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Case Study – Release Management (ITIL)

Release Management and repeatable testing in a Retail Banking environment

Releasing software into an environment without fully testing it in a way that accurately reflects the environment it should be released into is a common cause of software release failure. It can be difficult to completely replicate the customer's environment but because of a series of failures, a release management process was required that had a comprehensive testing environment that was "in step" with the software (and hardware) that existed in the real world environment.

So just how difficult could it be?

It was surprising that one of the major obstacles to the project was that the change and release management function had one process in place that was being used incorrectly – that of the "emergency" patch which was put in place (rightly so) to allow an emergency fix to be put in place should there be a problem. This loop hole allowed some members to release software into the environment, bypassing the standard processes and then to raise a retrospective change request to cover their tracks.

Whilst it is the remit of the developers to undertake integration and regression tests (and document these) it was noted that this too was sometimes bypassed and that software was presented to be release tested without having been properly pre tested or without User Acceptance or Usability tests having been undertaken.

Farnborough Projects were appointed to Project Manage the whole release process including the provision of the testing environment, test setup and the repeatable processes and this also had to take in best practice (ITIL) for Change and Release Management.

Historically, most software had been properly run through the Change and Release process but, with the speed of new releases (either competitive advantage or legislative) coming through, a way had to be found to keep pace with this and an automated system was reviewed allowing for prompt and accurate testing to be conducted in a repeatable manner.

Project

Perhaps the most challenging part of this project was to change the way in which the Change and Release management function was viewed by those wanting to get their product released. Release testing had always been a perceived bottleneck and prioritising was based on who shouted the loudest. Additionally, the test environment needed to be in synchronisation with the real environment and be able to accurately reflect the real world.

A requirements gathering exercise was initiated across all areas of the business to fully understand the scale of the current problems and the expectations of the new system. The project delivered a new test environment with automated testing tools that allowed regression testing and integration testing to be conducted in an automated and unattended fashion. Additionally the ITIL best practice procedures for change and release management were adopted and processes changed. All sponsors of new products were made aware of the new procedures and the loop holes were closed. The test environment was

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enhanced to allow stress testing to be conducted and the test environment was made available through a booking system for integration testing.

Strict configuration management was applied to the test environment to ensure that this fully mirrored the live environment. Software roll out and back out tests were also able to be undertaken allowing the bank to be confident that it had undertaken all reasonable steps prior to release.

Additional Benefits

Additional benefits of the project included more rigorous testing of software prior to passing in to the pre-release phase. A managed configuration of the live environment and a testing environment that was as close to the corporate environment as possible. The bank now had a test environment that was available to undertake security tests without disruption to their live environment. This allowed a number of specialist and disruptive tests (penetration and denial of service) to be undertaken to review and practice procedures.

The release and change management function were able to see in advance the pipeline of releases and plan the testing to a schedule. Unplanned and emergency changes were subject to a more rigorous approval process with key management sign off required. The test environment, being faster and more accurate than before, was available to test emergency releases to ensure that these actually fixed the problem and not made another.

About Farnborough Projects Limited

Farnborough Projects Limited is a privately owned Project and Programme Management company specialising in Project and Programme Management in the Finance (Retail and Investment), Telco, Logistics and Insurance markets. With in excess of 25 years experience in managing projects, using project tools and project and programme recovery, Farnborough Projects Limited experience is helping project teams and customers improve the way they deliver, track and plan business change.

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