

# **Veteran-focused Integration Process (VIP)**

## **Release Process Guide**



**May, 2016**

**Version 1.4**

**Department of Veterans Affairs**

## Revision History

Date	Version	Description	Author
2015.12.30	1.0	First published version	Griffith
2016.01.26	1.1	Minor modifications	Griffith
2016.01.30	1.2	Minor modifications	Griffith
2016.03.09	1.3	Minor modifications	Griffith
2016.05.03	1.4	Minor modifications	Griffith

## Table of Contents

<b>1. Introduction .....</b>	<b>1</b>
<b>2. Roles and Responsibilities.....</b>	<b>1</b>
<b>3. Definition of Terms .....</b>	<b>2</b>
<b>4. Data Requirements .....</b>	<b>4</b>
4.1. Pre-Initiation to Critical Decision #1.....	4
4.2. Critical Decision #1 to Critical Decision #2 .....	4
<b>5. VIP Release Process Workflow .....</b>	<b>4</b>
<b>6. High-level Timeline .....</b>	<b>8</b>
<b>7. Step-by-Step.....</b>	<b>9</b>
<b>8. Collection of Metrics.....</b>	<b>10</b>
<b>9. Follow-up Responsibility.....</b>	<b>10</b>

# 1. Introduction

The **Veteran-focused Integration Process (VIP) Release Process Guide** is intended for IT project team members, especially Project Managers, Project Configuration Managers, and Project Testing Managers.

VIP provides a single entry point for all IT releases to production. The intake vehicle is the VIP Request or VIPR. Requestors submit Epics and User Stories that describe their requirements in detail. Three decision makers, the **Portfolio Manager**, the **Product Owner**, and the **Receiving Organization**, decide whether the request will become a project at Critical Decision #1 (CD#1). CD#1 is followed by a three-month build cycle managed under the Agile Project Management Methodology. At Critical Decision #2 (CD#2) which occurs at the end of the build cycle, the same three decision-makers decide whether they approve the build for release into production. See the [VIP Guide](#).

The VIP Release Process is the single, simplified path from Build Planning to release. ***It replaces all other release compliance processes and removes all formal release reviews.*** Your project team will place a single set of required data in centrally located, configuration-controlled repositories. Your team will upload each data element only once, and update, as necessary. This will allow you to build reports or other information items using data elements that are common across multiple user groups or topics without having to enter any of those data elements more than once, each.

A **Release Agent** will be assigned to the planned release to guide you and your team through the new process as you build the IT solution, produce the required work products, and manage your project in the mandated tool set. The central repositories will enable you to review your project's status dynamically, throughout development. At regular intervals during development, your **Release Agent** will monitor the contents of the product account and provide feedback to you and your team. This regular feedback will support your ability to fulfill the release requirements at a steady pace.

All releases into the production environment must come through the VIP Release process. That includes hardware, software, IOCs, full deployments, new products, subsequent releases, maintenance releases, defect repairs, security patches, other types of patches, and any other sort of release to production.

## 2. Roles and Responsibilities

**Release Agent:** The Release Agent is at the center of the new VIP Release Process. The Release Agent is assigned to a release soon after Initiation. For products that do not go through CD#1, such as defect repairs, the Release Agent is assigned as soon as the decision is made to start work on the build. The primary role of the Release Agent is to monitor, audit, and report on the status of the product data associated with the release. The Release Agent provides information about release requirements, provides feedback about the status of the product data to the project team and other stakeholders, and collects metrics at certain points and intervals.

**Configuration Manager/Specialist:** The Project Team's Configuration Manager understands the key fundamentals of change and configuration management and has the skill set to use and navigate the IBM Rational Tool adeptly. The Configuration Manager's responsibilities are to add product data to the repositories in an appropriate and timely manner and to ensure that the data elements are appropriately linked among the repositories in a manner that facilitates product review, change tracking, and defect tracking activities.

**Testing Manager/Specialist:** The Project Team's Testing Manager is well versed in Quality Assurance and Quality Control and is a skilled user of the Rational Tool. The Testing Manager's responsibilities are to ensure that testing personnel perform tests as planned and appropriately link testing data among the

repositories, in order to provide the complete relationship record of requirements among the test plan, test case, test results, and so on.

**Requirements Manager/Specialist:** The Project Team's Requirements Manager analyzes and manages the product requirements and ensures that they are appropriately entered and managed in the Rational Doors repository.

**Scrum Master:** The Project Team's Scrum Master establishes the frequency of and conducts the Daily Scrums, the Scrum of Scrums, and other Agile ceremonies throughout the Build/Development phase.

**Acquisition Specialist:** This team member brings a thorough knowledge of the acquisition process and the ability to develop and review acquisition strategies. The Acquisition Specialist possesses a solid understanding of the product's requirements, and ensures that the resources necessary to deliver those requirements are added to the team.

**Project Manager:** In addition to the usual duties of project management, the Project Manager is responsible for ensuring that the appropriate team members are trained in the use of the Rational Tool. The Project Manager is also responsible for obtaining a product account in the tool and for granting account access to the assigned Release Agent and other key stakeholders who require notifications of product data status. Contact [rational@va.gov](mailto:rational@va.gov) to set up a product account in the Rational Tool and for all training requests and questions.

**Portfolio Manager:** Management of the full lifecycle of a particular suite of related programs or products is the responsibility of the Portfolio Manager. The Portfolio Manager is responsible for operational oversight and management of long term sustainment strategy and IT portfolios. The Portfolio Manager works in concert with the Programmatic System Owner and the Receiving Organization. The Portfolio Manager is one of the three decision-makers for CD#1 and CD#2.

**Product Owner:** The organization representative, customer, or individual served by the product, who provides the product requirements (epics, sub-epics, user stories, and so on). This is often the Project/Product Sponsor. The Product Owner is one of the three decision-makers for CD#1 and CD#2.

**Receiving Organization:** The entity or organization that is responsible for performing day-to-day system operational and administration tasks is the Receiving Organization. Local system administrators, IT specialists, or service support technicians perform these functions until the product's end of life (EOL). The Receiving Organization works in concert with the Portfolio Manager and the Programmatic System Owner (PSO). The Receiving Organization is one of the three decision-makers for CD#1 and CD#2.

**Programmatic System Owner:** The responsibility for operational oversight and management of the activities involved at the field management level or data center level of a particular system resides with the PSO. This person is an operational manager, application manager, or system manager, who works in concert and communicates with both the Receiving Organization and the Portfolio Manager.

### 3. Definition of Terms

Below are definitions for terms used in this guide, terms in the Release Process, and some of the terms that are associated with the Agile Project Management Methodology.

Term	Definition
Acceptance Criteria	Quality attributes that apply to Epics and User Stories; validate that the intent has been met; are expressed in clear and simple language that is actionable

<b>Term</b>	<b>Definition</b>
Agile Project Management Methodology	An iterative approach to software and product development that features short development cycles (Sprints) within the development/build phase
Backlog	The list of tasks that are yet to be completed; the Backlog continues to be maintained after a product is released; tasks are prioritized and scheduled for future Sprints, in future development cycles, with future releases
Backlog Grooming	An Agile Ceremony in which team members prioritize User Stories for the upcoming Sprint; add, subtract, and refine Epics, User Stories, and Acceptance Criteria; determine the level of effort for User Stories
Build	Package of functionality; product code or components that deliver a portion of or the complete solution or product; also used to denote the phase during which the build is produced, a three-month period
Ceremony	Agile term for standard, structured meetings such as Scrums, Sprint Planning, Backlog Grooming, and so on
Critical Decision (CD)	Key approval points in the VIP Process; made by the Portfolio Manager, the Product Owner, and the Receiving Organization; CD#1 determines Project acceptance; CD#2 determines Release acceptance and Product acceptance
Defect Resolution Period	The 90-day period following the full deployment of a product to production, during which the deliverer of the product maintains a presence to address issues, transfer product knowledge, and ensure successful transition of the product into sustainment; the Defect Resolution period covers everything stated in the product requirements
Epic	Required by VIPR; captures a large body of work to be completed during development; typically too large to complete within a Sprint; Is further decomposed into smaller Sub-epics and workable User Stories
EPMO	Enterprise Program Management Office
IOC	Initial Operating Capability; release into a small number of production sites
POLARIS	Planning and On-Line Activity/Release Integration Scheduler (POLARIS), the VA OI&T Enterprise Release Calendar; the single, authoritative release calendar for all of OI&T
Rational Tool	IBM suite of products; supports all aspects of product development and delivery: requirements management; quality management and testing; workflow, change and configuration management; and other activities
Release	Installation into Production Environment; hardware or software; includes IOC, full deployment, subsequent releases, maintenance releases, defect repairs, security and other patches, and any changes that are released into production
Release Candidate	The build that is destined for the initial release into production

<b>Term</b>	<b>Definition</b>
Scrum	A collaborative Agile development framework for managing projects that features brief, daily status meetings
Sprint	A short cycle of work (usually 2 weeks) during the development phase; each Sprint focuses on completing a defined subset of project deliverables
Sub-epic	Slightly smaller body of work than an epic, but still too large to complete within a Sprint
Task	A discrete portion of work that is required to finish a User Story; Each User Story has at least one, but usually more than one task
User Story	Brief statement of a product requirement, clearly identifying who, what, and why; typically owned by the VA Product Owner/VA PM; specific Acceptance Criteria are attached to each User Story, which is broken down further into workable Tasks
VIP	Veteran-focused Integration Process; single path, from beginning to end, for IT releases in the VA
VIPR	Veteran-focused Integration Process Request portal that provides the intake process for all IT releases

## 4. Data Requirements

### 4.1. Pre-Initiation to Critical Decision #1

Data elements required to initiate a project via the VIP Request (VIPR) include requirements for each area of concern for IT projects. In the Agile Project Management Methodology, Compliance Epics and Business Epics express these requirements before Initiation. At Initiation, the Project Manager and the Release Agent are assigned and Project Planning begins.

### 4.2. Critical Decision #1 to Critical Decision #2

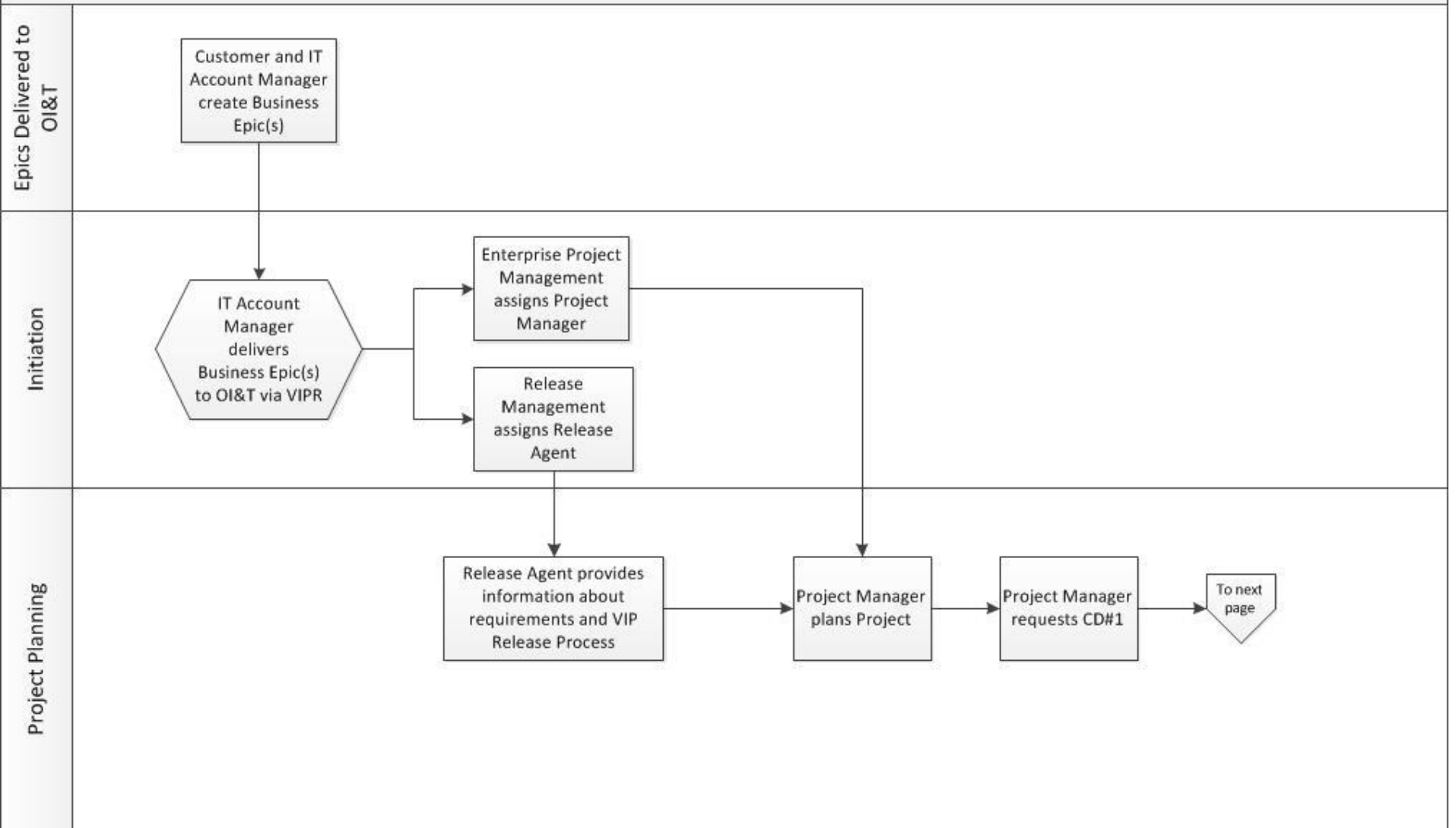
Project Teams post data elements and artifacts directly into the Rational Tool as they produce them, during the build and development phase. Teams must ensure that requirements, work items, test plans, test cases, test execution, defects, and so on, are appropriately linked among the Rational Tool repositories.

Releases that are enhancements to existing products in sustainment, defect repairs, VistA maintenance releases, and other types of releases that do not involve the delivery of a new product to the production environment might have fewer requirements. The CD#2 approval depends on the status of release-required data and VIP Process compliance.

## 5. VIP Release Process Workflow

The VIP Release Process Workflow is illustrated on the following pages.

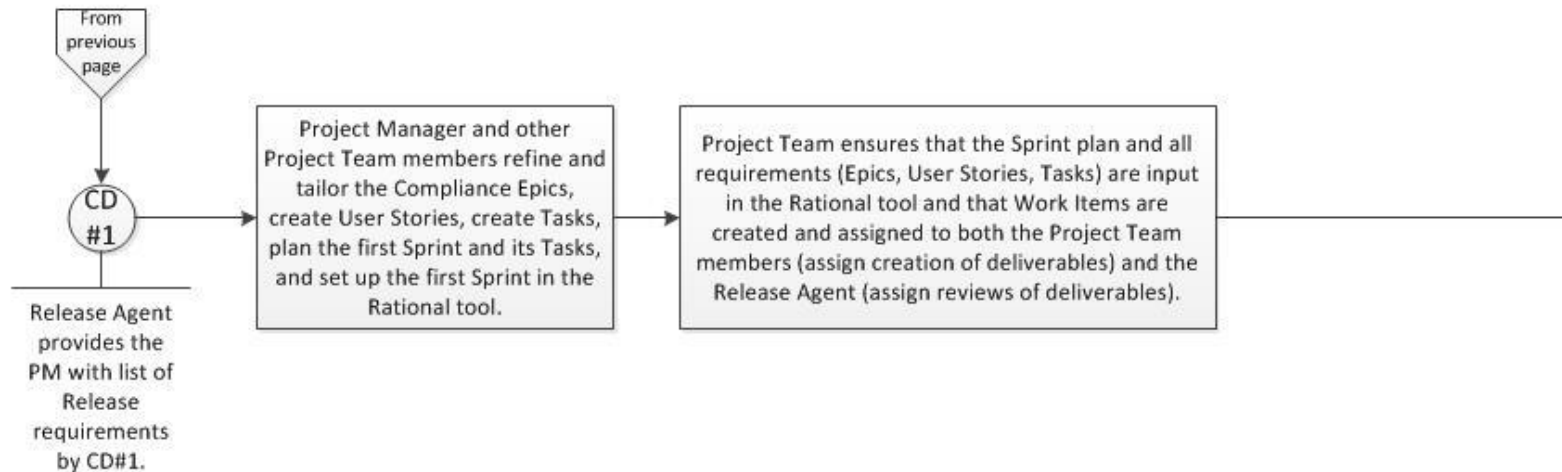
## Release Process – Initial Epics, Initiation, and Project Planning



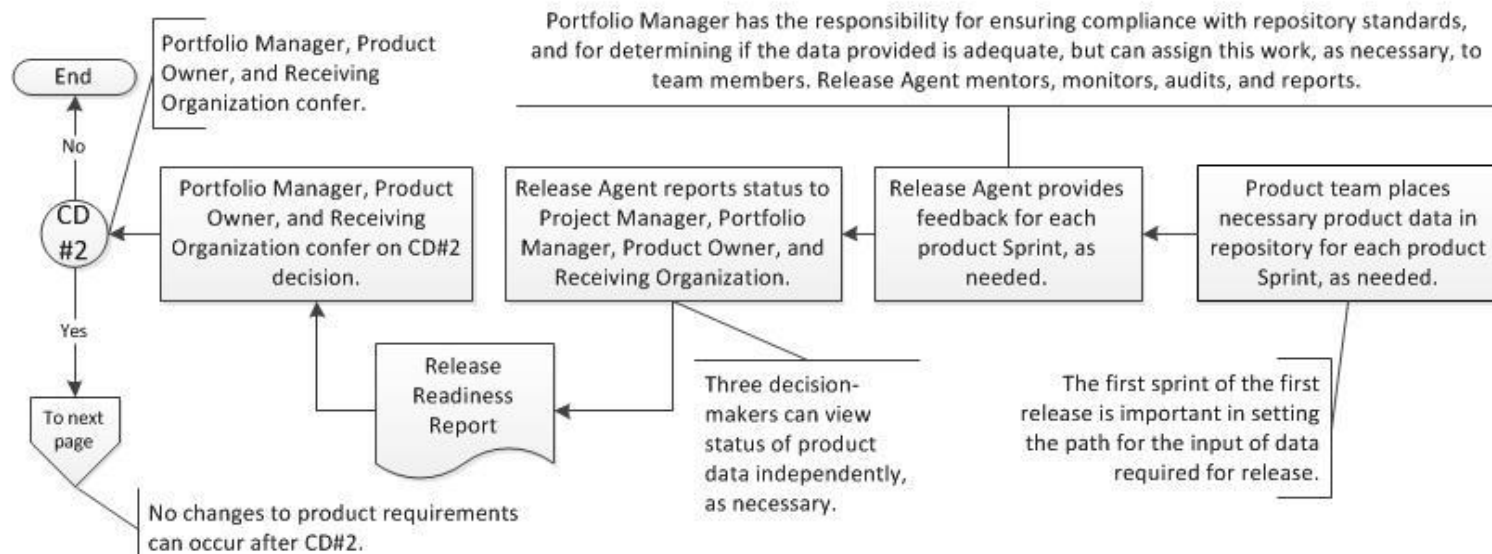


## Release Process – CD#1 to CD#2

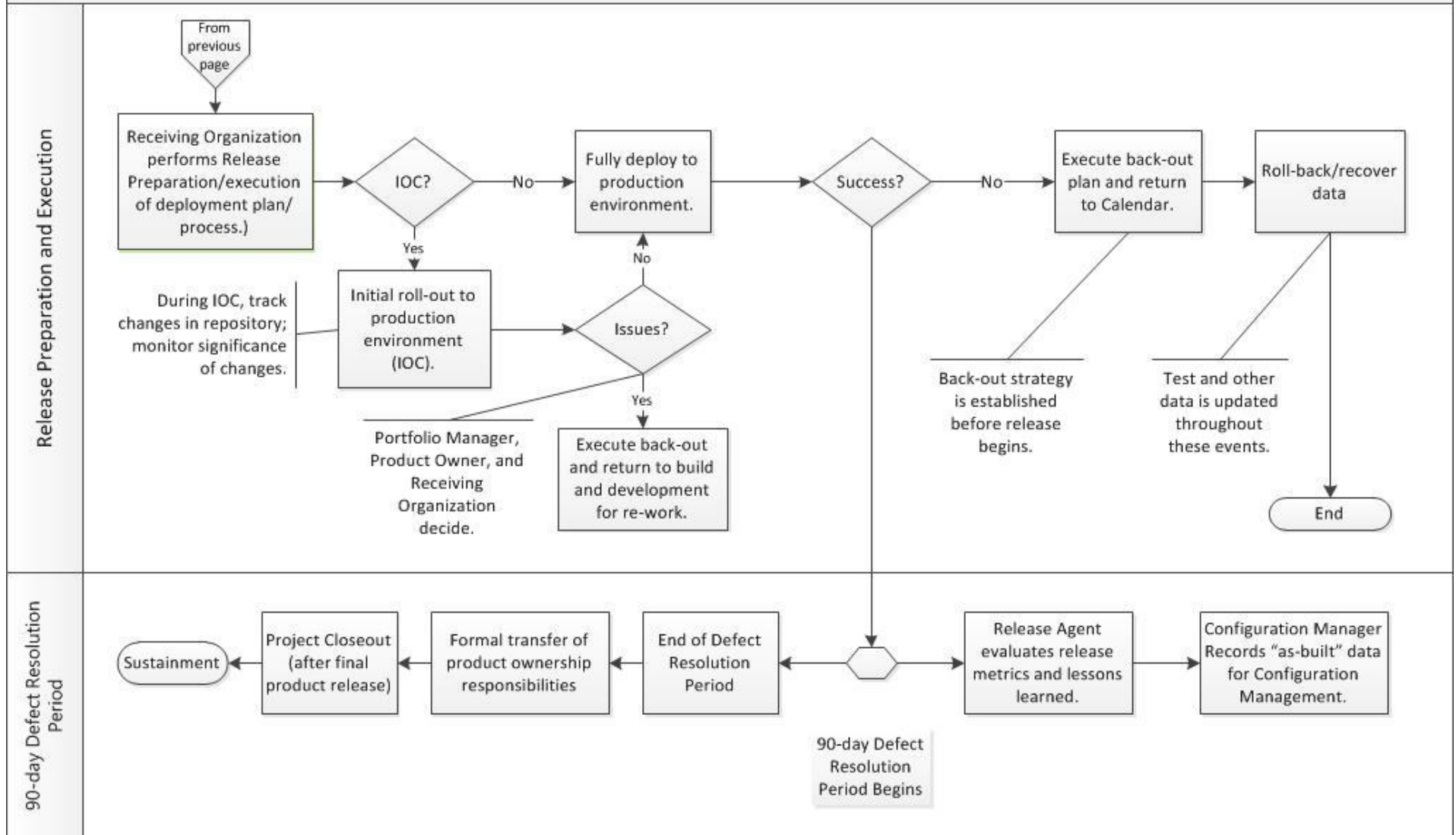
### Contract Award and On-boarding



### Build Development and Testing



## Release Process – Release Preparation and Execution through Defect Resolution Period



## 6. High-level Timeline

**Initiation:** The VIP Release Process begins at Initiation, with the assignment of the Project Manager and the Release Agent. The Release Agent acts as a mentor for the Project Manager, to ensure that the PM understands the required data and the required compliance with the VIP Process, which includes the VIP Release Process. During this phase, the Project Manager ensures that the Product Account has been established and that appropriate personnel, including the Release Agent, have access to the Product Account.

**Project Planning:** During this phase, Project Manager ensures that the Product Account exists in the Rational Tool, ensures that Project Team members are trained in the use of the Rational Tool, and ensures that Project Team members, the Release Agent, and all others who require it have access to the Product Account in the Rational Tool. Project Manager completes high-level plans for the project.

**CD#1:** The **Portfolio Manager**, **Product Owner**, and the **Receiving Organization** approve the start of the project at Critical Decision 1. For products that do not go through CD#1, such as defect repairs, the VIP Release Process begins when the decision is made to start work on the build.

**Contract Award and On-boarding:** The Project Manager and other Project Team members refine and tailor the Compliance Epics, create User Stories, create Tasks, plan the first Sprint and its Tasks, and set up the first Sprint in the Rational Tool. The Project Team ensures that the Sprint plan and all requirements (Epics, User Stories, Tasks) are input in the Rational Tool and that Work Items are created and assigned to both the Project Team members (creation of deliverables) and the Release Agent (reviews of deliverables).

**Build and Development:** During this phase, the Project Team manages the product data in the Rational Tool during each Sprint. The Release Agent monitors and audits the data for each Sprint and reports the status of the data and the team's process compliance at the end of each Sprint. The Release Agent can produce the Release Readiness Report more frequently, if necessary, for both the Project Manager and the three decision-makers.

**CD#2:** Near the end of the 3-month Build/Development phase, or earlier, if the Project Manager requests it, the VIP Business Office schedules the meeting for Critical Decision 2. The **Portfolio Manager**, **Product Owner**, and the **Receiving Organization** review the Release Readiness Report, which is a high-level summary of the status of the project data and the status of the team's process compliance. At the CD#2 meeting, the three decision-makers determine if they approve the product Release or not.

**IOC and National Release:** The Project Team continues to add data to the repositories during an IOC evaluation in a limited number of production sites. At the end of the IOC evaluation, the Release Agent again reviews the data and provides a status notification to the Portfolio Manager, Product Owner, and Receiving Organization. This additional notification provides decision-makers an opportunity to reassess the forward progress of the Release Candidate, based on IOC results. If no significant defects or changes occurred during the IOC, the Release Candidate continues on to National Release.

**End of Defect Resolution Period:** When the product is successfully released nationally, the 90-day Defect Resolution period begins. At regular intervals and at specific points during this period, the **Release Agent** reviews the product data. At the end of the Defect Resolution period, the Release Agent reviews product data and process compliance and provides a status notification to the **Portfolio Manager**, **Product Owner**, and **Receiving Organization**. If significant problems occurred during transition, the decision-makers determine a course of action to address those problems. If the transition

was successful, the **Product Owner** transfers product ownership to the **Receiving Organization**, and the **Receiving Organization** accepts ownership. This transfer is recorded in the tool itself.

**Post-installation Product Data:** Whenever possible, the **Release Agent** collects metrics associated with the product's life in sustainment. The collection of these metrics depends on reliable feedback loops from various incident management tools. These sustainment phase metrics provide a more complete picture of the product and are useful in assessing the feasibility and timing of product enhancements or defect repairs.

## 7. Step-by-Step

The VIP Release Process begins at Initiation.

1. At Initiation, the IT Account Manager requests an IT product via the VIP Request or VIPR, submits one or more Business Epics, and (if IOC is planned) presents MOUs for two IOC sites.
2. The EPMO assigns a Release Agent and a Project Manager.
3. During Project Planning, the Release Agent ensures that the Project Manager has or has requested a Product Account in the Rational Tool, understands the training requirements for the Project Team, provides access for the Release Agent and all other appropriate roles, and has complete information about the Release and process compliance requirements.
4. At CD#1, the Portfolio Manager, Product Owner, and Receiving Organization approve the project.

☛ The Project Manager can add the planned release to POLARIS at any time after CD#1, but no later than two weeks before the first planned product installation.

5. The Project Manager and Project Team begin Contract Award and On-boarding activities.
6. The Project Team tailors the Compliance Epics, creates User Stories, creates a high-level plan for the Build/Development cycle, and identifies the tasks (Work Items) for the first Sprint.
7. The Release Agent, the Project Manager, the Project Testing Manager, the Project Requirements Manager, and the Project Configuration Manager confirm the product data that must be entered and managed in the Product Account during the Build/Development phase.
8. The three-month Build/Development phase begins. This phase is punctuated by two-week Sprints, during which the Project Manager, via the Configuration Manager, ensures that the appropriate data elements are placed and managed in the Product Account.
9. At the end of each Sprint, or more frequently if necessary, the Release Agent provides feedback to the Project Manager concerning the status of data and process compliance. This feedback alerts the Project Manager to any deficiencies. The Release Agent also may attend the Daily Scrum or the Scrum of Scrums to announce any impediments.
10. Near the end of the three-month build cycle, prior to Critical Decision #2 (CD#2), the Release Agent ensures that the Portfolio Manager, the Product Owner, and the Receiving Organization have the most recent status of all product data in the Product Account and of the Project Team's process compliance. This information is provided in the Release Readiness Report which informs the decision at CD#2.
11. At CD#2, the Portfolio Manager, Product Owner, and Receiving Organization decide if the product can be released into production.
  - a. If the decision is "no," the Release Candidate returns to the appropriate stage in the process.

- b. If the decision is “yes,” the Release Candidate moves into the Release Preparation and Execution phase.
- 12. During Release Preparation and Execution, the Project Team and the Receiving Organization execute the deployment plan or standard deployment process.
  - a. If the Release Candidate will have an Initial Operating Capability (IOC), continue to step 13, below.
  - b. If the Release Candidate will be fully deployed to production, skip to step 15, below.
- 13. Personnel install the Release Candidate into two production sites. A third IOC evaluation is performed concurrently by Health Product Support, if appropriate.
- 14. Personnel track issues, changes, and the significance of changes during the IOC, and record these data elements in the repositories.
  - a. If significant defects result in changes to the requirements, personnel execute the back-out and return to the appropriate phase of the process.
  - b. If defects or changes are not significant, personnel conclude the IOC and prepare for full deployment into production.
- 15. Personnel execute the steps for full deployment of the Release Candidate into the production environment.
  - a. If deployment is unsuccessful, personnel execute the back-out and return to the appropriate phase of the process.
  - b. If deployment is successful, the Defect Resolution Period begins.
- 16. During the 90-day Defect Resolution Period, the deliverer of the product maintains a presence in the Receiving Organization to ensure agreed-upon level of service, to ensure knowledge transfer, to repair defects, and to ensure successful transition of the product into sustainment.
- 17. The Project Manager ensures, via the Configuration Manager and Testing Manager, that all defects, repairs, testing, and other changes to the product are recorded in the repositories.
- 18. At the end of the Defect Resolution Period, the official transfer of product ownership occurs and is recorded in the Product Account in the Rational Tool.
- 19. The Release Agent evaluates and records the release metrics and lessons learned during the release process.
- 20. The Configuration Manager records details of the “as-built” system in the Rational Tool.

## 8. Collection of Metrics

The Release Agent collects specific metrics at regular intervals and at certain points in the process. Collection of metrics begins at CD#1 and continues through development, CD#2, release, and into sustainment, if necessary feedback loops are available.

## 9. Follow-up Responsibility

Continuous improvement to the VIP Release Process is managed as an Agile project. The VIP Release Process Team adds suggested changes to the backlog as they are submitted. During Backlog Grooming, the team prioritizes the backlog items and determines which items will be addressed in the next regular release of the process and the **VIP Release Process Guide**.