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# **Process Guide**

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# **Release Management**

**Service Improvement Program (SIP)**

# Process Guide – Release Management

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# MOF EC/SIP Process Guide – Release Management

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**Published by** Company ABC  
XXXX Group

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**Written By**

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**Version** The following table refers to Version, Date, and Revisions.

Version	Date	Revisions

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# Approval

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**Overview** This document defines roles and responsibilities using the SARCI. The SARCI model was adopted as a means to identify the relevant stakeholders that are: Responsible, Accountable, Consulted, Informed, or Signature approval required.

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**SARCI Model** The SARCI titles and descriptions are:

Acronym	Title	Description
S	Signature	Does not have direct involvement, but has advisory capacity and approves the finished product.
A	Accountable	Full accountability to success or failure of an activity or role.
R	Responsible	Assigned authority. Executes defined work, and held responsible for success or failure.
C	Consult	Facilitates and contributes as needed (consultant).
I	Inform	Potential for contribution, but primary purpose is to maintain a line of communication to outside group.

---

**Delivery team approval** The team directly involved in the development of this document approve of its content.

Name	Title	Role	Date	Signature

---

**Client approval** The sponsor and Company ABC team directly involved in the development of this document approve of its content.

Name	Title	Role	Date	Signature

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## Approval, Continued

**Team members** The following Company ABC team members contributed and reviewed the contents of this document.

Name	Title	Role

---

## Section 1: Process Vision

### Overview

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**Introduction** This document describes the Process Foundation for the Release Management process.

---

**Contents** This chapter contains the following information.

<b>Topic</b>	<b>See Page</b>
Process Mission and Goals	
Guiding Principles	
Critical Success Factors	
Key Performance Indicators	
Process Solution Scope	

---

## Process Mission and Goals

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**Mission Statement**

Implement changes to XX services taking a holistic (people, process, technology) view which considers all aspects of a change to include plan, design, build, test and deploy activities.

---

**Process Goal**

The goal of Release Management is to take a holistic view of a change to an IT service and ensure that all aspects of a release, both technical and non-technical, are considered together. XX Release Management will:

- Adhere to any ABC Release Policies (whether de-facto or formalized) while establishing a focus on all aspects of Releases that originate inside EC, as defined by an EC-specific Release Policy
  - Collaborate with those organizations outside of XX that impact XX services to plan and ensure impacted stakeholders are involved and that the service is appropriately tested (from a customer's perspective) following implementation
  - Consider other planned Releases (originating inside and outside of EC) to analyze impacts and, wherever possible, coordinate efforts (such as packaging Release Units)
  - Ensure that there is proper distinction made between development, implementation, and testing roles and responsibilities to optimize the integrity of the Release function
-

## Guiding Principles

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**Principle** Release Management will be empowered to veto a new release into the XX production environment based on acceptance criteria as defined in the Release Management process.

---

**Example Application of Principle** The ABC application development team must submit a release package to Change Management to review planned release changes and deployment steps within 4 weeks before production deployment.

---

**Rationale** Rationales are:

- Ensures that the system will meet XX quality expectations.
- Ensures application integrity.
- Reduces production operational issues at the outset of production.

---

**Implication** Implications are:

- We understand the potential for delayed implementation.
- Resource skill levels needed to review solutions are understood.
- We have acceptance criteria defined

---

*Continued on next page*



**Guiding Principles** continued

---

**Principle** Release Management will have an active role in all changes to the XX production environment.

---

**Example Application of Principle** The XX Release Manager sits on the XX CAB to assist in analyzing and approving changes.

---

**Rationale** Rationales are:

- Release Management provides critical input on changes and impacts of changes underway
- Larger releases will require a closer working relationship with Change Management
- Every change is a release in some form or other

---

**Implication** Implications are:

- Our XX Release manager sits on all XX CAB meetings
- EC Release activities occur under the guidance and control of Change Management

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## Guiding Principles continued

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**Principle**                      Wherever possible, unit changes will be grouped into packages to minimize the volume of changes into the environment.

---

**Example Application of Principle**                      Several RFCs for patch changes have been grouped under a Release Package so that they will be applied as a single unit.

---

**Rationale**                      Rationales are:

- Minimizes impacts on production for releases and changes
- Provides control for situations where many changes are occurring

---

**Implication**                      Implications are:

- We are willing to hold up some changes so that they may be grouped with others
- We accept that errors with one change within a release unit will result in all changes being backed out at the same time

---

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## Guiding Principles continued

---

**Principle** All releases will be tested prior to production implementation and post production implementation.

---

**Example Application of Principle** The XX Release manager ensures that adequate testing has been performed prior to submitting a release package to Change Management for approval to go to production. After the release has been implemented, the testing is repeated to ensure the release was implemented successfully.

---

**Rationale** Rationales are:

- Ensures quality of releases going into production
- Ensures releases operate properly after they have been implemented

---

**Implication** Implications are:

- We always test releases as part of our release build cycle
- We always repeat release tests after production implementation to make sure releases are operating properly
- We have a disciplined release testing approach and policies that cover test data, test environments, test acceptance and expected results

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## Guiding Principles continued

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**Principle**

Releases will include a backout strategy wherever appropriate.

---

**Example  
Application of  
Principle**

Development of a backout strategy has been included as part of the release implementation plans for an upcoming server upgrade to ensure the server can be restored back to normal operating state in the event new errors are discovered when the release is implemented.

---

**Rationale**

Rationales are:

- Makes sure services are not compromised by new releases
  - Allows recovery actions to quickly take place in a controlled and planned manner
- 

**Implication**

Implications are:

- We have included development of a backout strategy as part of the release development lifecycle
  - We test backout strategies to ensure they will work if needed
-

# Critical Success Factors

---

**Introduction** This section describes Critical Success factors (CSFs) for the Release Management process.

---

**Success Factors** The Critical Success Factors (CSFs) are:

- Producing Operable Solutions
- Controlling Releases Into Production
- Implementing Releases Into Production On Time

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## Key Performance Indicators

---

**Indicators** Key Process Performance Indicators (KPIs) are:

<b>Metric</b>	<b>Metric</b>
<b>Producing Operable Solutions</b>	
Number of implementations bypassing Change Management	TBD
Number of implementations utilizing non-standard components	TBD
Number of implementations utilizing non-licensed components	TBD
Number of implementations non-authorized	TBD
Number of incidents caused by releases	TBD
Number of failed Releases	TBD
<b>Controlling Releases Into Production</b>	
Number of Releases implemented without a corresponding RFC	TBD
Number of urgent releases	TBD
Number of releases implemented but not adequately tested	TBD
Number of releases implemented without operational assurance	TBD
<b>Implementing Releases Into Production On Time</b>	
Number of Releases implemented	TBD
Number of Releases implemented late	TBD
<b>Other KPIs</b>	
Volume of major and minor releases per week/month	TBD
Percentage of releases that required implementing the back out plan	TBD
Percentage of releases where the back out plan failed	TBD
Average, Best and Worst volume of incidents generated by releases, by type, by priority	TBD
Average, Best and Worst labor spent by release type	TBD
Average, best and Worst time to implement (end-end) by release type	TBD

---

## Process Solution Scope

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**Introduction** This section describes the current scope of the Release Management process.

---

**Description** The scope of the Release Management process will primarily cover release activities within the XX organization. Although it is recognized that many XX services may be impacted by releases outside the XX organization, the role of XX Release Management at this time will be to make a best effort to coordinate activities where authorized. XX Release Management will report and highlight external issues where possible.

---

## Section 2: Process Workflow

### Overview

---

**Introduction** This chapter contains information on the Release Management workflow.

---

**Contents** This section contains the following topics:

Topic	See Page
Process Inputs	
Process Key Activities	
Process Outputs	
Process High Level Workflows	

---



## Process Inputs

---

**Introduction** This section describes the inputs to the Release Management process.

---

**Inputs** The table below describes the inputs to this process:

---

**Other ABC Business and IT Units**

- Incident history and detail to be used as input for determining development solutions
- Incident history and detail as well as customer feedback for incidents related to implementation of releases

---

**Incident Management**

- Incident history and detail to be used as input for determining development solutions
- Incident history and detail for incidents related to implementation of releases
- Identification of incidents caused by Release Management activities if they occur

---

**Problem Management**

- Identification of Known Errors that require development activities to resolve
- Identification of problems that occurred due to releases that were implemented
- Validation that releases implemented to resolve Known Errors were successful

---

**Change Management**

- Approval to undertake release implementation activities
- Change impact assessment results for releases under consideration for implementation
- Forward Schedule Of Changes (FSCs) to be used as input for determining release schedules
- Requirements for release testing and success criteria
- Coordination of release implementation phases (build, test, implement, etc.)

---

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## Process Inputs continued

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- Configuration Management**
- Configuration Item (CI) baselines
  - CI detail information
  - CI relationships
  - Definitive Software Library CIs
  - Definitive Hardware Store CIs
- 

- Service Level Management**
- Establishes priorities for release development activities
  - Determines impacts of releases and their development on services
  - Service Improvement Plan (SIP) to be used as input for release development
  - Ensure Service Level Requirements have been incorporated into release designs and activities
- 

- Service Monitoring and Control**
- Reviews planned and implemented releases for impacts on service monitoring and control impact
  - Identifies service monitoring and control capabilities for new releases
-

## Process Key Activities

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**Introduction** This section describes the key activities for the Release Management process.

---

**Activity Summary** The following table summarizes the key activities for this process:

<b>Release Management Key Activities</b>
Conduct release planning.
Coordinate design, building and configuring of releases.
Coordinate release acceptance.
Conduct rollout planning.
Coordinate release communications, preparations and training activities.
Coordinate distribution and installation of releases.
Provide management information about Release Management quality and operations.

---

**Conduct release planning** Create release units (delta, full and package) for releases; develop release strategy; develop release implementation plans; prepare for releases.

---

**Coordinate design, building and configuring of releases** Coordinate actions to conduct design, build, testing and packaging of release units.

---

**Coordinate release acceptance** Coordinate actions with Change management to obtain review and approvals for releases to go into production.

---

**Conduct rollout planning** Build rollout plans for releases.

---

**Coordinate release communications, preparations and training activities** Coordinate actions to handle non technical aspects of releases such as training and communicating release status to XX and non-EC business units as needed.

---

---

**Coordinate distribution and installation of releases**

Coordinate efforts to develop release distribution procedures; develop release installation procedures; coordinate release implementation schedules; oversee release rollout plans.

---

**Provide management information about Release Management quality and operations**

Reporting on KPIs on a monthly basis and providing management information that covers the state and health of Release Management activities.

---

## Process Outputs

---

**Introduction** This section describes the outputs from the Release Management process.

---

**Outputs** The table below describes the outputs from this process:

---

**Other ABC Business and IT Units**

- Identifies current status of releases being applied to the XX infrastructure
- Identifies impacts of new releases or release changes on non-IT infrastructure

---

**Incident Management**

- Link of releases to incidents being impacted/resolved
- Training for new incident handling skills and processes related to new or changed releases being implemented

---

**Problem Management**

- Identifies release actions being taken to resolve Known Errors
- Communicates Known Errors from development or other release activities if they occur

---

**Change Management**

- Participation in Post Implementation Reviews (PIR)
- Participation on the Change Advisory Board (CAB)
- Notifications of release status for changes
- Provides input for Forward Schedule Of Changes (FSCs) and Planned Service Availability (PSAs) related to release activities
- Submits plans and schedules to be used as input for change review and approval actions

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*Continued on next page*

## Process Outputs continued

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### **Configuration Management**

- Configuration Item (CI) information related to releases and their current implementation status
  - CI information related to the Definitive Software Library (DSL)
  - CI information related to the Definitive Hardware Stores (DHS)
  - Documentation about releases to be stored as CIs
- 

### **Service Level Management**

- Release plans and schedule status to determine impact on service quality
  - Release progress/status that can be communicated to customers
  - Validation that releases were implemented within customer SLA timeframes and agreed scope
- 

### **Service Monitoring and Control**

- Release and rollout plans to be used as input for assessment on impacts to availability
  - Service Monitoring and Control requirements for new/changed releases
-

# Process High Level Workflows

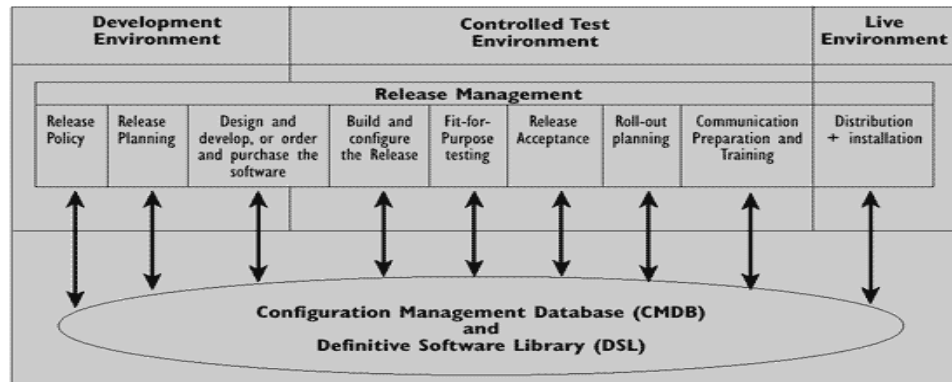
---

## Introduction

The following diagram illustrates a high level workflow for the Release Management process.

---

## Release Management Workflow Diagram



## Section 3: Process Resources

### Overview

---

**Introduction** This chapter contains information on the Change Management process resources.

---

**Contents** This section contains the following topics:

Topic	See Page
Process Roles	
Process Skills	
Process Resources	

---



## Process Roles

---

### Introduction

The key roles involved with executing this process are summarized as follows:

- Release Management Process Owner
  - Release Manager
  - Test Manager
  - Release Owner
- 

### Release Management Process Owner

Primary role is to ensure executive support of the Release Management process, coordinate the various functions and work activities at all levels of the process, provide the authority or ability to promote releases, as required, and manage the process end-to-end so as to ensure optimal overall performance. Key activities for this role include:

- Communicate the organization vision and the process's strategic goals to business units and IT organizations.
  - Identify and assimilate similar and/or overlapping activities/initiatives within IT.
  - Co-ordinate inter-process releases with other process owners.
  - Provide process ownership through design, implementation and continuous improvement activities in the process life cycle.
  - Work with all functions within the IT community to ensure processes are executed as designed and measured accurately and completely.
  - Ensure alignment of the process to the corporate and IT strategy.
  - Create a new environment by displaying a motivational impatience for results (be a behavior change leader)
  - Publicize activities and build commitment and consensus around Release Management activities
  - Facilitate resolution of interface problems with other process owners
  - Communicate with and manage the expectations of customers of Release Management
- 

### Release Manager

Represents XXXX within ABC and is responsible for all releases within that area. Key activities include:

- Develop release strategy
  - Publish a build plan
  - Publish a testing plan
  - Publish deployment plan
  - Conduct release plan reviews
  - Receive, log, qualify, assign all release requests.
  - Participate in release control gates (as needed)
  - Develop installation scripts
-

- Develop configuration scripts
- Develop roll back procedures
- Develop release procedures
- Develop test scripts
- Develop test readiness review
- Develop bill of materials
- Procure release components
- Works closely with the Test Manager to:
  - Review releases and assign appropriate release testing tasks
  - Compile and Review the Testing Deliverables
  - Conduct testing as needed
  - Conduct supporting documentation review
- Schedule release readiness reviews
- Conduct release readiness reviews
- Disposition releases
- Communicate release dispositions
- Participate in CAB meeting
- Deploy release
- Communicate release status
- Update Master Release Calendar & FSC
- Secure software in DSL
- Decommission Configuration Items (CIs)
- Request CI update
- Participate in Post Implementation Review (PIR)
- Establishes security permissions for DSL and access to managed environments
- Champions the new processes and encourage project managers and application teams to use them
- Reports exceptions to the Release process
- Automates Release procedures wherever possible
- Ensures that all Customer, support staff and Service Desk staff are trained and provided with the appropriate documentation and information
- Report KPIs
- Provide management reports
- Conduct periodic process audits

---

**Test Manager**

- Primary role is to ensure that proper testing occurs for all releases into the managed environments. Key activities include:
- Works closely with the XX Release Manager
- Manage the following tasks:
  - Review releases and assign appropriate release testing tasks
  - Compile and Review the Testing Deliverables
  - Conduct installation procedure tests
  - Conduct functional testing

- Conduct performance testing
  - Conduct integration testing
  - Conduct user acceptance testing
  - Conduct operational readiness testing
  - Conduct backout testing
  - Conduct supporting documentation review
  - Compile test results
  - Conduct release test review
  - Conduct post release testing
- 

**Release Owner** Single point of contact for the release being requested. Represents business unit or area interests regarding the release being requested. This role starts with the release submission to Release Management and ends once the release has been successfully implemented. Key activities include:

- Assembles submission package for a release
- Ensures requirements for a release have been provided and provides documentary proof
- Single point of contact to the Release Management process to represent the request for release
- Responds to issues regarding coordination of the release as necessary
- Responsible for verifying that the release has been implemented successfully

---

## Required Skills

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**Introduction** The following table lists the key skill sets needed to operate the process. Each skill is identified along with the level of expertise needed within that skill.

---

**Skill Expertise Levels** The following levels of expertise will be used with each skill listed:

Level	Description
1	<b>Basic:</b> has awareness and core understanding of tasks and concepts. Requires supervision and help to execute.
2	<b>Intermediate:</b> solid understanding of concepts and tasks. Able to execute independently or with minimal supervision and help.
3	<b>Advanced:</b> strong in-depth understanding of concepts and tasks. Able to lead and mentor others within the skill set.

---

**Roles/Skills Matrix** The following table identifies specific skills needed to execute the process by role. Expertise levels are also shown.

Process Role	Required Skill (Level)
Release Management Process Owner	<ul style="list-style-type: none"> <li>• Leadership (4)</li> <li>• Organization (4)</li> <li>• Project management (4)</li> </ul>
EC Release Manager	<ul style="list-style-type: none"> <li>• Organization (4)</li> <li>• Technical (3)</li> </ul>
Test Manager	<ul style="list-style-type: none"> <li>• Testing (3)</li> <li>• Planning (3)</li> </ul>
Release Owner	<ul style="list-style-type: none"> <li>• Communication (3)</li> <li>• Technical (2)</li> </ul>

---

## Process Resources

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### Introduction

The following table identifies process roles by Company ABC organizational units. Names are identified where known. A SARCI method is used to identify who is responsible for what process activities.

---

### SARCI Description

The SARCI model was adopted as a means to identify the relevant resources that will carry out each role. The following codes will be used:

Code	Description
S	Has signature authority for role tasks.
A	Accountable for role tasks.
R	Responsible
C	Consulted for help with role tasks
I	Informed about role activities

---

### Process Resources

The following table illustrates which resources from Company ABC will be responsible for various roles to operate the process.

Name	Title	Role	Organization
	SVP	S	XXXX
	Release Management Process Owner	A	XXXX
	Release Manager	A	XXXX
	Test Manager	A	XXXX

---

## Section 4: Process Tool Requirements

### Overview

---

**Introduction** This chapter contains Change Management process tool requirements.

---

**Contents** This section contains the following topics:

<b>Topic</b>	<b>See Page</b>
Functional Requirements	
Logical Support Architecture	
Existing Tool Support Matrix	

---

# Functional Requirements

---

**Introduction** This section identifies the types of tools needed to support Release Management and lists key functional requirements by each tool type.

---

**Tool Product Types** The tool types needed to support this process are:

- Distribution List Management
- Master Release Calendar and FSC
- Release Management Automated Workflow Capability
- Data Extraction and Reporting
- Software Configuration Management (SCM)
- Build management
- Electronic software distribution
- Software and hardware auditing tools
- Server management tools

---

**Functional Requirements Matrix** The following table identifies the functional requirements needed to operate this process. These have been grouped into the above tool types.

<b>Tool Product Type</b>	<b>Desired Tool Functionality</b>
<b>Distribution List Management</b>	<ul style="list-style-type: none"> <li>• Storage and maintenance of notification distribution lists</li> <li>• Linkages to company e-mail applications and services</li> </ul>
<b>Forward Change Calendar</b>	<ul style="list-style-type: none"> <li>• Ability to link releases to forward change events and schedules</li> <li>• Linkage with Change Management Database and Distribution List Management</li> <li>• Calendaring capabilities that can be viewed by those requesting release as well as those administering and implementing changes</li> <li>• Ability to identify scheduling conflicts</li> </ul>
<b>Release Management Automated Workflow Capability</b>	<ul style="list-style-type: none"> <li>• Automatic production of release requests</li> <li>• Ability for all authorized personnel to access release information from their own terminal or location</li> <li>• Ability to progress requests through the appropriate stages of authorization and implementation and to maintain clear records of this progress</li> <li>• Automatic warnings of any releases that exceed pre-specified time periods during any stage</li> <li>• Automatic prompting to carry out test reviews, etc.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ability to build releases</li> <li>• Process/workflow feature</li> </ul>
<b>Data Extraction and Reporting Capability</b>	<ul style="list-style-type: none"> <li>• Automatic generation of management and trend information relating to releases</li> <li>• Ad-Hoc reporting capabilities</li> <li>• Flexible data formatting and extraction capability</li> </ul>
<b>Software Configuration Management (SCM)</b>	<ul style="list-style-type: none"> <li>• Manage the different versions of software source code during its development.</li> <li>• SCM tool manages relationships. Enables a Change to any one CI to be assessed for impact upon other parts of the system, and thereby to identify what actions are required to ring-fence the Change as complete, and to plan appropriate testing.</li> <li>• Tool that can handle packages of Changes linked to an original Change request.</li> </ul>
<b>Build management</b>	<ul style="list-style-type: none"> <li>• Automated build of new Releases of software applications.</li> <li>• Does program compilations and links, in the correct sequence, under program control using the correct versions of the source code as stored in the SCM tool.</li> <li>• Requires making use of the cross-reference information stored in the software Configuration Management tool to determine which 'parent' objects need to be rebuilt when lower-level units are changed. For example, if a header or 'include' file is changed, then it is necessary to identify all source modules that need to be recompiled. Similarly, the names of the programs to be relinked should be determined, based on the list of modules that were recompiled.</li> <li>• Automated build process should save the generated executables in the DSL and update the CMDB accordingly.</li> </ul>
<b>Electronic software distribution</b>	<ul style="list-style-type: none"> <li>• Record the progress of a given distribution and record individual failures</li> <li>• Ability to restart broken transmissions from the point of failure. Ability to do back-out of Releases if it is only partially successful.</li> <li>• Remote installations</li> <li>• Ability to store a new version of an application in a dormant state.</li> </ul>
<b>Software and hardware auditing tools</b>	Determines exactly what software is installed and identifies most critical aspects of hardware configuration (e.g., sufficient available disk space, etc.)
<b>Server management</b>	Remote control and diagnostic facilities for live servers to aid in fault determination and resolution during and after



<b>tools</b>	Release rollouts. Typical facilities provided include: <ul style="list-style-type: none"><li>• Remote control of operations on the server, for example to assist with making Changes to a server as part of a Release rollout</li><li>• Remote monitoring of the event logs and other Problem logs on servers</li><li>• Monitoring of processor, memory and disk utilization</li><li>• Management of the disk space on servers - for example to monitor usage, to reorganize files for improved performance, and to allocate more disk space to applications.</li></ul>
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## Existing Tool Support Matrix

**Existing Tools** The following table identifies existing tools available at Company ABC and maps these to the tool types identified earlier. The scope of the management domains covered by existing tools is also shown.

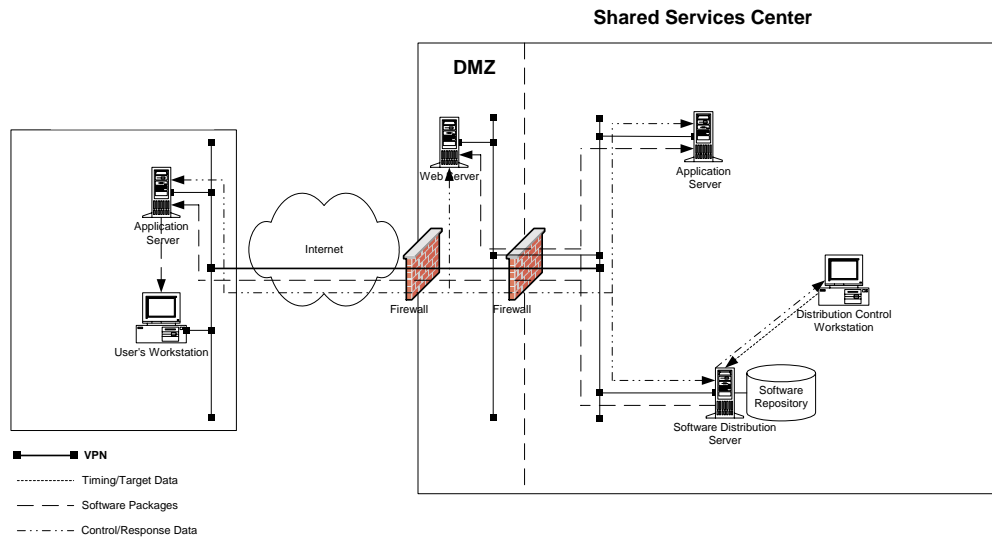
<b>Tool Type</b>	<b>Candidate Tools/Strategies/Issues</b>
<b>Distribution List Management</b>	Will continue to utilize MICROSOFT OUTLOOK. PEREGRINE may provide functionality for this in the long term.
<b>Forward Change Calendar</b>	SHAREPOINT will be used for this in the short term.
<b>Release Management Automated Workflow Capability</b>	Will continue to do manual checks on PEREGRINE for the short term. PEREGRINE might add this functionality in the future.
<b>Data Extraction And Reporting Capability</b>	CRYSTAL REPORTS has been suggested as the reporting tool. Reports will be produced by exporting PEREGRINE data to a text file and running CRYSTAL REPORTS against this.
<b>Software Configuration Management (SCM)</b>	<ul style="list-style-type: none"> <li>• For Wintel: XX is using a custom tool</li> <li>• For Exchange: EX DPA Analyzer</li> </ul>
<b>Build management</b>	<ul style="list-style-type: none"> <li>• ABC uses a custom package by SPS (Server Platform Systems) for Wintel platform</li> </ul>
<b>Electronic software distribution</b>	<ul style="list-style-type: none"> <li>• ABC uses Tivoli for Wintel.</li> </ul>
<b>Software and hardware auditing tools</b>	<ul style="list-style-type: none"> <li>• Missing</li> </ul>
<b>Server management tools</b>	<ul style="list-style-type: none"> <li>• Terminal server for Windows 2000 (and newer).</li> <li>• PC Anywhere</li> <li>• Monitoring: NetIQ, MOM, Tivoli, SiteScope, SpotLight</li> </ul>

# Logical Support Architecture

## Introduction

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### Support Architecture Diagram



## Section 5: Appendix

### Overview

---

**Introduction** Additional informational items concerning this process have been included in the following sections.

---

**Contents** This section contains the following topics: [Update this after final edit.]

<b>Topic</b>	<b>See Page</b>
Appendix A – Initial Wins	
Appendix B – Process Reporting Templates	
Appendix C – Process Form Templates	
Appendix D – Release Management SIPOC	
[other Appendices as necessary...]	

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## Appendix A – Initial Wins

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### Overview

These initial win milestones are expected to be included within the scope of the Service Improvement Program (SIP) for the Release Management process.

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<b>Initial Win</b>	<b>Planned Benefits</b>
Develop Release Policy	Clearly document the management of affairs of Release Management
Develop Release Processes	Clearly document and describe the activities of the Release Management lifecycle: <ul style="list-style-type: none"><li>○ Plan</li><li>○ Coordinate</li><li>○ Build</li><li>○ Test</li><li>○ Readiness Review</li><li>○ Deployment</li></ul>
Establish Release Enabling Technologies	Implementation of labor and time saving technologies
Launch and operate XX Release Management	Protection of the controlled environments and its services through the use of formal procedures and checks.

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## Appendix B – Process Reporting Template(s)

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### Overview

The following pages show planned reporting templates to be used with this process.

Template	Description

## Appendix C – Process Form Template(s)

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### Overview

The following pages show planned form templates to be used with this process.

Template	Description

## Appendix D – Release Management SIPOC

Supplier	Input	Process	Output	Customer
Other ABC Business and IT Units	<ul style="list-style-type: none"> <li>Incident history and detail to be used as input for determining development solutions</li> <li>Incident history and detail as well as customer feedback for incidents related to implementation of releases</li> </ul>	<p>Conduct release planning.</p> <p>Coordinate design, building and configuring of releases.</p> <p>Coordinate release acceptance.</p> <p>Conduct rollout planning.</p> <p>Coordinate release communications, preparations and training activities.</p> <p>Coordinate distribution and installation of releases.</p> <p>Provide management information about Release Management quality and operations.</p>	<ul style="list-style-type: none"> <li>Identifies current status of releases being applied to the XX infrastructure</li> <li>Identifies impacts of new releases or release changes on non-EC infrastructure</li> </ul>	Other ABC Business and IT Units
Incident Management	<ul style="list-style-type: none"> <li>Incident history and detail to be used as input for determining development solutions</li> <li>Incident history and detail for incidents related to implementation of releases</li> <li>Identification of incidents caused by Release Management activities if they occur</li> </ul>	<p>Conduct release planning.</p> <p>Coordinate design, building and configuring of releases.</p> <p>Coordinate release communications, preparations and training activities.</p>	<ul style="list-style-type: none"> <li>Link of releases to incidents being impacted/resolved</li> <li>Training for new incident handling skills and processes related to new or changed releases being implemented</li> </ul>	Incident Management



## Release Management SIPOC, Continued

Supplier	Input	Process	Output	Customer
Problem Management	<ul style="list-style-type: none"> <li>• Identification of Known Errors that require development activities to resolve</li> <li>• Identification of problems that occurred due to releases that were implemented</li> <li>• Validation that releases implemented to resolve Known Errors were successful</li> </ul>	<p>Conduct release planning.</p> <p>Coordinate release acceptance.</p> <p>Coordinate release communications, preparations and training activities.</p> <p>Coordinate distribution and installation of releases.</p>	<ul style="list-style-type: none"> <li>• Identifies release actions being taken to resolve Known Errors</li> <li>• Communicates Known Errors from development or other release activities if they occur</li> </ul>	Problem Management
Change Management	<ul style="list-style-type: none"> <li>• Approval to undertake release implementation activities</li> <li>• Change impact assessment results for releases under consideration for implementation</li> <li>• Forward Schedule Of Changes (FSCs) to be used as input for determining release schedules</li> <li>• Requirements for release testing and success criteria</li> <li>• <b>Coordination of release implementation phases (build, test, implement, etc.)</b></li> </ul>	<p>Conduct release planning.</p> <p>Coordinate design, building and configuring of releases.</p> <p>Coordinate release acceptance.</p> <p>Conduct rollout planning.</p> <p>Coordinate release communications, preparations and training activities.</p> <p>Coordinate distribution and installation of releases.</p>	<ul style="list-style-type: none"> <li>• Participation in post implementation reviews</li> <li>• Participation on the Change Advisory Board (CAB)</li> <li>• Notifications of release status for changes</li> <li>• Provides input for Forward Schedule Of Changes (FSCs) and Planned Service Availability (PSAs) related to release activities</li> <li>• Submits plans and schedules to be used as input for change review and approval actions</li> </ul>	Change Management

## Release Management SIPOC, Continued

Supplier	Input	Process	Output	Customer
Configuration Management	<ul style="list-style-type: none"> <li>• CI baselines</li> <li>• CI detail information</li> <li>• CI relationships</li> <li>• Definitive Software Library CIs</li> <li>• Definitive Hardware Store CIs</li> </ul>	<p>Conduct release planning.</p> <p>Coordinate design, building and configuring of releases.</p> <p>Conduct rollout planning.</p> <p>Coordinate distribution and installation of releases.</p>	<ul style="list-style-type: none"> <li>• CI information related to releases and their current implementation status</li> <li>• CI information related to the Definitive Software Library (DSL)</li> <li>• CI information related to the Definitive Hardware Stores (DHS)</li> <li>• Documentation about releases to be stored as CIs</li> </ul>	Configuration Management
Service Level Management	<ul style="list-style-type: none"> <li>• Establishes priorities for release development activities</li> <li>• Determines impacts of releases and their development on services</li> <li>• Service Improvement Plan (SIP) to be used as input for release development</li> <li>• Ensure Service Level Requirements have been incorporated into release designs and activities</li> </ul>	<p>Conduct release planning.</p> <p>Coordinate design, building and configuring of releases.</p> <p>Coordinate release acceptance.</p> <p>Conduct rollout planning.</p> <p>Coordinate release communications, preparations and training activities.</p> <p>Coordinate distribution and installation of releases.</p> <p>Provide management information about Release Management quality and operations.</p>	<ul style="list-style-type: none"> <li>• Release plans and schedule status to determine impact on service quality</li> <li>• Release progress/status that can be communicated to customers</li> <li>• Validation that releases were implemented within customer SLA timeframes and agreed scope</li> </ul>	Service Level Management

# Release Management SIPOC, Continued

Supplier	Input	Process	Output	Customer
Service Monitoring and Control	<ul style="list-style-type: none"> <li>Reviews planned and implemented releases for impacts on service monitoring and control impact</li> <li>Identifies service monitoring and control capabilities for new releases</li> </ul>	<p>Coordinate design, building and configuring of releases.</p> <p>Coordinate release acceptance.</p> <p>Conduct rollout planning.</p> <p>Coordinate release communications, preparations and training activities.</p> <p>Coordinate distribution and installation of releases.</p> <p>Provide management information about Release Management quality and operations.</p>	<ul style="list-style-type: none"> <li>Release and rollout plans to be used as input for assessment on impacts to availability</li> <li>Service Monitoring and Control requirements for new/changed releases</li> </ul>	Service Monitoring and Control