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Abstract:	This document details the Release Management strategy at a high level.
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Author & Dept:	Dan Whitman, Release Management
External Distribution:	NO
Security Risk Assessment Confirmed	YES

Approval Authorities:

Name	Role	See Dimensions for record
Alan Flack	Operational Change & Release Manager	
Tony Atkinson	Head of Release Management	

See HNG-X Reviewers/Approvers Matrix (PGM/DCM/ION/0001) for guidance on who should approve.

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0 Document Control

0.1 Table of Contents

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0.2 Document History

Version No.	Date	Summary of Changes and Reason for Issue	Associated Change - CP/PEAK/PPRR Reference
0.1	5/1/2011	Initial version	
0.2	13/2/2011	Updated version	
0.3	20/2/2011	Updated following review	
0.4	23/6/2011	Updated for review	
0.5	29/9/2011	External Review inc. Comment Updates	
0.6	05/10/2011	Post Internal Team Review inc. Comment Updates	
0.7	20/8/2014	Updated document to bring in line with current processes and procedures	
0.8	26-Jan-2015	Updated with changes following review of 0.7	
1.0	26-Jan-2015	Approval version	

0.3 Review Details

*See HNG-X Reviewers/Approvers Matrix (PGM/DCM/ION/0001) for guidance on completing the lists below. You may include additional reviewers if necessary, but you should generally **not exclude** any of the mandatory reviewers shown in the matrix for the document type you are authoring.*

Review Comments by :	
Review Comments to :	Dan.Whitman@ GRO
Mandatory Review	
Role	Name
Head of Release Management	Tony Atkinson
Release Management Team Manager	Alan Flack
Head of Test	Mark Ascott
Integration and SCM Manager	Vijesh Pandya
Senior SCM Specialist	Dave Pooler
Head of Post Office Transformation Service	Iain Janssens
Principal Technical Services Specialist	Andrew Gibson
Principal Technical Services Specialist	Paul Stewart
Technical Services Specialist	Ryan Hawkes
Optional Review	
Role	Name
Operations Director	Pete Thompson
Application Development Manager	Keith Tarran
Problem Manager	Steve Bansal
Test Manager	Chris Maving

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Lead SDM & Risk Manager	Yannis Symvoulidis
Release Manager	Sarah Payne
Release Manager	Julia Betteley
Release Manager	Adam Sobot
Release Manager	John Budworth
Release Planner	Louise Barham
Release Controller	John Boston
Release Controller	Lorraine Elliott
Operational Change Manager	Nina Brickell
Quality and Compliance Manager	Bill Membery
Business & Change Manager	Ken Westfield
Document Manager	Matthew Lenton
Requirements Analyst	Steve Evans
Senior Operations Manager	Alex Kemp
PMO Manager	Mark Arnold
SSC Manager	Steve Parker; SSC Duty Manager
Architect	Pete Jobson

(*) = Reviewers that returned comments

0.4 Associated Documents (Internal & External)

Reference	Version	Date	Title	Source
DEV/GEN/SPE/0007	Latest	Latest	Platform Hardware Instance List	Dimensions
DEV/INF/POL/0753	Latest	Latest	Platform upgrades and outage	Dimensions
PA/STR/003	Latest	Latest	Fujitsu Services Release Policy	PVCS
SVM/SEC/POL/0003	Latest	Latest	Information Security Policy	Dimensions
PGM/CM/PRD/0001	Latest	Latest	HNG-X Software Configuration Management Process Definition	Dimensions
SVM/SDM/PRO/1184	Latest	Latest	MSC Managed Service Change Procedure for Post Office Account	Dimensions
SVM/SDM/STD/2593	Latest	Latest	Terms of Reference for POA BIF and PTF	Dimensions
DE/PRO/015	Latest	Latest	POA Systems Integration Directorate Incident / Defect Management	Dimensions
PGM/CHM/MAN/0002	Latest	Latest	Change Management Instructions	Dimensions
CSMAN001	Latest	Latest	Peak User Guide	Dimensions
PGM/CM/STD/0001	Latest	Latest	Dimensions Naming Standard	Dimensions
DEV/GEN/SPE/0007	Latest	Latest	PHIL	
PGM/CHM/PRO/0001	Latest	Latest	Change Process	Dimensions
SVM/SDM/WKI/2689	Latest	Latest	Release Management Deployment Plan Work	Dimensions

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			Instruction	

Unless a specific version is referred to above, reference should be made to the current approved versions of the documents.

0.5 Abbreviations

Abbreviation	Definition
BAL	Branch Access Layer
BC	Business Continuity
BCP	Business Change Proposal
BDB	Branch Data Base Server - Main
BDS	Branch Data Base Server - Standby
BIF	Business Impact Forum
CP	Change Proposal
DG	Deployment Group
DPVB	Deployable Product Version Baseline
E2E	End to End
KEL	Known Error Log
KPI	Key performance indicators
LST	Live Support Test (a test rig and team of people who use the rig)
MSC	Manage Service Change
PAB	Patch Approval Board
PAF	Postcode Address File
PCI	Peripheral Component Interconnect
Peak	Fujitsu services incident and release management system. Also used to describe a record (defect) raised within the Peak system
PHIL	Platform Hardware Instance List DEV/GEN/SPE/0007
PLD	The Development environment where customizing and development can be performed by Fujitsu
PLE	The Test/Training 'isolated' environment for Post Office to test end-to-end functionality of the SAP solution. Authorisation for import of change into this system and all of its clients is the responsibility of Post Office following recommendation by Fujitsu Services
PLP	The stand-alone production environment for Post Office End-users. Authorisation for import of change into this system and all of its clients is the responsibility of Post Office following recommendation by Fujitsu Services
PLQ	The QA 'isolated' environment for Fujitsu to test customizing and development changes for integration and quality assurance. Authorisation for import of change into this system and all of its clients is the responsibility of Fujitsu
PM	Project Manager
POA	Post Office Account

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POL	Post Office Ltd
POLMI	Post Office Ltd Management Information (Credence)
POLSAP	Post Office Ltd SAP
PSPID	Platform Set Platform Instance Definition. This is a set of baselines which are delivered to the Data Centre for deployment
QC	Quality Centre
QFP	Quality Filtering Process
PTF	Peak Targeting Forum
RDT	SSC's Reference Data Test Rig
RM	Release Management
RMF	Release Management Forum
RN	Release Note. This is the form on Peak used to manage the release of baselines to Test and live.
RP	Release Planning
RS	Release Schedule
SCM	Software Configuration Management
SSB	System Software Baseline
SAP	Systems Application Product
SV&I	Solution Validation and Integrity
TEM	Tivoli Endpoint Manager
TES	Transaction Enquiry Service
TPM	Tivoli Provisioning Manager
TWS	TES Web Server

0.6 Glossary

Term	Definition
Baseline backlog	This is the set of baselines which have been delivered into Dimensions but have not been deployed to Test or live.
Baseline catch-up	This defines the baselines which are in the baseline backlog and whether they are to be taken with a release
Collection	This is used to describe the grouping of Peaks (usually a default set of characters such as "RP-Release_Planning")
Common Products	A common product is a baseline that is to be applied across all platforms within an operating system type (e.g. Windows) and is contained within the common product stack (this can be viewed within Dimensions via workset SCM_PLATFORM_ATTRIBUTES_NA, selecting ScmPlatformStack_WIN etc). It is not to be confused with a baseline that is applicable to more than one platform type.
Deployment Group	A Deployment Group (DG) is a set of platforms which can be upgraded in isolation from any other platform. Maintenance Releases are scheduled to include one or more DGs.

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Stack of baselines	This is a set of baselines which have been grouped together to be deployed by TPM as a set.
Superseded status	In Dimensions a baseline can have a "DPVB_Status" set to "superseded". It should not be deployed to the target platforms if a later version for the same release is available and will be deployed OR a later version for a later release is available and will be deployed.

0.7 Future Changes Expected

Changes
Section 2 need more details about releases being deployed to RDT
Add detail to 2.3.3 once the POLSAP release process is agreed. POLSAP Team to provide us with their process document.
LST need to know about SVI - Add to release planning spreadsheet, ask SP.
Currently no outputs from QFP, QFP TOR needed, but not in this document.
Changes to Flowcharts in section 2
Counters/PVCS section needed as area not covered by any other sections
Multi DG section needs to be created
Table of tools needs revisiting to accurately reflect how they are used in the process
Section needed for PVCS
Section needed for TEM
Frequency for deployment groups needs to be reviewed
Other comments to be addressed from SCM SSC and Business change

0.8 Accuracy

Fujitsu Services endeavours to ensure that the information contained in this document is correct but, whilst every effort is made to ensure the accuracy of such information, it accepts no liability for any loss (however caused) sustained as a result of any error or omission in the same.

0.9 Security Risk Assessment

Security risks have been assessed and it is considered that there are no security risks relating specifically to this document.

0.10 Requirements Acceptance Activity

POL NFR DR Acceptance Ref	Internal FS POL NFR Reference	Document Section Number	Document Section Heading
SER-2194	SER-2148	4	Future Release Mechanism

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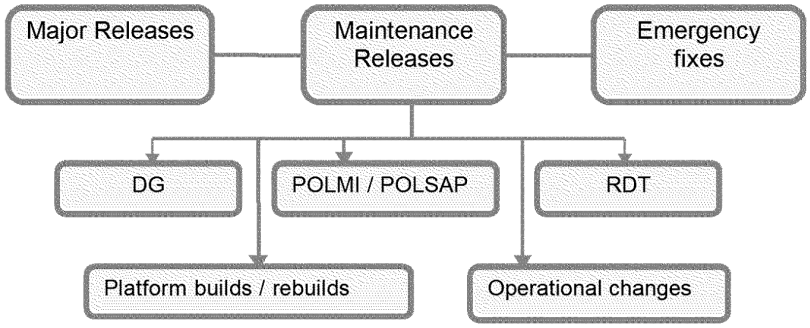
1 Purpose

This document details the Release Management strategy at a high level. It is backed up by a high level E2E Release process flowchart and a set of Work Instructions which are held in SharePoint.

2 Release types

The release policy is based on customer requirements and requests for change. The approach is dependent on the size and nature of the affected systems, the number and frequency of releases required, and any special user requirements that need to be prioritised.

Software Releases to the Post Office HNG-X environments are divided into three main types as shown below.



1. Major Releases (frequency every 6 to 12 months) – these are managed by the Post Office Account Programme Team and will normally deliver significant new functionality, scheduled with understanding of the requirements of the customer. There are three or four major releases during a year. A Major Release may contain one or more of the following types of change:

    - Change(s) to business functionality requested by the customer (including a new service)
    - Infrastructure changes (including major changes)
    - Non-critical fault fixes
    - Service level improvements.

2. Emergency fixes (frequency as required) – these are applied estate to resolve operational issues.

3. Maintenance Releases (frequency every 6 to 8 weeks) – these usually do not add significant new features or content, and are applied to address minor problems or security issues. These are applied frequently and there may be twenty or thirty between each Major Release. A Maintenance Release may contain one or more small changes implemented between Major Releases:

    - Service improvements

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- Non-critical fault fixes
- Security enhancements/fixes

2.1 Major Releases

These are managed by the POA Programme Team and are scheduled as agreed with the customer.

Each Major Release slot will be given a release number in the format xx, where xx is the next sequential Major Release number. For full details on release numbering see Appendix 4.

Major Releases are restricted to update only the platforms which are necessary to enable the deployment of the new functionality. By default any baseline backlog is NOT taken with a Major Release, though any common products as a result of the major release are deployed where possible to the whole estate.

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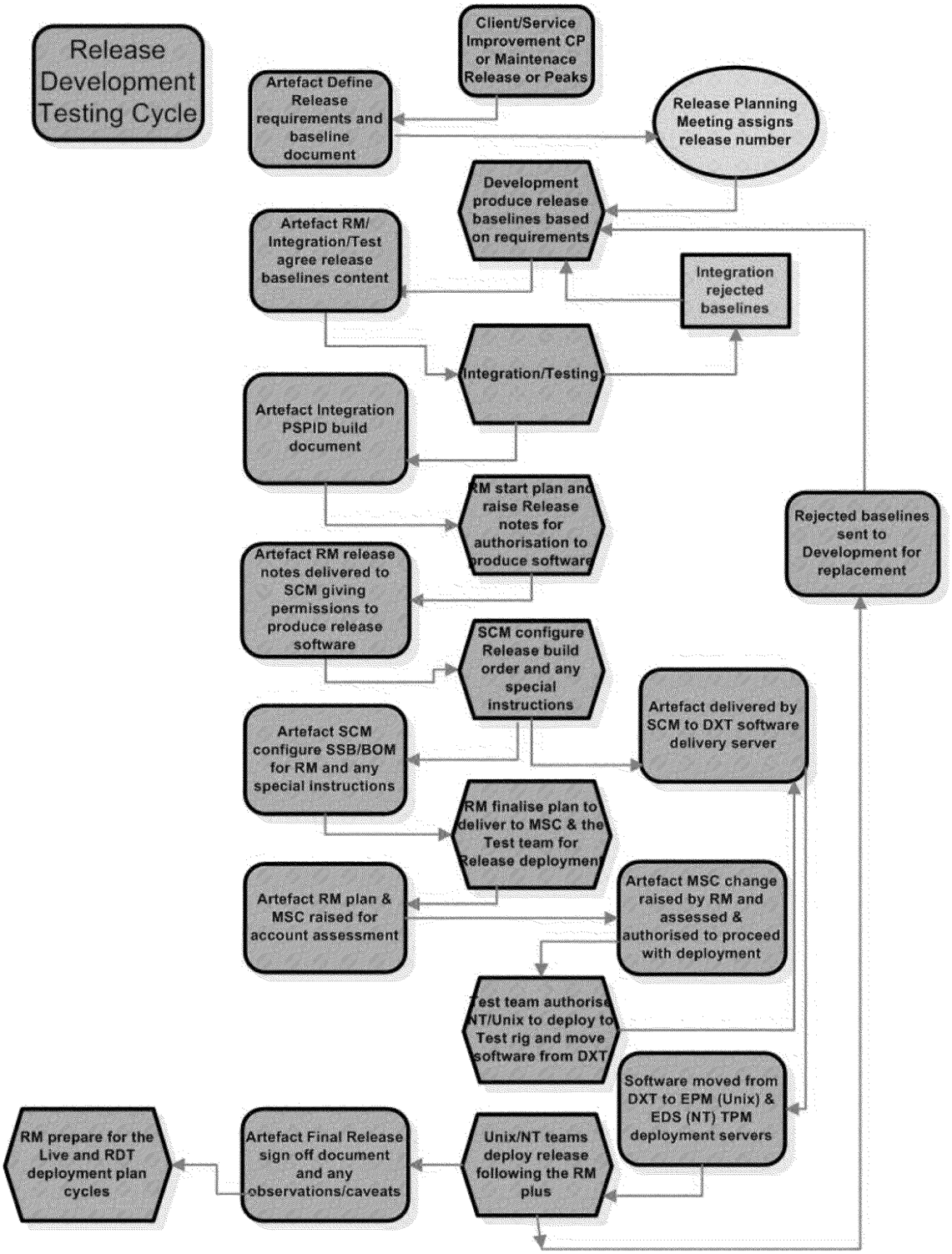

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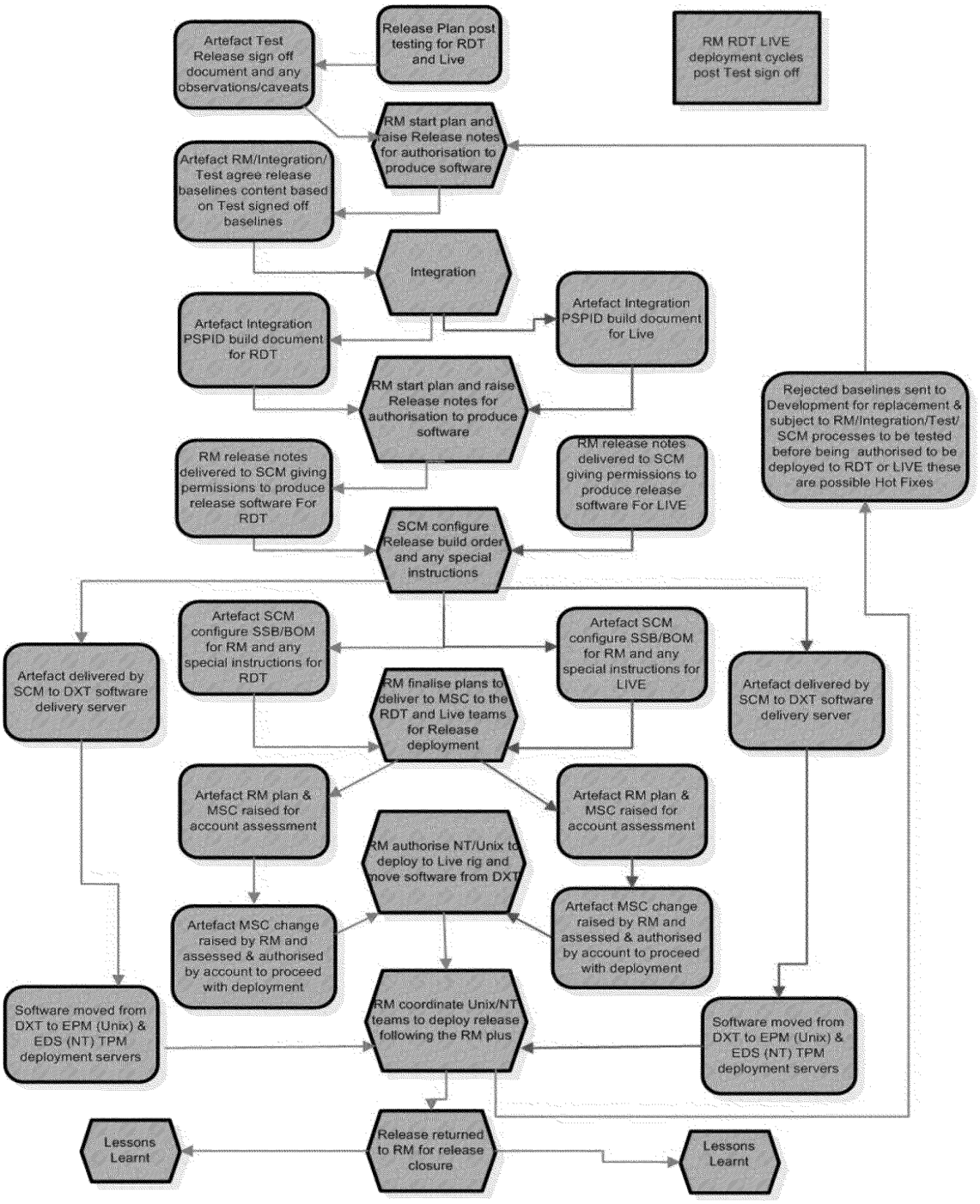

2.2 Emergency fixes

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Emergency fixes will only be applied for 'A' priority issues, fixes that need a baseline to be delivered by Development.

- The Peaks will be targeted at the current live release for the DG to which the fix applies.
- The fix will be delivered as a single RN with the inclusion of no other Peaks / CPs or baseline catch-up.
- The fix will be included in the next Maintenance or Major Release for the relevant DG.
- Fixes of this type can be released in parallel with other Maintenance and Major Releases.

Follows stanrd approach of PEAK raised, MSC rasied for testing, RN/notes rasied and tested, post successful testing applied to RDT and or live under full MSC approval

2.2.1 Operational changes

Where an urgent change is needed to the live estate, these are documented and tracked in MSC and will be applied and tested on LST before application to live.

Following application to live a call is raised which normally results in a Peak. This is passed to Development for review and is then processed in the normal way for a formal baseline fix to gain approval through the BIF / PTF and then included in a Maintenance or Major Release.

2.3 Maintenance Releases

Maintenance Releases can be split into a six different sub-types determined by area affected by the release:

- DG Maintenance Release
- POLMI / POLSAP
- RDT
- Operational changes
- Platform builds / rebuilds
- Security configuration – via a release independent process

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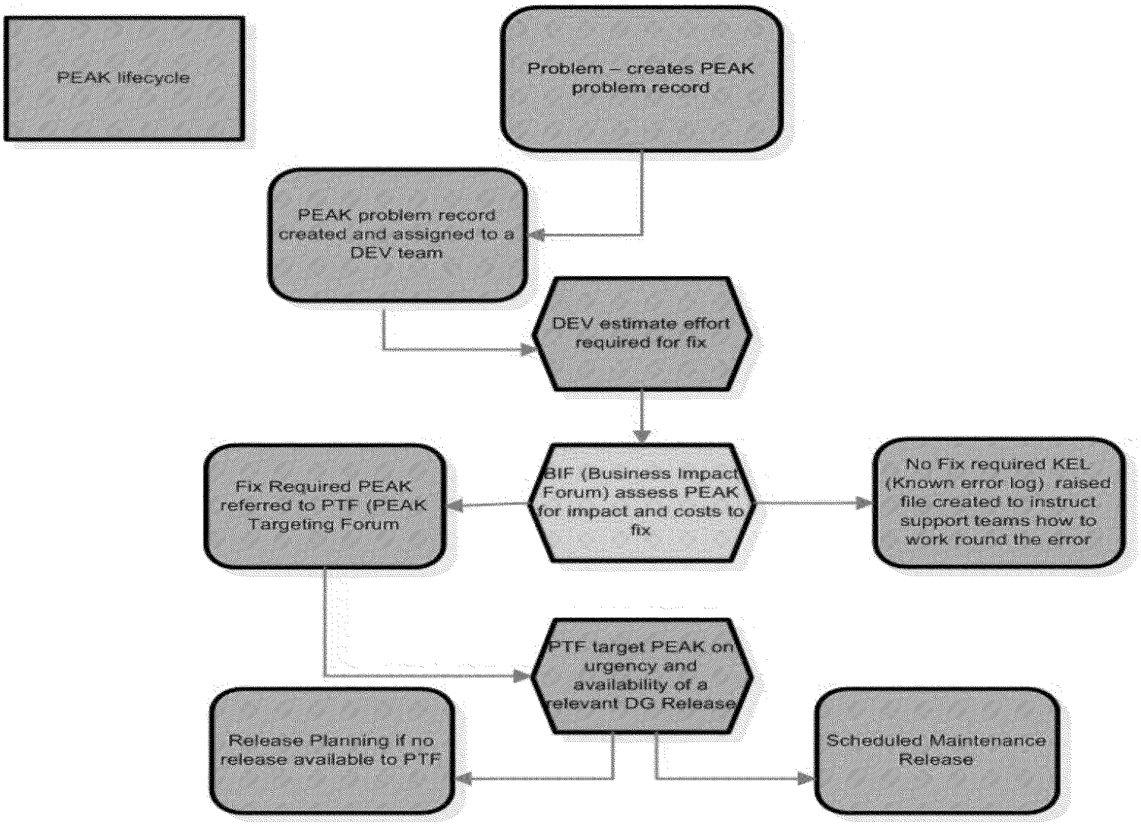

Information on PEAK

When required KEL is raised by the SSC

2.3.1 Maintenance Release planning rules

There are currently 27 DGs which are groupings of platforms that normally have an inter-dependency when updated, for example BDB baselines are normally applied to BDS. References can be found in the PHIL which gives details of the DG for each platform.

There are a number of planning rules around the scheduling of Maintenance Release slots for DGs, as follows:

- Each DG is allocated a Maintenance Release slot at least once a year
- The frequency of Maintenance Release slots for each DG will depend on the historic rate of change. The current rules are in Appendix 1
- Each Maintenance Release slot will be given a release number in the format xx.nn where:
  - xx relates to the Major Release
  - nn is a number with no sequence implications, starting at 10

  For full details on Release numbering see Appendix 4
- Each Maintenance Release number and its associated content is treated as completely independent of any other release
- Where DG releases are inter-dependent and must be deployed at the same time they will be allocated the same Maintenance Release number

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- Before each Major Release we strive to ensure a multi DG release is scheduled to enable any partially deployed and already tested common products to be deployed to their remaining target platforms. However this is not always the case, if this happens common products are bundled into the release due to time constraints
- The WEB DG must have a Maintenance Release slot so that a delivery can go live in April and November each year. This is required to comply with CCN0921 (CP520) for twice yearly changes to the Online Counter Training Web Service (platform OWS)
- The deployment to live must mirror the order in which Maintenance Releases are deployed to LST as far as possible
- PV Drivers are deployed manually currently.
- New platform builds require updates to documents such as the PHIL, and this should be done before the planning process to allow the appropriate impacting to take place.
- A platform rebuild needs clear working direction from Development as part of the delivery and it is prudent to allow additional time for this when planning.
- Platform builds / rebuilds are assigned Maintenance Release numbers in the twice weekly Release Planning meetings at which point the appropriate representative attending the meeting will be tasked with assigning a Project Manager or work package manager. This will then be recorded in the Maintenance Schedule.
- Assigning a new Maintenance Release number will result in the sending of a Target Release Request Template.xls to the following mailboxes to create them in both Peak and Dimensions ("PostOfficeAccount SCM HNG-X" & “Peak DBA”)
- A TWS Schedule release must not overlap with a DATABASE DG release or another TWS schedule release in LST

2.3.1.1 Maintenance Release timeline

Each Maintenance Release follows a timeline to track the delivery to live. This timeline is reflected in the Maintenance Release plan and is as follows:

Week	Elapsed days	Issue Addressed
Week x		Agree Maintenance Release slot and start targeting Peaks
Week y		Stop targeting Peaks (cut off date)
	+ 7	Development completed delivering all of their Peaks / CPs
	+ 14	Integration have processed all the deliveries
	+21	RM have a single RN plus PSPID with LST ready for use
		LST start testing
Week z		LST complete testing and sign off the release for live
	+ 7	RM have a single RN and a PSPID with live ready for deployment
		Commence release to live

The timeline for counter changes is different to the above as it requires a change to a Data Centre platform before the changes to the counter can be deployed.

2.3.1.2 Maintenance Release slot parallelism

There are a number of instances where DGs need to be combined into a single Maintenance Release. These will be managed as part of the Release Planning meeting but some general rules apply:

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Counter App and BAL DGs will be scheduled to be delivered by Development in parallel and will have the same Maintenance Release number.

DG SYSMAN3 will be scheduled to be delivered by Development in parallel but will have different release numbers as they will be deployed separately. This scheduling restriction is to assist the development unit.

CPs may require one or more maintenance slots to be combined and this will be managed as it becomes known.

Security patch testing (excluding Anti Virus signatures) should not run in parallel with DATABASE DG testing.

2.3.1.3 DG Maintenance Releases

These are scheduled, by DG, by the Release Planning forum with the understanding of all the other release streams.

The DGs have been agreed and are a subset of platforms on the HNG-X estate which can be upgraded in isolation from all other platforms. The master list of DGs and their associated platforms is held in the PHIL, however this is uploaded to both Peak and Dimensions. A report of DGs can be obtained from Peak.

DG Maintenance Releases are scheduled in a number of ways depending on the circumstances:

- A number of DG Maintenance Releases, scheduled between Major Releases, are planned as a set.
- At the request of the BIF / PTF forum, if there are Peaks to be resolved and no suitable slot exists.
- At the raising of a CP which needs to be included in a DG Maintenance Release and no suitable slot exists.

2.3.1.4 Multiple DG Maintenance Releases

Usually a fix for a single Peak or one or more CPs may need a change to multiple DGs. These changes can have various properties and these properties necessitate different planning scenarios as follows:

- Changes where the fix needed to resolve the issue is contained in a single DG but the baseline deploys to other DGs for completeness
    - Deploy to the DG which needs the fix to resolve the problem and deploy to the remaining DGs as part of baseline backlog catch up
- Changes where the fix needed to resolve the issue completely has to be deployed across multiple DGs and MUST be deployed at the same time
    - A Maintenance Release containing multiple DGs will be scheduled.
- Changes where the fix needed to resolve the issue completely has to be deployed across multiple DGs but each part can be deployed at different times. In this scenario the change can only be tested once the final deployment is made
    - If this is known up front then a Maintenance Release containing multiple DGs will be scheduled
    - If this comes to light as a fix is delivered then the delivery will be made in different Maintenance Releases.
    - The first part to be deployed to the first DG will use the original Peak and will be tested as benign
    - A clone Peak (or Peaks) will be raised to carry the changes to the later DG(s)
    - The Peaks will be updated to ensure they are clear that the complete change cannot be tested until the final DG is deployed

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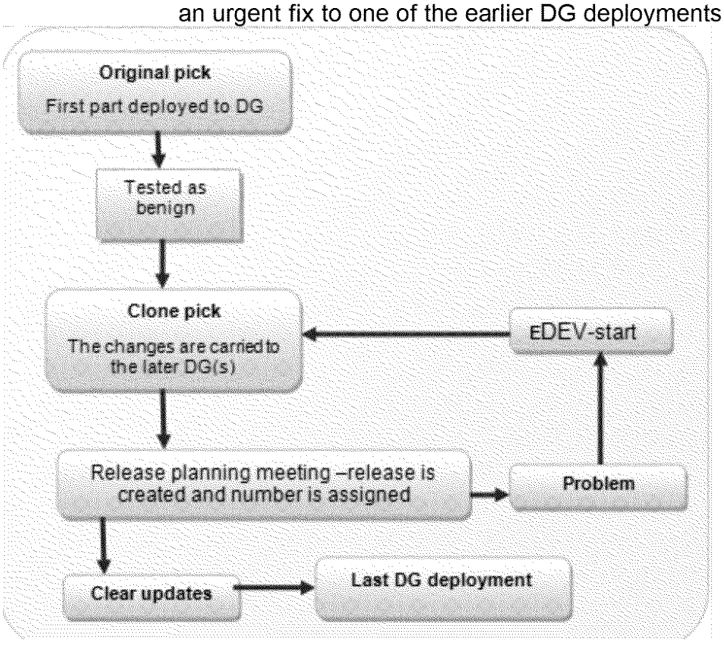
- This is the most complex scenario and, when deploying to the last DG, may necessitate an urgent fix to one of the earlier DG deployments



It would be possible to take a single emergency fix to a platform in parallel with a DG Maintenance Release slot but this should only be done in exceptional circumstances or if a change is needed in order for Test to approve the release for live.

2.4 POLMI and POLSAP releases

Changes to some DGs for HNG-X will also require deployment to POLMI or POLSAP platforms. Where this is the case a POLMI / POLSAP release will be scheduled for deployment immediately after deployment of the DG Maintenance Release to live.

Once the POLSAP process has been updated a POLSAP update schedule will be agreed and added to the Release Management Maintenance Schedule. The following platforms and update timings need to be taken into consideration for scheduling.

2.4.1 SAP Transports

The SAP landscape refers to the SAP development, test and production environments and how they relate to each other. For POLSAP there are multiple SAP instances spread across the environments as follows:

- Development - PLD
- Test - PLQ and PLE
- Production - PLP
- PLM (the Solution Manager system)

SAP Transports provide the mechanism for distributing updates within the SAP landscape. Transports are used for configuration and program changes. Data changes are usually typed manually into each system.

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2.5 Release Independent Releases

2.5.1 Reference Data Test releases

RDT is the Reference Data Team environment and is a deployment group in its own right. The RDT environment is split into 4 sub environments:

- RDDIV - Ref Data Initial Verification
- RDDT - Ref Data Terminal Verification
- RDDOV - Ref Data OSG (POL) Validation
- RDDPL - Ref Data OSG (POL) Validation
- Stand-alone platforms (e.g. single platform instances)

All applicable releases should be deployed to RDT prior to the live upgrade unless there is a valid technical reason which prevents this.

2.5.2 Security patching

Security patching is release independent and is managed outside of the DG deployment routine and in general security patches are not included in Maintenance or Major Releases. They are scheduled in the Release Management Maintenance Schedule with a timeline of approximately 42 days (6 weeks), see example below:

Patch	Released	PAB	Integration/Test	Deployed
June Patches	14-Jun-11	21-Jun-11	04-Jul-11 to 18-Jul-2011	26-Jul-11

There are 90 days to deploy non-emergency security patches but they are normally scheduled earlier to allow for contingency.

Security patches are split into the following areas:

- PAB agreed patches
- Operating system kernel changes
- Anti-virus engine

They are normally patches to the Red Hat (Linux), Windows and Solaris operating systems.

Red Hat Patches will include the DXC and other DGs.

POLSAP patching is currently outside this process and is the subject of a separate CP.

2.5.2.1 Patch Approval Board agreed patches

These are agreed by the Security Patch Approval Board and must be deployed to all Security Tier 1 and PCI platforms within 30 days of the patch being released by the supplier. The remaining platforms and non-urgent patches must be updated within 90 days. These timings are a customer requirement. Patches are managed as a complete set for deployment to all platforms concurrently.

The definitive list of Security tier 1 and PCI platforms can be found in the PHIL.

2.5.2.2 Operating system Kernel changes

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Security Operations will raise a CP for any security changes that require Kernel changes, and hence more testing, to be included in Major Releases.

2.5.2.3 Anti-Virus engine

Security Operations will raise a CP for any anti-virus engine changes that need to be scheduled.

2.5.3 Operational changes

There are occasions where an urgent change is needed to the live estate to ensure the continued running of the business. These are documented and tracked in MSC and will, where possible, be applied and tested on LST before application to live.

Following application to live, a call is raised which normally results in a Peak. This is passed to Development for review and is then processed in the normal way through the BIF /PTF and included in a future Maintenance or Major Release.

2.5.4 Platform builds / rebuilds

For Data Centre and platform upgrades, builds or rebuilds:

RM raises a single Admin Peak where no CP or Peak exists to document the requirement

A new Maintenance Release number for each build is allocated during the Release Planning meeting

A PM or work package manager is selected and assigned by a representative at the Release Planning meeting. This is part of the release planning process and the appointed person is emailed directly

In order for the release plan to commence, a detailed list that contains all new platforms with their associated DGs should be held in PHIL. The PHIL updates will also facilitate the correct Peak updates which are required in order to ensure the platform is upgraded with the correct security patches or DG releases

Fixes of this type can be released in parallel with other Maintenance and Major Releases.

2.5.5 Common Products

A common product is a baseline that is to be applied across all platforms within an operating system type (e.g. Windows) and is contained within the common product stack (this can be viewed within Dimensions via workset SCM_PLATFORM_ATTRIBUTES_NA, selecting ScmPlatformStack_WIN etc). It is not to be confused with a baseline that is applicable to more than one platform type.

Common product does not apply to a baseline that is applicable to more than one platform type. A common baseline release is tested within the DG release that targets the fault Peak. Once the common product has been signed off as fit for live, a further release note is raised regarding its application to the remaining platforms within LST and tested as a background activity. After sign off, the common product is scheduled for live application.

2.5.6 Backlog

Backlog contains arrears of baselines that are in line for testing and / or application to an environment e.g. a common product can be considered backlog once deployment has begun.

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3 Release Planning

3.1 Release Planning

Purpose	To oversee the release process and associated activities to ensure the smooth running of the process and successful delivery of releases. Release Planning meets to address the following topics: **Status** Review of actions Review of Release Schedule / Customer Forward Schedule of Change Update on Programme activities Update on Service Projects Update on Service Improvement Activities **Escalation** Issues raised from BIF / PTF Quality issues with the process Escalations required (POL, third parties)
Participants	Head of Release Management, Application Manager, Test Manager, Release Programme Managers, Release Team Manager, Maintenance Release Manager, Problem and Incident Manager, Integration Manager, SSC Manager
Invitees	SDMs with projects, BCP, Project Managers
Duration	1 hour
Frequency	Twice Weekly
Mandatory Input	Release Schedule (Internal), Forward Schedule of Change
Mandatory Output	Minutes recording proceedings, actions and agreements.

The meeting objectives are to review and agree:

- The overall schedule of Releases
- Changes to the existing Release Schedule
- Inclusion of CPs into maintenance slots when the CP is at the agreement to raise, impact, and approved stages
- To remove Cps from maintenance slots when the CP is at the removal stage
- The resolution of any issues arising from BIF / PTF and related to the Release Schedule
- Addition of new Maintenance Releases

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- The frequency with which each DG is scheduled. This should be done before the deployment of a Major Release to LST. This enables the forward schedule of DG Maintenance Releases between the next two Major Releases to be adjusted if needed

3.1.1 RP Objectives – 6 Week Release Plan (Tuesday meetings)

Agenda: Review forthcoming releases

- Confirm Development and Integration deliveries are on target
- Confirm Peaks are targeted at the correct release for the DG that will take the fix
- Confirm Peaks are progressing through the process as expected
- Confirm the dates for Maintenance Releases are being updated in Peak as per Appendix 5
- Highlight anomalies to the attendees for resolution
- Confirm that releases are on target to hit their test and deployment dates
- Confirm/Identify deliveries

3.1.2 RP Objectives – Upcoming Release Plan (Thursday meetings)

Agenda: Review Release Plan

- Discuss forthcoming CPs
- Review changes to dates of Maintenance Releases
- Add new Maintenance Releases
- Review frequency with which each DG is scheduled

3.1.3 RP Attendees

Origination	Role
RM – Release Controller	Chair
RM – Release Planner	Minutes
Application Development	Contributor
Service Management	Contributor
Release Management	Contributor
Infrastructure Development	Contributor
Test	Contributor
SSC	Contributor
Integration	Contributor
Programme / Project Management	Contributor

3.1.4 RP Inputs

Input	Source	Details
Release Schedule	RM	The release planning meeting uses a spreadsheet to inform the meeting. The spreadsheet uses data, including release planning records from

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		Peak to manage, control and review the release contents. The concepts behind the release planning records on Peak, and their use, are documented in 'Peak Release Planning Facilities'. The data from Peak is exported into the Release Schedule which is stored on SharePoint.
Forward Schedule of Change	RM	The Forward Schedule of Change is stored on SharePoint and updated weekly to reflect changes agreed in Release Planning.
PTF Minutes	RM	The PTF Minutes are issued weekly on Mondays detailing any new maintenance slots required.

3.1.5 Outputs

Output	Source	Details
Release Planning Minutes	RM	A new version of the Release Planning Minutes are kept on SharePoint and updated after every meeting to show the actions agreed in Release Planning.
Release Plan	RM	The Release Schedule is kept on SharePoint and updated weekly to show changes agreed in Release Planning.

3.2 Business Impact Forum (BIF) & PEAK Targeting Forum (PTF)

This meeting is held once a week on Monday.

An emergency PTF is held for any Peaks which are sufficiently urgent that they need to be targeted before the next scheduled meeting.

For information on BIF and PTF refer to document **SVM/SDM/STD/2593** (Terms of Reference for POA BIF and PTF).

3.3 Quality Filtering Process (QFP)

For information on QFP refer to document **DE/PRO/015** (POA Systems Integration Directorate Incident / Defect Management)

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4 Plans

There are a number of plans which drive the End to End Release process.

Plan	Feeds from:	Feeds into:
Programme Plan	Overall programme/account plan	Release Plan
Major Release Plan	PM/Major Release Manager plan	Release Plan
Release Plan	Programme Plan Major Release Plan BC Plans Datacentre Plans POL changes PCI audit Pen Testing CPs PAB dates High Level Deployment Plans	RM Breakout Plan Test Plans Integration Plans Development Plans Operations Security Plans Operations Business Continuity Deployment teams Forward Schedule of Change for POL High Level Deployment Plans
RM Breakout plan	Release Plan	
Release Deployment Plan	Release Plan 'Platform upgrades and outages' spreadsheet Test results	Test and deployment activities

4.1 Maintenance Release Schedule

The Maintenance Release Schedule is stored on SharePoint and updated by the Release Planner after any changes made in the Tuesday / Thursday Release Planning meetings.

Representatives from each department at the meeting can voice opinions and concerns, the updated Release Schedule is then uploaded to SharePoint and the link distributed by email every Friday.

Dates to be changed in the RS are agreed with the Integration, Test and Development representatives in the meeting.

To ensure there are no conflicts of interest relating to usage of the environments the RS includes details of the following:

- DG Maintenance Releases
- Security patching drops
- Business continuity testing dates
- Multi-DG Releases

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- Data Centre outages
- Major Release deployment dates on LST and live
- POL changes
- PCI audits
- Datacentre power outages
- Release independent CP work

For Maintenance Releases the plan contains the following:

- Date when Peaks will no longer be targeted
- Date by which Development need to deliver
- Date by which Integration need to process the baselines
- Date by which RM will provide a RN and PSPID to LST
- Dates during which LST will test the release
- Date by which RM will provide a RN and PSPID for live deployment
- Date or time period for live deployment
- Date for RDT deployment

When discussing the possible Maintenance Releases that can be accommodated between two Major Releases the content and concurrency is agreed with the Test representative before a fully detailed plan is distributed further for comment.

This plan is used by POA as the definitive source of information regarding Maintenance Releases. It is supported by plans from other units which detail the work they need to undertake to achieve the committed dates in the Release Schedule.

Changes to the Release Schedule are proposed and agreed in the Release Planning meeting. Any escalations / contentions will be highlighted to POA Operations Management and POA Programme Management for discussion and agreement.

4.2 Forward Schedule of Change (FSC) for Atos / POL

Atos / POL require a forward view showing a 6-month rolling schedule of change. This plan shows dates when the online service will be unavailable. They also require a view showing the detail of the changes planned in the next four week period.

Inputs to the FSC are taken from the Release Schedule, the MSC system and the POA Service Delivery Managers. The FSC is circulated internally and sent to Atos weekly on Fridays.

This FSC is produced by the Release Planner.

4.3 Release Deployment plans

Release deployment plans are needed at two levels, the detail for specific releases and at a high level for general planning with Atos / POL and the raising of MSCs etc. Both plans must take into account the Sunday Trading discussions which mandate that, except in special circumstances, the counter must be available for trading from 10am to 5pm on Sundays.

Each deployment plan will be discussed with LST and UNIX/NT for both LST and Live.

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4.3.1 High level deployment plans

On the provision of a new version of the Release Schedule a high level deployment plan is required to finalise the deployment dates for live. The dates for deployment to live are then fed back into the Release Schedule and are used in the production of the Forward Schedule of Change for Atos / POL.

To construct the updates to the Release Schedule each release will be reviewed to determine the probable day / time the change will be deployed to live. This is done using the spreadsheet Platform Deployment Crib Sheet.

This will be done by the Maintenance Release Manager who will feed dates back into the Release Schedule via the RM Planner.

Major release plan dates are also fed back into the Release Schedule via the Major Release Give / Gets plan. Forums are set up and run by the PM assigned to the Major Release.

4.3.2 Detailed deployment plans

Detailed release deployment plans are produced for Major and Maintenance Releases. They are produced by the RM team and are agreed with the Deployment and relevant Test teams.

The plans are attached to the relevant RNs on Peak and to the MSC which is being used to monitor the deployment. They will include at least the following detail:

- Deployment ordering
- Timings
- Special instructions
- The split of deployment where manual baselines are being delivered
- Detail if any reboots will be performed by the upgrade

Rm are also responsible for maintaining a portfolio of the Release Deployment Plans, so they can be re-used for future releases or release cycles. There is a library of Release Deployment Plans and templates in the service introduction area of **\\EuropeMUK097**.

4.3.1.1 Detailed live deployment plans

At times a number of DGs, although tested individually in LST, may be combined and deployed as part of a joint activity. The individual deployment plans for each DG are concatenated into a single detailed deployment plan for use on the live estate.

The producer of the deployment plan for live must check and include where appropriate all comments made about the release by the Test team. This is to ensure that any deployment issues are not lost when the release is deployed to live.

4.4 Deployment Plan Walkthrough

A deployment plan walkthrough WI is available through the document reference **SVM/SDM/WKI/2689**

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5 Release contents

The list of baselines in a release is available in Dimensions, represented by an Excel table and shared by LST and Integration for information. The release content determines not only which baseline is included but also involves using the result of performance measurement to calculate risk and share knowledge in the RM team.

For details of which baselines are included in a release and how this is validated to ensure the integrity of the live environment see Appendix 7.

5.1 Major Release contents

The majority of the content of a Major Release is derived from internal and external CPs. Some Peaks which are inappropriate for a maintenance slot are allocated to a Major Release via the BIF / PTF process. Any peaks targeted at a Major Release by the BIF / PTF must be agreed by Test and the Project Manager managing the release.

5.2 Maintenance Release contents

The Release Schedule indicates, for a point in time, whether a Maintenance Release has any content. This information can also be obtained from a search on Peak.

The content of a specific Maintenance Release for a DG is made up of a combination of the following:

- Peaks – which are targeted at a Maintenance Release via the BIF / PTF process
- Approved CPs which are for deployment outside of a Major Release – once the DGs affected by the CP are known a Peak is raised to track the delivery and deployment of the CP within the appropriate Maintenance Release. The inclusion of a CP is agreed by Release Planning
- Baseline catchup – identified by Integration and includes common products which have not previously been applied to a specific DG. If the backlog includes deliveries for a CP then this CP and the totality of what it delivered must be reviewed to ensure the inclusion is valid

Test regularly review the contents of Maintenance Releases and have the responsibility to inform the Release Planning meeting when a release is full and no more Peaks can be included. At this point RM update the description of the release on Peak to that effect.

5.2.1 Change Proposal inclusion

For information on the CP Process refer to the latest version of document **PGM/CHM/MAN/0002** (Change Management Instructions).

Once a CP has been raised and approved RM follow the process below.

A CP goes through a number of stages, the first of which is ‘Agreement to Raise’. At this stage the CP is checked to ascertain whether it is intended to deliver any baselines to live and whether it is intended for a Major Release.

CPs targeted at a Major Release will be managed by the POA Major Release Manager and can be ignored for the purposes of this section of the document.

CPs targeted at anything other than a Major Release and intending to make a delivery to live must be discussed and tentatively included in the Release Schedule. Once the CP is approved it will be confirmed for inclusion in a Maintenance Release. It is the responsibility of Release Management to ensure that CPs are discussed and included or removed as required. These discussions take place at the

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Release Planning meetings. The delivery team need to reference these peaks in their baseline delivery to Dimensions. Admin Peaks are not required for Major Releases that go through SV&I.

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6 Release tooling

In the context of this document for the creation and deployment of any release the units involved use a number of tools to drive the process.

Plan	Feeds from:	Feeds into:
Dimensions	Development	Contents Log
Peak	Dimensions	Release Planning Spreadsheet Contents Log Dimensions
Release Schedule	Development LST Live	RM Release Spreadsheet
TPM	PSPID	Contents Log
Contents Log	Peak Dimensions TPM Release Checking Database Integration Test Development	RM Release Spreadsheet PSPID
PSPID	Build Document	SSB BOM RN
Build Document	Dimensions Contents Log	Release Deployment Plan MSC PSPID
SSB	Build Document	Release Deployment Plan
RN	Contents Log PSPID Build Document	Authorisation for Release MSC
MSC	Contents Log PSPID Build Document	Authorisation for Release
Release Deployment Plan	RM Release Spreadsheet Implementation Team Build Document SSB/BOM	Deployment

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6.1 Dimensions

Dimensions store all the baseline deliveries made by Development and the deployable baselines created by Integration. These deliveries contain handover notes which are read by Integration and any information which may be needed during Deployment. These are added into the Dimensions attribute 'RM Special Instructions'. These special instructions may include details such as if several groups need to be involved in the deployment.

Dimensions provides an extract for inclusion in the Release Checking Database.

6.2 Peak

Peak is a web based application used for storing Peaks, which include information such as;

- RN Number
- Target Release
- Target Platforms
- Baseline

Peak provides a list of the Peaks which should be included in the release. This can be stand alone or via the Release Planning spreadsheet.

Peak also provides a number of reports which are used for the Release Planning Spreadsheet.

Peak also provides an extract from Dimensions for inclusion in the Release Checking Database.

6.3 Release Schedule

The Release Planning Spreadsheet is used to check that all Peaks expected to be included in the release are picked up. A release can include Peaks which were targeted and delivered at a previous release but are to be delivered with a later release. These Peaks need to be tested so are picked up via the release planning spreadsheet. It is also used to check that all Peaks are targeted at the correct DG Maintenance Release.

This spreadsheet is generated by the RM Planner and is updated at least twice a week.

6.3.1 Baselines

All releases are made up of a set of baselines, which will be classified in Dimensions as either Auto or Manual. Baselines are created in Dimensions and linked to a peak and or a CP. The Peak system regularly updates individual Peaks to add in any linked baseline names. The baseline name includes sufficient details that the target release can be presumed

6.4 TPM

TPM is the tool used to make auto deployment of baselines to the estate. In rare circumstances a baseline may be withdrawn and regressed from a platform. If a regression is performed a special script must be run on TPM to ensure that it no longer thinks the baseline is deployed.

6.5 Content Log

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During a release timeline a number of reports are required relating to which baselines will actually be deployed. These reports are used by RM to ensure the contents of the release are understood, agreed and thoroughly cross-checked.

The complete detail of how these reports are used is included in the RM processes and the E2E release process flowchart. Content Log – Work Instruction

6.6 RM Release Spreadsheet

The RM Release spreadsheet is produced and used by the RM Release Controller to document and agree the release. It contains a number of worksheets which are used in the various stages of the release. An individual spreadsheet refers to the deployment on a specific rig so for a single release there may be two spreadsheets, one for LST and one for live. The way the spreadsheet is used is documented within one of the worksheets.

It also includes the deployment plan for the release.

An excel template spreadsheet is held on SharePoint RM Working Templates, they are updated on a Half yearly basis.

6.7 Build document

The build document is provided by Integration. It is used by SCM to produce the PSPID and SSB. The contents of the build document is produced using, at least in part, the RM Release spreadsheet.

6.8 PSPID

A PSPID is provided by SCM in line with the build document. This provides all the software and meta-data to the deployment team for the potential deployment to a rig.

6.9 SSB

An SSB is also provided with the PSPID by SCM. The SSB is used by RM to check that what will be deployed by the PSPID is what was expected and agreed.

This spreadsheet is input to the Release Checking Database.

6.10 MSC

MSC is the change management tool used to gain POA and Atos approval for the deployment of change. It is also used to direct the deployment teams on the detail of the activity and retains an audit trail of the approval and deployment of the change. With the exception of Ref Data Deliveries.

An MSC is raised for every deployment to live and LST and includes a copy of the RM Release Spreadsheet.

Atos requires seven working days' notice of any deployment to live.

6.11 Release Notes

For each release Test expect to receive a single RN for the release. During the course of testing additional RNs may be provided to deliver additional fixes to the original release.

For each Maintenance Release to live the deployment team expect to receive a single RN for the release. Any additional fixes supplied to test will be included in the PSPID for live so only a single RN should be necessary.

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For each release RM creates an additional RN is created for each platform to which a Manual baseline is to be deployed. This RN is for administration purposes only to ensure that it is understood in Dimension's that the baselines have been included on a RN. The RN does not go to the Test or Deployment teams.

Each RN exists as a Release Peak on Peak. The Release Peak contains a reference to the MSC and includes a copy of the RM Release Spreadsheet.

RNs which carry just TAGS files will reference only a single Administration Peak.

6.12 Release Deployment Plan

The Release Deployment Plan is a full level 4 plan, the plan consists of information from RM Release Management Spreadsheet, Implementation Teams, Build Document, SSB, BOM and Release Notes. The plan is then used by Release Management team to ensure full delivery of the release. The plan contains:

- Deployment Timings
- Deployment Dates
- Implementation Teams

6.13 Bill of Materials (BOM)

A BOM is also provided with the PSPID by SCM. The BOM is used by RM to understand the phases used and manual baselines to be deployed.

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7 Monitoring of the End to End Methodology

7.1 Key Performance Indicators

Key performance indicators will be maintained for various areas related to the E2E release process. This will be done manually until a full set of requirements is available and automation can be defined / agreed and implemented.

The release planning records in Peak have the ability to track the planned and actual dates for a number of activities. The Release Plan could provide details as to whether a release met the dates if Baselines were used.

Ref Data deliveries do not fall within the scope of Release Management

7.1.1 Major Release Key Performance Indicators

- Deliveries out of development on time
- Deliveries out of Integration on time
- Release available to LST for deployment on time
- Release out of LST on time.
- Release ready for deployment to live on time
- Release deployed to live on time

7.1.2 Maintenance Release Key Performance Indicators

- Maintenance Release KPIs are manually recorded on the Release Planning spreadsheet. The current measures for each release are:
- Deliveries out of development on time
- Deliveries out of Integration on time
- Release available to LST for deployment on time
- Release out of LST on time
- Release ready for deployment to live on time
- Release deployed to live on time

7.1.3 Security patching Key Performance Indicators

- Deliveries from vendors on time
- Deliveries out of Integration on time
- Release available to LST for deployment on time
- Release out of LST on time
- Release ready for deployment to live on time
- Release deployed to live on time

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8 Roles and responsibilities

8.1 Release Management

8.1.1 Head of Release Management

The Head of Release Management is responsible for the overall delivery of the RM service, and owns the Release Policy and Release Management Strategy.

8.1.2 Release Management Team Manager

The RM Team Manager is responsible for ensuring that CPs are included and handled correctly within the process, and owns the E2E Release process and the line management of the Release Controllers and Release Managers.

This model allows for both the Release Management Team Manager & Major / Maintenance Release Managers to manage the Release Controllers on a day-to-day basis. The work allocation is managed by the Major / Maintenance Managers based on the direction given by the Release Management Team Manager to the individual Release Managers/Release Controllers.

8.1.3 Major Release Manager

The Major Release Manager is a member of the RM team and is responsible for the production and management of the deployment of Major Releases to SV&I, LST, RDT, and live, which includes creating plans for Major Releases.

The Major Release manager is also responsible for the following:

- The quality of data exiting RM relating to Major Releases
- Input into the Forward Schedule of Change for Atos / POL from the Major Release Schedule
- Joint monitoring of the delivery of product version baselines (PVB) by development into Integration and the subsequent consideration for inclusion of Deployable Product version baselines (DPVB) into the Major Release
- Joint identification with Integration of which Peaks / CPs have not been delivered in the correct timescales. Note: RM are not responsible for identifying that all design parts have been delivered as this is a handshake between Development and Integration.
- Escalation of identified missing deliverables to the responsible Programme Manager to assess impact and agree potential deferral with the customer
- Ensuring that Peaks which have not been delivered are given a target release of ‘Target missed need to re-target’ and Development are aware so they can route to PTF for a new target
- Ensuring that nothing is going live which has not been on LST – unless agreed prior to release.
- Co-ordination of RDT updates (done by both the Maintenance and Major Release managers)
- Ensuring that the SSB content has been checked against expected content, plans and LST deployment

8.1.4 Maintenance Release Manager

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The Maintenance Release Manager is responsible for the production and management of the deployment of Maintenance Releases to SV&I, LST and live, which includes creating plans for Maintenance Releases.

The Maintenance Release manager is also responsible for the following:

- Maintaining Contents Logs
- The quality of data exiting RM relating to Maintenance Releases
- Joint monitoring of the delivery of product version baselines (PVB) by Development into Integration and the subsequent consideration for inclusion of Deployable Product version baselines (DPVB) into the Maintenance Release
- Joint identification with Integration of which Peaks / CPs (in Contents Log) have not been delivered in the correct timescales. Note: RM are not responsible for identifying that all design parts have been delivered as this is a handshake between Development and Integration
- Escalation of identified missing deliverables (if all deliverables are supplied by the PM) to the Operations Manager or SDU Stakeholder to assess impact and agree potential deferral with the customer
- Ensuring that all releases going to live have LST sign off– unless agreed prior to release
- Ensuring that the SSB content has been checked against expected content, plans and LST deployment (where the release is for Live)
- Co-ordinating RDT updates (done by both the Maintenance and Major Release Managers).

8.1.5 Release Planner

The Planner is responsible for the following:

- The maintenance of the Maintenance Release plan
- The production and updating of the RM Breakout plan
- Production of the RM Release spreadsheet
- The Release Management planning spreadsheet
- Maintenance of planning records on Peak
- Escalating potential issues with the plans
- Maintenance of the Release details on Peak should they change during the planning process
- Maintaining and distributing the Forward Schedule of Change

8.1.6 Release Controller

The Release Controllers is responsible for:

- Updating Release description on Peak when a Maintenance Release reaches the cut-off date
- Raising of MSCs for the release
- Chairing Release Planning Meetings
- Ensuring Peaks which have not been delivered are given a target release of 'Target missed need to re-target' and development are aware so they can route to PTF for a new target
- Production and closedown of RNs

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- Managing any Peaks raised by the Test unit to ensure that Development can deliver on time and that appropriate RNs are then raised and passed to test
- Act as a single point of contact for any issues arising from the testing or deployment of the release
- Maintenance of planning records on Peak
- Use release checking database
- Working with the dates in the RM Breakout Plan
- Adding a Final Response to all Peaks which have successfully passed test and ensure they are routed back to originator for closure
- Create Administration peaks for TAGS RN's and target at Release Independent
- Create Administration peaks for CP's
- Validation of the SSB for a release against expected content and LST deployment (where the release is for live)

8.1.7 Peak Targeting Forum Administrator

The PTF is responsible for:

- Targeting peaks at releases
- Creating Maintenance Releases on Peak
- This is done once the PTF have agreed that a Peak should be targeted at the release. The information required for creation of a release should come from the Maintenance Release plan.
- Release Management create the release on Peak and Dimensions, then supply the information to SCM and Integration respectively.
- Maintenance of planning records on Peak

8.2 Development

Development is responsible for:

- Escalating to the Release Planning Meeting if a Peak or CP will impact additional platforms to those defined when the Peak / CP was targeted at a release
- Only developing a change once the Peak / CP has been targeted
- Asking Integration to withdraw baselines which must never be deployed
- Ensuring that peaks are passed on to RMF promptly where release targeting is approved
- Participating in RMF meetings to provide apps development input to release priority
- Participating in release planning to provide apps development support of release planning decisions and setting of release dates
- Ensuring code fixes are delivered to the relevant release delivery toolsets in accordance with the agreed release plan.
- Ensuring each Peak status is maintained consistent with development and release processes.

8.3 Integration

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Integration is responsible for:

- Processing all deliveries made by Development
- Providing confirmation to RM on the contents of a build via the RM Release Spreadsheet
- Production of the Build Document
- Ensuring that all baselines which will initiate a reboot are documented as such in the Special Instructions in Dimensions
- Ensuring that any special instructions in the handover from Development are included in the Special Instructions in Dimensions

8.4 SCM

SCM are responsible for:

- Production of the PSPID
- Production of the SSB
- Delivery of software and associated meta-data to the DXT
- Delivery of the release to the DXT

8.5 Test

Test is responsible for testing:

- Emergency hot fixes, Peak fixes delivered in Maintenance Releases, internal service improvements via approved CPs, and POL requested business functionality changes via approved CPs
- Reviewing and agreeing the Release Schedule and the Release Planning Spreadsheet in the Release Planning Meeting
- Production of Test Plans
- Signing off or rejecting the release
- Assisting PEAKs at BIF and PTF
- Reviewing document plans for LST, RDT and Live
- Recording Test results

8.6 Architect

The Architects are responsible for:

- Updating the PHIL for new platforms prior to them being released from Development and signed off before they are planned to go into Integration.
- Producing a Migration Strategy that feeds into the RM Deployment Plan. This should be reviewed internally and externally

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9 Appendices

9.1 Appendix 1 – Deployment Groups

This Appendix details the current frequency recommendations around the scheduling of DGs into Maintenance Release slots. Note that these may not be required at these frequencies for a variety of reasons, e.g. the number of Peak fixes in existence that need the specific DG Maintenance release, or customer requests for new functionality releases which take priority over DG Maintenance releases and may include Peak fixes in order to be able to deliver the functional release.

DG	Frequency
DG_ACCESS	Every 3 months
DG_AUDIT	Every 2 months
DG_BACKUP	Every 6 months
DG_BAL	Every 6 weeks
DG_BANKING	Monthly
DG_DATABASE	Every 3 weeks, every other one with the counter
DG_Decom	n/a
DG_EMC	Every 6 months
DG_Estatemgt	Monthly
DG_FTMS	Every 2 months
DG_HORIZON	Every 6 months
DG_Individual	As and when needed but at least once a year
DG_INITIAL	Every 3 months
DG_KEYS	Every 6 months
DG_NETWORK	Every 6 months
DG_POLMI	need to discuss
DG_POLSAP	need to discuss
DG_RDT	Following on from other DG releases
DG_SECURITY	Every 6 months
DG_SUPPORT	Every 6 months
DG_Sysman2	Monthly
DG_SYSMAN3	Monthly
DG_VIRTUAL	As and when needed but at least once a year
DG_WEB	Every 3 months There must be a slot in April and November
DG_noinstance	n/a
Counter Infrastructure	need to discuss
Counter App	Every 6 weeks
TWS schedule	Every 8 weeks

Usual timescale for testing is 10 working days.

9.2 Appendix 2 – Cloned Peaks

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Clone peaks must be created by either Test or the SSC. As Test peaks generated from QC cannot be cloned a new QC defect will be created.

9.3 Appendix 3 – Release numbering

9.3.1 Major Release

Additional release numbers are used for a Major Release to control the various drops of software that are delivered. These are of the format xx.nn.mm.yy where:

xx is the Major Release number

nn is usually 00 but is set to 01 for deliveries that will go direct to LST for testing

mm is a number which starts at 00 and increases by 1 for each cycle of testing

yy is a number which is used to represent the rig for a PSPID release. It is used as follows:

00 to 09 is ITU1 (SVI)

10 to 19 is ITU (was Vol)

20 to 29 is POLSAP

30 to 39 is LST

40 to 49 is RDT

50 to 59 is Production (live).

9.3.2 Maintenance Release

Each Maintenance Release slot will be given a release number in the format xx.nn where:

xx relates to the last Major Release

nn is just a number with no sequence implications, taking values between 10 and 99.

There is one caveat to the ‘no sequence implication’ and that is that for every given DG type) e.g. DATABASE) the release number must be in numerical order so 03.16 must be deployed before 03.20 before 03.21

Although some of the tooling can use additional quartets in a release number these are NOT used for the actual release process.

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9.4 Appendix 4 – Release planning facilities / dates in Peak

Peak has a set of facilities which are used for release planning. These need to be maintained as follows:

Field	Associated with:	Initial set up	Maintained by:
Plan out Dev	Fault Peak Release Peak Target Release	Set to the value associated with the Release in Peak when a Peak is targeted	This value can be set by Development if they expect to deliver past the expected date If the Release dates change RM will reset the date from the Target Release screen on Peak
Plan out Integration	Fault Peak Release Peak Target Release	Set to the value associated with the Release in Peak when a Peak is targeted	This value can be set by Integration if they expect to deliver past the expected date If the Release dates change RM will reset the date from the Target Release screen on Peak
Plan into Test	Target Release		
Plan out Test	Fault Peak Release Peak Target Release	Set to the value associated with the Release in Peak when a Peak is targeted	This value can be set by Test if they expect to deliver past the expected date If the Release dates change RM will reset the date from the Target Release screen on Peak
Plan into Live	Fault Peak Release Peak Target Release	Set to the value associated with the Release in Peak when a Peak is targeted	This value can be set by RM if they expect to deliver past the expected date If the Release dates change RM will reset the date from the Target Release screen on Peak
Release description	Target Release		RM update this when a release is full and no more peaks should be targeted RM update this when the release has reached it's cut-off date RM update to add in the name of the Release Controller for the release when it is known
Collection	Target Release	The collection associated with the release is added to the Peak when it is targeted	

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9.5 Appendix 5 – Baseline inclusion in a release

As part of the RM process for a release RM review the baseline backlog which are possible targets for the release. The contents of the release are then agreed with Test, Integration and Development (where necessary).

Each baseline is afforded a status within the release as follows:

Exclude – baseline NOT to be included in the build document or PSPID & SSB

Include – baseline to be included in the build document, PSPID & SSB and will be deployed by the release

Applied – baseline to be included in the build document, PSPID & SSB but will not be deployed by the release

Once the SSB and PSPID have been produced RM check the contents of the SSB to ensure that it includes the expected baselines. RM also checks that what is expected to be deployed to live has already been deployed to LST. These checks ensure the integrity of the build and hence what will be applied to the live environment.

It is important to note that checks MUST be done at a platform type level as any baseline which is included in the PSPID & SSB will apply to ALL platforms types which are being upgraded by the release.

9.6 Appendix 6 – Fault Peak Lifecycle

This section outlines the lifecycle of fault Peaks and the responsibility at each level.

The basic Peak Lifecycle is as follows:

- Open — Initial state of a Peak call
- Pending — Incident is being investigated
- Final — Investigations have finished –Final response is sent back for approval
- Closed — Final state – call is closed on the Peak system.

If a Peak has been sent to a team it is that team's responsibility to monitor it, send it on for investigation, fix it or release it to the correct Peak stack.

Example: A Peak is raised by Integration with the comment "Build Description not correct or doesn't work". The Peak should identify where the build fault is if known, or alternatively provide some supplementary information to enable investigation.

Responsibility is initially with Integration to send the Peak to the "Build Owners / Development" stack for investigation.

Accountability is always with the team leader / manager on whose stack the Peak resides. So for a Peak which is on an incorrect stack, or if it needs attention by another team, it is the Peak stack manager's responsibility to reroute it as soon as possible, consulting the team to whom it is being sent by email / phone / text if it is urgent.

The Peak is then investigated by Development and if a fix is required it should be sent by them to the BIF stack for consideration of the business impact.

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Responsibility is with Development / Design to send the Peak to the BIF before fixing, and to provide an impact statement on the Peak of how long it will take to fix and what it would impact taking into account other development activities, including any issues with the order of the code update or release.

If the BIF decide that a fix is not warranted for cost or other reasons, the Peak detail is added to the Known Error Log (KEL), the Peak is closed, and the originator is informed.

If the BIF decide that the Peak should be fixed it is returned to Development for further comment, and is then sent on by them to the PTF stack for targeting. They should also inform the originator that it is being sent for targeting and inform the RM team by email / phone / text if it is urgent.

The PTF will assign the Peak to a target release if one exists. If a suitable target release does not exist the Peak is referred to Release Planning for a Maintenance Release to be created.

Responsibility is with the PTF to get the Peak assigned to a target release and associated timeline.

Accountability also lies with the PTF to ensure it has an appropriate target.

The developers, Integration and Release Planning should be consulted when targeting the Peak to ensure that the timing would work, taking into account other development activities, including any issues with the order of the code update or release.

The Peak is then sent back to Development to deliver the fix.

Responsibility is then with Development to deliver the Peak and route it to Integration.

Accountability for confirming the fix is then with Integration, who should consult with Development, Test and Release Management to confirm how the build is progressing, a day or two before the out of integration date.

Integration then inform Development, Test, and Release Management whether the build was successful.

Sign Off: Integration close the Peak. If the Peak was not fixed it would have been communicated at the inform stage.

Note: Peak will enforce this call lifecycle so it will not allow a Final response to be entered unless the current status is “Pending”, and a call cannot be closed until its status is Final.

For detailed Peak information please see the Peak website’s “help” or the document CSMAN011 - Peak User Guide.