Release Management v3
For Service Transition and Operational Release

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POL Release Management - Description

❑ The POL Release Management Process will be invoked for all Releases that impact or present a risk to the controlled environments and services.

❑ A Release is defined as a bundle of maintenance, enhancements, fixes to the service, or could be an initial deployment of the service.

❑ All Releases will be recorded in a single Service Management tool - **servicenow**

❑ POL Release assurance ensures that Releases are managed and delivered in a consistent, predictable and cost-effective manner.

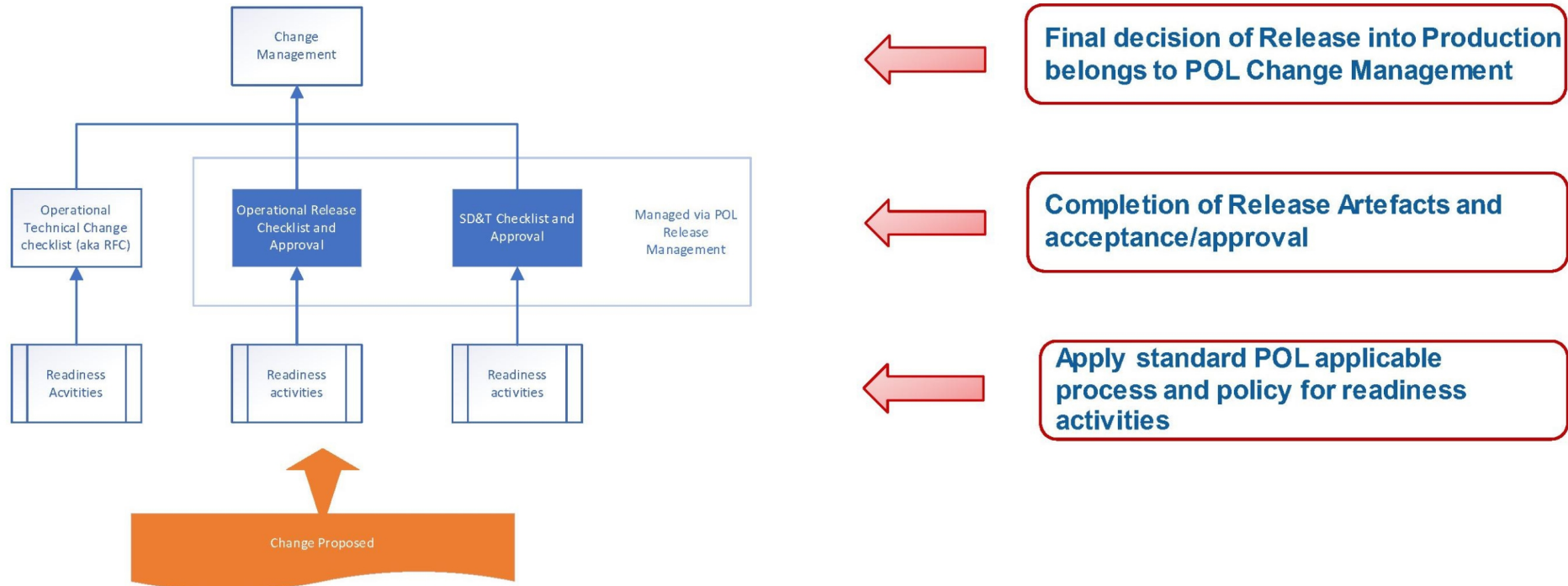# Release Management **vs** Service Design & Transition Management

Releases will be generated from either Release Management or Transition Management - *the difference is the level of governance and assurance.*

❑ A <u>new</u> or changed service will require Service Design and Transition to ensure that the activities are fully managed:

   ❑ **Releases follow POL SD&T policy, including artefacts such as**

      ❑ Service Readiness Reviews, Boards & Checkpoints will be used

   ❑ **A Service Acceptance Board will be convened for approval of the Service changes prior to go live**

❑ A software change with minimal or no change to IT Service management processed will require POL Release Management:

   ❑ **Releases will follow POL Release management strategy including artefacts such as**

      ❑ Release records, scheduling detail, Release Notes and Test plans/results etc

   ❑ **To be approved by POL Release Manager & Board**

Release Authorisation context

POL Release Management is an integral part of the overall end-to-end Change delivery lifecycle…

Final decision of Release into Production belongs to POL Change Management

Completion of Release Artefacts and acceptance/approval

Apply standard POL applicable process and policy for readiness activities
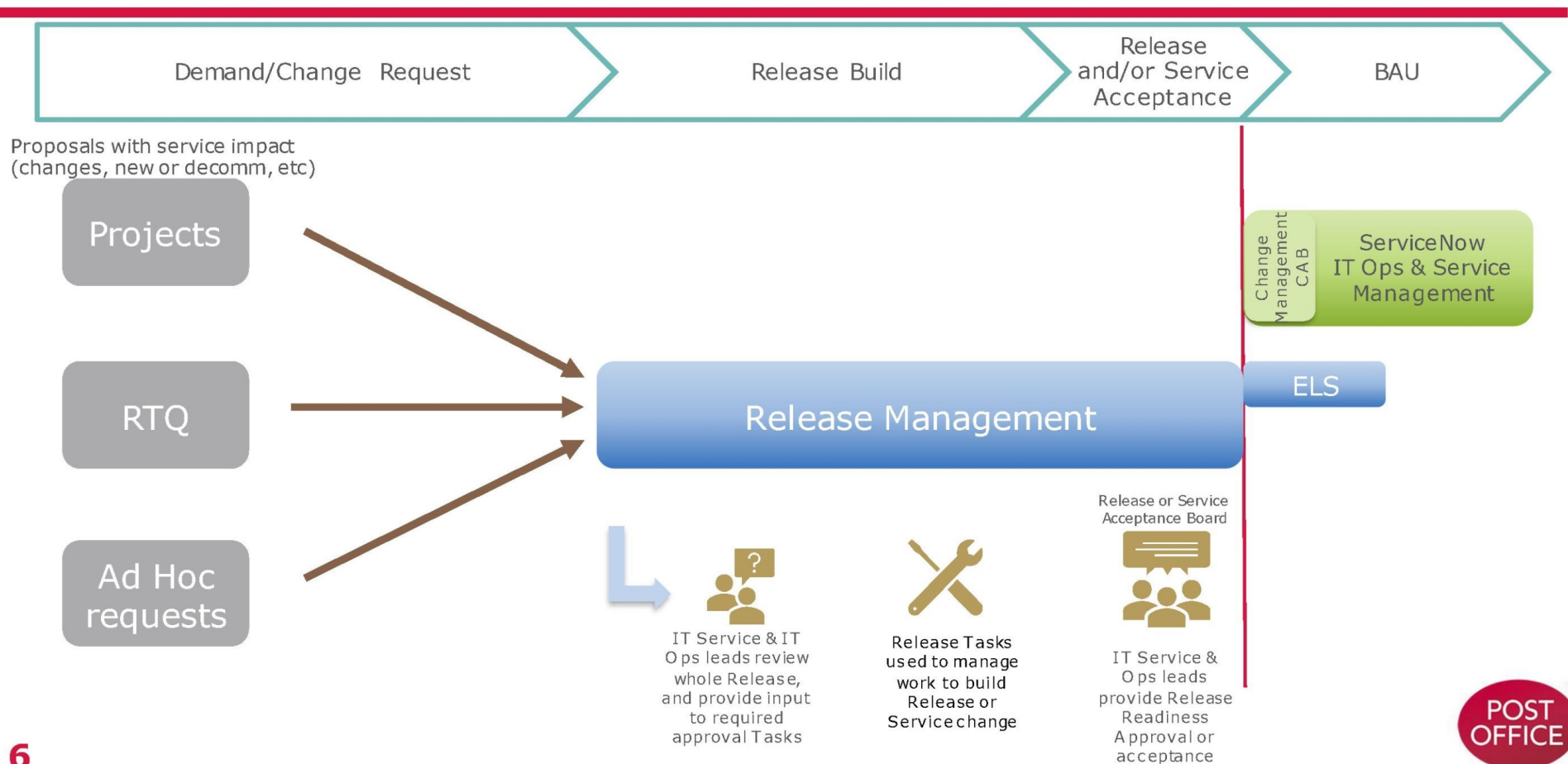
ServiceNow Release Management Purpose

Purpose

- All service impacting changes follow standard policy and process
- Removes paper based activities
- Ensure IT Service and IT Ops leads accepting services have sight of, reviewed and agreed on boarding of services
- Creates a single tool for Service Acceptance/Release Acceptance
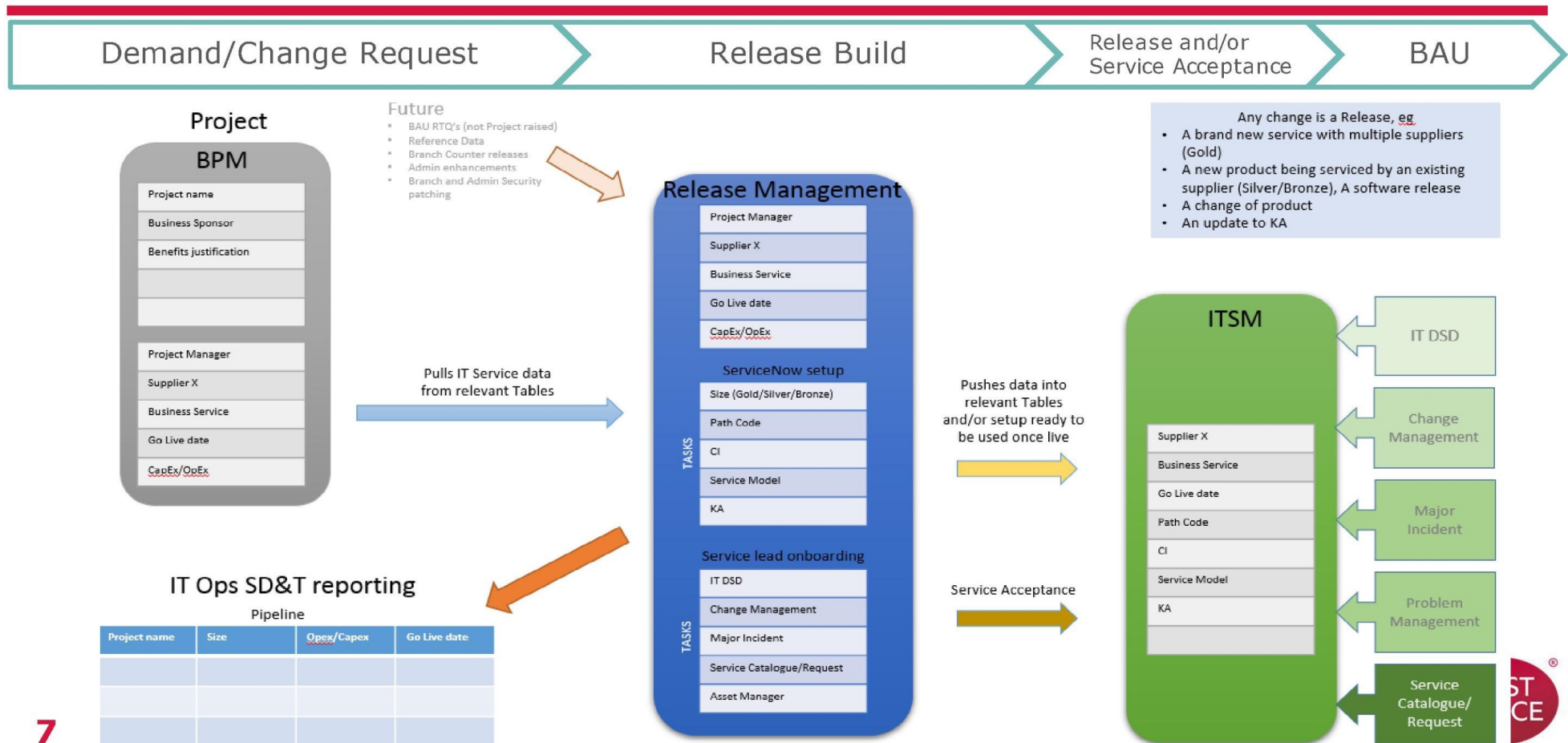- Allows central and auditable Acceptance Criteria review per change

Future

- Pull relevant data into Release Management and ultimately into the IT Service (ServiceNow)
  - Already known to POL – through Project and RTQ
- Provide more automation to Service Design * Transiiton and Operational Release management
- Push tasks to Project teams to complete
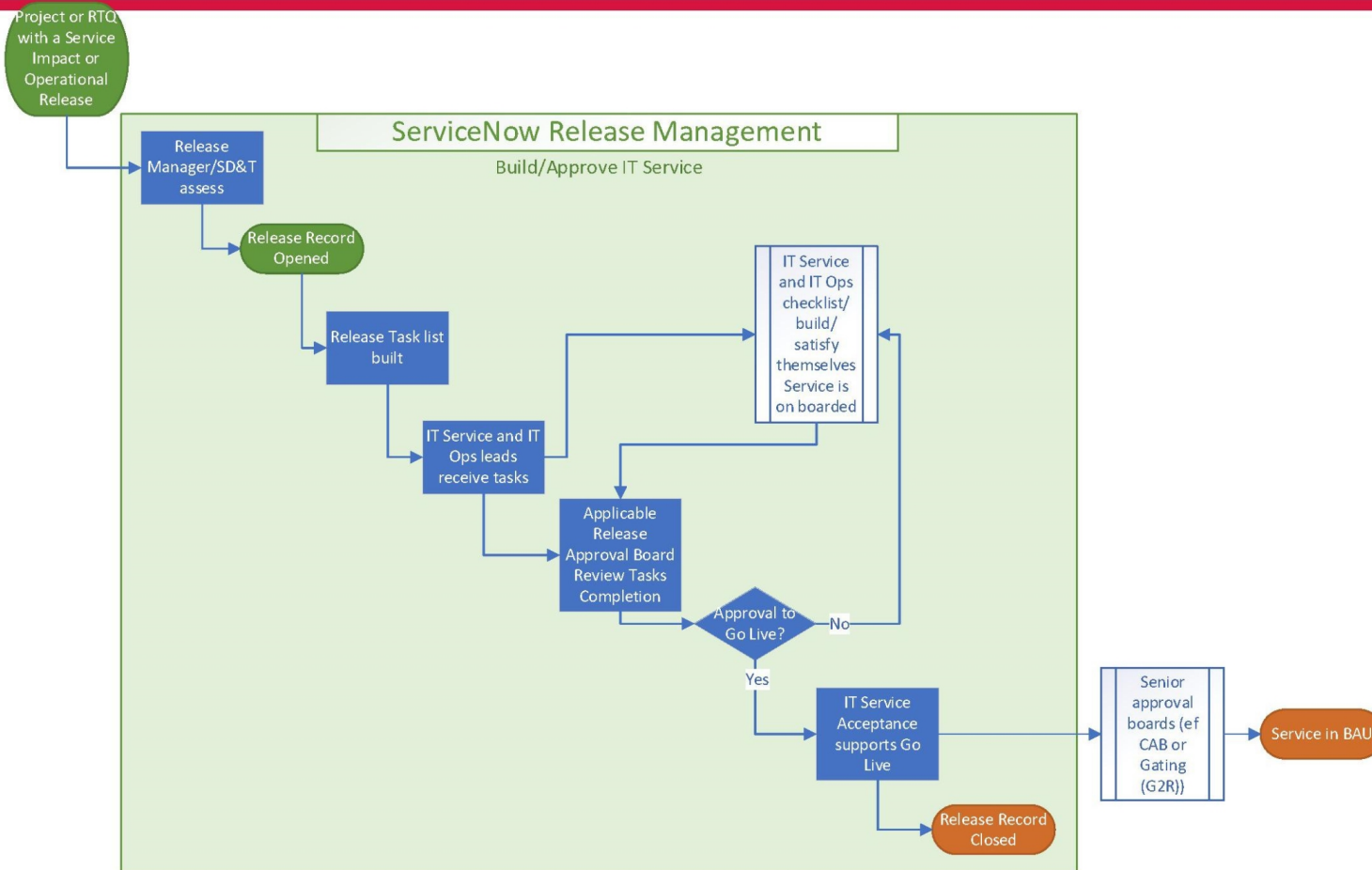- Resource scheduling and timesheeting
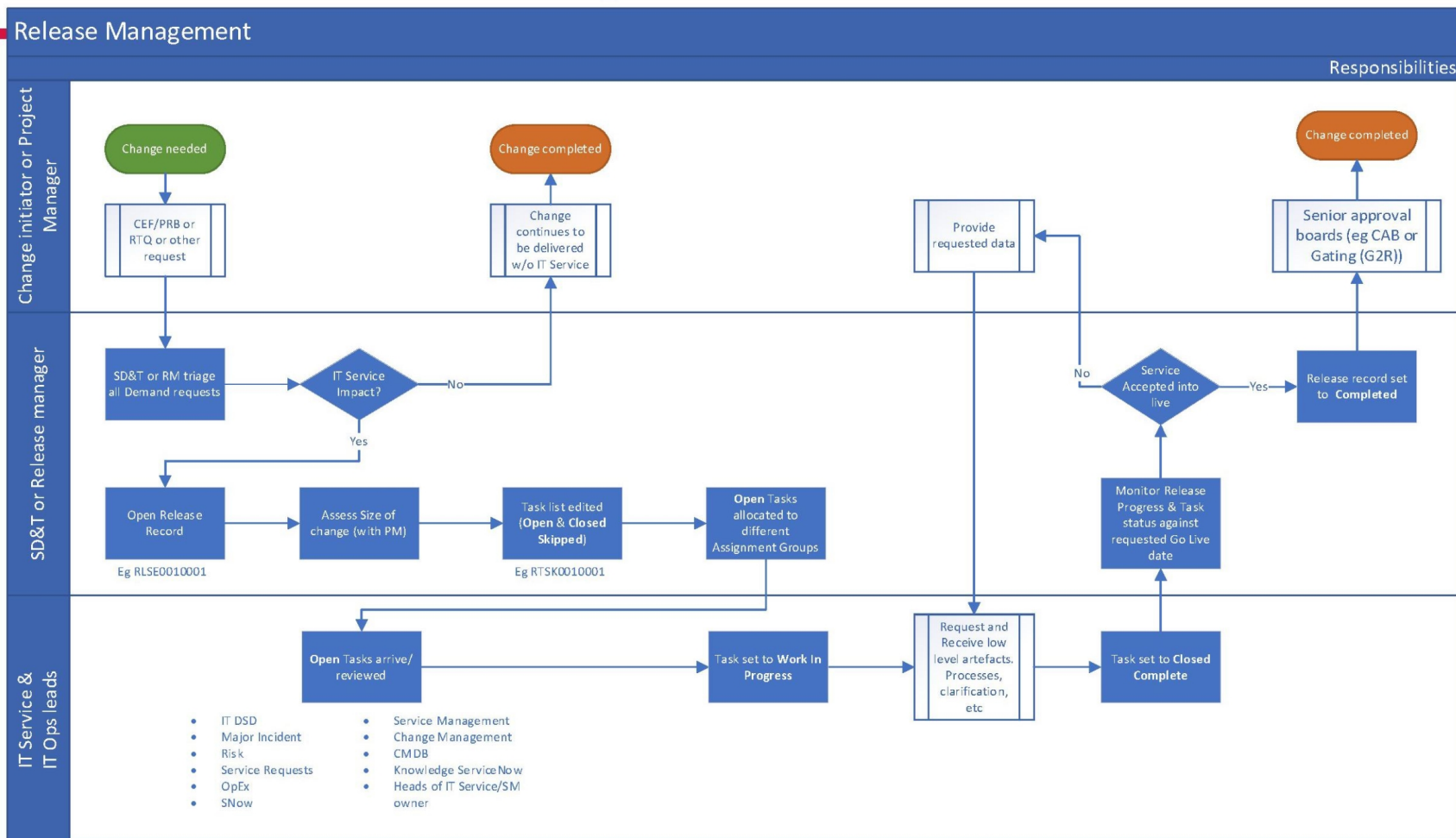
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Route changes through Release Management

RM bridge between BPM/RTQ and ITSM

Demand/Change Request	Release Build	Release and/or Service Acceptance	BAU

Project

BPM

Project name
Business Sponsor
Benefits justification
Project Manager
Supplier X
Business Service
Go Live date
CapEx/OpEx

Future
- BAU RTQ's (not Project raised)
- Reference Data
- Branch Counter releases
- Admin enhancements
- Branch and Admin Security patching

Pulls IT Service data from relevant Tables

IT Ops SD&T reporting

Pipeline

Project name	Size	Opex/Capex	Go Live date

Release Management

Project Manager
Supplier X
Business Service
Go Live date
CapEx/OpEx

ServiceNow setup

TASKS
Size (Gold/Silver/Bronze)
Path Code
CI
Service Model
KA

Service lead onboarding

TASKS
IT DSD
Change Management
Major Incident
Service Catalogue/Request
Asset Manager

Pushes data into relevant Tables and/or setup ready to be used once live

Service Acceptance

Any change is a Release, eg
- A brand new service with multiple suppliers (Gold)
- A new product being serviced by an existing supplier (Silver/Bronze), A software release
- A change of product
- An update to KA

ITSM

Supplier X
Business Service
Go Live date
Path Code
CI
Service Model
KA

IT DSD

Change Management

Major Incident

Problem Management

Service Catalogue/ Request

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Flow - Build and Approve Service

Responsibilities

RACI

Role	Project Manager	Service Design and Transition	Release Manager	IT DSD	Change Management	Major Incident Management	Risk Management	Service Requests	Service Management	ITSCM (DR)	IT Operations Lead	IT DSD Lead	Knowledge Manager	ServiceNow	Heads of IT Service	Software Asset Manager	IT Security	IT Finance	IT Vendor Management	IT Architect
		Owner depends on type of Release															**Future Work**			
Demand Request (Project or RTQ)	A/R	C	C								C				C		C	C	C	C
Impact Assessment *	C	A/R	A/R	I	I	I	I	I	I	I	I	I	I	I	I	I	C	C	C	C
Raises Release Record	I	A/R	A/R	I	I	I	I	I	I	I	I	I	I	I	I		I	I	I	I
Raises appropriate tasks	I	A/R	A/R	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C
Receives and works task	I	A	A	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Complete Tasks (onboarding)	I	A	A	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Release or Service Acceptance Board	C	A/R	A/R	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C
Closes Release Record	I	A/R	A/R	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
Attends Senior approval boards (eg CAB or Gating (G2R))	A/R	C	C						I					I			C	I	I	C
Submits to Gating	A/R	C	C						I					I						
Request For Change/CAB	A/R	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C	C			I

Release Management

Release Record

Release Management drop downs

ServiceNow progress bar

| Draft | Scoping | Awaiting Approval | Work in Progress | Testing/QA | Deploy/Launch | Closed |
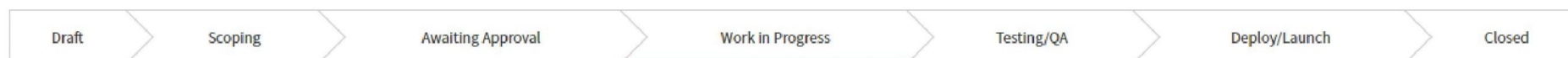
- Not currently used

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Release Type

- Impact of change = Service activities needed to approve = Release Type

ServiceNow	Explanation
Major	Large Transitions, multiple suppliers, multiple services. New Services or Clients only
Minor	New services or clients. Templated type transitions. INC/CM/MI service capabilities only. SAB done offline (email confirmation). No service testing, no ELS, no ServiceNow changes (apart from basic enrolment), no SR/Service Catalogue. Limited Service Volume
Upgrade	Upgrades/changes to existing services only
Retrospective	BAU services which need to be revisited due to outstanding SD&T activities, where SD&T Team may have never been involved and a service wrap is required. Also, can be used for supplier/Client exit. Note - Service was live in past. This is not for new Servcie Transitions
Mini	For BAU/RTQ or any other light touch SD&T activities.
Operational Release	Enables Enterprise service ops to introduce a release management process using this release type. Assignment groups:Change Management , Horizon Release Management, NBIT Release Management, IT Release Management

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Release record fields

Release Priority	
1 – Critical	Not used
2 – High	Full Funding
3 – Moderate	Funding available but no way to cross-charge
4 - Low	No Funding

Parent	
PRJXXXXXX	Project reference from ITBM
POREQXXXXX	Service Request reference from RTQ
<empty>	No lead RTQ or Project – usually a BAU request

ServiceNow Development work required (not used currently)	
Yes	Any development of ServiceNow, including Email integration, Service Catalogue, etc
No	No changes in ServiceNow required

State	
Draft	Early notice of a change that has been assessed to have IT Service Impact Setting any new Release record to Draft will prevent any Release Tasks being added
Planning	Assessment stage of Service Intro, Service Design, Service Modelling. Tasks may be generic at this stage with all open. Once they are either assigned or closed, then can move to Current
Current	SD&T engaged and working to design and/or transition to live, or service in ELS. Tasks opened with relevant RME's service being built. Tasks should show as "Work in Progress" or "Close Completed"
On Hold	Project/Delivery on Hold, or no progress for 6 months, release may be closed after 2 months of being on Hold and still no progress update or movement.
Complete	Service in BAU
Cancelled	Service intro cancelled

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Release record fields

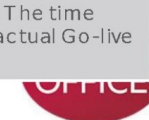| Release Phase			
ServiceNow	CEF stage	RTQ Stage	Explanation
Requirement Gathering	Innovate	RTQ opened (but not approved by IT Service)	Early stages when SD&T or Release Manager has just opened Release record and gathering details about the change to understand the scope of the Service changes
Design	Prove	RTQ triaged and with supplier	Service impact is being clarified with all SME teams. Service model or Release Plan **is not** agreed
Development		RTQ responded to by supplier, but no PO supplied by POL	Service impact is being clarified with all SME teams. Service Model or Release plan **is** agreed
Build	Deliver	Work Order or similar signed off & PO provided Supplier in process of building/implementing	Change being built. Service being built, release details being put together. Service Transition plan available Release Note **is** available
Deployment		RTQ delivered	Changes being put into place in test environments or non Prod impacting changes. Or Prod changes (eg preload etc) being moved to live
QA			Testing
User Acceptance	After Gating (G2R)		Service Live in ELS. Project trying to close. ELS under review to ensure IT Service and Ops support project closure

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Release record fields

Ownership	Detail
Assignment Group	The Ownership of the Release Record
Assigned To	The lead SME in release Team or SD&T responsible for managing this record

Description	Detail
Short Description	A short description – related to project name or RTQ title
Description	More in-depth detail about the service, more specific service name (rather than business/programme name). Will contain some high level requirements

Schedule	
Planned Start Date	Start date of the Service Transition, Project or delivery (automated – created when RLSE is opened)
Planned End Date	End date of all work being fully completed. Aligns to Project Close, end of ELS, all other follow up work completed.
Planned Duration	Automated field (end date – start date)

Schedule	
Baseline Go live date	The original date the project or Delivery team have set for Go-Live
Go Live Date	Updated as the Go-Live date if original Go-Live date pushed back or brought forward
Duration over Go Live	Automated field (Baseline Go Live Date – Go Live Date). The time difference between the original planned go-live and the actual Go-live date.

Release Tasks

Release Type	Total Release Tasks	Purpose
Major	25	Large Transitions, multiple suppliers, multiple services. New Services or Clients only
Minor	25	New services or clients. Templated type transitions. INC/CM/MI service capabilities only. SAB done offline (email confirmation). No service testing, no ELS, no ServiceNow changes (apart from basic enrolment), no SR/Service Catalogue. Limited Service Volume
Upgrade	10	Upgrades/changes to existing services only
Mini	0	For BAU/RTQ or any other light touch SD&T activities
Retrospective	14	BAU services which need to be revisited due to outstanding SD&T activities, where SD&T Team may have never been involved and a service wrap is required. Also, can be used for supplier/Client exit.
Operational Release	0	Enables Enterprise service ops to introduce a release management process using this release type. Assignment groups: Change Management, Horizon Release Management, NBIT Release Management, IT Release Management

Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
Assess Escalation Path Options	Service Manager	Assess Escalation Path Options : Review Service with Business owner. Define/agree appropriate Escalation path for non Incident related issues. Document in Service Model/Service Design .	Review Service with Business owner. Define/agree appropriate Escalation path for non Incident related issues. Document in Service Model/Service Design	• Service Model • Service Design
Change Management	Change Manager	Change Management : Review OLA with Change Management, agree POL processes are appropriate, and added into Tiers document.	Review OLA with client/supplier for Change Management and agree POL processes are appropriate Onboard into Tiers document Open RFC for Service Go Live	• OLA Review • Updated Tiers matrix • RFC for the Go Live (Change Ref. Number) • RFC submitted to CAB and approved
CMDB	CMDB lead	CI information: Agree and load complex Asset detail into ServiceNow. Cis: Agree basic CI needed in ServiceNow, assign to appropriate Business/Company. Model: Review where this service/product sits within Post Office CMDB model.	Review where this service/product sits within Post Office CMDB model Agree basic CI needed in ServiceNow, assign to appropriate Business Service/Company Agree and load complex Asset detail into ServiceNow	• ServiceNow CI visible/available • Business Service visible/available and linked to CI • ServiceNow CMDB updated with asset details
ELS	SD&T Manager	ELS : Agree the period of ELS, what activities will be carried out during ELS. Agree the exit criteria. Review this against project closure requirements.	Agree the period of ELS, what activities will be carried out during ELS. Agree the exit criteria. Review this against project closure requirements	• Service Model • Service Design • ELS Plan • ELS Exit Criteria
File Transfer Service	Application SME – Enterprise Messaging (PODG)	File Transfer Service: Questions to PM/Change initiator: • Is there a requirement to transfer files between various parties? • If yes, does this transfer involve PODG or other service? • Is the transfer documented? • Has the transfer been tested? • Are the Service Desk aware? KAs written/updated etc	Confirmation that any File Transfer Service is setup and documented Add to a separate Ops document/KA if required Confirm all parties aware aware of who engages who in event of an error	• Documented details

Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
Future product/ release roadmap	SD&T Manager	Future product/release roadmap : Description and/or plans for future releases need documenting. How will service changes including Defects be delivered? .	Description and/or plans for future releases need documenting. How will service changes including Defects be delivered? Include not just software/application updates, but future service expansions (more devices, more sites, more clients etc)	• Documented future releases/updates/enhancements • Release plan • Release Management (where needed)
Hardware acceptance review	SD&T Manager	Hardware acceptance review : Hardware Acceptance Review document is completed (by Project), reviewed and approved by Service .	Hardware Acceptance Review document is completed (by Project), reviewed and approved by Service Manager	• HAR completed and approved
HLD	SD&T Manager	HLD reviewed/available : High Level Design document is reviewed and appropriate call outs made to IT Service. High Level Design document is reviewed and appropriate call outs made to IT Service	High Level Design document is reviewed and appropriate call outs made to IT Service	• HLD available/stored • Release Notes available/stored • HLD reviewed by SSAG and approved
Incident Mgmt and IT DSD	Incident Management lead and L2 Ops lead	Readiness and knowledge transfer activities to IT DSD and L2 Ops teams. ServiceNow Training: IT DSD, or other support POL area, have confirmed that training has taken place for their colleagues on how to manage any activities under their remit Change lead has confirmed that end user User/Client training has been completed and methods to engage with Post Office IT are understood and tested where necessary.	ServiceNow Training, Review Service Description, Troubleshooting and Resolver groups KA. Incident Mgmt: Incident management process is in place & all applicable IT support levels are prepared and have signed off. IT DSD sign off: Consulted IT DSD lead/Manager and have accepted.	• Comms and Trianing completed • Service Description and KA uploaded and other documents available • IT DSD sign off • L2 Ops lead sign off
Knowledge	Knowledge Manager	Knowledge Article: Knowledge Articles have been generated – Service Description, Troubleshooting, Resolver Groups, User articles. Technical handover: A Technical handover has been completed & provided by delivery in the format required by POL support area (i.e.Technical handover document, email, chat)	Knowledge Articles have been generated – Service Description, Troubleshooting, Resolver Groups, User articles Minimum is a Service Description for a new Service. Plus others. KA's written and uploaded Updating KA's Reviewing out of date KAs that need to be retired	• Service Description KA written • Other KA's updated • KA's uploaded and available (w/ ServiceNow reference) • IT Ops Document available/stored

Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
Licences	Software Asset Manager	New users/licences : If new ServiceNow licences are require, approval and setup needed. SAM Licences : Does any solution require licencing, this must be handed over to Software Asset Manager to manage into future.	Is any solution requires licencing, this must be handed over to Software Asset Manager to manage into future If new ServiceNow licences are require, approval and setup needed Costs/budgeting for the licences must be agreed	• Full set of Licences documented • SAM tool update • Budget agreed
Major Incident	Major Incident Manager	Incident Matrix : Review likely failure scenarios and what may cause a Major (Critical/P1 or High/P2) severity incident and what the MI response should be. Major Incident Management OLA : Review OLA with Major Incident Management and onboard. Present Agreed Escalation Path : Review Escalation paths with MIM team. Problem Management: Supplier/Client Problem management process recorded, Resolver matrix updated Y/N with point of contact. Risk raised for no Problem Management.	Review likely failure scenarios and what may cause a Major (Critical/P1 or High/P2) severity incident and what the MI response should be Review Escalation paths with MIM team Review OLA with Major Incident Management and onboard	• Service Model • Service Design • OWA • Resolver matrix updated • KA updated (MI details) • Risks updated
Opex	SD&T Manager	1st year Opex costs : Ensure that the 1st Year Opex costs have been fully understood and mapped out for whole service and agreed with HoITS and IT Finance. Document where needed. Opex Forecasts : Opex forecast for service lifecycle, including lifespan and any end of life activities (decommissioning) has been reviewed and agreed.	Opex forecast for service lifecycle, including lifespan and any end of life activities (decommissioning) has been reviewed and agreed Ensure that the 1st Year Opex costs have been fully understood and mapped out for whole service and agreed with HoITS and IT Finance. Document where needed	• Opex model documented • Opex model reviewed with IT • Agreement on when costs land in IT

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Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
Review Meetings & reporting	Service Manager	Review Meetings : Agree appropriate Service review meetings with stakeholders (clients, business leads, etc). May be subject to formal contractual delivery/frequency/terms or reference requirements. Service Reporting: Any reporting requirements needed to run the service are setup and in place. Evidence: ServiceNow Task update/completion IT Operations Reporting : If any reporting on service is needed for the Monthly Service Review, ensure the requirements and reporting is setup, including the responsible reporter. Advanced Reporting Requirements : Ensure any requirements for reporting that relies on ServiceNow have been documented and built.	Agree who provides the data, sources internal or external Is any processing/understanding of the data needed? Agree appropriate Service review meetings with stakeholders (clients, business leads, etc). May be subject to formal contractual delivery/frequency/terms or reference requirements Service packs reviewed and understood If any reporting on service is needed for the Monthly Service Review, ensure the requirements and reporting is setup, including the responsible reporter	• Service review meetings in the diary • Agreement on format in place with sample/draft • ServiceNow Reports setup/available
Risks	IT Services Risk Lead	Risks : Ensure all IT risks are logged within IT and/or Project. Review/agree mitigation. • Has a Risk assessment been performed - Y/N • Have any Risks been identified - Y/N • Will ALL Risks that have been identified be remediated prior to go live date - Y/N • Have the necessary Risks been shared and reviewed with the IT Service Risk Lead - Y/N	Ensure all IT risks are logged within IT and/or Project. Review/agree mitigation	• Risk log updated
Service Acceptance	SD&T Manager	Service Acceptance : Schedule and complete the Service Acceptance Board.	Pilot and Proof of Concept document has been completed Service Acceptance Board has been completed All Release Tasks are either "Close Completed", or "Work In Progress" with agreed mitigation Risks agreed Gating/CAB/RAB all in plan and/or completed Release Record moved to State *Delivered*	• Pilot and Proof of Concept document • Service Acceptance document (email/template etc) completed • Service Manager sign off to enter live

Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
Service Availability	SD&T Manager	Service Availability : Availability targets agreed and reviewed. Any contractual commitments are understood and communicated . Service Capacity : Service Capacity estimated and agreed . Business Continuity : Review Business requirements including any Service Availability SLAs. Document Business Continuity responses (RPO/RTO). Regular DR plan is updated. Ensure Business Continuity lead has reviewed and engaged.	ServiceNow Task update/completion Review Business requirements including any Service Availability SLAs. Document Business Continuity responses (RPO/RTO). Regular DR plan is updated. Ensure Business Continuity lead has reviewed and engaged.	• HLD reviewed • SLAs reviewed • Service Availability/Capacity management documented • ITSCM plan available
Service Continuity	ITSCM Manager	Business Continuity : Review Business requirements including any Service Availability SLAs. Document Business Continuity responses (RPO/RTO). Regular DR plan is updated. Ensure Business Continuity lead has reviewed and engaged.	Review Business requirements including any Service Availability SLAs. Document Business Continuity responses (RPO/RTO). Regular DR plan is updated. Ensure Business Continuity lead has reviewed and engaged.	• ITSCM plan available
Service Design	SD&T Manager	Service Model : Service Model built and shared. Feedback and build may tweak this through several iterations . Service Packs : Full Service Wrap available for complex services.	Service Model and/or Service Design built and shared. Feedback and build may tweak this through several iterations Hold a call to intro the Service wrap. Email team. Upload the Service Model/Design to Teams	• Service Model • Service Design • Service Intro has taken place (with IT Service/IT Ops)
Service Request/ Catalogue	Request Manager	Service Request/Catalogue : If any new Service Request, Catalogue or Branch Hub entries are needed, setup and test. Includes request that may be required outside of ServiceNow, eg OBC, RTQ. Review existing Service Request/Catalogue: There no impact to existing entries, or no amendments are needed (i.e. old entries to be updated/deleted).	If any new Service Request, Catalogue or Branch Hub entries are needed, setup and test. Includes request that may be required outside of ServiceNow, eg OBC, RTQ Enhancement requests may be need to initiate the build of the SR/SC	• Service Requests built • Service Catalogue setup
SLA/KPI measures	Service Manager	SLA/KPI measures : Ensure that any service SLAs or SLO's agreed with clients and business are understood. Where required agree KPI's in order to ensure service quality is monitored and maintained.	Ensure that any service SLAs or SLO's agreed with clients and business are understood. Where required agree KPI's in order to ensure service quality is monitored and maintained	• Business requirements understood • Contract (external parties) understood • Risks raised

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Task List

Task Name	IT Sign off	Description	Actions that may be needed	Evidence
SNOW Functionality	ServiceNow System Manager	Functional System Testing : Any changes in ServiceNow need Functionality Agreement & Setup : Where new functionality is identified within ServiceNow (eg Incident forms, Service Catalogue, Supplier email Integration, other), ensure this agreed and delivered. Set up Integrations: Setup any Integrations for ServiceNow with suppliers, clients, and internal requirements.	Where new functionality it identified within ServiceNow (eg Incident forms, Service Catalogue, Supplier email Integration, other), ensure this agreed and delivered Setup any Integrations for ServiceNow with suppliers or clients Ensure any requirements for reporting that relies on ServiceNow have been documented and built ChangesIf any reporting on service is needed for the Monthly Service Review, ensure the requirements and reporting is setup, including the responsible reporter in ServiceNow need testing and confirming	• ServiceNow Enhancement Idea completed • Integrations tested • Reports setup
SNOW Standard Requirements	ServiceNow System Manager	Path Codes : Add path codes for any new Clients or Service Providers. Resolver Groups : Setup appropriate resolver groups. Company/Client Table : Update Company/Client table with any new/changed Companies.	Add path codes for any new Clients or Service Providers Update Company/Client table with any new/changed Companies Setup appropriate resolver groups Ensure resolver groups are fully defined and understood	• Path Code added • Company added • Resolver Group added
Supplier/Client Setup	SD&T Manager	OLA : Generate new OWA where needed and sign off with client/service provider. Suppliers identified/contracts in use/new : Review the Service Mode and the resolver groups. Ensure that the contracts or OLA's underpinning the service are appropriate to achieve any service SLA .	Review the Service Mode and the resolver groups. Ensure that the contracts or OLA's underpinning the service are appropriate to achieve any service SLA Generate new OLA where needed and sign off with client/service provider	• OWA generated • OWA agreed with supplier • Contract reviewed • SLA/KPI reviewed
Testing	SD&T Manager	Product Testing : Review Test plan and ensure IT Service requirements are present. Review success output/testing completion results . IT DSD Service Testing : Approval that the IT DSD are able to manage inbound issues (generate Incidents) and can successfully triage these to appropriate resolver groups . Operational Acceptance Testing : Run full OAT with all service teams, including Suppliers .	Review Test plan and ensure IT Service requirements are present. Review success output/testing completion results Run full OAT with all service teams, including Suppliers Approval that the IT DSD are able to manage inbound issues (generate Incidents) and can successfully triage these to appropriate resolver groups	• Product test reports • IT DSD confirm INC testing • Operational Acceptance document • OAT Test completed (or caveats/ mitigation in place)

Task Fields

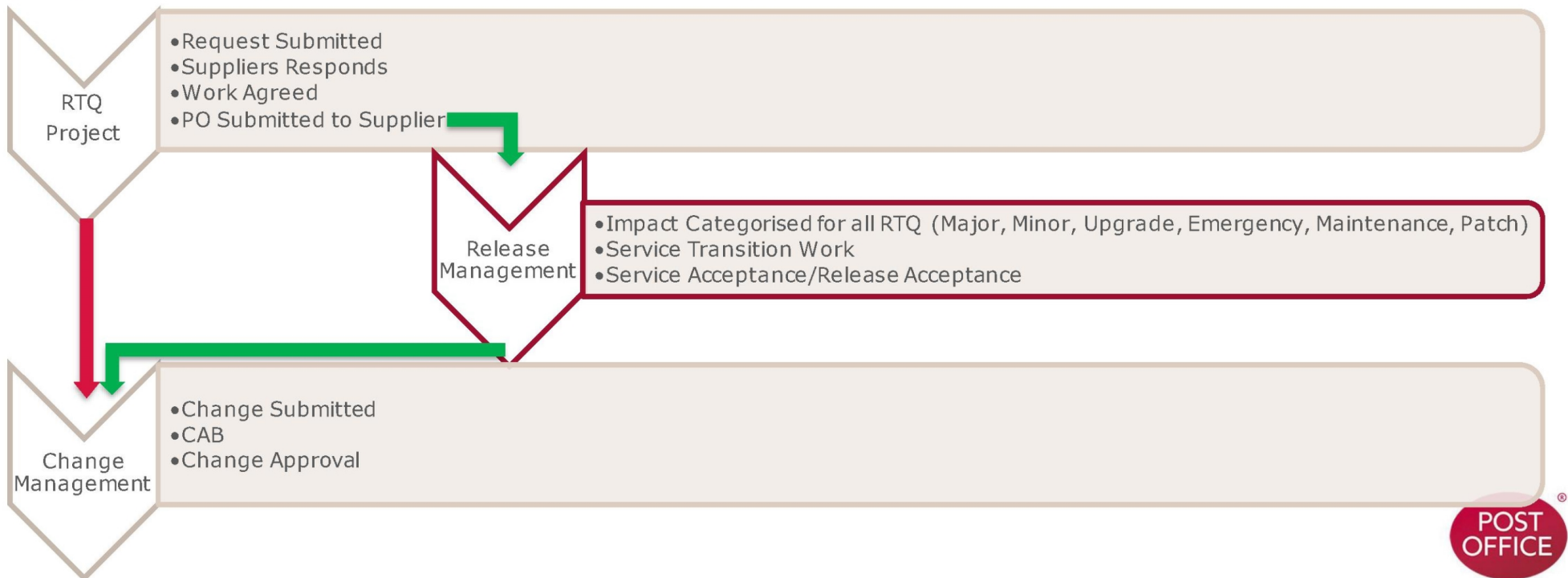| Priority	
1 – Critical	Not used
2 – High	Not used
3 – Moderate	Not used
4 - Low	Not used
5 - Planning	Not used

State	
Pending	Not used
Open	When Task first opened/ No owner in *Assigned To*
Work In Progress	Being worked by owner (within IT Ops/IT Service)
Closed Complete	All activities completed in Task
Closed Incomplete	*Some activities not completed. Not sure we'd use this, do we add this to Risks?*
Closed Skipped	Task is not required – for example if the service is Bronze level it will not require certain onboarding Tasks

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Small Changes

Small changes currently are agreed and funded at RTQ, then X days later appear at CAB

Proposal – flag the work as soon as RTQ Work Agreed regardless of size

RTQ Project
- Request Submitted
- Suppliers Responds
- Work Agreed
- PO Submitted to Supplier

Release Management
- Impact Categorised for all RTQ (Major, Minor, Upgrade, Emergency, Maintenance, Patch)
- Service Transition Work
- Service Acceptance/Release Acceptance

Change Management
- Change Submitted
- CAB
- Change Approval

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Current process