Release Management Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | The (DEMO) Exchange Service is used by the full Enterprise and by critical business processes. Therefore, changes to this service need to be scheduled, planned and tested together and will involve many IT stakeholders and groups. For these reasons, we want to manage it as a Release thru the release management process. |
| Customer Challenge | Many small changes are being done independently. The changes are not coordinated and sometimes the changes are put into production at different times leading to failed changes and/or incidents. Work that is not part of the individual changes does not have a place to be recorded, assigned, and tracked.  Release Management can help customers being their change process under control. |
| Engage Them | * Do you know which changes are required to deliver a new function that is required by the business? * Can you ensure that all these changes are being evaluated together and scheduled for the same maintenance window? * Are you properly scheduling other activities, such as end user training, which is necessary for the business to adopt this new functionality? |
| Differentiators | * Release calendar allows you to manage the changes included in the release as a group. When rescheduling a change, the calendar offers available dates within the maintenance windows or the Release Manager can visually drag and drop the change on the calendar display. * Release models define workflow and track higher level tasks associated with the release management process, while maintaining flexibility to add additional tasks on the fly. * To more effectively manage a Release, the tiles on the Included Changes tab identify changes in the Release that are in Breach, Unscheduled, or Awaiting Approval. |

# Quick Flow

Quick flow is to provide a benefit oriented overview, to introduce customer to value and should be completed in ~5-10 minutes. Optional sub-flows are below. Make sure your environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide to the demo.

| **Do** | **Say** | **Cheat Sheet** |
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| **Release Calendar and reschedule a change**   * As [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com), Go to Mega Menu > Change > Calendar> View Release (top right corner of the page) * In the release drop-down, select the “(DEMO) Exchange Service – minor monthly release” release. * Drag and drop a scheduled change on a different maintenance window on the calendar to show the visual way to reschedule a change. (If there is no scheduled changes visible on the calendar, then “Scroll to change” button near the name of the change ) * Drag this change outside a maintenance window. Notice the red lightning bolt icon appears indicating it is in breach of the maintenance window. Click on the lightning bolt and press “Suggest next available window” and let it move the change, and click the disk icon on the calendar to save it. * Select the down arrow next to the change on the calendar and press “View additional available windows” to see other possible times to reschedule. Close the Available Windows list box. | * To ensure related changes are being evaluated together and scheduled within a defined time window, customers often create a Release. Let’s look at how SMA-X leverages the model concept to ensure releases are consistently planned and executed, and how the calendar and release workflow, and management of changes as a group assists the release manager. * Viewing the Release on the calendar shows all the Included changes with the Release window shown in a blue line at the top of the list * To reschedule a change, the Release Manager can ask the calendar to offer alternate dates or they can visually drag and drop the changes to the desired maintenance window within the Release window. | * Change > Calendar > View release * “(DEMO) Exchange Service – minor monthly release” release * Click down arrow next to change to see available maintenance windows * Drag and drop to reschedule a change outside of a maintenance window. |
| **View Release**   * In the upper left corner of the calendar, click on “(DEMO) Exchange Service – minor monthly release” release number to open it * On General page, focus on release model field in Classification section * Show the workflow tab | * Notice some of the fields here in the Classification section – the release type (Major), affected service (DEMO) Exchange Service) and release model (Minor release). * Choosing this release model help to follow the company approved process for minor releases, including tasks needed for the release itself, such as preparing release documentation and training for support staff | * Release * “DEMO) Exchange Service – minor monthly release” * Discuss minor release model and pre-defined workflow |
| **Add Additional Task**   * This release is in Plan and Design phase. * Go to Plan and execute tab, Task plan * Add a new manual task for Build and test to “Schedule a release announcement webinar” with a planned start and planned end date and save (if the Scheduled start time for the release is in the past, you will need to update the Scheduled start time to a date in the future) | * We have determined that we should schedule a release announcement webinar – let’s add it as a task in the Build and Test phase of this release. * Notice the standard tasks are already here, these are inherited from the release model we are using. * In addition to the standard tasks, more tasks can be added on-the-fly to the release workflow process. | * Create new task to “Schedule a release announcement webinar” on the Build and Test phase task plan |
| **Included changes tab**   * View list of included changes and tiles above the list. * Click on Unscheduled tile * Select one of the unscheduled changes (select row, not link) * Click notify change owner * Text: I will schedule the change for this release. Please have a look later. * Send | * I’m sure you noticed these tiles at the top of the Included Changes tab. They help me, as release coordinator, to track the included changes and quickly identify areas that need my attention. * Some of the changes are still unscheduled. By clicking on the tile, I can quickly filter the changes list to see the details of unscheduled changes and can take action right from here. * I really need to have this change scheduled ASAP and will do it myself now. But first, I want to notify the change owner about it. | * View list of changes * Unscheduled changes tile * Select one change * Notify owner * send |
| **Approval plan**   * Back to release page via ID URL at the top * Workflow tab * Show the Approval tab [just show approval plan even though it hasn’t started yet, no drill down] | * As the release moves on thru its lifecycle, it passes the Build and test phase, including completion of the defined tasks. *(Optional, you can move the release thru the Build and Test phase and complete release tasks to get to the Approve Deployment to activate the approval plan)* * Then it gets approved according to the governance level approval plan. * And moves into deployment phase where changes execute their implementation plans. | * Work flow discussion * Approval plan review |
| **Post deployment CI tiles**   * Let’s take a look at another release which is already in execution. * Release module queue, select Payroll release * Open and go to Included changes * Show the mega tile, click on Failed change tile | * Once the release is in Deployment, it is critical for me as the release coordinator, to track the status of the changes execution. * The tiles dynamically adjust to what becomes now the most important thing for me and that is tracking the changes status. * After the release is deployed, using the Survey capabilities of SMA-X I can collect feedback from IT stakeholders and even end users about the quality of the release and its process to see how we can further improve. | * Payroll release * Included changes * Post deployment tiles |
| **After your demo is completed:**   * Delete the manual task you created in the Exchange minor monthly release. |  |  |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
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# Demo Preparation

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Use case was modified to use an out-of-the-box release for the (DEMO) Exchange Service.
* Create Payroll application upgrade release
* Relate at least 3 changes for the Payroll Service to the Payroll release
* One change should be worked through workflow to the Review phase and then marked as Failed completion code to populate post-deployment tiles
* Advance the Payroll upgrade release to the deployment phase (complete tasks and approvals and required fields for each phase as you go)

## Per-demo Checklist (in addition to above)

* Delete the manual task you created in the Exchange minor monthly release.