

Understanding Release Management

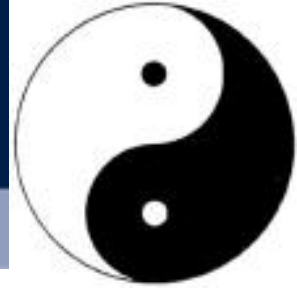
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What is this symbol?

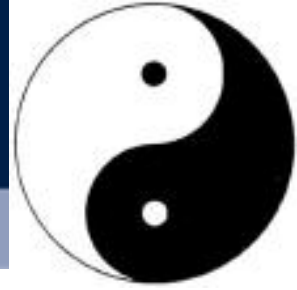


Yin Yang



- Chinese symbol of the interplay of forces in the universe.
- In Chinese philosophy, yin and yang represent the two primal cosmic forces in the universe.
- Yin (moon) is the receptive, passive, cold, female force.
- Yang (sun) is masculine - force, movement, heat.
- The Yin Yang symbol represents the idealised balance of the forces; equilibrium in the universe.

Yin Yang – Change & Release



- ITIL symbol of the interplay of forces in the **service management** universe.
- In ITIL philosophy, **Change** and **Release** represent the two primal cosmic forces in the universe.
- **Release** (Yin) is the receptive, passive, cold, female force.
- **Change** (Yang) is masculine - force, movement, heat.
- The **proper implementation of Change and Release** represents the idealised balance of the forces; equilibrium in the universe.

Definition from ISO20000

Release Management

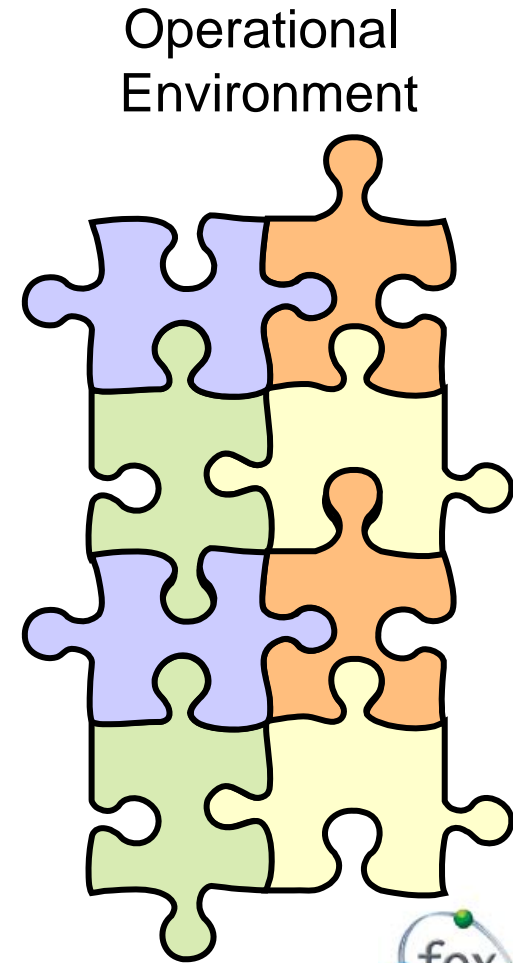
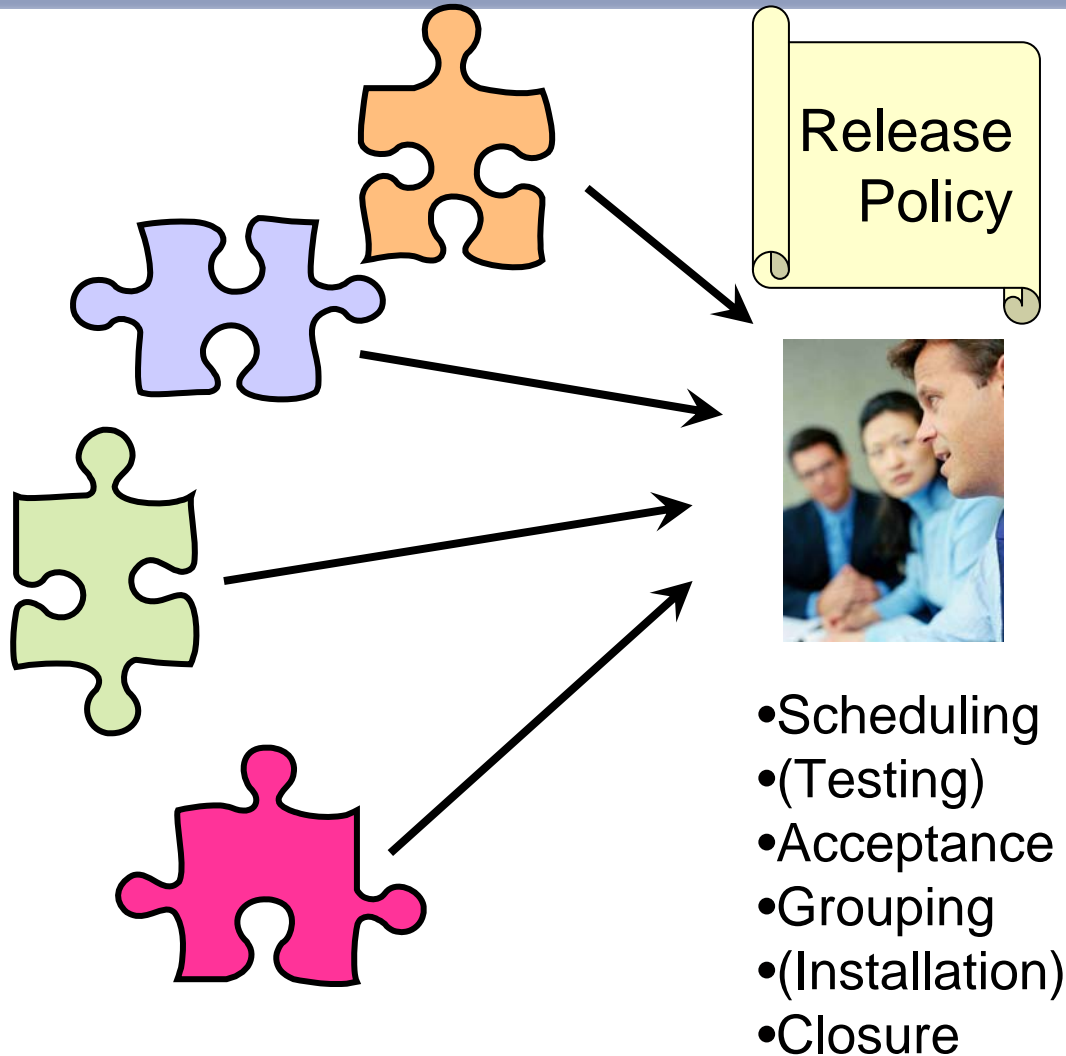
The set of management practices

to deliver, distribute and track
one or more changes ...
into the **live** environment

Definition – from ITIL

- The focus of Release Management is the protection of the live environment and its services through the use of formal procedures and checks
- Protection? protection against what ?
- Against **changes!**
 - Untested changes
 - Unapproved changes
 - Unsafe changes
 - Unfunded changes

Release Management



Relationship with Change Management

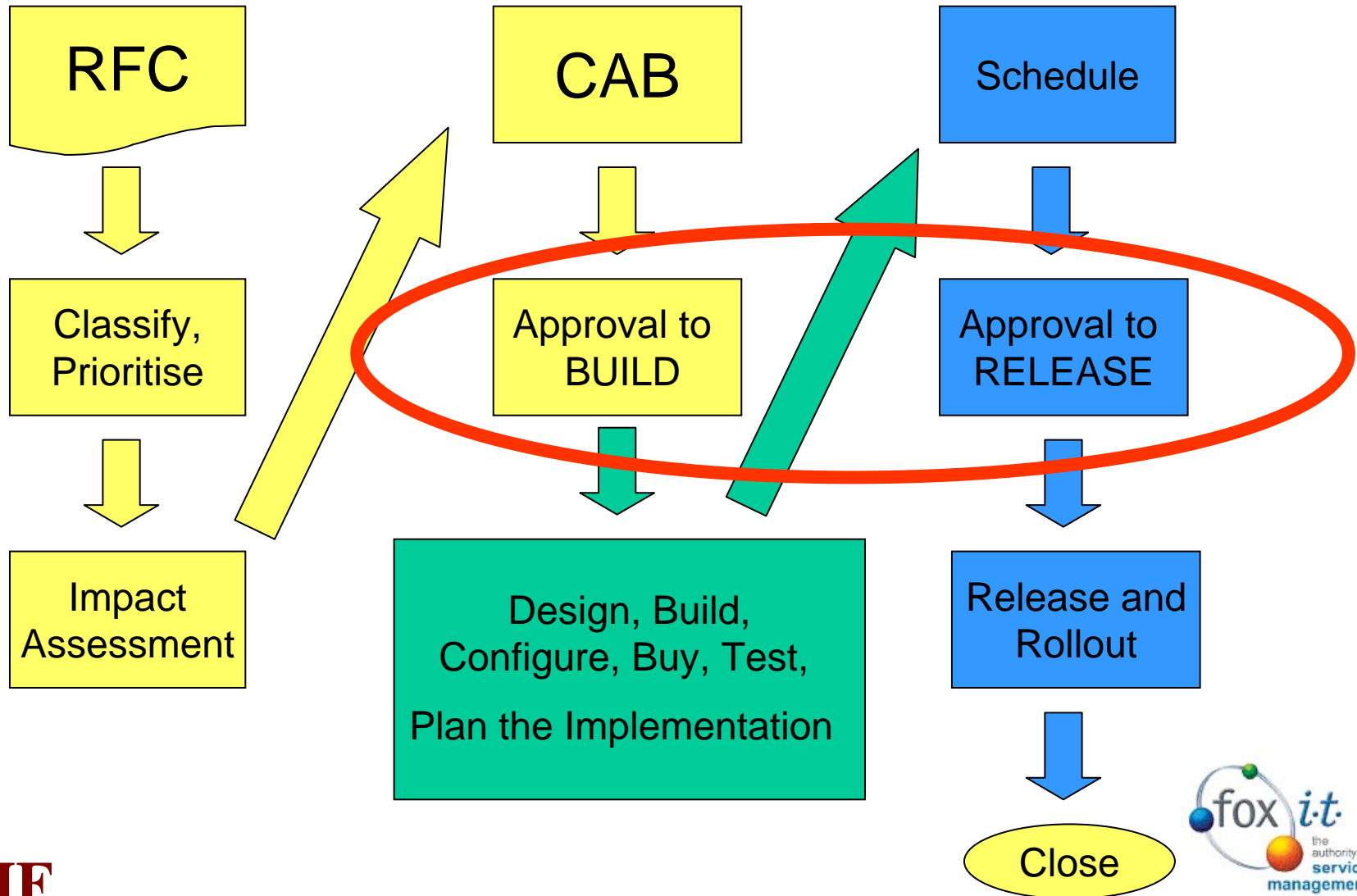


Change Management

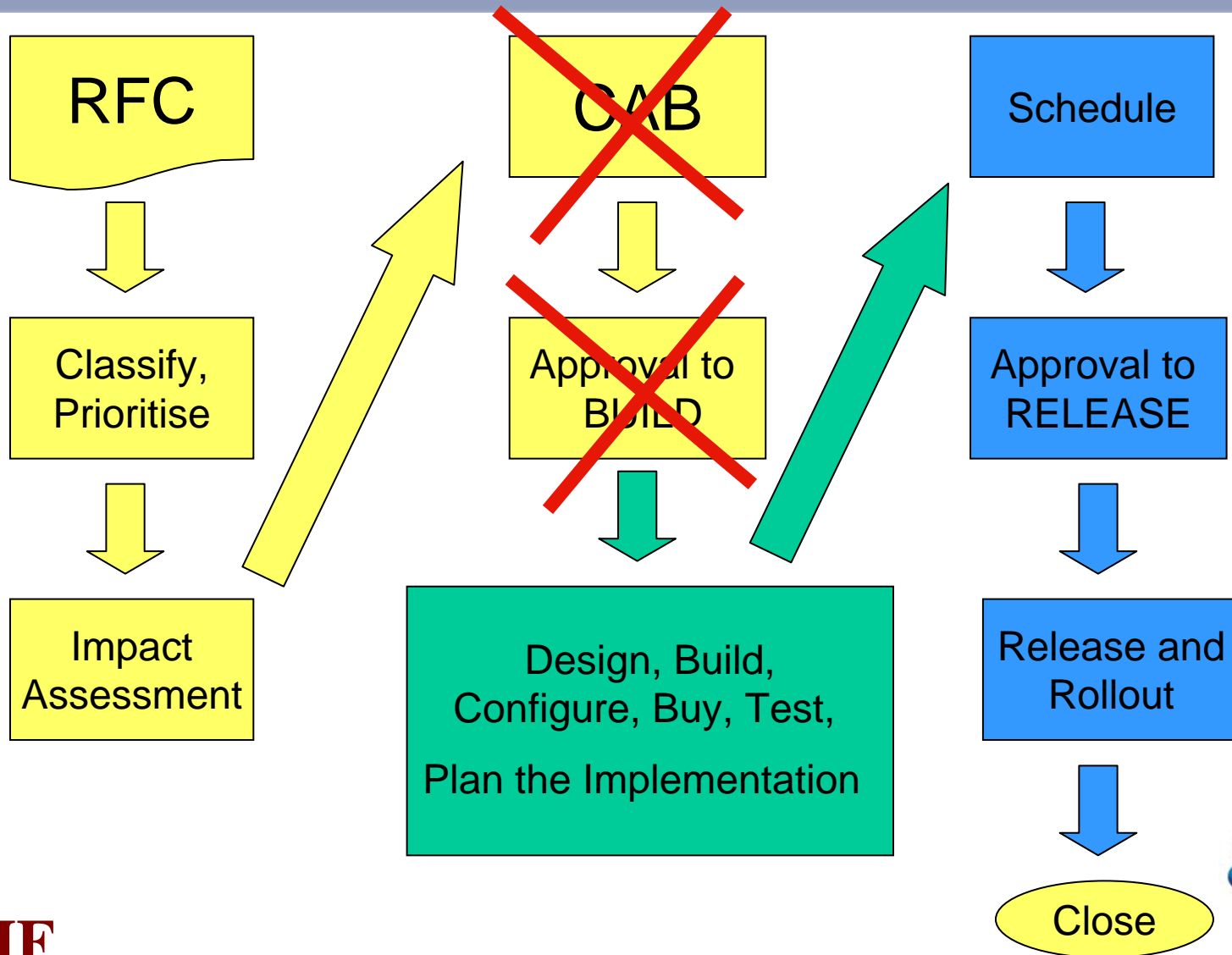
“The release management process should be integrated with the configuration and change management processes” (ISO20000)

Release Management

Change and Release Management Processes



Change and Release Management Processes



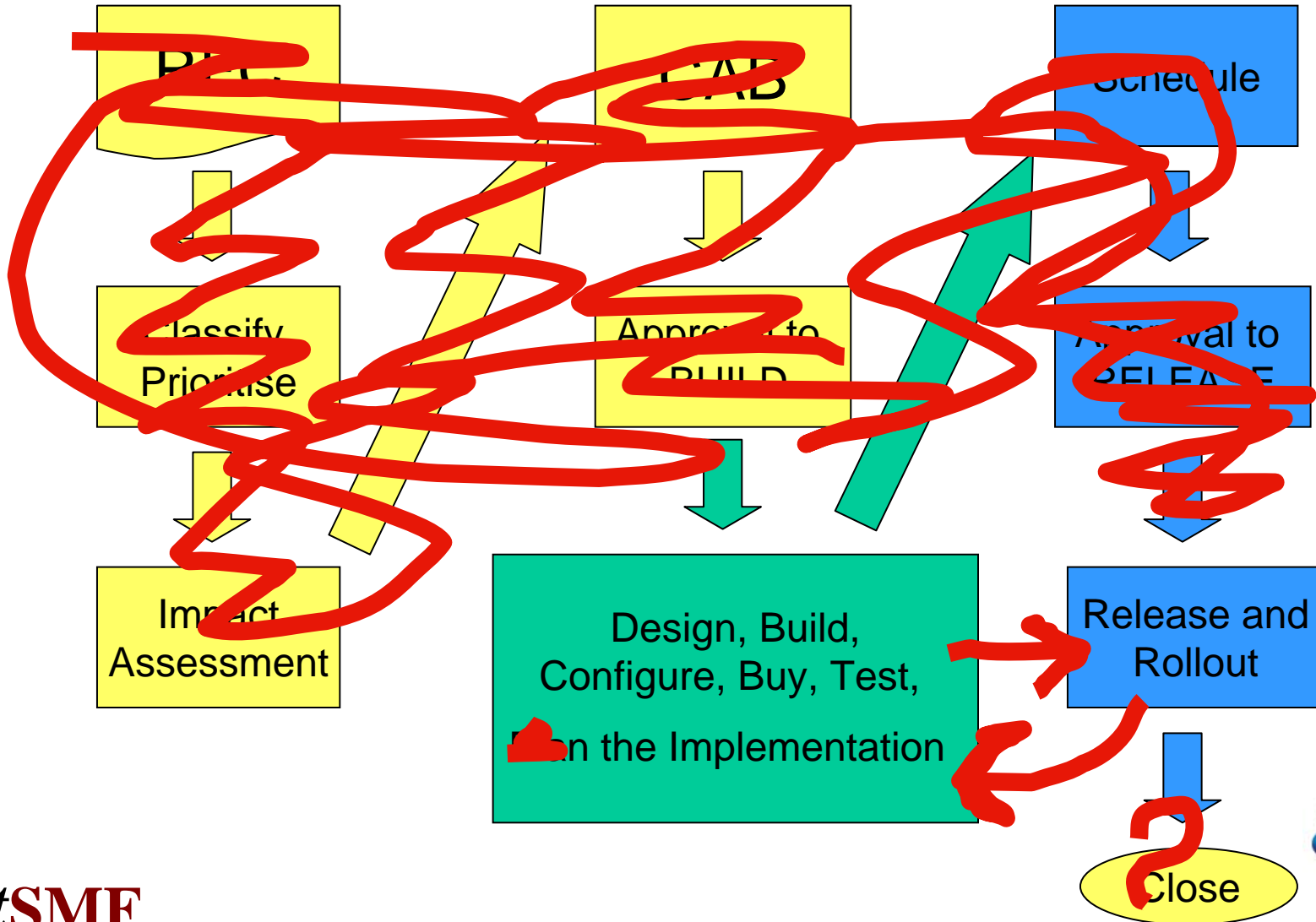
Case Study 1

- A service manager (in a multi-site environment) stands up at the end of a workshop and announces:
“I have the CDs with the new version of <application>. If you want it, come and get a copy from me”
- Problems:
 - No control
 - No scheduling
 - No guarantee of which version being run where
 - No verification that the release reached all targets

Case Study 2

- The service desk advises that severe network performance problems are being experienced across the entire network, affecting thousands of users
- Problem management investigates and discovers that:
 - A business unit that does its own systems development was releasing **several** new versions of a widely-used application **per day!**
 - Each time a user logged onto the application, it checked for the latest version, and downloaded the new client, if necessary
 - The business unit didn't understand why there was a problem with this, and especially why they needed IT's approval

Case Study 2



Case Study 3

- A major hospital had a (computer) virus outbreak
- It raged uncontrolled for three days, continually reappearing after all attempts to clear it up
 - Hospital network was crippled
 - Hospital and IT productivity severely reduced
- A problem analysis was undertaken
 - There were many factors involved
- Root Cause:
 - A group of nurses were attempting to install software, that contained the virus on the CD

Release Policy

- All these case studies occurred in the **absence** of a Release Policy
- They (and many other examples) were drivers for the development and approval of the Release Policy
- Release Policy is an enterprise (not IT) document
 - Removed the authority for non-IT staff to release hardware and software
 - Allocated the roles and responsibilities for Change Management and Release Management

Release Policy – ISO20000

- The release policy ... shall be documented and agreed
- The release policy should include the:
 - a) frequency and type of releases ✓
 - b) roles and responsibilities ✓
 - c) authority for releasing into acceptance test and production environments; ✓
 - d) unique identification and description
 - e) approach to grouping changes into a release;
 - f) approach to automating the build, installation and distribution
 - g) verification and acceptance of a release ✓

Frequency and Type of Releases

Concepts include:

- Standard changes
 - Don't have to be scheduled, tested, accepted with other changes
- Release windows
 - e.g. Tuesday evenings, 6:00 pm – 8:00 pm
- Freeze periods
 - e.g. 15 December – 15 January
 - in Australia, summer holidays coincide with Christmas / New Year
- “Prime time”
 - e.g. 6:00 am – 6:00 pm, Monday - Friday
 - “There shall be no planned maintenance during Prime Time.”

Roles and Responsibilities

● Process Owners

- If possible, different people for Change and Release Management
- Responsible for defining the processes and ensuring compliance and effective operation

● Enterprise Change Manager

- Coordinates all change in the organisation
- Chairs the CAB
- May not be a single person in a large organisation

● Enterprise Release Manager

- Schedules and coordinates all releases in the organisation
- Approves changes to be released
- Enforces the Release Policy

Roles and Responsibilities (cont.)

- Change Manager for each change (change owner?)

- Drives the change
- Manages the building, development, acquisition, testing, etc of the change
- Presents the change to the CAB and Release Manager
- Is probably a project manager



- Technical / Project Teams

- Actually releases and rolls out the changes, under the authority (and control) of the Release Manager



Release Management and Testing

- Who is responsible for testing?
- Change Management / Project / Technical Teams
 - Are responsible for testing all CHANGES
- Release Management
 - Is responsible for ensuring that adequate testing has been done
 - Assembles groups of changes into Releases
 - Therefore Release Management must be responsible for testing the assembled RELEASE

Release Acceptance and Sign-off

- This is NOT user acceptance
 - User acceptance is performed before a change is presented ready for release and rollout
- Done by the Release Manager
 - Using a comprehensive checklist
- Release Manager MUST have authority to accept / reject / defer the release of a change
 - Document this in the Release Policy
- Release Manager may be supported by a Release Board
 - May operate like a CAB – may have similar membership

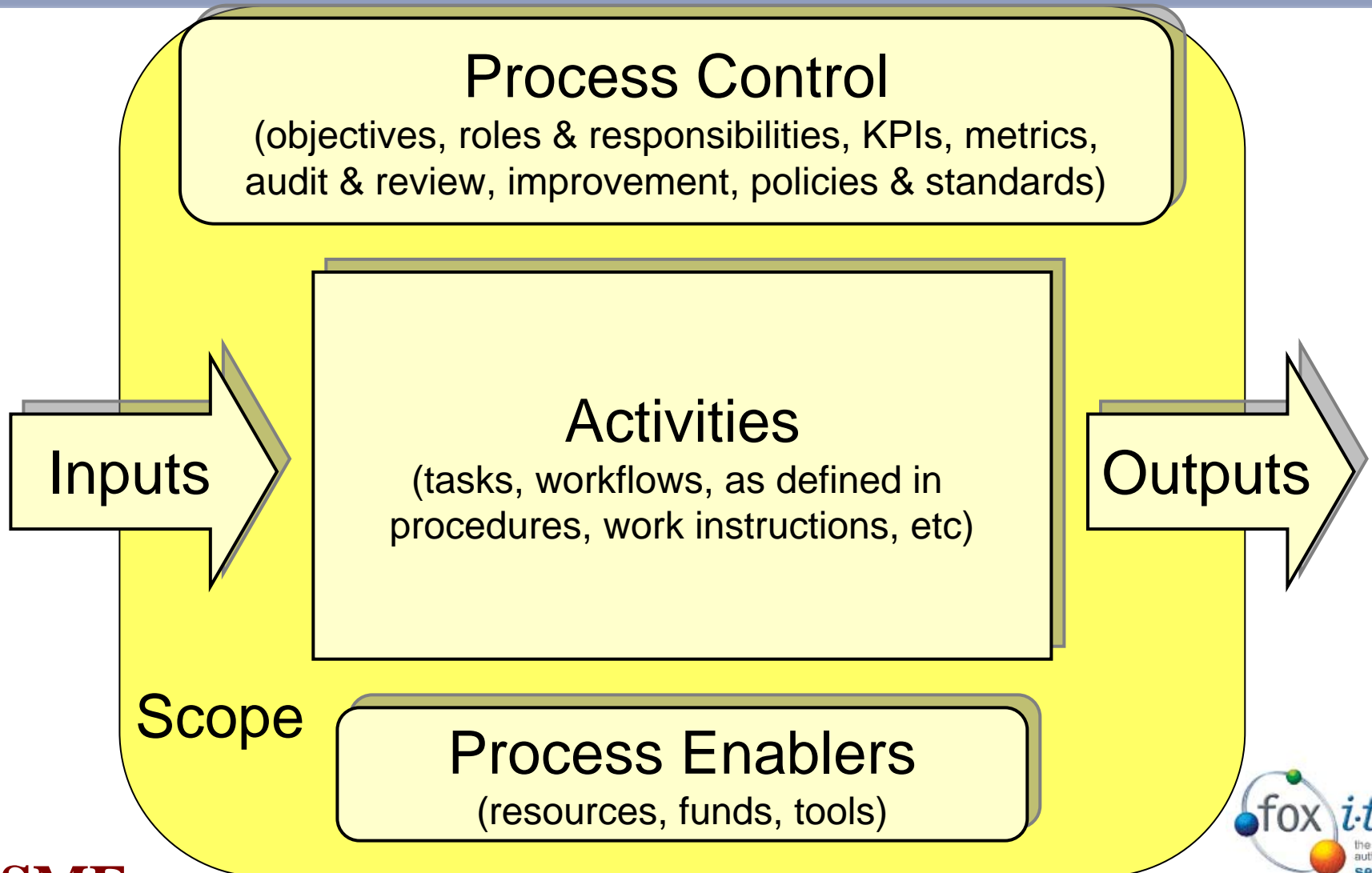
Release Checklist

- ✓ Was the change approved?
- ✓ Is the release different to the approved change?
 - ✓ Send back to CAB
- ✓ Does the change have an owner?
- ✓ Testing
 - ✓ Accepted by users?
 - ✓ Accepted by technical support groups?
 - ✓ Did the test environment adequately represent the live environment?
- ✓ SLAs, OLAs, contracts updated?
- ✓ Operational funding adequate?
- ✓ Security assessment?
- ✓ Release notes?
- ✓ Any known errors?
 - ✓ Advise incident and problem management
- ✓ Capacity assessment?
 - ✓ Server
 - ✓ Network
 - ✓ etc.
- ✓ Is there a backout plan?
 - ✓ Has it been tested?
- ✓ Has training been done or arranged?
 - ✓ For users
 - ✓ For support staff
- ✓ etc., etc., etc.

Release Management Description

- ITIL and ISO20000 are not clear, nor consistent
 - You will need to document your own definition to avoid unnecessary arguments
- Adopt and Adapt
- Base your definition on the Process Model
 - See next slide

Process Model



Release Management Problems

- Resistance from staff
- Circumvention of procedures may be attempted
- Staff may keep using emergency fixes
- Reluctance to carry out a controlled build
- New versions are not installed on time at remote locations
- Unclear ownership and responsibilities
- A lack of understanding of the Release
- Release Management procedures seen as cumbersome and expensive
- Unavailable resources for adequate testing
- Unavailable machine and network resources
- Staff may be reluctant to back out from a Release
- Poor testing environments and procedures may exist

Release Management Self-assessment

- In your environment, does infrastructure (including hardware, software, networks, etc.) get **RELEASED**?

or

- Does it just **ESCAPE** into the operational environment?

Change and Release



- By recognising the separate roles of Change and Release, you can bring
 - **peace,**
 - **harmony and**
 - **balance**to your environment
- But perhaps
 - “equilibrium in the universe” is a bit too much to expect!

I hope this has helped you in

Understanding Release Management

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