations* – Identify related regulatory requirements
- *Manuals* – Create as many manuals as necessary to facilitate the continuity of operations
- *Style* – Adopt and ensure consistent style, text, sectioning, etc throughout the documents
- *Authors/Editors* – If possible, appoint a single author and a different editor
- *Align* – Align O&M Manuals with the policies and processes of the performing organization
- *Update* – O&M Manuals are living documents and should be updated as influencing variables change
- *Educate* – Train stakeholders and staff, and continually reinforce O&M practices, processes, policies, and standards
- *Lessons* – Review previously used O&M Manuals. Lessons learned from key personnel involved in their development may identify specific lessons learned relevant to current operational activities

For more information and tools related to Operations and Maintenance, the CDC Unified Process, or the Department of Health and Human Services Enterprise Performance Life Cycle, please visit the CDC UP website at <http://www.cdc.gov/cdcup/>. ■

Project Management Community of Practice

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For more information on the Project Management Community of Practice visit the PMCoP website at <http://www2.cdc.gov/cdcup/library/pmcop/> ■

CDC Unified Process Presentations

The CDC UP offers a short overview presentation to any CDC employee and/or contractor group, upon your request. Presentations are often performed at your facility, on a day of the week convenient for your group, and typically take place over lunch structured as 1-hour brown bag/lunch-and-learn style meeting.

Contact the CDC Unified Process at cdcup@cdc.gov or visit <http://www.cdc.gov/cdcup> to arrange a short overview presentation for your group. ■

Contact the CDC Unified Process

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek MBA, PMP and published by the National Center for Public Health Informatics.

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