BOSTON UNIVERSITY

USERS' GUIDE

Release Management

Service Management and ServiceNow

SERVICE EXCELLENCE SUITE

Release Management Users' Guide

Table of Contents

Introduction

This document defines the Boston University Information Services & Technology (IS&T) Release Management process. It is based on the Information Technology Infrastructure Library® (ITIL) and has been adapted to address Boston University's specific requirements.

This document should be read by all Boston University employees who are adopting the IS&T Release Management process.

It is divided into the following sections:

Overview and Objectives	States the objectives of the Release Management process at Boston University and what is in-scope and out-of-scope to the process.
Release Management Policies	Outlines policies that support the Release Management process.
Key Attributes of a Release	Releases are separated into three different categories for managing the work at differing levels of detail. The Release may consist of brand new functionality, enhanced features, system updates, or any other change that requires a push to the production environment. Each release may also consist of a number of tasks required to implement the release.
Process Definition	Illustrates the high-level Release Management process with the following use-cases covered: ▪ Manage Release ▪ Manage Release Item ▪ Manage Release Task
Roles and Responsibilities	Identifies the roles within the Release Management process and the responsibilities for each role.
Release Procedures	Specifies procedures for completing ServiceNow's Release forms, including which fields are minimally required.
Key Performance Indicators	Identifies the metrics for measuring the success of the Release Management process. These metrics will be defined once the system and processes have stabilized.

Overview, Objectives, and Current Scope

Overview

Release Management is the process responsible for planning, scheduling, and controlling the build, in addition to testing and deploying Releases. Release Management ensures that IS&T delivers new and enhanced IT services required by the business while protecting the integrity of existing services.

Objectives

Boston University's objectives for the Release Management process are:

- Increase the number of successful Releases, including reducing the number of Releases with unexpected outcomes.
- Decrease the number of incidents caused by Releases.
- Create a single documented process for managing all Releases.
- Maintain a single repository for recording all Releases through the lifecycle.
- Ensure that the process is adopted, adhered to, and escalated to management if there are compliance issues.
- Improve coordination between IS&T groups to ensure smooth and timely delivery of IT services.
- Improve productivity by establishing standard release processes and tooling.
- Initiate the Release Management process to provide sufficient lead-time for adequate impact analysis by the CAB.
- Ensure that auditable Release controls are established and documented .
- Communicate Releases to IS&T, affected client representatives, clients (where appropriate), and other IT organizations (where appropriate).
- Streamline the procedures so that there is an appropriate balance between the complexity of the Release and the required controls.
- Harvest lessons learned from the Release Management process that could be applied to other areas of Service Management.

Current Scope of Release Management

Any introduction of a new service into production, any large change to an existing service, or multiple changes to an existing service must adhere to the Release Management process. Single, small operational changes, or emergency changes are not required to adhere to the Release Management process. The nature of small operational changes will vary depending on the service. Individual guidelines regarding Release Management process exemptions will be defined on an individual basis with each Service Owner. All changes to existing services are expected to adhere to the policies below unless otherwise agreed to by the Service Owner and the Release Management process owner.

Release Management Policies

- All **projects**, **bundled changes to an existing service** (releases containing multiple enhancements/fixes) and **cyclical changes to an existing service** must go through the Release Management process and must have a completed request for change (RFC) with appropriate approvals.
- Whenever possible, changes to an existing service should be bundled together and released on a regular (e.g., monthly) basis using the Release Management process.
- A single Release Engineer must be identified for every Release. The Release Engineer will be responsible for successful coordination and execution of the Release, as well as ensuring all required documentation related to the Release exists.
- Proof that controls (initiation, testing, and approval) have been followed for all auditable Releases shall be stored with the ability to be reproduced.
- Each Release shall be initiated through a standardized and approved process (service request, incident management, problem management, or PRIME).
- Each Release should be well tested and verified prior to implementation.
- All implementation work on the Release should be completed by the Planned End Date/Time.
- Validation that the Release has been completed successfully should be confirmed through post-release testing.

Roles and Responsibilities

A role is a set of activities. An individual can perform more than one role. The current roles and responsibilities associated with BU's Release Management process include the following:

Governance

Governance refers to a body, an individual, or a group of individuals representing the business stakeholders of the service offered via a solution suite or other means. They are accountable for business requirements for a Release and are responsible for arriving at a final release bundle in consultation with Release Team Leadership. They also represent the voice of customers/clients and are accountable for resolving conflicts in requirements as well as defining metrics targets for the release. Their tasks include:

- Define Release scope, priority, and timeline constraints.
- Work with Release Team Leadership to arrive at final Release scope and priority.
- Document business requirements.
- Optionally set metric targets (including timeline constraints).
- Communication of Release scope to Release Team Leadership.
- Communication to Key Customer stakeholders. (Optional and could be delegated to Release Team Leadership.)

Release Team Leadership

Release Team Leadership refers to a formal group of functional and technical experts accountable for deploying a Release Bundle into live production use. Depending on the type of Release, the Leadership Team may include Project Managers, Technical Leads, and/or Service Owners. The team works with Governance to set the priorities, keeping in mind the technical constraints while committing to Release scope. They represent the operational leadership (working closely with Release Team) translating the business vision into a functional solution using appropriate means. Their tasks include:

- Reach consensus with Governance on Release scope, priority, and timeline.
- Document the Release Bundle as a functional spec.
- Define final version of Release milestones, time line, risks, contingency and mitigation plans.

> Note: Release milestones to include an operational readiness plan (end user/operational/internal training and operational readiness tasks). This team leadership is also likely to interface with Applications (Dev, Mgmt, and Arch), QA, Documentation, Infrastructure, and Training to finalize milestones.

Release Engineer

The Release Engineer has ultimate responsibility for ensuring the Release is executed in accordance with the policies and guidelines defined in this document. The individual assigned as Release Engineer will vary depending on the service or sub-service.

The Release Engineer is intended as a technical role with the skills necessary to understand all technical implications of the Release. Whenever possible, the Release Engineer should be independent from the service stakeholders and individuals responsible for executing the technical changes to the service to ensure an objective approach to Release Management. Their tasks include:

- Communicate with Governance, Release Team, Change Manager & CAB, Customers/Business, and Quality Assurance.

- Document Release Bundle in the tool.
- Create placeholder RFC for the release based on available details (provisional approval by CAB).
- Validate all Release Tasks are completed prior to deployment.
- Communicate Release status to the Release or project teams, and the Service Owner.

Release Team (led by Release Engineer)

Release Team refers to a formal team accountable for implementing the Release Bundle in line with functional scope set by Release Team Leadership. They work with Release Team Leadership to define the Release Task List and work assignment, and monitor progress in addition to sharing status reports. Their tasks include:

- Develop the fine-grained Release Task List in consultation with Release Team Leadership (work assignment, timeline, and dependency). The Release Task List should include back out and handover to operations as mandatory steps.
- Execute Release Task List and update status in tool. Tasks include training and documentation.
- Update tool with documentation references including pointers to enterprise content management solutions such as SharePoint.
- Fix defects from QA testing and UAT.
- Deploy the Release Bundle to production environment after QA/UAT.

QA & UAT Team

QA & UAT Team represents the Quality Assurance interface with Release Management. It is responsible for verifying that the software release meets its functional scope and business requirements. They will develop formal test plans, cases, and document results appropriately so that a complete audit trail of testing is available for the Release. They will also work with Release Team to resolve defects. Their tasks include:

- Develop test plans and test cases.
- Execute tests and document results.
- Participate in Release's go/no-go decision meeting to share testing results.
- Document defects and work with Release Team to resolve them.

Change Manager & CAB (Change Advisory Board)

Change Manager and CAB represent the Change Management process interface with Release Management. Their tasks include:

- Review RFCs and approve them in consultation with Release Team Leadership.

ServiceNow Release Module Overview

What Is ServiceNow?

ServiceNow is the enterprise service management ticketing tool that is used by IS&T and its University partners to manage many of its ITIL processes. It is the goal of IS&T to have Incident, Change, Configuration, Request Fulfilment, and other service management processes managed through the same tool. ServiceNow delivers the product via the SaaS (Software as a Service) model, which enables IS&T to deploy more quickly, with less technical investment. Resources that would be used to manage ServiceNow are freed up to focus on the core mission of enabling the University's research and teaching priorities.

Service Now Release Module

ServiceNow handles Releases using the task record system. Each planned feature is generated through a variety of means as a task record, populated with the pertinent information in individual fields. These tasks can be assigned to appropriate Release Management team members, who will deal with the task as appropriate until the release has been properly deployed. Release Management can be effectively used to coordinate and planned Releases composed of individual features.

Key Attributes of a Release

Types of Releases

Releases are separated into 3 main categories for managing the work at differing levels of detail:

- Release – Captures the overall detail of each particular release.
- Release Item - Details the separate pieces of work that will be deployed as part of the individual Release.
- Release Task – Details the work required in order to deploy each Release Item.

Release

Releases represent a planned release for a product (hardware or software). The content of a Release is defined by the features, or Release Items and associated Requests for Change (RFC) that it implements.

Each Release is includes information such as:

- Release Name and Description
- Release Engineer
- Service, Service Component and Configuration Item
- Planned/Actual Start Dates

A Release should not be completed until all Release Tasks have been updated and marked as 100% completed. There will be situations where a Release Task or a Release

Item may need to be removed from the Release. In this situation, the best practice is for the Release Engineer to create a new Release, and place that problem Release Task or Release Item into the new Release for tracking through to completion.

Release Item

Each Release is made up of one or more Release Items. These items are the new/modified features, or Release content, that will be delivered as part of the Release Bundle. The following information will be displayed:

- The type of Release Item (Defect, Problem, Project, or Service Request).
- A short description of the functionality being delivered.
- Details of the RFC to which this particular Release Item is linked.

Release Task

Release Tasks represent a number of tasks, or actions, that are **required** to implement each Release and may be performed by a multitude of resources across many teams. A Release Task is the most granular of detail within the Release Management process and may include such information as:

- The short and long description.
- Task type.
- The assignment data by group and individual.
- Due date.
- Percentage complete and status.
- Work notes.

Approval Process

The approval process for Release Management is managed by the business, and not within ServiceNow. Each Release is defined and approved prior to creation of the Release within the tool. In order to move any Release into production, however, an RFC will be required.

Please refer to the Release Task Checklist below for a list of items that may be required for an RFC to be approved so that the release may move into production. The checklist consists of:

- Location of all Release documentation.
- Release plans.
- Confirmed and completed test (QA/UAT) documentation.
- Operational planning documents.

Approvals Required

The lead-time required for submitting a Request for Change is based upon the type, scope, and risk of the proposed Change as defined in Boston University's Change Management process.

Interaction with Change Management

Change Management Interaction

Change Management encompasses all changes in technology, systems, applications, hardware, tools, documentation, and processes, as well as the roles and responsibilities of people. The goal of Change Management is to ensure that all changes are deployed successfully into the production IT environment in the least disruptive manner.

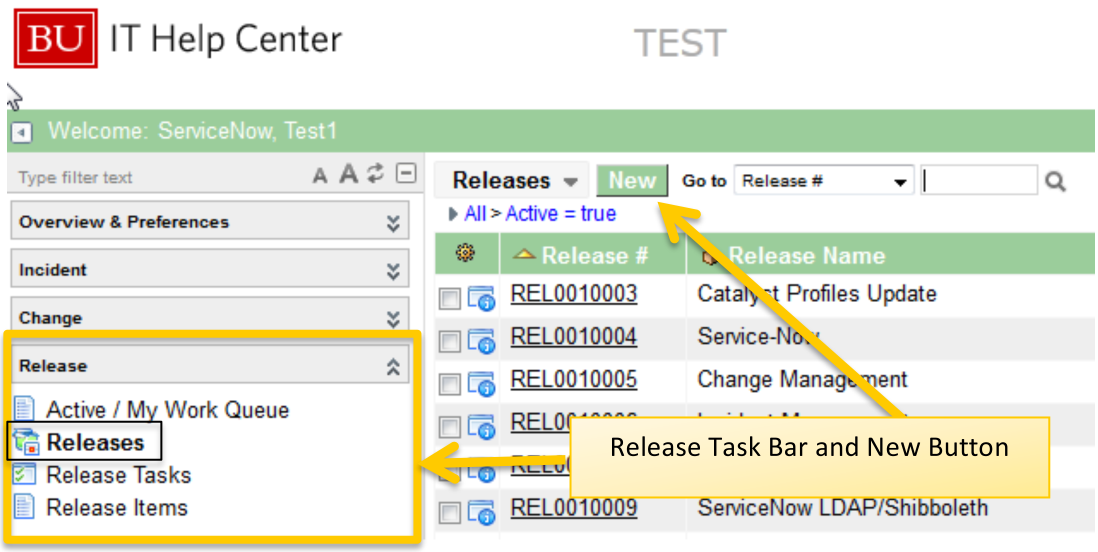
Release Management makes the Change Management process more proactive, predictable and auditable. It groups a series of Changes into a collection known as a Release, which is based on defined common characteristics of the Changes.

Where Change Management looks at the overall IS&T landscape to ensure coordination and compatibility of all Changes, Release Management addresses the specific details associated with a one-time change to, or introduction of a single service.

Release Management Procedures

To Create a New Release

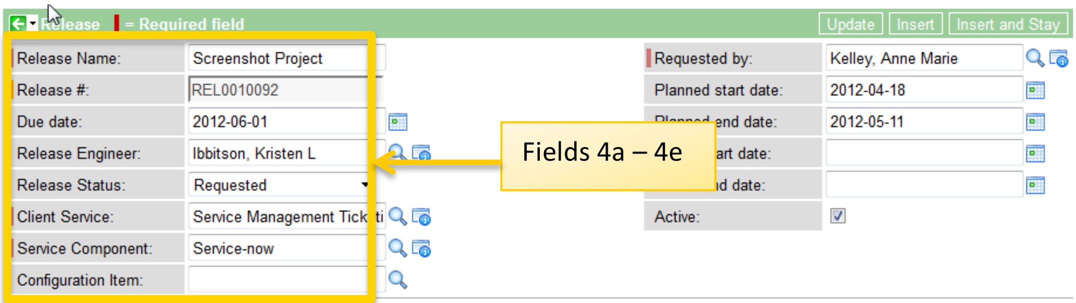
1. Using your BU login name and Kerberos password, log in to ServiceNow at http://bu.service-now.com.
2. Select **Release** from the left pane.



3. From the **Release Module** list view, click on the **New** button to launch a new Release form.
4. Fill out the appropriate fields for the Release.
   a. **Release Name***.
   b. Select **Due Date** from the calendar or type in the date.
   c. Select **Release Engineer** using the selector or begin to type last name.
   d. Select appropriate **Release Status** from the drop-down menu. States must be manually changed throughout the lifecycle of the release. To help the user identify the most appropriate status, their definitions and uses are:
      i. **Idea** – *The desire to implement a certain feature, product, or functionality has been generated and logged for tracking.*
      ii. **Business Case** – *The idea is being turned into a business case.*
      iii. **Requested** – *The Business Case/Idea is being reviewed for confirmation that the team should move forward.*

  iv. **Scoping** – *The Business Case/Idea is being sized for level of effort.*
  v. **Approved** – *The Business Case/Idea has been approved and the Release is now slated to move forward.*
  vi. **In Progress** – *The release is in the process of being analysed, designed, and developed.*
  vii. **Testing/QA** – *The Release has been moved into the QA environment for testing.*
  viii. **Launch** – *The Release is being moved into the production environment.*
  ix. **Complete** – *The Release has been moved into production and all required tasks are complete.*
  x. **Rejected** – *The Release was not approved to move forward.*
  xi. **On Hold** – *The Release and all associated tasks are not currently being progressed or scheduled for movement into production.*

e. Select **Service***, **Service Component*** using the selector, and optionally **Configuration Item.**
  i. The **Service Component** field will only allow you to choose a component that is associated with the **Client Service** chosen.
  ii. If you know the affected **Service Component**, you may enter that first and the system will fill in the **Client Service** automatically.

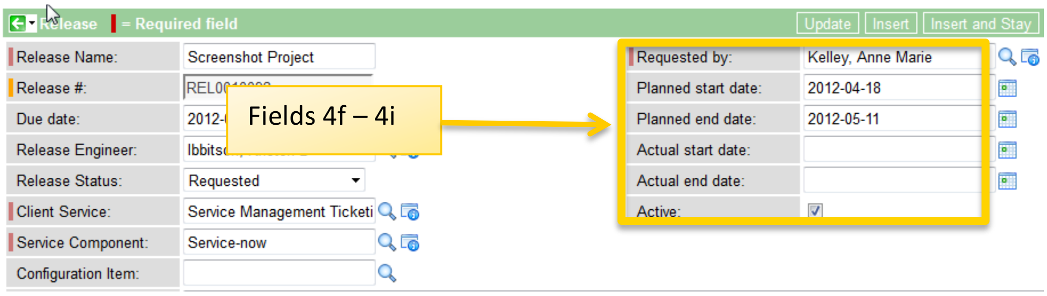


**Required Fields*

4. Continue to fill out the remaining fields on the form:

  f. Select **Requested By*** – *This should be the Service Owner for the Release.*
  g. Type in a meaningful **Short Description*** and **Long Description.**
  h. Select **Planned Start** and **End Date** appropriately.

i. Select **Actual Start** and **End Date** appropriately.

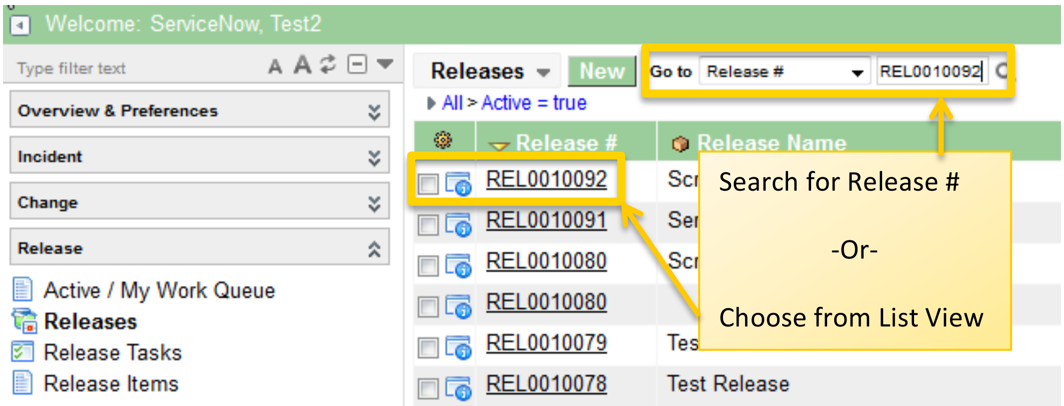


**Required Fields*

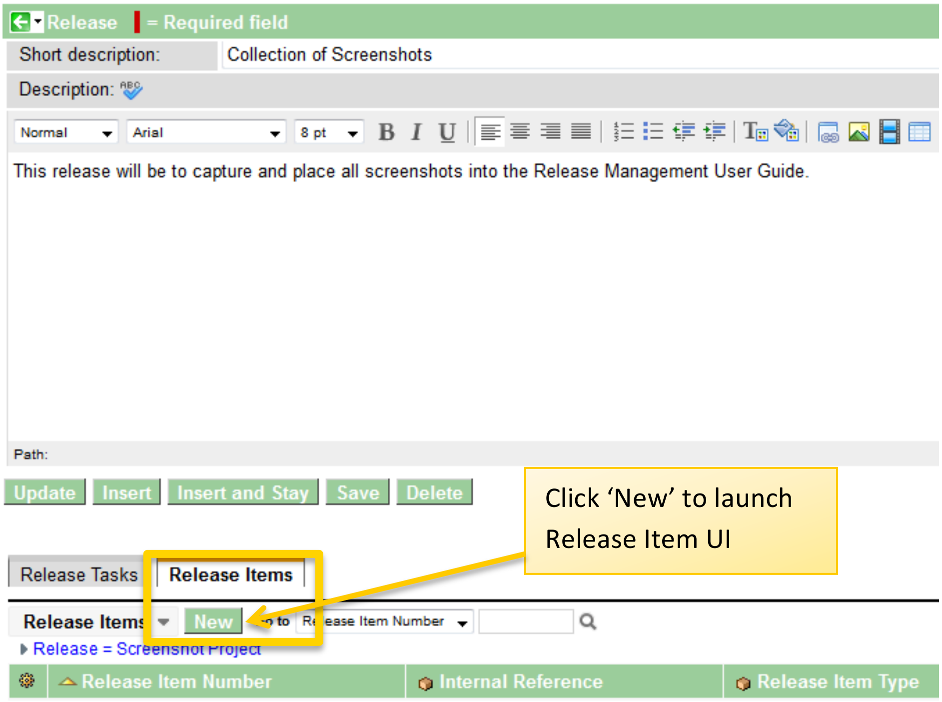
5. Click **Save/Submit** once all necessary inputs are in place.

To Create a Release Item

1. From the Release List View, search for and select the specific release.



2. Navigate to the **Release Item** tab at the bottom of the UI and click on **New** to launch Release Item UI.



3. Fill in the appropriate information within Release Item fields
   a. Select **Release Item Type** from the drop-down menu.
   b. Each Release Item Type will open up different fields for association/linking purposes.
      i. **Enhancement**
         1. **Service Request** field opens on form.
         2. Choose the **Service Request** and the **Internal Reference** field will automatically populate. This field will overwrite any changes upon save.
      ii. **Defect/Incident**
         1. **Incident** field opens on form
         2. Choose the **Incident** and the **Internal Reference** field will automatically populate. This field will overwrite any changes upon save.
      iii. **Defect/Incident – Non-ServiceNow**
         1. **External Reference** field opens on form.
         2. Enter a tracking number from a non-ServiceNow ticketing tool.

iv. **Problem**

1. **Incident** field opens on form.
2. Choose the **Incident** and the **Internal Reference** field will automatically populate. This field will overwrite any changes upon save.

v. **Project**

1. **External Reference** field opens on form and is required.
2. Typically a URL to the project documentation.

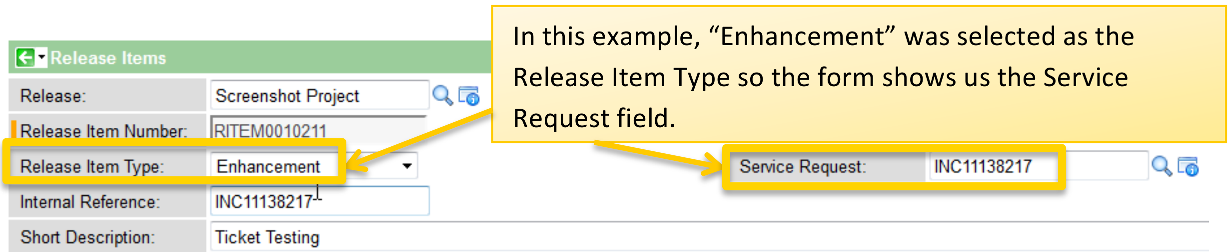
vi. **Service Request**

1. **Service Request** field opens on form.
2. Choose the **Service Request** and the **Internal Reference** field will automatically populate. This field will overwrite any changes upon save.

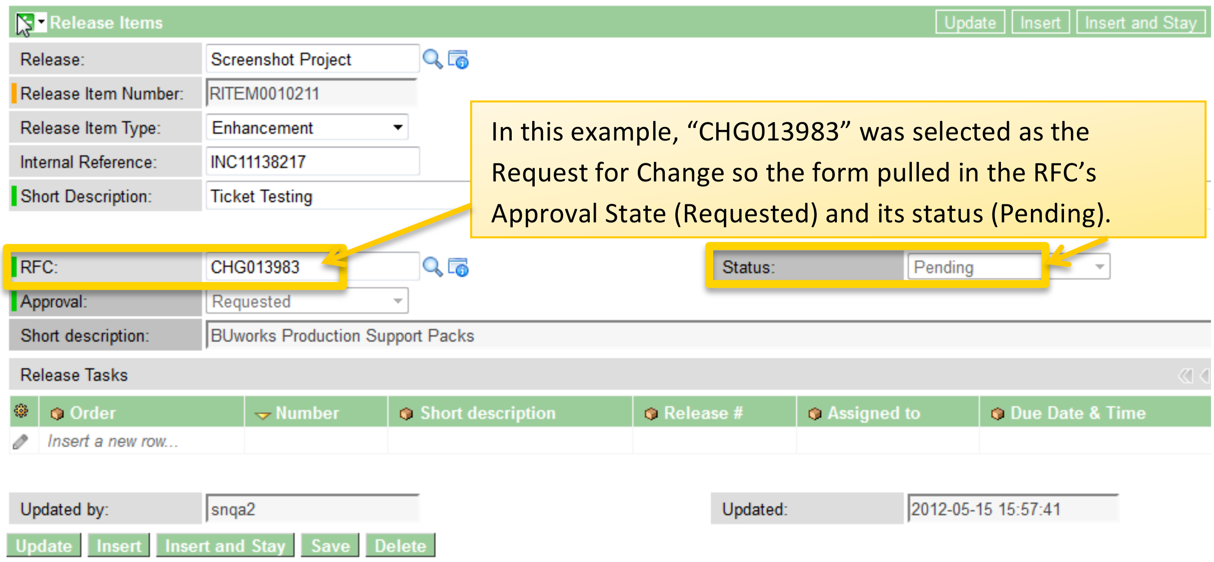
vii. **Service Request – Non-ServiceNow**

1. **External Reference** field opens on form.
2. Enter a tracking number from a non-ServiceNow ticketing tool.

c. Type in an appropriate **Short Description.**



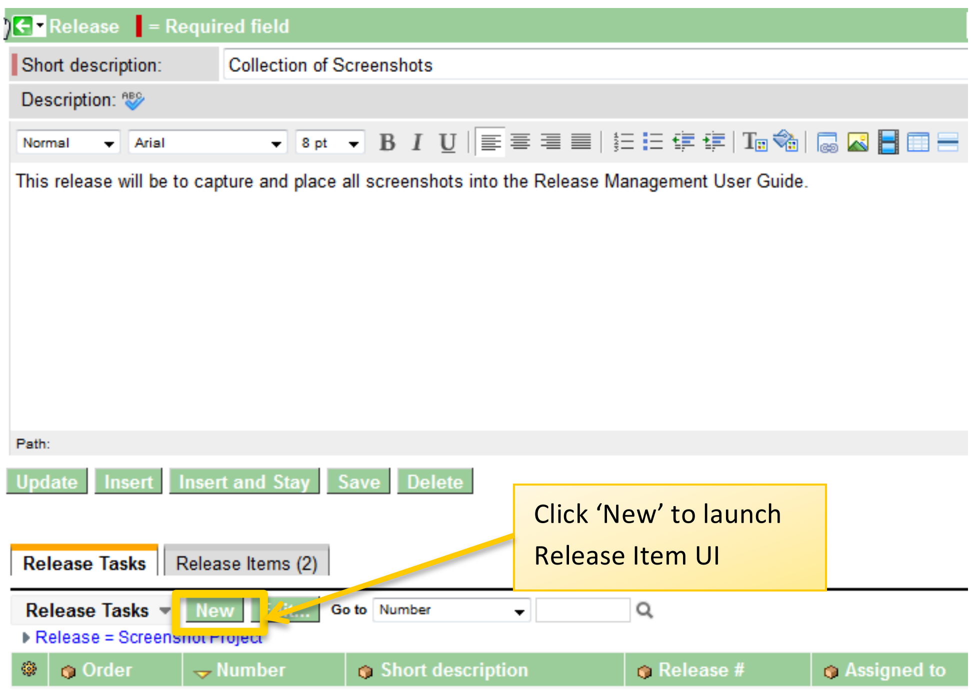
d. Select an RFC from the selector and the system will populate the RFC description and **Current Status** as well as **Approval Status.**



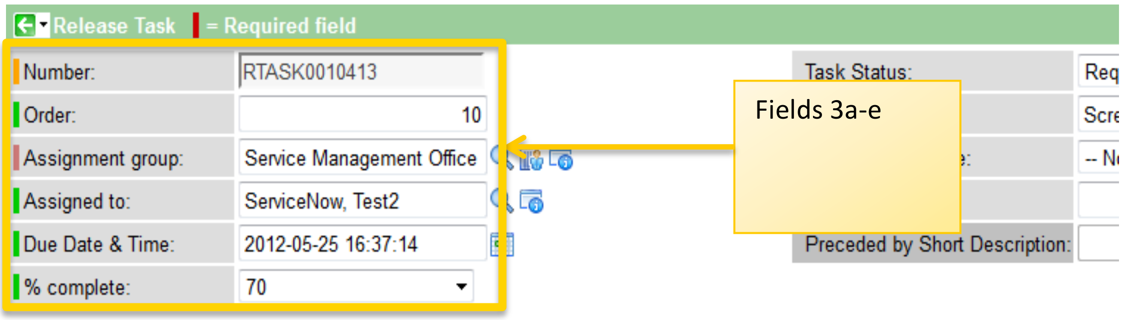
4. Click **Save/Submit** to associate this newly created Release Item with the Release.

To Create Release Task:

1. From the Release List View, search for and select the specific release.
2. Navigate to the **Release Task** tab at the bottom of the UI and click on **New** to launch Release Task UI.



3. Enter the appropriate fields in the Release Task form
    a. **Order #** in which this task should occur.
        i. You may find it easier to order tasks from the list view.
        ii. Use intervals of 10 to help manage the need to insert a new task into the order.
    b. Select an **Assignment Group*** from among the available list.
    c. Select an **Assigned To** from within the selected Assignment Group.
    d. Select **Due Date & Time.**
    e. Select **% Complete** from the drop-down menu.

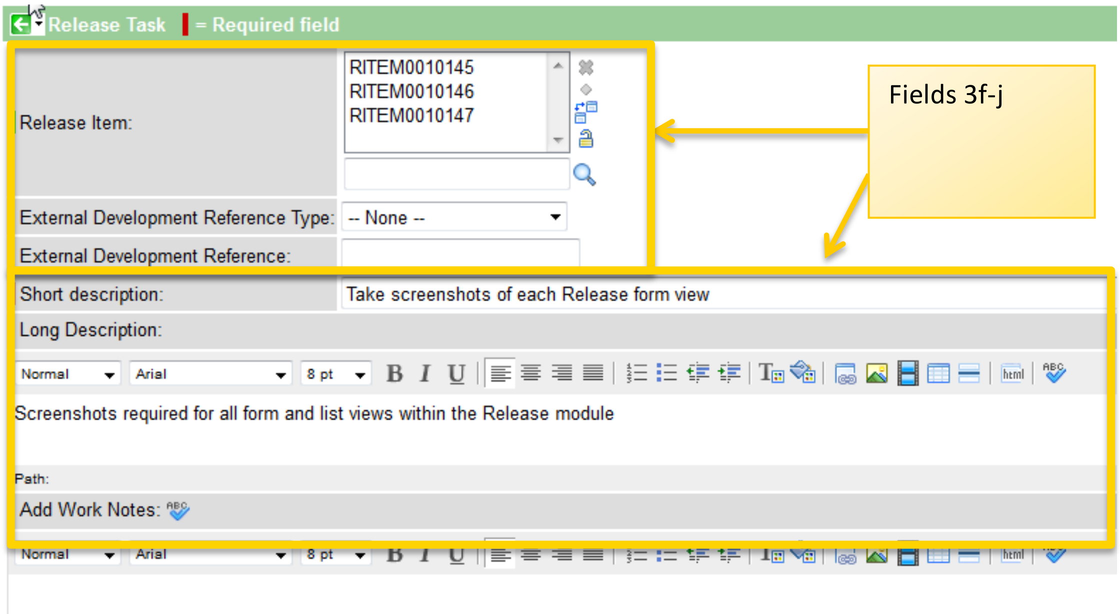


**Required Fields*

    f. Select one or more Release Item Numbers using the search option from the multi-select field.
    g. In case there is an **External Development Reference Type**, select the same from the drop-down menu populated with:
        i. ATPMOVE
        ii. Footprints
        iii. TFS
        iv. UISCGI Move
        v. RMPBUILD
        vi. Subversion
        vii. SAP Transport
        viii. GIT
        ix. Other
    h. If **External Development Reference Type** is populated, type in an appropriate **External Development Reference**.

i. Enter a **Short*** and **Long description.**

j. Enter any **work notes.**



**Required Fields*

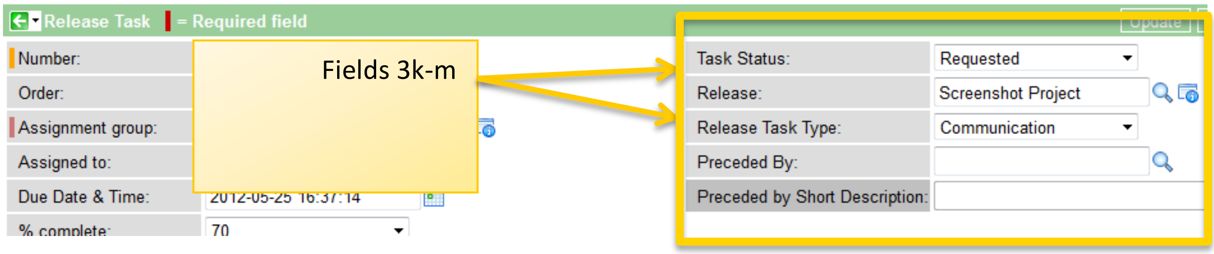
k. Select **Task Status** from the drop-down menu appropriately.

l. Select a **Release Task Type** from the drop-down menu populated with:

  i. Architecture
  ii. Audit Trail
  iii. Backout plan
  iv. Communication
  v. Implementation
  vi. Operation Transition
  vii. Requirement
  viii. QA Testing – Functional
  ix. QA Testing – Volume
  x. QA Testing – Stress
  xi. Security
  xii. Other

m. If necessary, you may select a predecessor task in **Preceded By** using the search option. The use of this field is optional.

i. **Preceded By Short Description** will be automatically populated.



To attach documents to *any part of* the R*elease*, select the paper clip icon in the upper-right corner of the window.

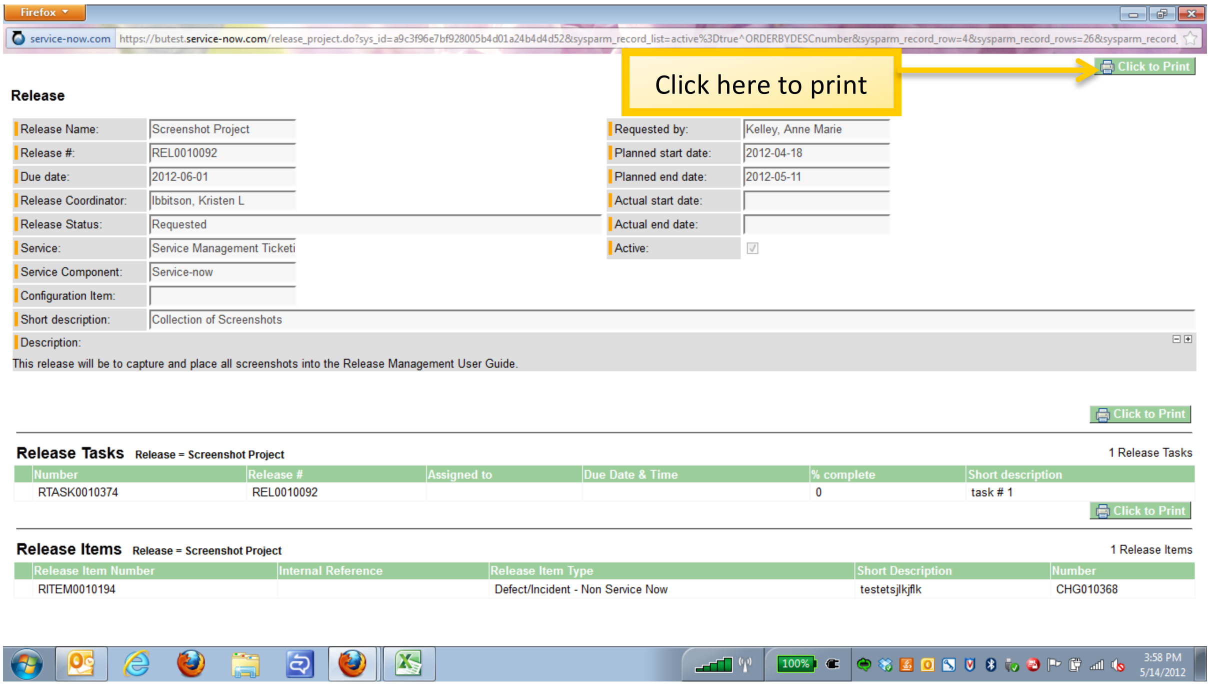
To Update a Release Task:

1. Login to SN and select **Active / My Work Queue** option under **Release** menu from the left pane.
2. Click on a **Release Task** assigned to you.
3. In the Release Task UI, type in **Work Notes** and update **Workflow State** appropriately.
4. Click **Save/Submit** to update the **Release Task** status.

Some fields will be pre-populated or calculated based on information that is entered. These will be greyed out, and are indicated by an orange bar to the left of the field. Other fields will be mandatory; these will be indicated in red or by a red bar to the left of the field.

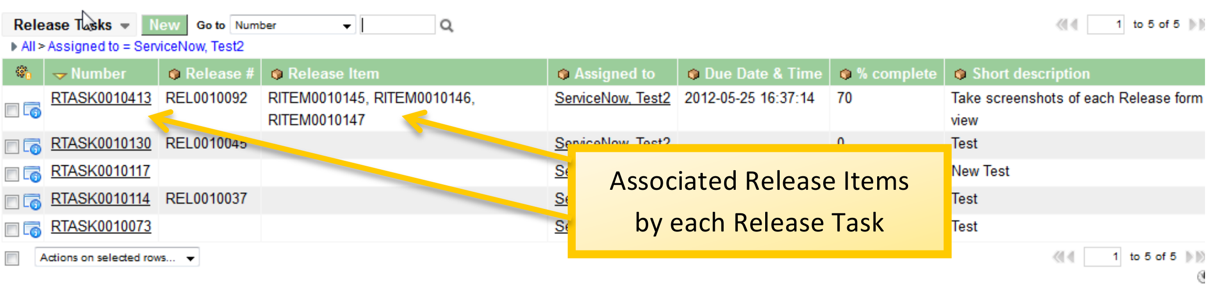
To Print a View of the Entire Release

1. From the **Release List** view, click on the **Release** that you would like to print.
2. In the top, right-hand corner, near the **logout** button, click on the **printer** icon.
3. You will be presented with a consolidated view of the entire Release, and its associated Release Items and Release Tasks.



To View Associated Release Items for a Task

1. Navigate to the **Release Task** list view.
2. Click on the **Personalize List** gear icon.
3. Select and order your fields in the following, suggested order:
    a. Number
    b. Release #
    c. Release Item
    d. Assigned To
    e. Due Date & Time
    f. % Complete
    g. Short Description



Release Task Checklist

- Record location of business requirements.
- Record all references to external build and deploy tooling, ATPMove, TFS, etc.
- Create a back-out plan.
- Create IS&T and Client Contact list.
- Confirm architectural documentation and record its location.
- Confirm that QA testing is complete, including volume/stress testing, record the location of QA documentation.
- Confirm that UAT is complete and record the location of UAT documentation.
- Confirm that transition to operations activities are complete.
- Confirm that an operations transition plan has been created and record its location.
    - Review new cycle requirements or enhanced existing Operational Sustainment Plan.
    - Security and permissions for Sustainment Staff.
    - Skill requirements.
    - Training follow-up for special items.
    - Existing documentation (IS&T from Project or other relevant sources).
    - Implementation plan.
    - Identify a Project Plan item for hands-on knowledge transfer.
    - Items in scope not completed in delivered or deferred.
    - Known defects.
- Set 2-4 week post-implementation follow-up.
- Confirm than an operations plan has been created and communicated and record its location.
    - Work instructions/run books.
    - Standard Operating Procedures.
    - o Troubleshooting guides.
    - Known issues or Problems.
    - Vendor contacts.

Appendix A

Frequently Asked Questions

Q. What is Release Management and why do we need it?

A. Release Management is the process responsible for planning, scheduling, and controlling the build, testing and deploying releases, and for delivering new and enhanced IT services required by the business while protecting the integrity of existing services.

Central IS&T has implemented Release Management for a number of reasons. Namely, to reduce the number of Incidents caused by Releases, to maintain a single documented approach for managing releases, and to ensure that auditable Release controls are established and documented.

Q. What does NOT fall into the domain of Release Management?

A. Release Management may NOT BE REQUIRED for:

- Defect fixes or small Service Requests.

Q. How are Release Management and Change Management connected?

A. The goal of Change Management is to ensure that all changes are deployed successfully into the production IT environment in the least disruptive manner.

Release Management makes the Change Management process more proactive and predictable. It groups a series of Changes into a collection known as a Release, which is based on defined common characteristics of the Changes.

Q. What is the role of a Release Engineer?

A. The Release Engineer is the formal, accountable individual charged with implementing the Release Bundle in line with the functional scope set by Release Team Leadership. The Release Engineer works with Release Team Leadership to define the Release Task List and work assignment. The Release Engineer also monitors progress and shares status reports. The role is expected to:

- Document the Release, Release Items, and Release Tasks in the tool, ensuring all statuses are kept up to date.
- Manage the deployment of the Release into production.
- Conduct a post-implementation review of the Release.

Q. What is the difference between a Change Manager and a Release Engineer?

A. The Change Manager is the authoritative lead for Change Management and is accountable for the planning, implementation, and improvement of the process.

The Change Manager is responsible for running the CAB, where Requests for Change (RFCs) are approved.

The Release Engineer is accountable for implementing the Release as part of a Request for Change. The Release cannot be implemented without the approval of the CAB.

Q. I am a project manager for Project X. Is it expected that I will also be the Release Engineer?

A. No. It is not expected. The designated Release Engineer should be from a technical team.

Q. Where do the roles and responsibilities of a Project Manager end and the roles & responsibilities of a Release Engineer begin?

A. The Project Manager will define a work package within the Project Plan to deploy into production, and turn this work package over to the Release Engineer. The Release Engineer is now responsible for delivery of this work package and communicates Release status to the Project Manager.

Q. What is the involvement of a Release Engineer after implementation?

A. The Release Engineer should validate that all changes implemented as part of the Release were successful and the service is functioning as expected.

Q. When do we determine who on a project team should be the Release Engineer?

A. Planning for a release, including assigning a Release Engineer, should begin at the same time the project planning phase begins and will evolve over the course of the project.

Q. Where can I get a description of a field within any of the Release forms?

A. A description balloon will appear for a particular field when the cursor is held over that field for more than a second or two.

Q. What are Release Tasks?

A. Tasks can be used to track activities as part of the Release. They should be used to help coordinate between groups or team members. For example, the development of training materials should be assigned to a Release Team member as part of the Release. The Release should not be closed until the training materials have been created.

Q. What is the difference between a Release Task and a Release Item?

A. A Release Item is a feature or enhancement to a service that will be included as part of the Release. A Release Task is a body of work that needs to be accomplished in order for the Release as a whole to be implemented successfully.

Q. What are my responsibilities as an individual assigned to a Release Task?

A. If you have been assigned to a Release Task, it is your responsibility to complete the task and keep the status of the task up to date within the release tool. As part of the status update, you should also update the % complete.

Q. At what point, is a Release considered complete?

The Release will be considered complete when all Release Tasks have been completed, the Release has been pushed to the production environment, and the Release Engineer has validated that the Release has been deployed successfully.

Q. How do I review the history of Releases to which I, or a certain individual, was connected as a Release Engineer?

A. To review the history of past Release where you were assigned as a Release Engineer, you may use a filter, add a condition for "Release Engineer," and specify your name or the name of the Release Engineer you are looking for.

You may also add criteria for the filter to only show releases with an Actual End Date of "between" two different dates, perhaps to find Releases assigned to you within a year.

Q. Is there a specific repository where the portfolio of supporting Release documentation – outside of the form itself – is maintained?

A. No. The Release Management process does not dictate where the portfolio of supporting documentation resides, only that the documentation must exist and its location should be documented within the Release tool.

Appendix B

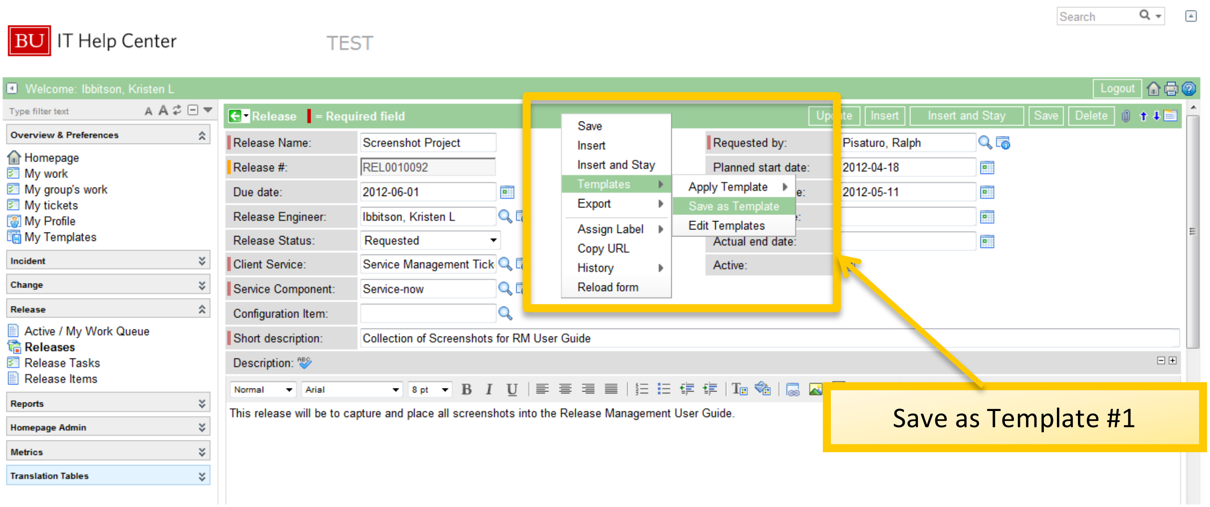
Templates

Creating and utilizing templates for creating releases, items or tasks is strongly recommended for those IS&T staff who may be responsible for a high volume of Releases (especially Tasks) that have many of the same attributes. The following is an overview of how to create a template.

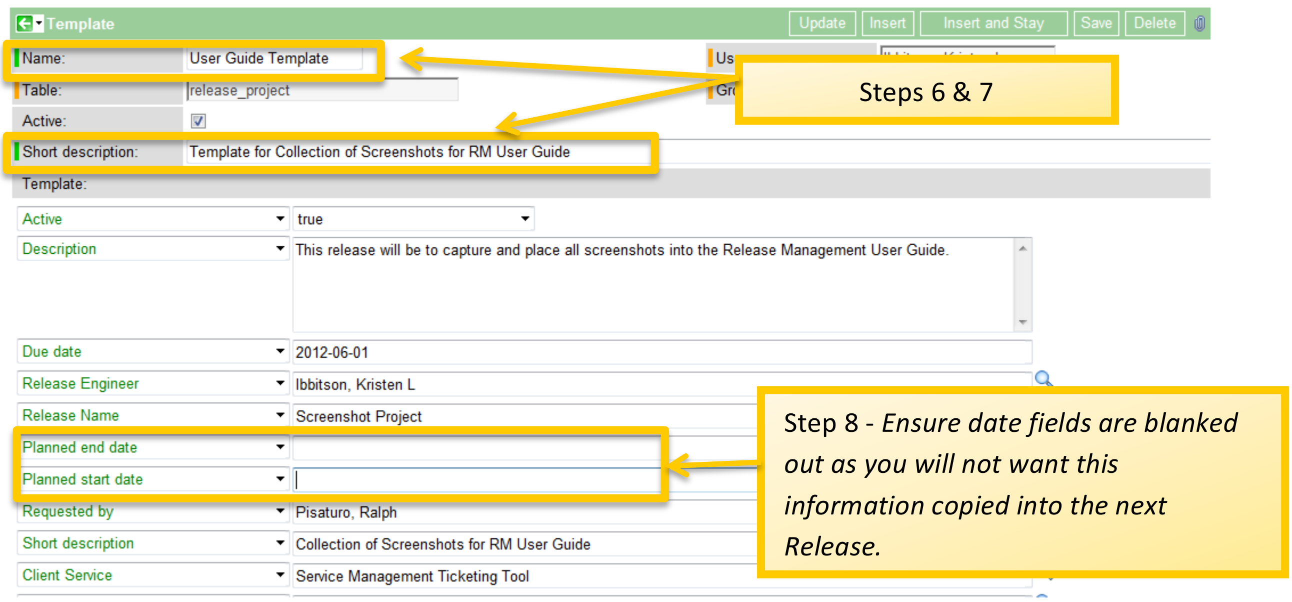
Creating a Template

1. To create a template for a release, follow steps 1–5 in the How to Create a Release Procedures section of this guide (make note of the assigned Release number).
2. Open the Release number that was just created.
3. Right-click on "Release" on the upper bar

4. Select “Templates.”
5. Select “Save as Template.”



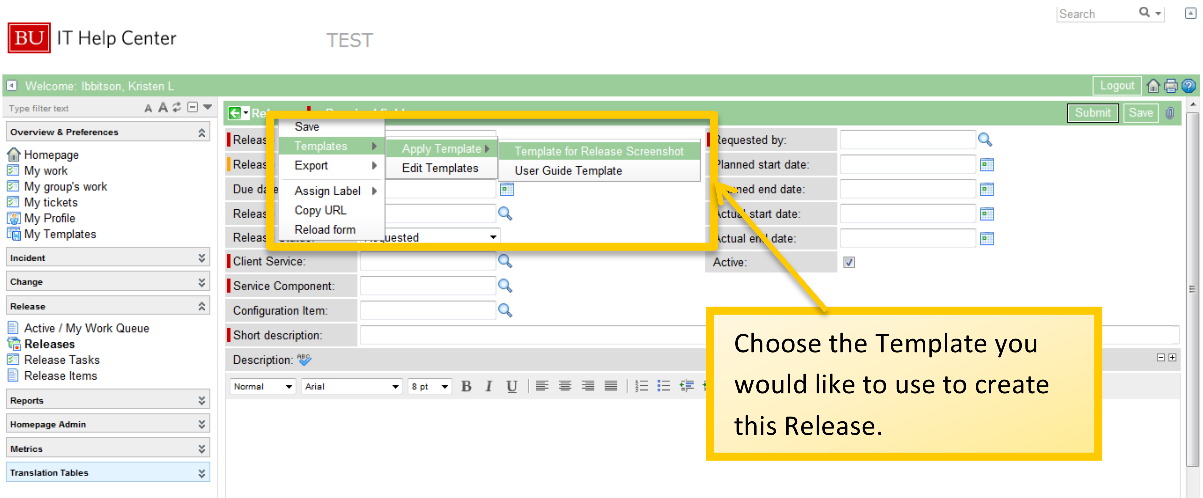
6. Create a descriptive, non-technical name for the template.
7. In the “Short Description” field, type “Template for” and then copy the text from the “Short Description” field in the body of the template into the field.
8. Clear the “Planned End,” “Back-Out,” and “Planned Start Date and Time” fields.
9. Click on the update box in the lower left or upper right part of the screen to save the template.



Utilizing Templates

10. From the Release List View, click on “New” button to begin creating a new Release.

11. Right-click on "Release" on the upper bar.
12. Select "Templates," "Apply Templates," and the template that you wish to use (previously named).



13. The Release will populate with the values from the template selected.
14. Complete any additional required fields in the Release and update those fields that need to be changed to reflect the new Release content.
15. Click on either "Submit" or "Save".

Appendix C

E-mail Notification Template

Assigned To Notification

These notifications are sent to the assignment group and to the individual assigned to the task.

From: IT Help Center [mailto:bu@service-now.com]
Sent: Wednesday, February 15, 2012 12:25 PM
To: Tester, ServiceNow
Subject: RTASK0010011: Assigned - Share templates with others and other groups

A Release Task has been **assigned** to you . You may log in to track, view, or update the ticket.

Internal notes:

Short Description: Share templates with others and other groups

Ref:MSG0747170

Appendix C

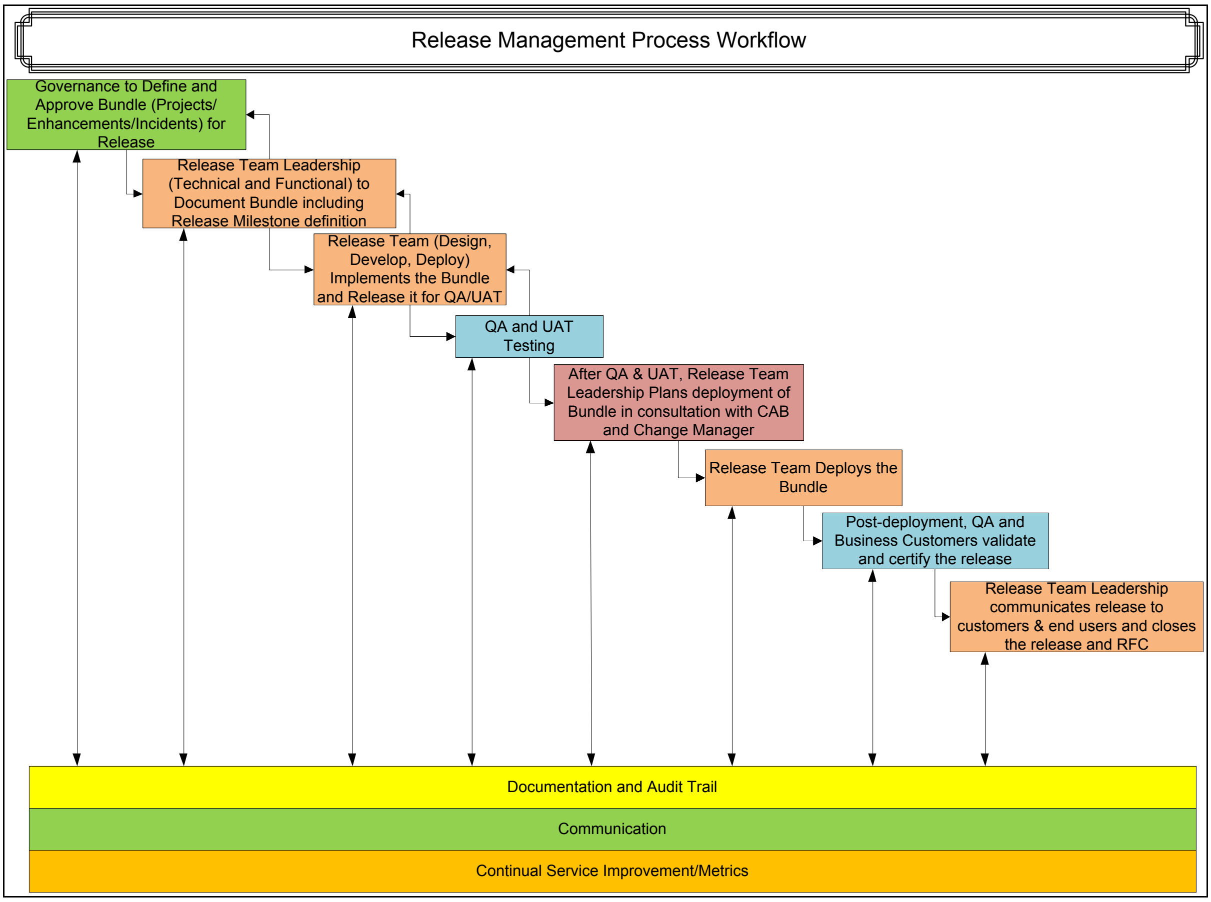
Glossary of Key Terms

Glossary Term	Explanation	Use Case Reference
Change Advisory Board(CAB)	Change Advisory Board is responsible for formally approving and coordinating changes/updates to the production environment by evaluating risk and impact among other criteria. The CAB handles all RFCs (Requests for Change).	Manage Release Item
Client	Refers to a business representative requesting services/products to improve business function's efficiency, client satisfaction, and other business objectives.	
External Development Reference	Any external development tool reference to keep track of the details such as ATPMove #s, UISCGI Move numbers, TFS task numbers associated with a Release Task.	Manage Release Task
External Development Reference Type	Any external development/deployment tool reference associated with the Release Task. This field is primarily used to connect TFS Task, ATPMove, UISCGI Move, SAP Transport reference with a Release Task	Manage Release Task
External Reference	Reference URL to an existing project from PRIME or other project management repositories.	Manage Release Item
Internal Reference	Reference to an existing Incident, Problem, or Service Request.	Manage Release Item
Portfolio	A collection of Projects within a business function. For instance, financial aid portfolio will consist of Projects related to enhancing the financial aid business function.	
Project	An initiative launched to deliver specific enhancements or new features to existing products/services or to develop new products/services.	Manage Release Item

Release	Deployment of a software product/service upgrade/fixes to a production environment. The deployment could consist of fixes to Incidents/Problems or upgrades to address Service Requests/Projects.	Manage Release
Release Engineer	Role responsible for overseeing a Release.	Manage Release
Release Item	An individual Incident/Problem/Service Request/Project in scope for a Release.	Manage Release Item
Release Task	An activity to be completed in order to accomplish Release objectives. A Release Task can have an individual or a group assigned for execution.	Manage Release Task
RFC	Request for Change associated with an individual Release Item. An RFC is used to coordinate necessary tasks for production deployment of a Change including CAB approval.	Manage Release Item

Appendix D

Release Management Business Process



ServiceNow Manage Release Process