Release Management

Process

The Release Management process consists of four procedures.

The first procedure is called "Change Request Handling". It is used by the release managers to review the support requests and problems that have been passed to Release Management.

The second procedure is called "Release Definition". This procedure is used by release managers to organize CAB meetings and by CAB members when they decide which of the change requests that have been collected for CAB review should be fulfilled by the next release. Release managers also use this procedure to split the requirements of releases into logical groups that can be handled efficiently by change coordinators.

The third procedure is called "Business Justification". It is used by the release managers when additional funding needs to be obtained for the implementation of a release.

The fourth procedure is called "Release Coordination". Release managers use this procedure to initiate the implementation of releases and to decide on corrective actions as needed.

For more details about these procedures, click on the Process button to return to the graphical representation of this process and click on the box that represents the procedure that you would like to know more about. The graphical representation of this procedure will appear and you will be able to click on the Description button in the upper left-hand corner of your screen to read more about it.

Mission

The mission of the Release Management process is to ensure that changes are implemented to keep the functionality and service levels of the services aligned with the ever-changing business needs of their customer(s).

Scope

The scope of the Release Management process is limited to requests for distinct changes, with the exception of distinct changes that have been requested for the prevention or fix of a problem, provided that their implementation:

- can be coordinated by a single change coordinator,
- will not cause the functionality of a service to become different, and
- does not require any additional funding.

Level of Detail

The level of detail in which Release Management information is to be registered is specified in the field utilization guidelines for the fields of the forms that are available in the service management application for the support of this process.

The following forms are available in the service management application for the Release Management process:

- Release
- Change
- Work Order

Click on a form to obtain the field utilization guidelines for each of its fields.

Roles & Responsibilities

The table below lists the different roles that are involved in the Release Management process, along with their respective responsibilities. Click on a role to review its profile.

Role	Responsibility	
CAB member	Decides which of the change requests that have been collected for CAB review should be rejected, which should be fulfilled by the next release, and which should be reviewed again during the next CAB meeting.	
Release manager	Reviews the change requests for the service(s) for which he/she acts as the release manager after they have been passed on from Change Management. Organizes and facilitates the CAB meetings for the service(s) for which he/she acts as the release manager. Splits the requirements of releases into logical groups that can be handled efficiently by change coordinators. Prepares a business case for a new release when additional funding is needed for its implementation. Initiates the implementation of releases and decides on corrective actions as needed. Organizes and conducts post-implementation meetings to collect improvement suggestions for future releases.	

Key Performance Indicators

The table below presents the key performance indicator (KPIs) that has been selected for tracking the success of the Release Management process.

KPI	Definition	Frequency	Unit
Successful releases	The number of completed releases with the Completion code field set to "Implemented", divided by the total number of completed releases.	Monthly	%

Beneficiaries

The roles that rely on the Release Management process are listed in the table below, along with their respective requirements for the Release Management process.

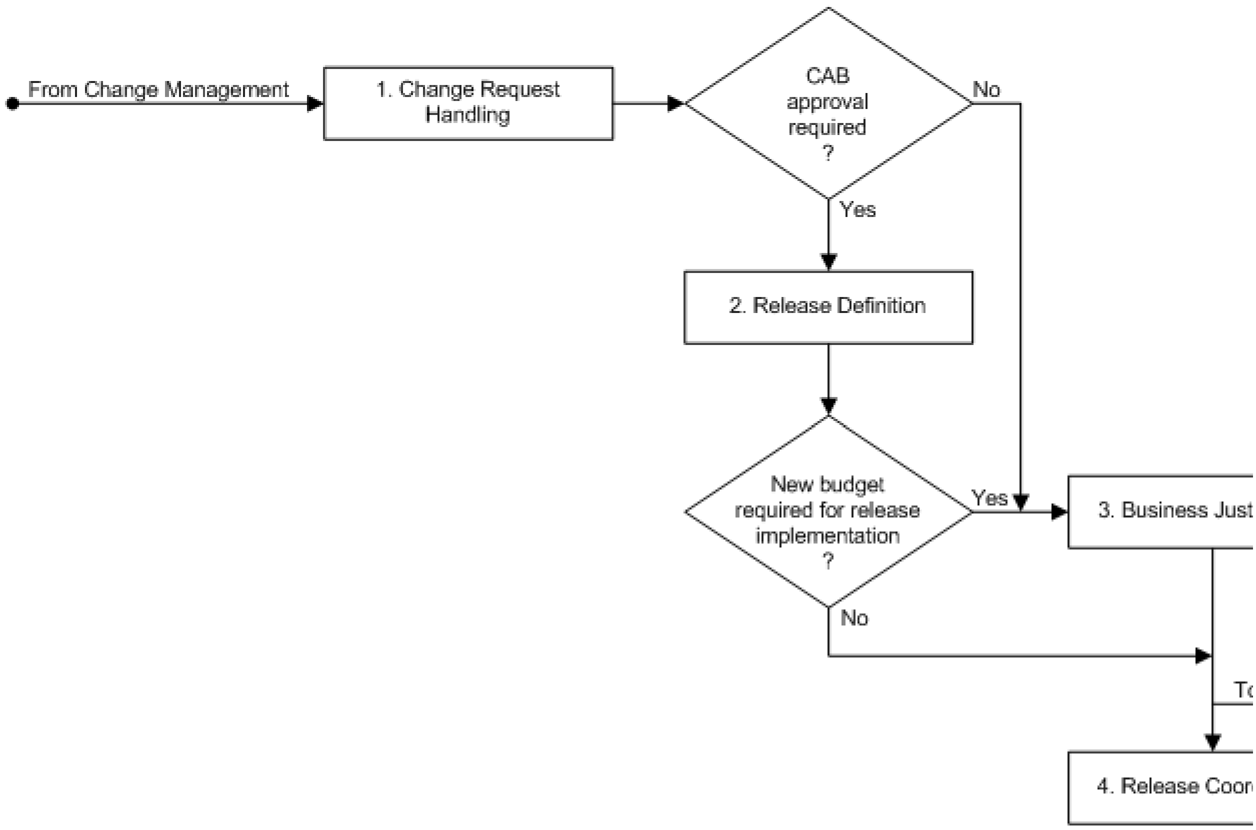
Beneficiary	Requirement
CAB members	Information regarding support requests that have been passed to Release Management, but which have not yet been rejected or linked to a release.
Change coordinators	Detailed descriptions of those requirements of a release that they have been asked to take responsibility for.
Problem managers	Information regarding the progress of releases which implementation will prevent or fix one or more problems. Information added to problems following their rejection during a CAB meeting or the completion of the release to which they are linked.
Service desk agents	Information regarding the progress of releases so that the customers of the support requests that have been linked to releases can be kept up-to-date. Information added to support requests following their rejection during a CAB meeting or the completion of the release to which they are linked.

Owner

The owner of the Release Management process is the Service Management CAB.

This CAB is responsible for reviewing, and subsequently approving or rejecting, requests for improvement of the Release Management process and its supporting functionality in the service management application.

Process



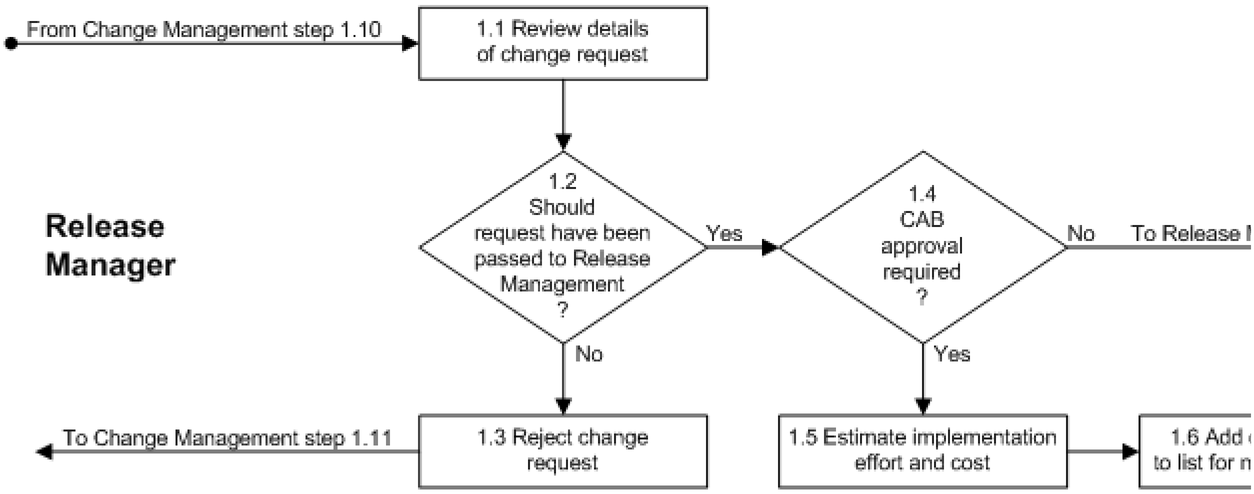
Procedure 1, Change Request Handling

After a change coordinator of a service has passed a change request to the release manager of the service, the release manager reviews the request to gain an understanding of its requirements. The release manager passes the change request back to the change coordinator if it does not require the involvement of Release Management. Only change requests that ask for the implementation of a distinct change must be handled by Release Management, with the exception of change requests that have been submitted for the prevention or fix of a problem, provided that their implementation:

- can be coordinated by a single change coordinator,
- will not cause the functionality of a service to become different, and
- does not require any additional funding.

If the request does require the involvement of Release Management, the release manager checks to see if it requires CAB approval. The CAB does not need to review the change request if it asks for the implementation of a change to prevent or fix of a problem and if this change will not cause the functionality of a service to become different. If CAB approval is required, however, the release manager adds the change request to the list of requests that are waiting to be reviewed during the next meeting of the service's CAB.

Procedure 1, Change Request Handling



Work Instructions

Procedure Step	Work Instructions for Release Managers
1.1 Review details of change request	1.1.1 Examine the information in the support request or problem to gain an understanding of the change request's requirements.

Work Instructions

Procedure Step	Work Instructions for Release Managers
1.2 Should request have been passed to Release Management ?	1.2.1 If the change request does not require the involvement of Release Management, continue with 1.3.1. Otherwise go to 1.4.1. Note: Change requests that ask for the implementation of a distinct change must be handled by Release Management, with the exception of change requests that have been submitted for the prevention or fix of a problem, provided that their implementation: can be coordinated by a single change coordinator, will not cause the functionality of a service to become different, and does not require any additional funding.

Work Instructions

Procedure Step	Work Instructions for Release Managers
1.3 Reject change request	1.3.1 Ensure that the change request is returned to the Change Management process. 1.3.2 If the change request was received from Incident Management in the form of a support request, do this by specifying in its Information update field that the change can be implemented without the involvement of the Release Management process. Select the change coordinator who assigned the change request to you in the Member field of the support request. Leave the Status field of the support request set to "Assigned". Note: Do not set the Status field of the support request to "Rejected", as that will cause the service management application to automatically assign it to the service desk. 1.3.3 Similarly, if the change request was received from Problem Management in the form of a problem, do this by specifying in its Information update field that the change can be implemented without the involvement of the Release Management process. Select the change coordinator who assigned the change request to you in the Member field of the problem. Leave the Status field of the problem set to "Change Requested". Note: Do not set the Status field of the problem to "Rejected", as that will cause the service management application to automatically assign the problem to its problem manager.

Work Instructions

Procedure Step	Work Instructions for Release Managers
1.4 CAB approval required ?	1.4.1 Go to 2.9.1 if the request asks for the implementation of a change to prevent or fix of a problem and if this change will not cause the functionality of a service to become different. Otherwise continue with 1.5.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
1.5 Estimate implementation effort and cost	1.5.1 Estimate the effort of internal employees and long-term contractors that will be required to get the requested change implemented. 1.5.2 Also estimate the cost of CIs, services and support that will need to be acquired from suppliers in order to get the requested change implemented. Note: Consult with change coordinators and specialists as needed to come up with realistic estimates. 1.5.3 If the change request was received from Incident Management in the form of a support request, enter both estimates and the assumptions on which they are based in the Information update field of the support request. 1.5.4 Similarly, if the change request was received from Problem Management in the form of a problem, enter both estimates and the assumptions on which they are based in the Information update field of the problem.

Work Instructions

Procedure Step	Work Instructions for Release Managers
1.6 Add change request to list for next CAB meeting	1.6.1 If the change request was received from Incident Management in the form of a support request, click on its Relations tab and link it to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of the service's CAB. Indicate in the Information update field of the support request that the "Responsibility for coordination has been accepted by Release Management". Set the Status field of the support request to "Change Pending". 1.6.2 Similarly, if the change request was received from Problem Management in the form of a problem, click on its Relations tab and link it to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of

	the service's CAB. Indicate in the Information update field of the problem that the "Responsibility for coordination has been accepted by Release Management". Set the Status field of the problem to "Change Pending".

Procedure 2, Release Definition

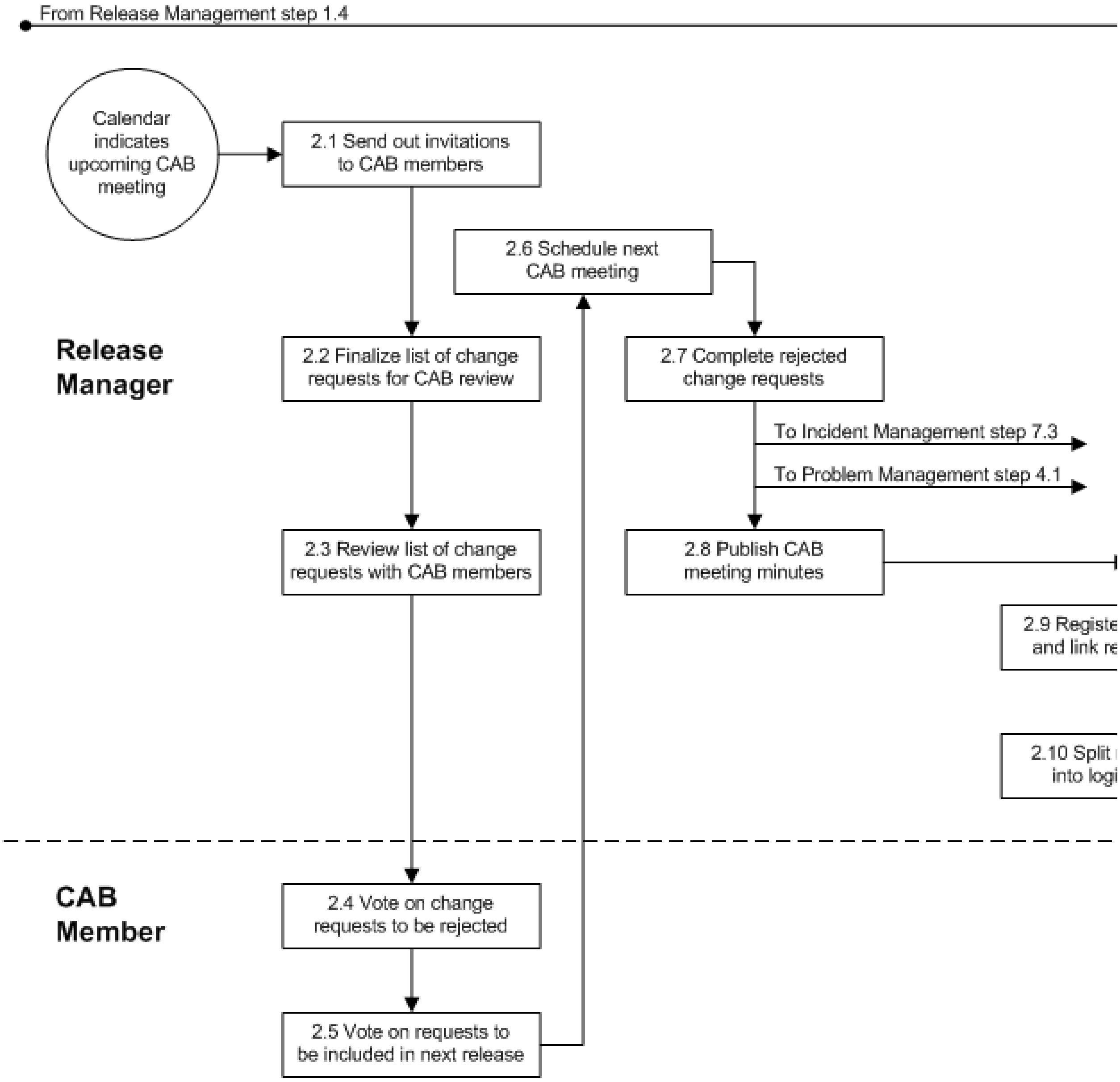
When the next CAB meeting for a service is due, the release manager of the service sends out the invitations to the service's CAB members. In the invitation, the release manager specifies the deadline until which change requests can be submitted for review during the next CAB meeting. After the change request submission deadline has passed, the release manager finalizes the list of change requests that will be reviewed during the next CAB meeting and sends it to the CAB members so that they can discuss the change requests internally before the meeting.

The finalized list of change requests is reviewed during the meeting. After all change requests have been reviewed, each CAB member lets the release manager know which change requests he/she would like to see rejected and which change request(s) he/she would like to see included in the next release. A change request is rejected when at least two-thirds of the CAB members agree that it should be rejected. Similarly, a change request is included in the next release when two-thirds or more of the CAB members have asked for it to be included. Change requests that are neither rejected or included in the next release will be reviewed again during the next CAB meeting. Before closing the CAB meeting, the CAB members agree on the date, time and location of the next CAB meeting.

After the CAB meeting, the release manager ensures that the requesters of the rejected change requests are informed by completing these change requests. Having done this, the release manager publishes the minutes of the CAB meeting and registers the new release. To this release he/she links a change for the coordination of the release and links the change request(s) that are to be included in the release to this change.

The release manager then reviews these change requests with the change coordinators of the service for which the release is to be implemented and the change coordinators of the supporting services that will also need to be changed. Together they divide the requirements of the different change requests amongst them and they draft a high-level implementation plan that indicates the duration of each change, as well as the dependencies between these changes.

Procedure 2, Release Definition



Work Instructions

Procedure Step	Work Instructions for Release Managers
2.1 Send out invitations to CAB members	2.1.1 E-mail the invitations for the upcoming meeting of the service's CAB to all its members. Be sure to specify the deadline until which change requests can be submitted for review during this CAB meeting.

Work Instructions

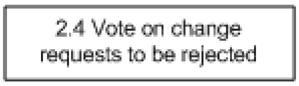
Procedure Step	Work Instructions for Release Managers
2.2 Finalize list of change requests for CAB review	2.2.1 After the change request submission deadline for the next CAB meeting has passed, prepare a list that summarizes the details of each change request that is to be reviewed by the CAB. These requests are linked to the change that acts as the placeholder for the service's change requests that are awaiting CAB review. Note: This list of change requests should provide the following columns of information: Support request or problem number, Name and organization of the requester, Description of the change request, Estimated implementation effort, and Estimated implementation cost. 2.2.2 E-mail the finalized list of change requests that will be reviewed during the upcoming CAB meeting to all members of the CAB. This allows them to discuss the change requests internally before the meeting.

Work Instructions

Procedure Step	Work Instructions for Release Managers
2.3 Review list of change requests with CAB members	2.3.1 Review the progress, in terms of Release Management activities concerning the CAB's service, that has been made since the previous CAB meeting. If a release has been closed since the previous meeting, present the learnings from that release to the CAB members attending the meeting. 2.3.2 Review and discuss each change request on the finalized list with the CAB members. Make sure that every CAB member understands all consequences of implementing a requested change before moving on to the next change request. 2.3.3 After all change requests on the finalized list have been reviewed, ask the CAB members to vote for the change requests they would like to see rejected and for the change requests they would like include in the next release. 2.3.4 Take the meeting minutes to ensure that they can be

	published after the meeting.

Work Instructions

Procedure Step	Work Instructions for CAB Members
	2.4.1 Let the release manager know which change requests you would like to see rejected (if any). Note: A change request is rejected by the CAB when two-thirds or more of the CAB members agree that it needs to be rejected.

Work Instructions

Procedure Step	Work Instructions for CAB Members
	2.5.1 Let the release manager know which change requests you would like to see included in the next release. Note: Discuss with other CAB members as needed to ensure that a practical balance is achieved between the number of change requests to be included in the next release and the time it will take to get it implemented. Make sure that the time it will take to obtain approval for the release's business case is taken into consideration if this applies. Note: A change request is included in the next release when two-thirds or more of the CAB members have asked for it to be included. Note: Change requests that are neither rejected or included in the next release will be reviewed again during the next CAB meeting.

Work Instructions

Procedure Step	Work Instructions for Release Managers
2.6 Schedule next CAB meeting	2.6.1 Before closing the CAB meeting, agree with the CAB members on the date, time and location of the next CAB meeting. Note: Ideally, the next CAB meeting is held after the next release has been implemented and the CAB members have been able to experience its benefits.

Work Instructions

Procedure Step	Work Instructions for Release Managers
2.7 Complete rejected change requests	2.7.1 Make sure that the requester is informed that the change request has been rejected by the CAB of the service. 2.7.2 If the change request was received from Incident Management in the form of a support request, do this by specifying in its Information update field that the "Change request has been rejected by the service's change advisory board". Set the Completion code field of the support request to "Unable - Not Able to Solve or in Conflict with Standard or Policy", and set its Status field to "Completed". 2.7.3 Similarly, if the change request was received from Problem Management in the form of a problem, do this by specifying in its Information update field that the "Change request has been rejected by the service's change advisory board". Set the Status field of the problem to "Rejected". This will cause the problem to be returned to its problem manager.

Work Instructions

Procedure Step	Work Instructions for Release Managers
2.8 Publish CAB meeting minutes	2.8.1 Publish the CAB meeting minutes on the service's Release Management section of the service provider

	organization's web site. 2.8.2 E-mail the link to the CAB meeting minutes to all of the service's CAB members.

Work Instructions

Procedure Step	Work Instructions for Release Managers
2.9 Register new release and link request(s) to it	2.9.1 Open a new release. Leave the Status field of the release set to "Registered" (its default value). 2.9.2 Ensure that you are selected in the Manager field of the release. 2.9.3 Enter a short description of the release in the Description field and summarize the requirements in the Information update field of the release. 2.9.4 Select the main reason for preparing the release in the Reason field of the release and specify an specify an achievable target date in the Target date field. 2.9.5 Click on the Changes tab of the release and add a new change to it. Use the release coordination template to fill out the necessary fields of the change and to automatically generate the work orders for: the business justification of the release, the update of the requesters and approvers of the release, and the post-implementation meeting. 2.9.6 Ensure that the Status field of the change set to "In Progress". 2.9.7 Ensure that you are selected in the Coordinator field of the change. 2.9.8 Select the service for which the release is to be implemented in the Service field of the change. 2.9.9 Adjust the short description of the change in the Description field as needed. 2.9.10 Click on the Relations tab of this new change and link the support request(s) and/or problem(s) to it which requirements are to be fulfilled by the release to which the change is linked.

Work Instructions

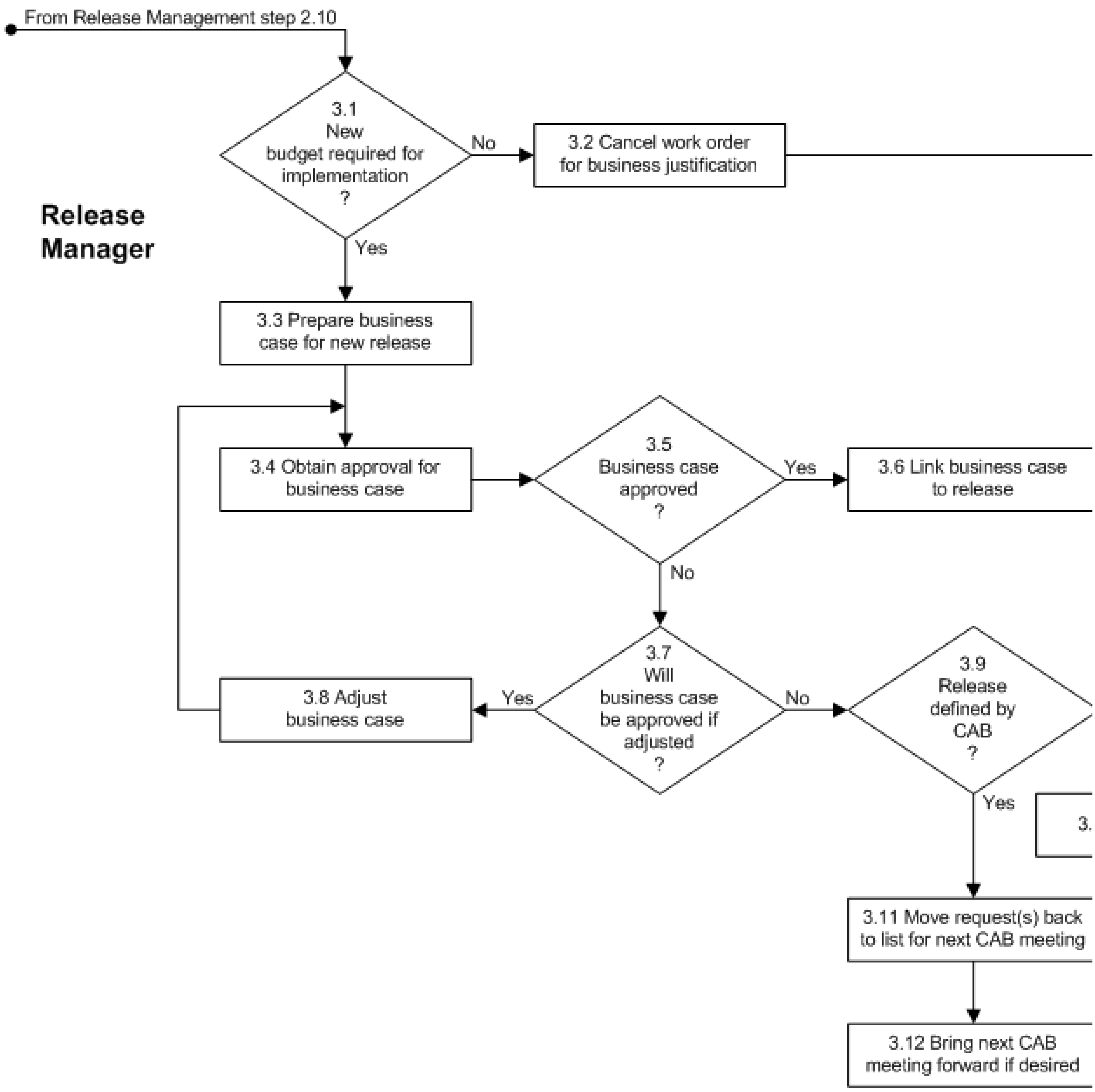
Procedure Step	Work Instructions for Release Managers
2.10 Split requirements into logical groups	2.10.1 Review the requirements of the change requests that you have linked to the new release of the service to determine which of its supporting services will need to be changed. 2.10.2 Schedule a meeting with the change coordinator of the service for which the new release is to be implemented, and with the change coordinators of the supporting services that will also need to be changed. 2.10.3 Review the change requests that have been linked to the new release with these change coordinators. Ensure that the estimated cost and effort for each change request are realistic. 2.10.4 Work with the change coordinators to divide the responsibility for fulfilling the different requirements amongst them. Do this in such a way that each change coordinator gets the responsibility for requirements that his/her group will be able to implement. 2.10.5 Draft a high-level implementation plan that indicates the duration of each change that will be coordinated by the change coordinators to fulfill their requirements, as well as the dependencies between these changes.

Procedure 3, Business Justification

If an approved business case is not required for the release, the release manager cancels the business justification work order that is part of the change to which the change requests of the release are linked. On the other hand, if the next release cannot be implemented using the budget(s) already available to the service provider, the release manager prepares a business case to justify the release. Having prepared the business case, the release manager requests approval for the business case to ensure that a budget will be made available for the implementation of the new release.

If the business case was rejected, the release manager adjusts it if this could still get the business case approved. If it is not possible to get the business case approved, the release manager lets the requesters of the release know that the business case has for the release has been rejected. If the release was defined by the CAB, the release manager moves the change requests that are linked to the release back to the change that acts as the placeholder for change requests that are to be reviewed during the next CAB meeting. Before closing the release, the release manager also contacts the CAB members to inform them that the business case of their release has been rejected and gives them the option to bring the next CAB meeting forward.

Procedure 3, Business Justification



Work Instructions

Procedure Step	Work Instructions for Release Managers
	3.1.1 If the next release can be implemented using the budget(s) already available to the service provider, continue with 3.2.1. Otherwise go to 3.3.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.2 Cancel work order for business justification	3.2.1 Open the change to which the change requests for the release are linked. From this change, open the work order for business justification that was generated by the change template when the change was registered. 3.2.2 Set the Status field of the work order to "Cancelled" and specify in the Result field that the release can be implemented using the budget(s) already available to the service provider.

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.3 Prepare business case for new release	3.3.1 Set the Status field of the release to "To Be Approved". 3.3.2 Open the change to which the change requests for the release are linked. From this change, open the work order for business justification that was generated by the change template when the change was registered. 3.3.3 Specify in the Information update field of this work order why an approved business case is required for the implementation of the release. 3.3.4 Leave the Impacted org. field of the work order empty and set its Downtime field to "None". 3.3.5 Update the Target date field of the work order, by specifying a date and time that can be achieved easily. Take into consideration the time it will take to get the business case approved. 3.3.6 Select yourself in the Member field of the work order. 3.3.7 Change the Status field of the work order from "Registered" to "Accepted" if you are not yet ready to prepare the business case for the release. As soon as you are ready to start working on it, set the Status field of the work order to "In Progress". 3.3.8 Ask the CAB members for the name(s) and position(s) of the people who will act as the sponsor(s) for the new release. 3.3.9 Specify the name(s) and position(s) of the

	sponsor(s) in the Information update field of the business justification work order. 3.3.10 Work with CAB members as needed to prepare a business case that justifies the investment (in terms of cost and effort) for the sponsor(s) of the new release.

Work Instructions

Procedure Step	Work Instructions for Release Managers
 	3.4.1 Request approval for the business case to ensure that a budget will be made available for the implementation of the new release. 3.4.2 Set the Status field of the business justification work order to "Waiting for…" and specify in its Information update field that you are waiting for the business case to be approved.

Work Instructions

Procedure Step	Work Instructions for Release Managers
 	3.5.1 If the business case has been approved, continue with 3.6.1. Otherwise go to 3.7.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.6 Link business case to release	3.6.1 Attach the approved business case to the business justification work order and specify in the Result field that you have attached the approved business case. 3.6.2 Set the Status field of the business justification work order to "Completed". 3.6.3 Set the Status field of the release to "Approved".

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.7 Will business case be approved if adjusted ?	3.7.1 Continue with 3.8.1 if all required approvals can still be obtained for the business case if it is adjusted. Otherwise go to 3.9.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.8 Adjust business case	3.8.1 Set the Status field of the business justification work order back to "In Progress". 3.8.2 Specify in the Information update field of the work order why the business case was rejected and what will need to be changed to get it approved. 3.8.3 Open the digital copy of the rejected business case. 3.8.4 Adjust the rejected business case as needed to ensure that all approvals can be obtained.

Work Instructions

Procedure Step	Work Instructions for Release Managers
	3.9.1 Continue with 3.10.1 if the release was to prevent or fix a problem without causing the functionality of a service to change. Otherwise, if the release was defined by the CAB, go to 3.11.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
	3.10.1 Attach the rejected business case to the business justification work order and specify in its Information update field why it was rejected. 3.10.2 Set the Status field of the business justification work order to "Failed". 3.10.3 Open the work order for updating the requesters and approvers of the release. This work order is linked to the same change as the business justification work order and was also generated by the change template when this change was registered. 3.10.4 Leave the Impacted org. field of the work order empty and set its Downtime field to "None". 3.10.5 Update the Target date field of the work order, by specifying a date and time that can be achieved easily. 3.10.6 Select yourself in the Member field of the work order. 3.10.7 Change the Status field of the work order from "Registered" to "Accepted" if you are not yet ready to perform the requester and approver update. As soon as you are ready to do this, set the Status field of the work order to "In Progress". 3.10.8 Click on the Relations tab of the change to which the problem for which the release was registered is linked (this is also the change to which the work order for updating the requesters and approvers of the release is linked). 3.10.9 Open the problem that is linked to this change. Specify in its Information update field that the business case for the release has been rejected. Also include the reason for the rejection. Set the Status field of the problem to "Rejected". This will cause

	the problem to be returned to its problem manager. 3.10.10 Unlink the problem from the change that is linked to the release. 3.10.11 Indicate in the Result field of the work order for updating the requesters and approvers of the release that there were no approvers to be updated as the CAB did not define the release and the approvers of the business case rejected it. Set the Status field of the work order to "Completed".

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.11 Move request(s) back to list for next CAB meeting	3.11.1 Attach the rejected business case to the business justification work order and specify in its Information update field why it was rejected. 3.11.2 Set the Status field of the business justification work order to "Failed". 3.11.3 Open the work order for updating the requesters and approvers of the release. This work order is linked to the same change as the business justification work order and was also generated by the change template when this change was registered. 3.11.4 Leave the Impacted org. field of the work order empty and set its Downtime field to "None". 3.11.5 Update the Target date field of the work order, by specifying a date and time that can be achieved easily. 3.11.6 Select yourself in the Member field of the work order. 3.11.7 Change the Status field of the work order from "Registered" to "Accepted" if you are not yet ready to perform the requester and approver update. As soon as you are ready to do this, set the Status field of the work order to "In Progress". 3.11.8 Click on the Relations tab of the change to which the change request(s) for the release are linked (this is also the change to which the work order for updating the requesters and approvers of the release is linked). 3.11.9 Open each change request that is linked to this change. Indicate in the Information update field of each change request that the business case for the release to which the change request was linked has been rejected. Also include the reason for the

	rejection and specify that the change request will be reviewed again during the next CAB meeting for the service. 3.11.10 Relate each change request to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of the service's CAB. Unlink these change requests from the change that is linked to the release. 3.11.11 Send an e-mail to the person who is selected in the Customer field of each support request that you moved back to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of the service's CAB. In each e-mail, include the information that you entered in the Information update field of the e-mail recipient's support request.

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.12 Bring next CAB meeting forward if desired	3.12.1 Inform all members of the service's CAB that the business case for the next release has been rejected. 3.12.2 Discuss with the CAB members whether or not they would like to bring their next meeting forward to discuss possibilities that could minimize the impact of the release's rejection. 3.12.3 Indicate what has been agreed on with the CAB members in the Result field of the work order for updating the requesters and approvers of the release. 3.12.4 Set the Status field of this work order to "Completed".

Work Instructions

Procedure Step	Work Instructions for Release Managers
3.13 Close release	3.13.1 Open the change to which the change requests for the release were linked. From this change, open the

	work order for the post-implementation meeting that was generated by the change template when the change was registered. 3.13.2 Set the Status field of the work order to "Cancelled" and specify in the Result field that the business case for the release has been rejected. 3.13.3 Select the option "Rejected by Approver(s)" in the Completion code field of the change to which the work order for the post-implementation meeting is linked. 3.13.4 Ensure that the Status field of the change is set to "Completed". 3.13.5 Specify in the Information update field of the release that it could not be implemented because its business case has been rejected. Also include the reason for the rejection. 3.13.6 Select the option "Business Case Rejected" in the Completion code field of the release and set its Status field to "Closed".

Procedure 4, Release Coordination

The release manager prepares a document for each change coordinator that details the release requirements that the change coordinator will be responsible for. The release manager sends the requirement documents to the change coordinators and ensures that the requested changes are registered and linked to the release.

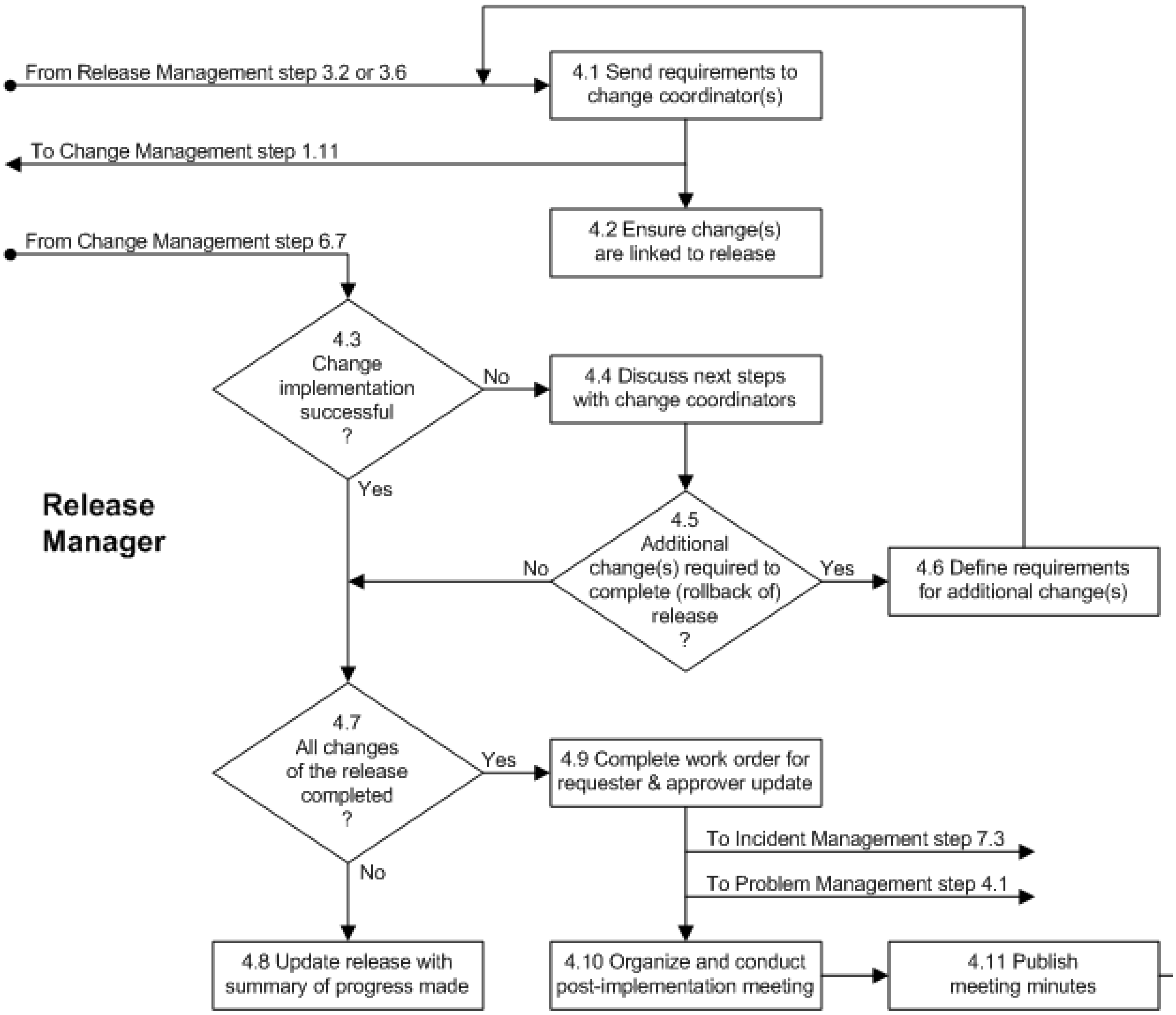
When a change coordinator has informed the release manager that one of the release's changes has been completed, the release manager enters a short update in the release.

If the change could not be implemented successfully, the release manager works with the coordinators of the changes that are linked to the release to determine how the (partial) failure of the change implementation affects the overall implementation of the release. If it is still possible to implement one or more additional changes to ensure that all or most requirements of the release are fulfilled, or if one or more additional changes are required to ensure that the rollback of the release is completed, the release manager documents the requirements for the additional change(s) before passing them to the appropriate change coordinator(s).

After the last change that a change coordinator was asked to get implemented for the release has been completed, the release manager ensures that the requesters are informed whether or not their requirements were fulfilled by the release implementation. If the release was defined by the CAB, the release manager moves any change requests which requirements were not fully met back to the change that acts as the placeholder for change requests that are to be reviewed during the next CAB meeting. The release manager also informs the CAB members (if the release was defined by them) and the approvers of the business case (if one had to be prepared for the release).

Having updated the requesters and approvers of the release, the release manager continues by organizing and conducting the post-implementation meeting. During this meeting, the release manager reviews the entire lifecycle of the release with the service provider of the service for which the release was implemented, and the change coordinators who coordinated one or more of the release's changes. After the meeting, the release manager publishes the improvement suggestions and decisions that were agreed on by the attendees of the meeting. Finally, the release manager closes the release.

Procedure 4, Release Coordination

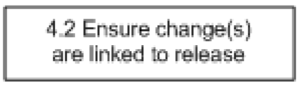


Work Instructions

Procedure Step	Work Instructions for Release Managers
4.1 Send requirements to change coordinator(s)	4.1.1 Prepare a document for each change coordinator. In each document, detail the requirements which fulfillment the change coordinator has agreed to assume the responsibility for. 4.1.2 E-mail each document to the change coordinator for which it was prepared. In each e-mail, ask the change coordinator to plan a change for the fulfillment of the requirements. Also specify the date on which you expect the change to be implemented. Make sure that this date is achievable. Finally, be sure to include the release number that is specified in the Number field of the release so that each change coordinator can use it to link his/her change to the release.

	Note: When you are asking for multiple changes to be implemented, ensure that the requested changes get implemented in the correct order and at the right moment (if this is important for the overall success of the release implementation). 4.1.3 List the names of the requirement documents in the Information update field of the release and indicate which document was sent out to which change coordinator. 4.1.4 Set the Status field of the release to "In Progress".

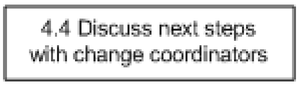
Work Instructions

Procedure Step	Work Instructions for Release Managers
	4.2.1 Follow up on the change request(s) that you sent to the change coordinator(s) by making sure that the requested change(s) are registered in the service management application and that they are linked to the release. 4.2.2 If a change has not yet been registered, remind the responsible change coordinator to do this. 4.2.3 If a change coordinator forgot to link his/her change to the release, open the release and link the change to it on the Changes tab.

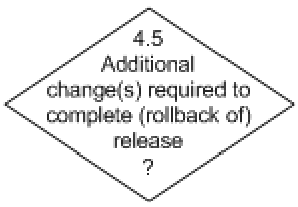
Work Instructions

Procedure Step	Work Instructions for Release Managers
	4.3.1 Go to 4.7.1 if the change coordinator has informed you that all the requirements for the change have been met. Otherwise continue with 4.4.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
	4.4.1 Discuss the situation with the coordinators of the changes that are linked to the release. Do this to determine how the (partial) failure of the change implementation affects the overall implementation of the release. 4.4.2 Agree with the change coordinators on the best actions to take to deal with the failure. The decision could be made to implement additional changes as needed to ensure that all or most requirements can still be met. On the other hand, if the cost and effort to get (some of) the unfulfilled requirements implemented is too high or unknown, the decision could be made not to do anything, or to perform a complete rollback of the release. In such a case, the change requests that were not implemented will have to be reviewed again so that a more realistic cost and effort estimate can be provided.

Work Instructions

Procedure Step	Work Instructions for Release Managers
	4.5.1 Continue with 4.6.1 if it has been decided that one or more additional changes need to be implemented to ensure that either more of the release's requirements will be met, or to ensure that one or more of the changes that were already completed for the release are rolled back. Otherwise, if no additional changes need to be implemented for the release, go to 4.7.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.6 Define requirements for additional change(s)	4.6.1 Continue to work with the change coordinators to define the requirements for the additional change(s). 4.6.2 Summarize in the Information update field of the release what the result has been of the change that was not implemented successfully. Specify which requirements were not fulfilled by the implementation of the change, why they could not be fulfilled, and why it was decided to add one or more changes to the release to ensure that the unfulfilled requirement(s) can still be met, or to ensure that the release is rolled back.

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.7 All changes of the release completed ?	4.7.1 Go to 4.9.1 if all changes that are linked to the release, with the exception of the change to which the change request(s) for the release are linked, are now completed. Otherwise continue with 4.8.1.

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.8 Update release with summary of progress made	4.8.1 Summarize in the Information update field of the release what the result has been of the completed change implementation. If the change implementation was not completely successful, specify which requirements were not fulfilled by the implementation of the change, why they could not be fulfilled, and why it was decided not to add one or more changes to the release to ensure that the unfulfilled requirement(s) can still be met.

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.9 Complete work order for requester & approver update	4.9.1 Summarize in the Information update field of the release which requirements of which change requests have not been fulfilled (if any). 4.9.2 Open the change to which the change request(s) for the release are linked. From this change, open the work order for updating the requesters and approvers of the release. This work order was generated by the change template when the change was registered. 4.9.3 Leave the Impacted org. field of the work order empty and set its Downtime field to "None". 4.9.4 Update the Target date field of the work order, by specifying a date and time that can be achieved easily. 4.9.5 Select yourself in the Member field of the work order. 4.9.6 Change the Status field of the work order from "Registered" to "Accepted" if you are not yet ready to perform the requester and approver update. As soon as you are ready to do this, set the Status field of the work order to "In Progress". 4.9.7 Click on the Relations tab of the change to which the change request(s) for the release are linked (this is also the change to which the work order for updating the requesters and approvers of the release is linked). 4.9.8 For each change requests which requirements were not (fully) met, estimate the effort of internal employees and long-term contractors that would still be needed to get the requirements fully implemented. Also estimate the cost of CIs, services and support that would still need to be acquired from suppliers for each of these change requests to ensure that their requirements are fully met. 4.9.9 If the release was defined by the CAB, open each change request which requirements were not (fully) met. Specify in the Information update field of each of these change requests: which of their requirements were not met and why this is the case,

	the new cost and effort estimates and the assumptions on which they are based, and that the unfilled requirement(s) of the change request will be reviewed again during the next CAB meeting for the service. Relate each of these change requests to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of the service's CAB, and unlink them from the change that is linked to the release. 4.9.10 If you moved one or more support requests back to the change that acts as a placeholder for requests that are waiting to be reviewed during the next meeting of the service's CAB, send an e-mail to the person who is selected in the Customer field of each of these support requests. In each e-mail, include the information that you entered in the Information update field of the e-mail recipient's support request. 4.9.11 If the release was not defined by the CAB, and the release could not implement the requested fix for the (anticipated) problem that is related to it, open this problem. Specify in its Information update field why the release could not (fully) meet the requirements of the problem. Also enter the new cost and effort estimates, and the assumptions on which they are based, in this field. Set the Status field of the problem to "Change Completed". This will cause the problem to be returned to its problem manager. 4.9.12 Open each support request which requirements were fully met by the implementation of the release. Summarize how the release was implemented in the Solution field of such support requests and set their Completion code field to "Solved - Root Cause Analysis not Required". Note: Selecting an option in the Completion code field causes the Status field of a support request to be set to "Completed". This ensures that the service desk will inform the person who is linked to the support request in the Customer field. 4.9.13 Open each problem which requirements were fully met by the implementation of the release. Summarize how the release was implemented in the Solution field of such problems and set their Status field to "Change Completed". Note: Setting the Status field of a problem to "Change Completed" causes a problem to be returned to its problem manager. 4.9.14 Prepare an e-mail for the CAB members (if the release was defined by the CAB) and the approvers of the business case (if one had to be prepared for

	the release). Specify in this e-mail whether or not all requirements have been met. If this is not the case, specify which requirements were not met and why it was decided to complete the release without fulfilling these requirements. 4.9.15 Set the Status field of the work order for updating the requesters and approvers of the release to "Completed". 4.9.16 Select the appropriate option in the Completion code field of the release. Ensure that the Status field of the release is set to "Completed".

Work Instructions

Procedure Step	Work Instructions for Release Managers
	4.10.1 Open the change to which the change request(s) for the release are, or were, linked. From this change, open the work order for the post-implementation meeting. This work order was generated by the change template when the change was registered. 4.10.2 Leave the Impacted org. field of the work order empty and set its Downtime field to "None". 4.10.3 Update the Target date field of the work order, by specifying a date and time that can be achieved easily. 4.10.4 Select yourself in the Member field of the work order. 4.10.5 Change the Status field of the work order from "Registered" to "Accepted" if you are not yet ready to start organizing the post-implementation meeting. As soon as you are ready to do this, set the Status field of the work order to "In Progress". 4.10.6 Invite the service provider of the service for which the release was completed, as well as the change coordinators who coordinated one or more of the release's changes, to the post-implementation meeting. 4.10.7 Review the entire lifecycle of the release with the attendees of the meeting and discuss any issues that were encountered. 4.10.8 Collect all improvement suggestions. 4.10.9 Agree on the points that are to be taken into consideration for all future releases of the service. Also agree on any actions that could already be taken to get improvements implemented and decide

	who will be responsible for which actions. 4.10.10 Take the meeting minutes to ensure that all improvement suggestions and decisions are documented and that they can be published after the meeting.

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.11 Publish meeting minutes	4.11.1 Publish the post-implementation meeting minutes on the service's Release Management section of the service provider organization's web site. 4.11.2 E-mail the link to the post-implementation meeting minutes to everyone who was invited to the meeting (i.e. the service provider of the service for which the release was completed, as well as the change coordinators who coordinated one or more of the release's changes). 4.11.3 Set the Status field of the work order for the post-implementation meeting to "Completed".

Work Instructions

Procedure Step	Work Instructions for Release Managers
4.12 Close release	4.12.1 Select the option "Implemented" in the Completion code field of the change to which the work order for the post-implementation meeting is linked. 4.12.2 Ensure that the Status field of the change is set to "Completed". 4.12.3 Specify in the Information update field of the release that the post-implementation meeting has been completed and include the link to the post-implementation meeting minutes. 4.12.4 Set the Status field of the release to "Closed".

Release

The table below lists the fields of the Release form and provides utilization guidelines for each field.

Page	***Main***
Field	**Utilization**
Number	This field contains the unique release number. This number is automatically generated by the application.
Status	Use this field to select the appropriate status for the release from the following list of options: Registered — The release has been registered by its manager. To Be Approved — A business case is being prepared or approved for the release. Approved — The business case of the release has been approved. In Progress — The requirements for the implementation of the release have been sent to the change coordinator(s). Completed — The work on the implementation of the release has come to an end because of the reason specified in the Completion code field. Closed — The release implementation has been reviewed during its post-implementation meeting.
	Separator
Manager	Use this field to select yourself as the release manager responsible for the release.
	Separator
Description	Use this field to enter a short description that summarizes the main reason for implementing the release.
Information	This field shows all information that was entered in the Information update field when the release was saved. Above each entry, the application indicates who entered the text in the Information update field and when it was saved. Each new entry is inserted at the top of this field.
Information update	Use this field to enter a description of the requirements that the release is expected to fulfill. Also use this field to summarize the progress of the release.
	Separator

Reason	Use this field to select the main reason for creating the release from the following list of options: New Business Requirement New Legal Requirement Problem Prevention or Fix
Creation date	This field is automatically set to the date and time at which the release was created.
Target date	Use this field to select the date and time at which the changes that are linked to the release, with the exception of the change to which the change request(s) for the release are linked, should be completed.
Completion date	This field is automatically set to the date and time at which the release status was set to "Completed" or "Closed".
Completion code	Use this field to select the appropriate completion code for the release from the following list of options, after the release has been completed: Implemented Partially Implemented Rolled Back Business Case Rejected
	Separator
Folder	This field is automatically set to the folder of the organization to which the release manager who created the release belongs.
Page	***Changes***
Changes	This field is used to create a link with the changes that form a part of the release.
Field	**Utilization**
Page	***History***
Field	**Utilization**
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.

Change

The table below lists the fields of the Change form and provides utilization guidelines for each field.

Page	***Main***
Field	**Utilization**
Number	This field contains the unique change number. This number is automatically generated by the application.
Status	Use this field to select the appropriate status for the change from the following list of options: Registered — The change is not yet ready for risk & impact analysis. Risk & Impact — The risk & impact analysis is being conducted for the change and the change plan is being finalized. To Be Approved — Approval has been requested for the change. Approved — The change has been approved. In Progress — The change is currently being implemented. Completed — No further action will be taken for this change because it has been implemented, rolled back, or rejected by its approver(s), as specified in the Completion code field.
	Separator
Coordinator	Use this field to select yourself as the coordinator of this change.
Service	Use this field to select the service that is to be changed. Select the special service "NORECORD - Service is not registered in database" if the service that is to be changed has not yet been registered in the application.
	Separator
Description	Use this field to enter a short description of the change.
Information	This field shows all information that was entered in the Information update field when the change was saved. Above each entry, the application indicates who entered the text in the Information update field and when it was saved. Each new entry is inserted at the top of this field.
Information update	Use this field to specify what the result should be after the change has been implemented and any additional information that could prove useful for the people affected by this change (including the specialists who are helping to implement it and the people who need to approve it).
	Separator
Category	Use this field to select the change category from the following list of options:

	Distinct - Approved Change Template not Available Emergency - Required for Incident Resolution Standard - Approved Change Template Was Used
Reason	Use this field to select the reason why the change has been requested from the following list of options: Expansion of Infrastructure or Service Improvement of Infrastructure or Service Replacement of Infrastructure Component(s) Correction of Infrastructure Component(s) Removal of Infrastructure or Service Move of Infrastructure Component(s)
	Separator
Creation date	This field is automatically set to the date and time at which the change was created.
Completion date	This field is automatically set to the date and time at which the change status was set to "Completed".
Completion code	Use this field to select the appropriate completion code for the change from the following list of options, after the change has been completed: Implemented Partially Implemented Rolled Back Rejected by Approver(s)
	Separator
Folder	This field is automatically set to the folder of the organization to which the person who created the change belongs.
Page	***Work Orders***
Field	**Utilization**
Work orders	Use this field to create new work orders and to link them to this change.
Page	***Relations***
Field	**Utilization**
Release	Use this field to create a link with the release for which this change was requested.
Relations	Use this field to create a link with the support requests and/or problems that form the requests for this change.

	Use this field also to create a link with the support requests that have been caused by the implementation of this change. In these cases, set the relation type to "Caused by Change Implementation".
Page	***Workflow***
Field	**Utilization**
Predecessors	Use this field to create a link with all the changes that must be completed before this change can be executed.
Successors	Use this field to create a link with all the changes that cannot be executed before this change is completed.
Page	***History***
Field	**Utilization**
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.

Work Order

The table below lists the fields of the Work Order form and provides utilization guidelines for each field.

Page	***Main***	
Field	**Utilization**	
Number	This field contains the unique work order number. This number is automatically generated by the application.	
Status	Use this field to select the appropriate status for the work order from the following list of options: Registered — The work order should not yet be executed. Rejected — The work order had better be assigned to another group or member. Assigned — The execution of the work order can start, unless it should not be executed before a specific date and time specified in the	

	Information field. Accepted — The work order will be executed as soon as the member to whom the work order has been assigned is ready to start working on it. In Progress — The work order is currently being worked on. Waiting for… — It is temporarily not possible to make any further progress in the execution of the work order. Failed — An answer cannot be found for the risk & impact work order, the person to whom the approval work order was assigned cannot approve the change, or the objective of the implementation work order cannot be achieved. Completed — The answer has been provided for the risk & impact work order, the change has been approved by the person to whom the approval work order was assigned, or the execution of the implementation work order has achieved its objective. Cancelled — The work order should not be completed (e.g. because the change has been rejected, or the work order was generated by a change template but does not apply to this specific change implementation).
	Separator
Change	Use this field to select the change to which this work order should be linked. If this work order was created from within a change, then this change is automatically selected in this field.
	Separator
Description	Use this field to enter a short description of the work order.
Information	This field shows all information that was entered in the Information update field when the work order was saved. Above each entry, the application indicates who entered the text in the Information update field and when it was saved. Each new entry is inserted at the top of this field.
Information update	Use this field to specify how the work order should be executed, to describe what should be accomplished, and/or to provide a summary of the actions that have been taken to date.
	Separator
Folder	This field is automatically set to the folder of the organization to which the person who created the work order belongs.

Page	*Details*
Field	**Utilization**
Category	Use this field to select the work order category from the following list of options: Approval Implementation Risk & Impact
Impacted org.	Use this field to enter the codes of all customer organizations that will be impacted by the execution of this work order. Customers will be impacted if: the implementation of the change will cause the customer(s) to experience a service degradation or a service outage (regardless of the fact whether this is planned to occur during service hours), and/or the implementation of the change will cause the functionality that is provided to the customer(s) to become different.
Downtime	Use this field to select the downtime duration from the following list of options: None 15 Minutes 30 Minutes 1 Hour 2 Hours 3 Hours 4 Hours 6 Hours 8 Hours 10 Hours 12 Hours 16 Hours 20 Hours 24 Hours 30 Hours 36 Hours 42 Hours 48 Hours > 48 Hours Leave the default value set to "None" if the execution of the work order will not cause the service to be down.

	Separator
Creation date	This field is automatically set to the date and time at which the work order was created.
Target date	Use this field to select the date and time at which the execution of the work order should be completed.
Completion date	This field is automatically set to the date and time at which the work order status was set to "Completed", "Failed", or "Cancelled".
Assignment	Separator
Group	Use this field to select the group to which the work order is to be assigned.
Member	Use this field to select the person to which the work order is to be assigned.
Supplier	Use this field to select the supplier organization that has been asked to assist with the work order.
Reference number	Use this field to enter the unique reference number under which the work order has been registered by the supplier organization.
	Separator
Result	Use this field to provide information that might prove useful to the change coordinator, after the work order has been set to the status "Failed". For example, specify why the risk & impact work order could not be answered, or specify why the change was not approved in case of an approval work order. After the work order has been set to the status "Cancelled", enter the reason for the cancellation in this field. The work order could, for example, require cancellation because the approver(s) of the change rejected it, or because the work order was generated by the change template used to register the change, but is not required for this specific implementation. Also, fill out this field after having set the status to "Completed" and when the result is slightly different, or if the result was achieved in a different fashion, than specified in the Information field. If the work order was executed as specified, and the objective(s) have been achieved, there is no need to fill out this field.
Page	***Affected CIs***
Field	**Utilization**
Configuration Items	Use this field to create a link with all the configuration items that will be affected by the execution of this work order. Only use this field if the work order category is "Implementation".

Page	***Workflow***
Field	**Utilization**
Predecessors	Use this field to create a link with all the work orders that must be completed before this work order can be executed.
Successors	Use this field to create a link with all the work orders that should not be executed before this work order is completed.
Page	***History***
Field	**Utilization**
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.