Test Environment Management Plan Template

Enov8 Limited

Reference: https://www.enov8.com/blog/the-test-environment-management-plan-template

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1 Introduction

1.1 Purpose of the TEM Plan

This document constitutes the Test Environment Management (TEM) Plan for *[My Company | Program]*. The methods are based on established Configuration Management practices recommended by leading organisations including the ANSI-IEEE and the ISO and the Test Environment Management Maturity Index (EMMi).

The scope of this document can be described by the following TEM definition:

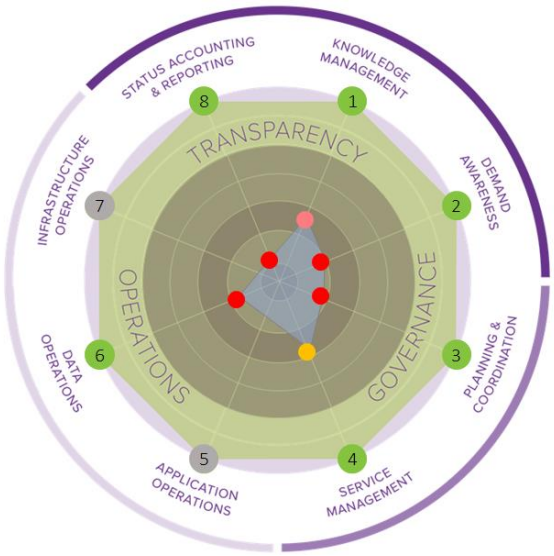
IT & Test Environment Management is the act of understanding your cross-life-cycle IT environments and establishing proactive controls to ensure they are effectively used, shared, rapidly serviced and provisioned and/or deleted in a timely manner.

1.2 Scope of Document

The scope of this document is structured around the 8 primary dimensions of the EMMi.

This includes:

1. Knowledge Management
2. Demand Awareness
3. Planning & Coordination
4. Service Management
5. Applications Operations
6. Data Operations
7. Infrastructure Operations
8. Status Accounting & Reporting



1.3 Definitions, Acronyms and Abbreviations

The following definitions will be used in this document.

- *CCB (Change Control Board)*
- *CMDB (Configuration Management Database)*
- *CR (Change Request)*
- *IM (Incident Management)*
- *ITSM (IT Service Management)*
- *TEM (Test Environment Management),*

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1.4 Document References

The following sources were used in defining this plan.

- Enov8 EMMI definition (V3): https://tinyurl.com/y3ev8bg6
- IEEE 828 Configuration Mgmt Standards: https://tinyurl.com/yyfy5ydl
- *TBC (Tip! Add Project/Solution Specific references)*
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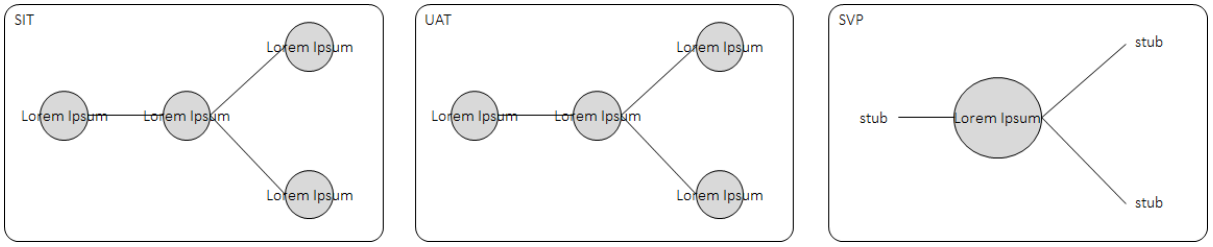
1.5 Document Overview

The primary purpose of this document is to apply TEM best practices to *[My Company | Program]* Nom Production Environment footprint.

This Environment Consists of the following major Platforms & Components:

- *SIT Environment*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*
- *UAT Environment*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*
- *SVP Environment*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*
  - *System Instance Name1*

Hint: Diagram(s) showing high level environment/architecture would add context.



And the following major Actors:

Teams responsible for Environment Governance:

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- Test Environment Management Team
- *Architect Team(s)*
- *System Team(s)*

Teams responsible for Environment Operations:

- *Application Operations Teams*
- *Data Operations Teams*
- *Infrastructure Operations Teams*

Teams responsible for Environment Consumers:

- *UAT Testing Teams*
- *System Testing Teams*
- *Development Teams*

2 The TEM Team Structure

2.1 Organisation

The [Company | Program] will have two key teams managing/controlling the Test Environments.

These are:

- The Test Environment Management Team
- The Change Control Board (Out of Scope for this Plan)

They will coordinate the operations teams:

- *Application Teams*
- *Data Teams*
- *Infrastructure Teams*

2.2 Responsibilities

The Test Environment Management Team

The TEM team will be responsible for day to day Non-Production Environments. Ultimately responsibility will include modelling environments (identification), central planning & coordination (including demand management), servicing requests e.g. CR & IM Requests, directing operation teams and status accounting (including audit).

Refer EMMI spider diagram.

The Change Control Board

The Change Control Board will be responsible for approving "functional change requests".
The CCB usually comprises of key stakeholders including the Test Environment Manager(s).
Note: The CCB function out of scope of this document.

Define other Teams Roles and responsibilities

2.3 Tools & Infrastructure

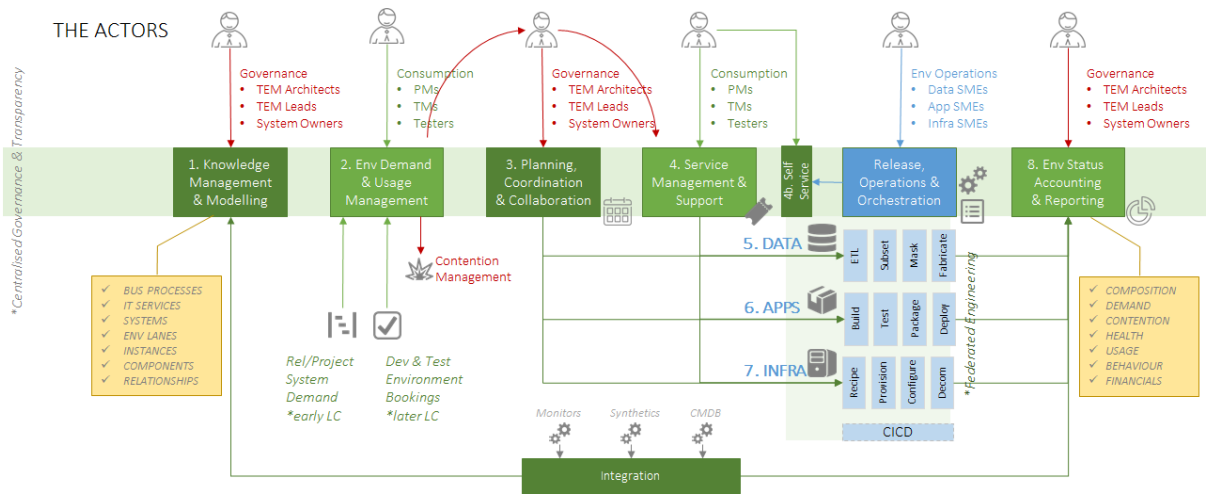
In promotion of TEM best practice, the following tools will be utilised.

- Environment Modelling: *Reference Tool(s)*
- Planning & Coordination: *Reference Tool(s)*
- Service Management: *Reference Tool(s)*
- Application Tools: *Reference Tool(s)*
- Data Tools: *Reference Tool(s)*
- Infrastructure Tools: *Reference Tool(s)*
- Status Accounting *Reference Tool(s)*

Define other TEM tools to be used.

3 The TEM Process

The overall TEM process can be described by following high level workflow.



The implementation of each process step is described in sections below.

3.1 Knowledge Management

Explain how you will identify the current state of your products and systems.

Hint: Mention People, Process, Products/Tools.

Tip: Implement a CMDB.

Refer: Enov8 Environment Manager.

3.2 Demand Management

Describe how you will understand & capture the demand and usage of your test environments.

Hint: Mention People, Process, Products/Tools.

Tip: Implement a Booking System. (May be unnecessary for small Programs/Companies).

3.3 Planning & Coordination

Articulate how you will ensure all your test environment activity is planned & coordinated. E

Hint: Mention People, Process, Products/Tools.

Tip: Implement an Environment Calendars.

3.4 Service Management

Explain how you will service consumer/customer requests e.g. CRs & IM Requests.

Hint: Mention People, Process, Products/Tools.

Tip: Implement a Ticketing / ITSM tools.

3.5 Data Operations

Describe how you will control & track the key "Data" operations & deployment status.

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Hint: Mention People, Process, Products/Tools.

Tip: Runsheets, ETL Tools, Data Compliance Tools.

Refer: https://www.enov8.com/data-compliance-suite-devops-edition/

3.6 Application Operations

Articulate how you will control & track the key "Application" operations & deployment status.

Hint: Mention People, Process, Products/Tools.

Tip: Runsheets, Build, Packaging, Deployment Tools.

3.7 Infrastructure Operations

Explain how you will control & track the key "Infrastructure" operations & deployment status.

Hint: Mention People, Process, Products/Tools.

Tip: Runsheets, Build, Packaging, Deployment Tools.

3.8 Status Accounting & Reporting

Describe how you will collate & disseminate information for purpose of reporting, audit & insight.

Hint: Mention People, Process, Products/Tools.

Tip: Measures/Scorecards, Reports, Dashboards, Portals, Notification Methods.

4 Plan Outcomes

The intention / benefits of implementing this plan can be summarised as follow:

- End to End visibility of Environments
    - Systems,
    - Instances,
    - Components &
    - Interfaces
- End to End Visibility of Activity
    - Operations
    - Usage/Consumption
- Operational Standardization
- Increased DevTest productivity
- Reduced Environment Incidents / Disruption
- Accelerated IT Project Delivery
- IT Cost Optimization / Controlled Spend i.e. spend based on need & usage.

5 Implementation Project Plan

Provide schedule for implementing the TEM Plan (described in this document).

5.0 Project Resources

Describe project resource delivering this e.g. PM, Support personnel.

5.1 Delivery Milestone Plan

Describe timelines for implementing this plan.

Tip: Consider Tactical & Strategic limestones to ensure early wins.

5.2 Actor Training Plan

Describe plan for upskilling relevant TEM personnel & actors.

5.3 Optimization Plan

Clarify how this plan will be maintained and mature. This will prevent the plan becoming redundant and outdated. Note: An excellent way to ensure CM maturation is by having "critical" reviews planned at key milestones.

Appendix

Relevant support material e.g. Release Request Forms, Sign-Offs.