Contents

[Release Procedures 1](#_Toc172208615)

[Iterations 1](#_Toc172208616)

[Iteration Deck 1](#_Toc172208617)

[Iteration Scenarios 2](#_Toc172208618)

[Documentation 2](#_Toc172208619)

[SCR Descriptions 2](#_Toc172208620)

[Release Screenshots 2](#_Toc172208621)

[Test Case Files, Test Scenario Outline, and Test Case Peer Review Checklist 2](#_Toc172208622)

[Code Review Checklist 2](#_Toc172208623)

[Release Notes 3](#_Toc172208624)

[Release Summary and Approval Form (RSA) 3](#_Toc172208625)

[Product Backlog Report 3](#_Toc172208626)

[Software Test Report (STR) 3](#_Toc172208627)

[Role Matrix 3](#_Toc172208628)

[Release Day Tasks 4](#_Toc172208629)

[Appendix 4](#_Toc172208630)

[Release Day Task List 4](#_Toc172208631)

[Iteration Deck Examples 5](#_Toc172208632)

# Release Procedures

## Iterations

### Iteration Deck

* Create an iteration deck for each SCR in the release with the following file naming convention:
  + RN-XXX – Iteration – YYYY-MM-DD
* Include initial slide with Legend for slide box colors. [Example](#_Iteration_Deck_Examples)
* Include title slide with ProjectName and the RN-### - SCR Title. [Example](#_Iteration_Deck_Examples)
* Make sure all slides (outside of title slides) in the Current Iteration section have date and slide number in the footer.
  + Date should be the same as the date in the file name of the deck.
  + Slides in the Previous Iteration sections should have the date for the iteration deck they were introduced.
* When creating follow on iteration decks, make sure to have a Previous Iteration slide and then a Title slide for the iteration in which that set of mockup slides were a part of.
  + i.e. Previous Iterations > Iteration 1 – YYYY-MM-DD > Mockup slides from iteration 1.  
    Iteration 2 – YYYY-MM-DD > Mockup slides from Iteration 2. [Example](#_Iteration_Deck_Examples)
* Once an iteration is complete, attach that iteration’s deck to the Technical Solution - Design Review: UI task for the corresponding SCR.

### Iteration Scenarios

* Gather information and put together a scenarios document for the current release SCRs that are approved to go to development.
* Put the finalized iteration documents up on Teams for and share with the team to make sure all scenarios for the iteration are captured.
* Once an iteration is complete, attach that iteration’s scenarios to the Technical Solution – QA Review task for the corresponding SCR.

## Documentation

### SCR Descriptions

* Gather information and put together a document for the current release’s SCRs with fleshed out descriptions.
* Put the finalized description for the SCR in the change request in TFS.

### Release Screenshots

* Create a slide deck in PowerPoint with a title slide, slide numbers, and date of release in the template.
* Capture screenshots of changes relating to the SCR and put them on a slide with the SCR# and Title as the title of the slide. Utilize the notes section to lay out scenarios, pertinent information, or relay how that slide screenshot flows in the storyboard.
* Upload working PowerPoint to the Teams.
* On the Wednesday before release week, review the document with Project Lead, Team Lead, and QA.
* On the day of the release, make sure to remove the file from Teams to make room for the next release’s documents.

### Test Case Files, Test Scenario Outline, and Test Case Peer Review Checklist

* Create or edit test case files.
* Capture additions or changes to ProjectName application relating to the SCR and highlight them.
* Upload working test case file(s) to SharePoint folder titled “Test Cases.”
* Create SCR-focused test scenario outline.
* Upload working SCR-focused test scenario outline to Teams in folder titled “Test Scenario Outlines.”
* QA and Dev Teammates review newly created or edited test case files and test scenario outline against the TFS SCR Change Request description, ProjectName application, Test Case Peer Review Checklist, and mockups on Teams.
* On the Wednesday before release week, review Test Case Peer Review Checklist to finalize test case(s) and test scenario outline for the release.
* Up-to the Friday after the release, verify Test Case Peer Review Checklist and test scenario outline finalized for SharePoint archive and attach to TFS Review ticket.

### Code Review Checklist

* After code development, the Dev team member assigned to the task attaches a copy of the Code Review Checklist to the code review task.
* Dev team member updates and verifies both Web and DB checklist items that have been reviewed.

### Release Notes

* Utilize the finalized Release notes document from the previous release and add in a new section at the top for the current release.
* If the release includes a Maintenance Task Item and other fixes are included, standard language listed below in the [Maintenance Release](#_Maintenance_Release) section do not need to be included.
* On the Wednesday before release week, run the query for ProjectName – Customer Report – Releases and utilize the information for the current release to create a draft version of the Release Notes. Send the document to Lead and Team Lead for review and finalization.
* Once finalized, create PDF version of the document.
* Project Lead will send Finalized Release notes along with the Backlog report to the customer as soon as the release is complete, and the site is out of Maintenance.

#### Maintenance Release

* If the release is only for maintenance, create a Release Notes document as per usual and utilize the standard language below:
  + System maintenance and/or software upgrades
* Maintenance only releases do not require the Release Notes to be sent to Project Lead. They will go out with the next Major Release as part of that Release’s Documentation.
* Maintenance Releases are shown on the ProjectName – Customer Report – Releases query in TFS for easier visibility and tracking.

### Release Summary and Approval Form (RSA)

* Create the RSA document with current date and release information.
* Only system change requests with an assigned SCR number will be included in the RSA document.
* On the Wednesday before release week, send the document to Project Lead and Team Lead for review and finalization.
* Once this document is finalized, create a PDF version, and include a digital signature box for the customer to sign off on the release.

### Product Backlog Report

* Review Release query the week of deployment (earlier the better) so any work items that are not in a closed state can be verified and closed.
* Pull new Backlog Report once Deployment has finished.

### Software Test Report (STR)

* Create STR document.
* On the Wednesday before release week, review document with Project Lead at the QA/UI Tag Up.

### Role Matrix

* Update each tab in the Role Matrix as necessary.
* Make sure the release number is updated reflecting changes are “As of Release x.x”.

Finalize documents and make sure they are sent to Project Lead the Wednesday prior to the week of release so that she can send them to the customer.

## Release Day Tasks

* When Maintenance has finished, send Project Lead an IM to alert them that the Product Backlog Report is being worked on. Pull a finalized Product Backlog Report and send to Project Lead.
* Make sure Finalized Release Notes are sent to Project Lead.
* Remove the release documents from the ProjectName Teams file section.
* Archive meeting notes from the release in Teams.
  + Use the ellipsis to make a copy of the meeting notes and save it to the “Tag Up – Meeting Notes” folder.
  + Make sure the name of the file includes the current date of the release (example: ProjectName – Tag Up – Bi-Weekly – Meeting Notes – 2020-12-04.docx)
* Upload the finalized Release Notes (Doc and PDF) to the SharePoint site under the current release header.
* Discuss and finalize any SCR or related mockups/documents with QA/Requirements by Friday after the release and then upload to the SharePoint site under the respective SCR header.
* Create new Task List in Teams for next release.
  + Copy template into new Release bucket
  + If new tasks are required add them to the bucket
    - If new for all releases going forward, make sure to include it in the template bucket as well.
    - Release set-up tasks are Blue.
    - During/Near end of release cycle tasks are Yellow.
    - Release Day tasks are Green.
* Final draft of the STR is sent to Project Lead.

# Appendix

## Release Day Task List

|  |  |
| --- | --- |
| Task Name | Task Items |
| Schedule Release | Maintenance Window |
| Team |
| Generate Release Documents | Release Notes |
| Release Summary and Approval |
| Generate Documents for Change Requests | SRS Documents |
| Mockups |
| Present STR Draft |  |
| Resolve TFS Tickets |  |
| Update Change Reference |  |
| Tear Down Documents | Requirements |
| QA |
| Upload to Dev Team SharePoint |
| Archive Meeting Notes |  |
| Role Matrix Update |  |
| Pull Update Backlog Report | Customer Report Backlog Report |
| Customer Report Release Report |

## Iteration Deck Examples

|  |  |
| --- | --- |
| Slide | Example |
| Legend | Text  Description automatically generated with low confidence |
| SCR Title |  |
| Previous Iterations |  |