SIEBEL® eBUSINESS APPLICATIONS

SIEBEL RELEASE MANAGER GUIDE

SIEBEL 2000
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Contents

Chapter 3. Using Siebel Release Manager

Introduction

Who Should Use This Guide

The audience for this guide consists of:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Release Managers	Persons responsible for managing a new product release.
Product Marketing Managers	Persons responsible for defining the features to be incorporated into a new product release.
Engineering Managers	Persons responsible for implementing features in a new product release.
Quality Assurance Managers	Persons responsible for ensuring the quality of a new product release.
Technical Publications Managers	Persons responsible for documenting features in a new product release.

How This Guide Is Organized

This guide includes the following chapters:

- Chapter 1, "Overview," explains how Siebel Release Manager benefits the product release process and introduces the feature-centric architecture of Siebel Release Manager.
- Chapter 2, "Administration Tasks," is a guide for administrators and release managers in setting up and maintaining Siebel Release Manager for the primary users.
- Chapter 3, "Using Siebel Release Manager," provides instructions on completing the most common tasks in Siebel Release Manager for the primary users: product marketing managers, engineering managers, quality assurance managers, and technical publications managers.

Additional Documentation

The following documentation also provides information on the topics addressed in this guide.

- *Using Siebel Applications*
- *Siebel Server Installation Guide*
- *Siebel Applications Administration Guide*
- *Siebel System Requirements and Supported Platforms*

The *Using Siebel Applications* guide provides information on using the Siebel Professional Services product. Siebel Release Manager is based on the project management structure of Siebel Professional Services.

The *Siebel Server Installation Guide* provides additional information on database administration tasks.

The *Siebel Applications Administration Guide* provides information on how to set up and maintain Siebel applications features.

The *Siebel System Requirements and Supported Platforms* provide up-to-date information on any changes and updates to the product and the documentation.

You will find information about Siebel Technical Services or customer support in the *Guide to Siebel Global Services*.

For copies of these documents, please use Siebel Books Online, accessible via the Worldwide Services tab on the Siebel Systems Web site (www.siebel.com). Through Siebel Books Online, you can order additional Siebel documentation and copies of the *Bookshelf for Siebel eBusiness Applications* CD-ROM.

Another source of information is the Siebel Online Help.

Overview 1

Siebel Release Manager is a closed-loop, feature-centric system to help manage the new product development and release cycle from beginning to end. Siebel Release Manager leverages data collected within Siebel eBusiness Applications to assist in the product feature selection and development process. Siebel Release Manager will help you streamline your product release process and will help to ensure an on-time release that meets your customers' needs.

Siebel Release Manager assists in a number of release-related activities. With Siebel Release Manager, users can:

- Communicate detailed feature descriptions throughout the organization.
- Prioritize features intelligently so that the right features get implemented.
- Develop marketing requirements documents for engineers to use as product specifications.
- Allocate engineering resources and track engineering tasks.
- Track QA test plan development and test execution.
- Track documentation development.
- Help ensure release integrity.
- Track activities associated with a release-related item.
- Print status reports.

Managing the Product Release Process

The product release process is very similar across companies and industries (Figure 1-1). It consists of four main stages:

- **Stage 1:** Product marketing defines product features and develops requirements documents.
- **Stage 2:** Engineering completes tasks to implement the features.
- **Stage 3:** Quality assurance (QA) tests the features in the product as it is developed.
- **Stage 4:** The technical publications group documents the features for the end user.

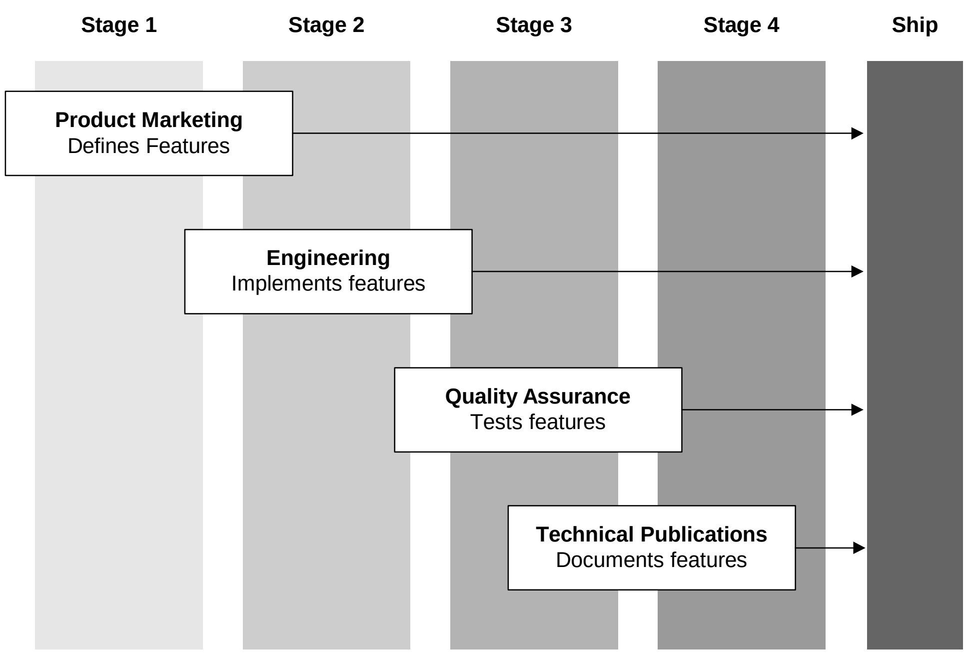

Figure 1-1. The Product Release Process

Understandably, the product release process involves a lot of information flowing within and between organizations to ensure a quality product is built on time to the right requirements and with proper documentation. Without an integrated system to help track and communicate this information, organizations must get by with disconnected systems such as makeshift spreadsheets, white boards, memos, and slips of paper. Often, information is lost or miscommunicated, resulting in a misallocation of resources; missing, undocumented, or inadequately tested features; late product shipments; and, ultimately, dissatisfied customers. The problem only becomes worse as companies grow and product releases become more frequent and more feature-rich.

Organizations sometimes hire a Release Manager to coordinate the information flow, track release status, and guide important release-related decision making. Siebel Release Manager is an integrated, automated system to help do the job.

Usage Scenario

Siebel Release Manager is used to help manage the four stages of the release process and to track overall release status. Product marketing begins the release cycle by entering features into the system, determining which are to be implemented, and developing marketing requirements documents (MRDs). Engineering then defines the tasks required to implement the features and uses the system to track task completion. QA defines test plans to be run against the new features and uses Siebel Release Manager to track the test plan development. QA then executes the test plans in various operating environments and records in Siebel Release Manager the details of each test iteration. Finally, the technical publications group documents each feature and uses Siebel Release Manager to track document development status.

A Feature-Centric System

One way to think of a new product release is as a composite of many new product features. The decision to implement these features then spawns a host of other release-related items: MRDs to further specify the features, engineering tasks to implement the new features, QA test plans to test the features, and documentation to describe the features. A disciplined release manager will perform a check-and-balance periodically during the release process to ensure that each task, test plan, and document really do derive from one or more new features. After all, if an engineering task doesn't implement a new feature, one has to question why it's being done at all! In Siebel Release Manager, all engineering tasks, MRDs, QA test plans, and technical publications documents are linked back to their associated features (Figure 1-2).

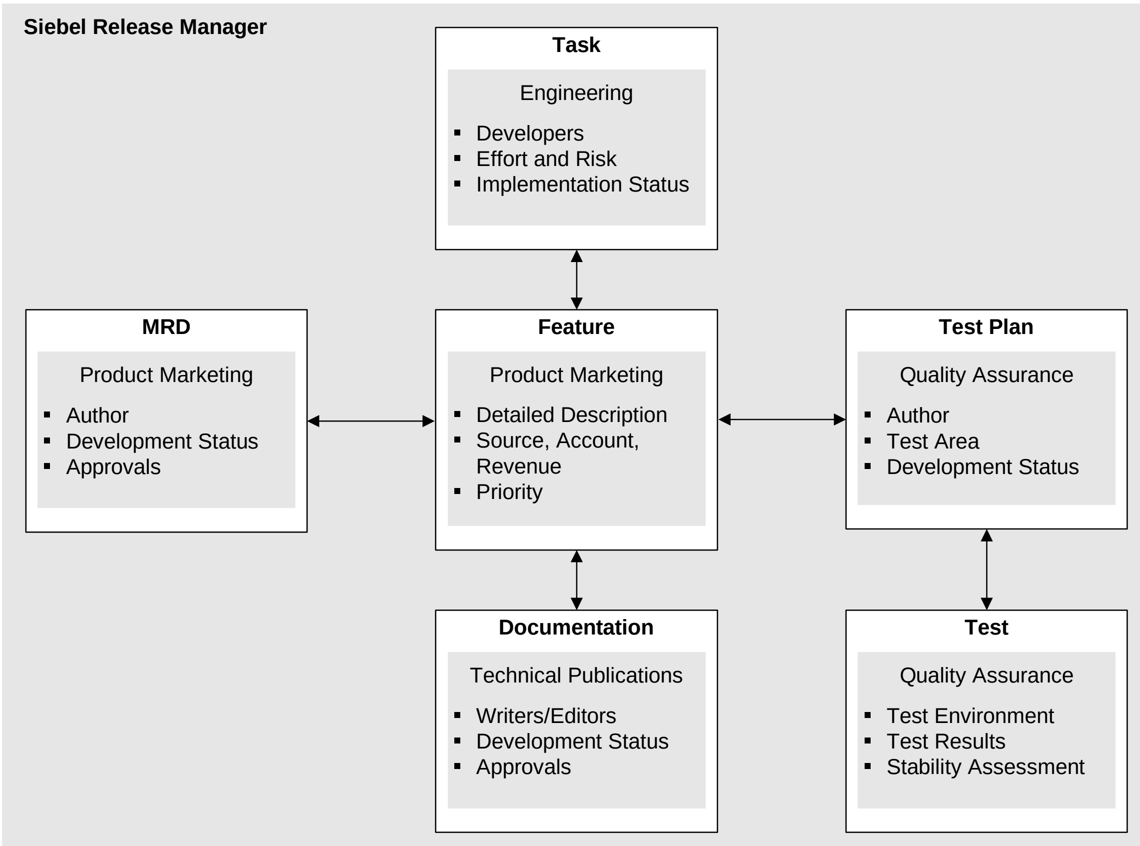

Figure 1-2. Siebel Release Manager Release-Related Items and Attributes

Although, on one level, Siebel Release Manager is simply a tool for individually tracking MRDs, engineering tasks, test plans, and technical publications, much of the benefit of Siebel Release Manager lies in the linking of these release items back to the features from which they derived. Using this feature-centric system,

- Executives can easily justify critical decisions concerning how to allocate engineering resources and how to schedule QA testing.
- Product marketing managers can help ensure that all of their features are properly specified in MRDs, and they can easily determine the development, testing, and documentation status for a given feature.
- Engineering and QA managers will immediately know what new features need to be incorporated into their project plans and test plans.

Administration Tasks 2

A number of areas of Siebel Release Manager must be set up in advance or managed on an ongoing basis to ensure usability of the application by product managers, quality assurance managers, engineers, and writers. Some of these activities (for example, setting up a list of values, adding organizations) are usually considered general administration tasks to be performed before the system is even used by the organization. Other activities (for example, adding releases, adding employees to the release team) might be considered the ongoing responsibility of the organization's Release Manager and might be conducted for each new product release that is tracked in the system. For simplicity, all of these administration tasks are discussed in this chapter without regard to how organizations might choose to assign them.

Setting Up Project Teams

Siebel Release Manager is based on the Siebel Professional Services model for project management, which includes the concept of "project teams." For any given project, there will be a team of individuals (i.e., the project team) who will own, approve, or otherwise be associated with a given release item (i.e., a feature, MRD, engineering task, QA test plan, QA test, or tech pubs document). Although anyone with access to the Siebel Release Manager views can benefit from using the system, in order to be associated with a release item, an employee must be a member of the project team.

Of course, in order to be added to a project team, an individual must first be added as an employee in Siebel eBusiness Applications. Information on adding employees to the system may be found in the *Siebel Applications Administration Guide*.

To view members of the project team for a given product release

1. Choose Screens → Projects → All Projects.

   The All Projects View appears.

2. Select a project in the All Projects list applet.
3. Click Team Workbook in the viewbar.

   Members of the selected project team will be listed in the Team Workbook list applet.

To add an employee to the project team

1. After completing the steps above, select the Team Workbook list applet and choose Edit → New Record.
2. Click on the drop-down button in the Position column.
3. Select the employee you wish to add.
4. Click the Pick button.

For more information on Project Teams, see the *Siebel Applications Administration Guide*.

In Siebel Release Manager, one or more members of the project team are linked to a release item via the Associated Parties field.

Setting Up Lists of Values

The Siebel Administrator is typically responsible for setting up all of the lists of values (LOVs) for use in Siebel eBusiness Applications. Information on setting up LOVs can be found in the *Siebel Applications Administration Guide*.

Although the Status field is shared by all types of release items, it is likely that the LOVs for the Status field are specific to each release item. For example, while the Status LOV for an Engineering Task typically relates to the development phase of the task (for example, Unit Test, Final), the Status LOV for a Technical Publications document typically relates to the production phase of the document (for example, Final Edit, Draft). While updating the status of his engineering task, an engineer would probably prefer not to have to sift through the LOVs for the document development phases. For information on restricting the views associated with specific LOV values, refer to the *Siebel Applications Administration Guide*.

Table 2-1 lists information about the LOVs to be set prior to using Siebel Release Manager.

Table 2-1. Siebel Release Manager LOVs (Sheet 1 of 2)

View Label	Associated Release items	Type	Usage	Typical Values
Client OS	QA Tests	PSTASK_CLIENT_OS	The type of operating system running on the client test machine.	Windows 2000, Mac OS
Client Type	QA Tests	PSTASK_CLIENT_TYPE	The type of test machine used by the tester.	Dedicated, HTML
Database	QA Tests	PSTASK_CLIENT_DB	The database type running in the test environment.	IBM DB2, Microsoft SQL Server 7.0
Effort	Engineering Tasks	PSTASK_ENGINEER_EFFORT	The level of effort required on the part of the engineer to complete the task.	High, Low, 1 Man Month
Priority	Features	PSTASK_PRIORITY	The relative importance of the feature.	High, Medium, P1-Critical

Table 2-1. Siebel Release Manager LOVs (Sheet 2 of 2)

View Label	Associated Release items	Type	Usage	Typical Values
Revenue	Features	PSTASK_REVENUE	The amount of revenue that can be expected if the feature is implemented.	High, Low, >5M, <1M
Risk	Engineering Tasks	PSTASK_ENGINEER_RISK	The level of risk to destabilizing the product by undertaking this engineering task.	High, Low
Server OS	QA Tests	PSTASK_SERVER_OS	The type of operating system running on the server machine.	Windows NT
Source	Features	PSTASK_SOURCE	The source of the feature.	Customer Input, Market Survey
Status	All	PSTASK_STATUS	The current implementation or development phase of the release item.	Draft, Unit Test, Final
Type	QA Tests		The type of test that was conducted.	Blitz, Ad Hoc, Detailed

Setting Up Organizations

Each QA test plan, engineering task, or feature is typically associated with a particular group within the quality assurance, engineering, or product marketing organization, respectively. You associate the release item with its group as you enter the record. These groups are set up as “organizations” within Siebel eBusiness Applications. Organizations are set up by the Siebel Administrator. For details on setting up organizations, see the *Siebel Applications Administration Guide*.

Adding Product Prototypes

As your product progresses through the release cycle, more and more advanced product prototypes will become available for testing. (In the case of software development, these prototypes are known as “builds.”) When Quality Assurance executes a test plan, they will want to track in Siebel Release Manager the version number of the prototype they tested. Therefore, as each new prototype becomes available, the Administrator is responsible for entering it into Siebel Release Manager so that it is available in the dialog box when the test is recorded. Prototypes are entered as “products” in the Screens → Marketing Administration → Products view of Siebel eBusiness Applications. For details on entering products, see the *Siebel Applications Administration Guide*.

Setting Up Releases

As a user enters a release item record, she is required to associate it with a particular release. In Siebel Release Manager, releases are tracked in the same way as projects are tracked in Siebel Professional Services. In fact, a release is really just a special type of project, and both releases and projects are created in the same way in the All Projects view. For more information on setting up projects, see the *Siebel Applications Administration Guide*.

Future Releases

Since each release item must be associated with a particular release, it is important that the Administrator set up the release (project) prior to records being entered. In fact, although there may be only one active release in progress within your organization, the Administrator might be wise to set up records for several future releases in Siebel. That way, if a particular feature is deferred from the current release, the product manager can immediately target it as a future release by selecting the appropriate release from the dialog box.

Unspecified Releases

Of course, there may be instances when the appropriate future release for a given feature or other release item cannot be known. Since Release is a required field for all release items in Siebel Release Manager, the Administrator may wish to set up a "dummy" release called "Unspecified Release" to which orphan release items may be linked. When the appropriate future release has been determined, the release item may be retargeted to that release by updating the Release field.

Using Microsoft Project Plan Integration

Many engineering organizations develop their project plans using resource planning tools such as Microsoft Project. However, each line item in such a project plan actually corresponds to an engineering task in Siebel Release Manager. In fact, you can think of the information displayed in the Engineering Task view in Siebel Release Manager as a window into the high-level details of an engineering project plan.

For those engineering organizations that use Microsoft Project to manage their project plans, Siebel Release Manager offers Microsoft Project Plan Integration. Engineering tasks can be tracked in Microsoft Project and then synchronized with Siebel Release Manager, obviating the need to update the same information in two different places. For details on setting up the required mappings and using Microsoft Project Plan integration with Siebel eBusiness Applications, see the *Siebel Applications Administration Guide*.

Using Siebel Release Manager 3

Siebel Release Manager Views

Siebel Release Manager consists of a set of over 20 views that users throughout the organization can use to track and manage the release of Siebel software products. Although certain organizations will primarily be interested in those views relating directly to them (for example, engineering will be most interested in the Engineer Task views), all views are available to all organizations to promote information sharing and teamwork. Views, associated tasks, and their primary users are summarized in Table 3-1.

Table 3-1. Siebel Release Manager Views and Users (Sheet 1 of 2)

Primary User Organization	Task	View (Accessed from the Screens and Features Menu)
Product Marketing	Add/update feature.	Feature → Features
Product Marketing	Associate activities with features.	Feature → Feature Activities
Product Marketing	Attach associated files to feature.	Feature → Feature Attachments
Product Marketing	View feature-subfeature hierarchy.	Features → Sub Features
Product Marketing	Add/update MRD record.	MRD → MRD
Product Marketing	Associate activities with MRDs.	MRD → MRD Activities
Product Marketing	Attach current MRD to MRD record.	MRD → MRD Attachments
Engineering	Add/update engineering task.	Engineer Task → Engineer Tasks
Engineering	Associate activities with engineering tasks.	Engineer Task → Engineer Task Activities
Engineering	Attach associated files to engineering tasks.	Engineer Task → Engineer Task Attachments
Engineering	View task-subtask hierarchy.	Engineer Task → Engineer Sub Tasks
Quality Assurance	Add/update test plan record and review summary of tests executed against the test plan.	QA Test Plan → QA Plans
Quality Assurance	Associate activities with QA test plans.	QA Test Plan → QA Plan Activities

Table 3-1. Siebel Release Manager Views and Users (Sheet 2 of 2)

Primary User Organization	Task	View (Accessed from the Screens and Features Menu)
Quality Assurance	Attach current test plan to test plan record.	QA Test Plan → QA Plan Attachments
Quality Assurance	View records for tests executed against a test plan.	QA Test Plan → QA Plan Tests
Quality Assurance	Add a test execution record.	QA Test → QA Test Details
Quality Assurance	View defects logged during a given test. Requires configuration to integrate with Siebel Quality.	QA Test → QA Test Defects
Technical Publications	Add/update a technical document record.	Tech Doc → Tech Documents
Technical Publications	Associate activities with a technical document.	Tech Doc → Tech Document Activities
Technical Publications	Attach current technical document draft to the record.	Tech Doc → Tech Document Attachments

Linking Features to Other Release Items

As discussed in the Overview, much of the value of Siebel Release Manager lies in the linking of features to other release items. In Siebel Release Manager, features must be proactively linked to other related release items (that is, MRDs, QA test plans, engineering tasks, and tech pubs documents). As described in the appropriate sections below, features may be linked to other release items from the feature side or from the release item side. It should be considered the responsibility of all organizations to ensure that these links are correct and that information is kept current.

Tasks for Product Marketing

Product marketing managers use Siebel Release Manager to manage and track new product features and the MRDs that document them. At any point, a product manager may enter a candidate feature into the Features view (Figure 3-1 on page 3-5). By setting the Release field, the product manager targets the feature to the current release or to a future release. As releases become better defined, the product manager may return to a feature record to update information or to assign the feature to a different release.

Engineering should not develop any features without a proper specification. Product marketing managers should group like features together into an MRD and track the development of the MRD in Siebel Release Manager. The most current public version of the MRD should be attached to the record in Siebel Release Manager.

Product marketing managers should work with the VP of Product Marketing to establish the appropriate priorities for their features. Information in the Source, Account, and Revenue fields for all features should weigh into the process.

As the current release progresses, product marketing managers can use Siebel Release Manager to track the status of their features and the related release items. In addition, product managers can ensure that important features are not forgotten by querying regularly for features associated with contractual requirements, high revenue, or high-profile customers.

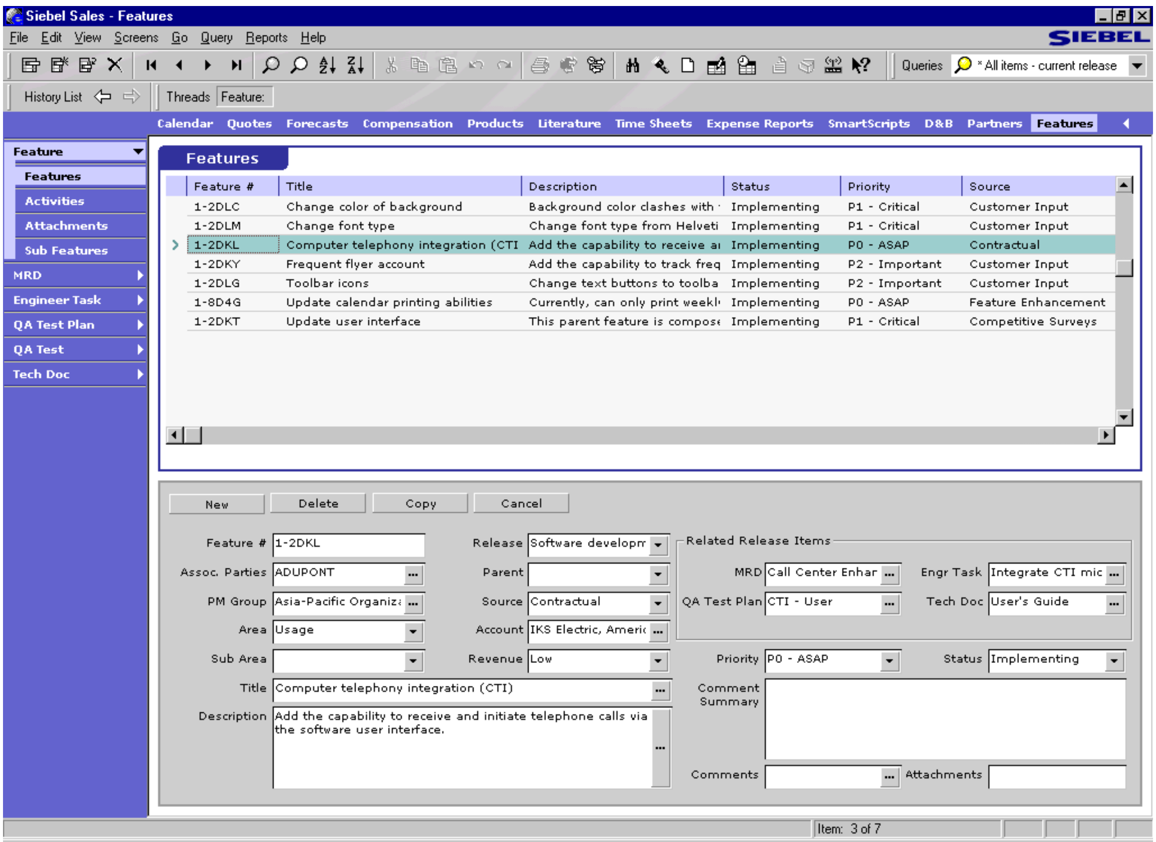

Figure 3-1. Siebel Release Manager Feature View

To add a feature

1 Choose Screens → Feature → Feature → Features.

The Features view (Figure 3-1 on page 3-5) appears.

2 Choose Edit → Add New Record.

An empty row is added to the list.

3 Complete the fields; some fields are described in the following table.

Field	Comments
Account	If appropriate, the account that requested the feature or for which we are contractually obligated to deliver the feature.
Area/Sub-Area	The product area associated with the feature. The list of sub-areas will depend on the chosen area.
Assoc. Parties	Individuals associated with the feature. The product marketing manager should be set as “primary”.
Description	
Parent	The parent feature to the current feature. Use this field if you wish to set up a hierarchy of parent features and child subfeatures.
PM Group	The product marketing group responsible for the feature. Usually, this is the group to which the product marketing manager (owner) of the feature belongs.
Priority	The priority of this feature relative to other features targeted for the same release.
Release	Required. The name of the product release for which the feature is a candidate.
Revenue	Revenue that is tied to delivering this feature in the targeted build.
Source	The source of the feature idea.
Status	
Title	

To view the subfeatures for a given feature

1. Choose Screens → Feature → Feature → Features.
2. Select a feature in the list applet.
3. Click Sub Features on the view bar.

   In the Feature and Subfeatures view, the master feature will be displayed in the form applet and the associated subfeatures will be displayed in the list applet.

To add an MRD

1. Choose Screens → Feature → MRD → MRD.

   The MRD view (Figure 3-2 on page 3-8) appears.

2. Choose Edit → Add New Record.

   An empty row is added to the list.

3. Complete the fields; some fields are described in the following table.

Field	Comments
Assoc. Parties	Individuals associated with the MRD. The author should be set as “primary”.
Description	
PM Group	The product marketing group responsible for the MRD. Usually, this is the group to which the author (owner) of the MRD belongs.
Release	Required. The name of the product release with which the MRD is associated.
Status	The development status of the MRD.
Title	

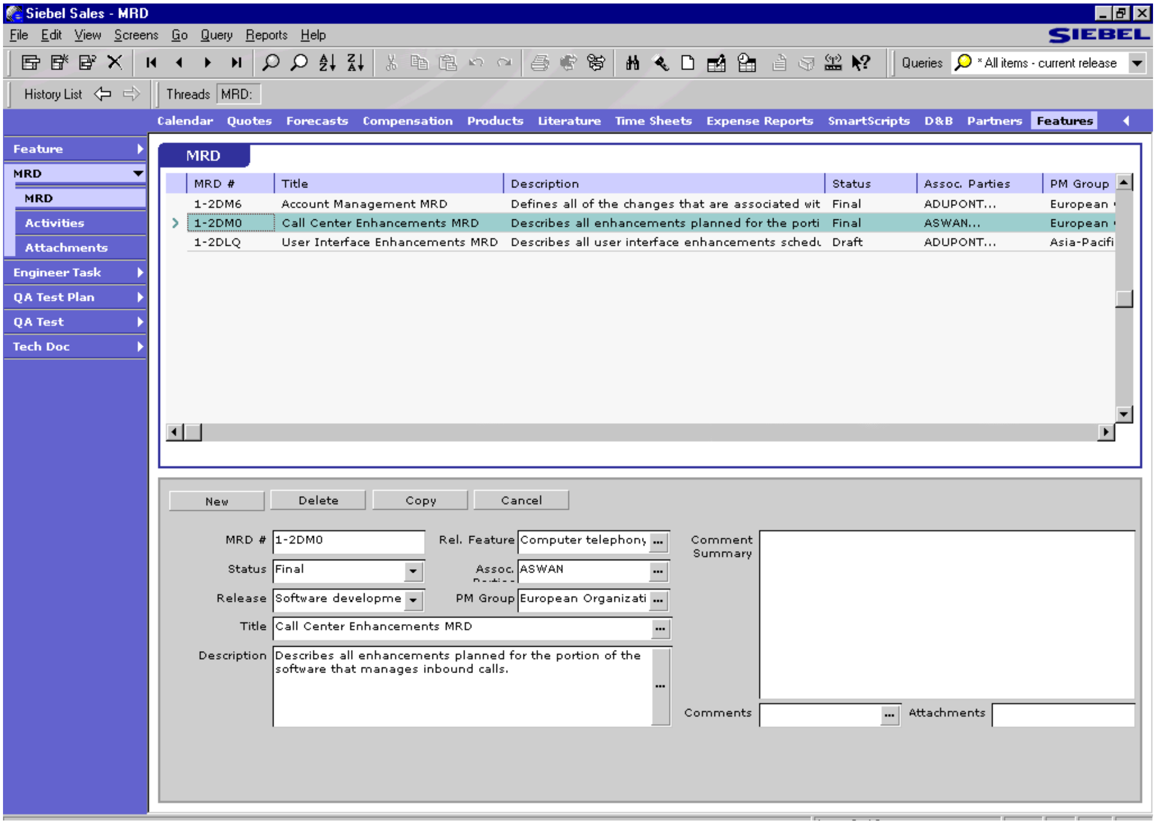

Figure 3-2. Siebel Release Manager MRD View

To link an MRD (or other related release item) to a feature from the feature side

1. Choose Screens → Feature → Feature → Features.
2. In the list applet, select the feature to which you wish to link an MRD.
3. In the MRD field, click the ellipsis button.
4. In the dialog box, click New.
5. Select the MRD you wish to link to the feature and click Add.
6. Click Close.

Follow a similar procedure to associate other release items (for example, engineering tasks, QA test plans, and technical publications documents) with a feature. Note that this linking may be initiated from the release item side as well, as described in the Tasks for Engineering, Tasks for Quality Assurance, and Tasks for Technical Publications sections below.

To link a feature to an MRD from the MRD side

1. Choose Screens → Feature → MRD → MRD.
2. In the list applet, select the MRD to which you wish to link a feature.
3. In the Related Feature field, click the ellipsis button.
4. In the dialog box, click New.
5. Select the feature you wish to link to the MRD and click Add.
6. Click Close.

   Note that this linking may be initiated from the feature side as well, as described above.

Tasks for Engineering

Once product marketing managers have added a number of features and their corresponding MRDs to Siebel Release Manager, engineering managers should begin scoping the development work and identifying the discrete tasks required to implement the features. These tasks may be entered directly into Siebel Release Manager or recorded in a Microsoft Project plan which will be synchronized with Siebel Release Manager periodically.

A reconciliation process should occur between engineering and product marketing during which the set of requested features are matched with the available engineering resources. During this process, the relative importance of the features (see the Priority, Source, and Account fields in the Feature) should be weighed against the investment required to implement them (see the Effort and Risk fields in the Engineering Task). Some features may be deferred to a future release. The end result should be a final set of release features for which the necessary engineering resources are available.

During the course of the development process, engineering managers will use Siebel Release Manager to track the status of the tasks underway. Design reviews and (for software releases) code reviews should be conducted and recorded. For each task, the fraction completed and the target completion dates are logged so that potential issues will be flagged before they become critical.

To add an engineering task

Engineering managers use the Engineer Task List view (Figure 3-3 on page 3-12) to enter and track information relating to tasks being completed to implement features. Information about a task is entered into the “Task Description” area, and information about the progress of the engineering effort is updated in the “Task Status” area.

1 Choose Screens → Feature → Engineer Task → Engineer Tasks.

The Engineer Task view (Figure 3-3 on page 3-12) appears.

2 Choose Edit → Add New Record.

An empty row is added to the list.

3 Complete the fields; some fields are described in the following table.

Field	Comments
Assoc. Parties	Individuals associated with the engineering task. The owner should be set as “primary”.
Code Review	For software releases. The date the code review took place.
Complete %	The portion of the task that has been completed to date.
Description	
Design Review	The date the design review took place.
Effort	The level of effort required on the part of the engineer to complete the task.
Eng Group	The engineering group responsible for the task. Usually, this is the group to which the owner of the task belongs.
Parent	The parent task to the current task. Use this field if you wish to set up a hierarchy of parent tasks and child subtasks.
Release	Required. The name of the product release with which the engineering task is associated.
Risk	The level of risk to destabilizing the product by undertaking this engineering task.
Status	The implementation status of the task.
Target Date	The expected date that the task will be completed.
Title	

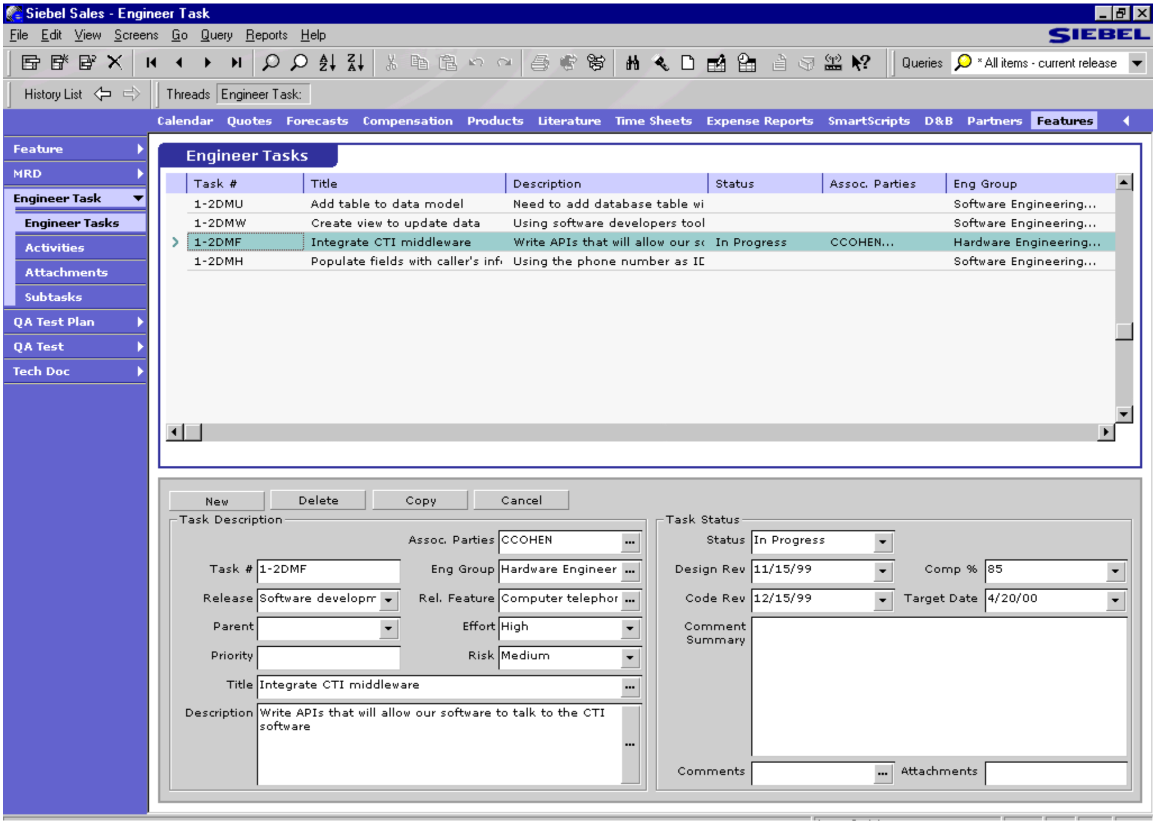

Figure 3-3. Siebel Release Manager Engineer Tasks View

To link an engineering task to a feature

1. Choose Screens → Feature → Engineer Task → Engineer Tasks.
2. In the list applet, select the task to which you wish to link a feature.
3. In the Related Feature field, click the ellipsis button.
4. In the dialog box, click New.
5. Select the feature you wish to link to the task and click Add.
6. Click Close.

   Note that this linking may be initiated from the feature side as well, as described in Tasks for Product Marketing, above.

To synchronize engineering tasks with a Microsoft Project plan

Details on how to synchronize with Microsoft Project can be found in *Using Siebel Applications*.

To view the subtasks for a given task

1. Choose Screens → Feature → Feature → Features.
2. Select a feature in the Features list applet.
3. Click Sub Features on the view bar.

   In the Feature and Subfeatures view, the feature will be displayed in the form applet and the associated subfeatures will be displayed in the list applet.

Tasks for Quality Assurance

Once features have been identified for a given release, QA can begin revising test plans or developing new ones to exercise new product functionality. Test plan development is tracked in Siebel Release Manager, with the most current version of the test plan available as an attachment to the record. Parties such as product managers who may be associated with the development of the plan are linked to the record, and their approvals are recorded. For each test plan, the fraction completed and the target completion dates are logged so that potential issues will be flagged before they become critical.

When the QA test plan is complete, tests may be executed against it. Since test plans are linked to their features in Siebel Release Manager, QA managers can focus test efforts on those test plans that are associated with the greatest number of new features, improving the quality of the release. As each test is executed, results are recorded in Siebel Release Manager. QA managers can review test summary information to assess overall product quality and determine when the product is ready to ship.

To add a QA test plan

QA managers use the QA Plans view (Figure 3-4 on page 3-16) to enter and track information relating to QA test plans developed to test product features. Information about the test plan is entered into the “Plan Description” area, and information about the progress of the effort to develop the test plan is updated in the “Plan Development” area. To add a QA test plan:

1. Choose Screens → Feature → QA Test Plan → QA Plans.

   The QA Test Plan view (Figure 3-4 on page 3-16) appears.

2. Choose Edit → Add New Record.

   An empty row is added to the list.

3 Complete the fields; some fields are described in the following table.

Field	Comments
Assoc. Parties	Individuals associated with the test plan. The author should be set as “primary”.
Complete %	The portion of the test plan that has been completed to date.
Description	
Last Build	Read only. The last product prototype version tested and the stability of the prototype as assessed by the tester during that test.
Passes	Read only. The number of tests that have been executed against the test plan.
QA Group	The QA group responsible for the test plan. Usually, this is the group to which the author of the test plan belongs.
Release	Required. The name of the product release with which the engineering task is associated.
Status	The development status of the test plan.
Target Date	The expected date that the test plan will be completed.
Title	

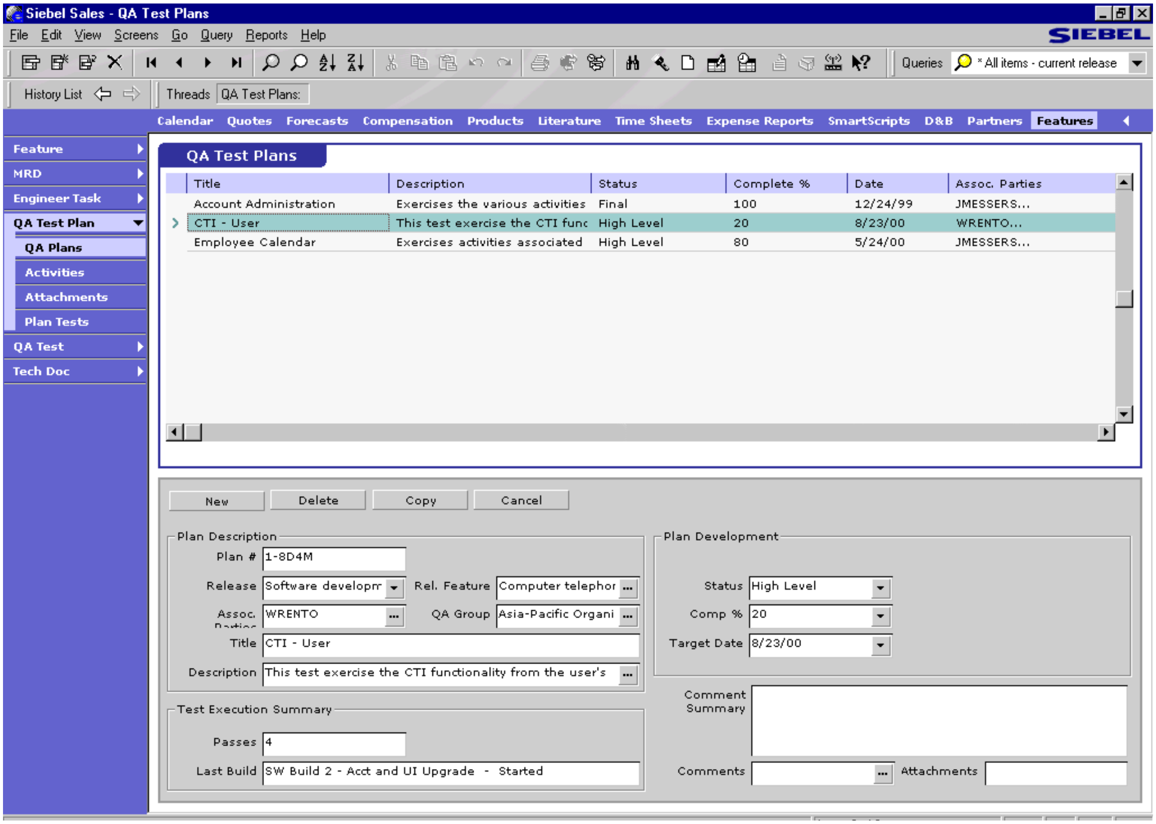

Figure 3-4. Siebel Release Manager QA Plans View

To link a test plan to a feature

1. Choose Screens → Feature → QA Test Plan → QA Plans.
2. In the list applet, select the test plan to which you wish to link a feature.
3. In the Related Feature field, click the ellipsis button.
4. In the dialog box, click New.
5. Select the feature you wish to link to the test plan and click Add.
6. Click Close.

   Note that this linking may be initiated from the feature side as well, as described in Tasks for Product Marketing, above.

To record a QA test that has been executed against a test plan

QA managers use the QA Test Details view (Figure 3-5 on page 3-19) to enter and track information relating to tests conducted during the course of the release. Information about a test is entered into the “Test Description” area, information about the test environment is entered into the “Test Environment” area, and information about the test results is entered in the “Test Execution Status” area. To record a QA test:

1. Choose Screens → Feature → QA Test → QA Test Details.

   The QA Test Details view (Figure 3-5 on page 3-19) appears.

2. Choose Edit → Add New Record.

   An empty row is added to the list.

3 Complete the fields; some fields are described in the following table.

Field	Comments
Build	The product prototype that was tested.
Client OS	The type of operating system running on the client test machine.
Client Type	The type of test machine used by the tester.
Cover %	The portion of the test plan that was executed (covered).
Database	The database type running in the test environment.
Date	The date that the test was conducted.
Pass %	The portion of the test plan that passed.
Release	Required. The name of the product release with which the test is associated.
Server OS	The type of operating system running on the server machine in the test environment.
Status	The stability of the prototype as assessed by the tester during that test.
Test Plan	The test plan that was executed.
Tester	Individuals associated with the test. The individual who conducted the test should be set as “primary”.
Type	The type of test that was conducted.

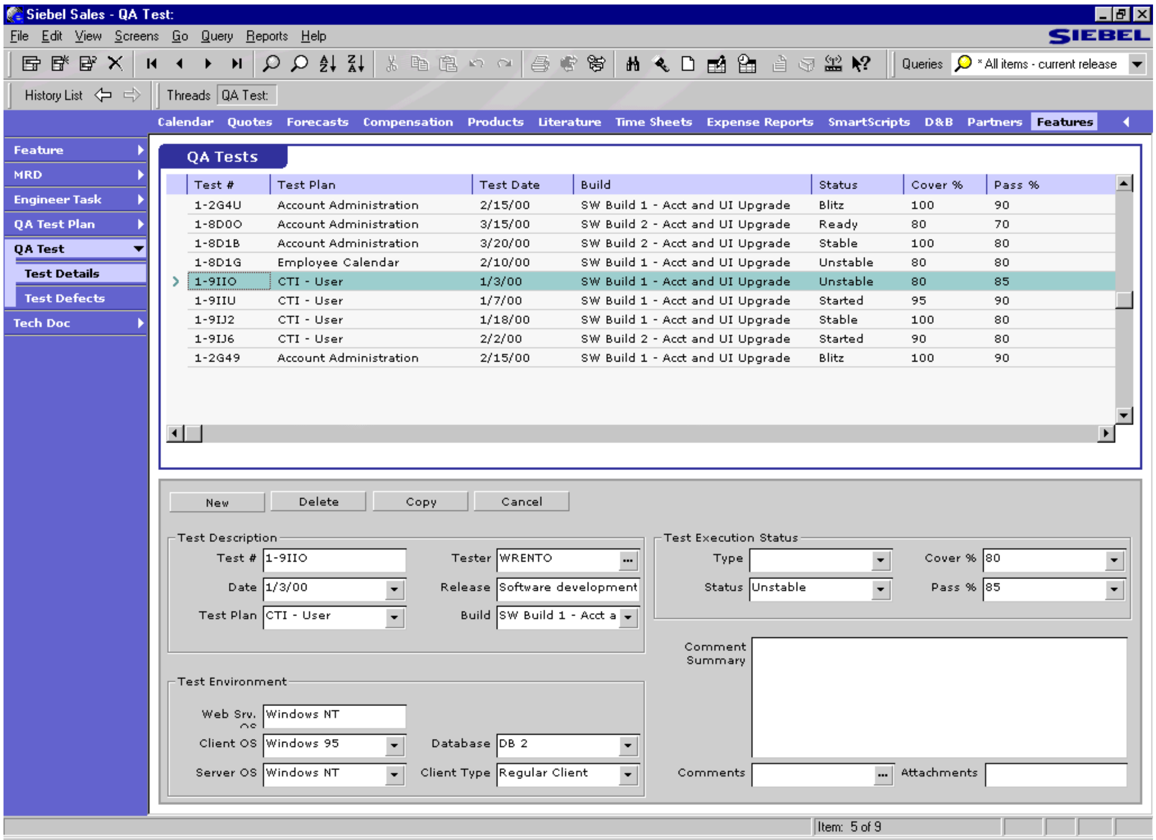

Figure 3-5. Siebel Release Manager QA Test Details View

To determine which new product features may not have been fully tested

Several options are available to QA managers for monitoring product quality. In the QA Plans view (Figure 3-4 on page 3-16), the Test Execution Summary area shows the number of executions (passes) of the test plan and the status as assessed by the tester the last time the test plan was executed. The more passes of the test plan and the higher the stability of the tested area, the greater the overall product quality. QA managers can run queries to further pinpoint areas of risk to product quality. For example, to determine which new product features have been tested to only a minimum level:

1. Choose Screens → Features → QA Test Plan → QA Plans.
2. Choose Query → New Query.
3. In the Release field, select the current release.
4. In the Passes field, enter < n, where n is the minimum number of test iterations that you feel is adequate at this point in the release.
5. Choose Query → Execute Query.
6. For each test plan that is returned, click the ellipsis button for the Related Feature field. The features displayed in the dialog box are at risk because they have not been fully tested.

To determine which new product features may be unstable

1. Choose Screens → Feature → QA Test Plan → QA Plans.
2. Choose Query → New Query.
3. In the Release field, select the current release.
4. In the Last Build field, enter Unstable, or some other value from the Status LOV on the QA Test Details view that represents a low quality assessment.
5. Choose Query → Execute Query.
6. For each test plan that is returned, click the ellipsis button for the Related Feature field. The features displayed in the dialog box are at risk because they may not have been functional in the most recent test.

Tasks for Technical Publications

Once features have been identified for a given release, Technical Publications can begin revising documentation or developing new documents to describe new product functionality. Documentation development is tracked in Siebel Release Manager, with the most current version of the document available as an attachment to the record. Parties such as product managers who may be associated with the development of the document are linked to the record, and their approvals are recorded. For each document, the fraction completed and the target completion date are logged so that potential issues will be flagged before they become critical.

To add a record for a technical publications document

Managers in technical publications use the Tech Docs view (Figure 3-6 on page 3-23) to enter and track information relating to documents that are being developed. Information about the document is entered into the "Document Description" area, and information about the progress of the effort to develop the document is updated in the "Document Development" area. To add a record for a technical publications document:

1 Choose Screens → Feature → Tech Doc → Tech Documents.

The Tech Documents view (Figure 3-6 on page 3-23) appears.

2 Choose Edit → Add New Record.

An empty row is added to the list.

3 Complete the fields; some fields are described in the following table.

Field	Comments
Assoc. Parties	Individuals associated with development of the document. The author should be set as “primary”.
Complete %	The portion of the document that has been completed to date.
Description	
Estimated Pages	The estimated number of pages of the completed document.
New %	The portion of the document that will be new in this version.
Release	Required. The name of the product release with which the document is associated.
Status	The development status of the document.
Target Date	The expected date that the document will be completed.
Title	
Version	The version number of the document.

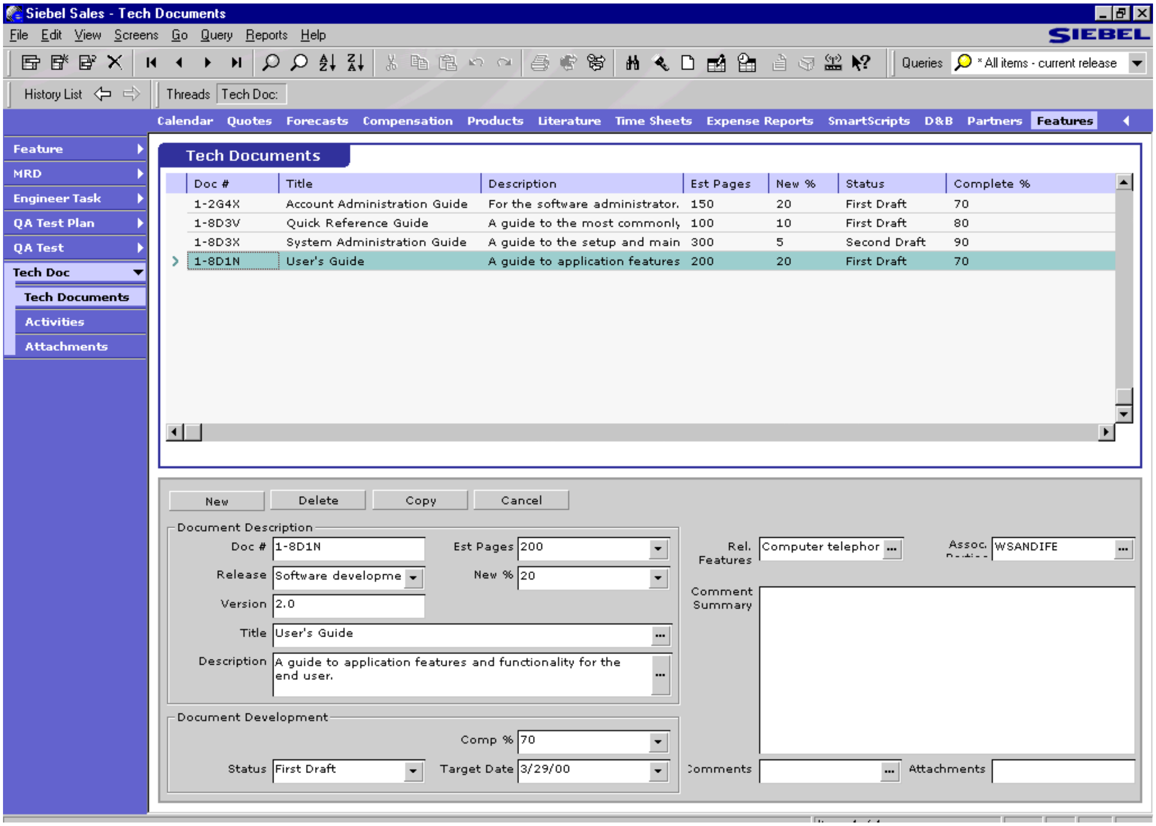

Figure 3-6. Siebel Release Manager Tech Documents View

To link a document to a feature

1. Choose Screens → Feature → Tech Doc → Tech Documents.
2. In the list applet, select the document to which you wish to link a feature.
3. In the Related Feature field, click the ellipsis button.
4. In the dialog box, click New.
5. Select the feature you wish to link to the test plan and click Add.
6. Click Close.

   Note that this linking may be initiated from the feature side as well, as described in Tasks for Product Marketing, above.

Tasks for All Users

To link an activity to a feature or other release item

You may wish to identify activities associated with a release item and track them in Siebel Release Manager. For more information on activities in Siebel, see *Using Siebel Applications*. To link an activity to a feature:

1. Choose Screens → Feature → Feature → Features.
2. In the list applet, select the feature to which you wish to link an activity.
3. On the viewbar, choose Activities.
4. Select the list applet and choose Edit → Add New Record.
5. Complete the fields.

Use a similar process for linking activities to other release items.

To link a file attachment to a feature or other release item

In Siebel Release Manager, you can associate (attach) files to the records. Obvious file attachments might be the most current version of a test plan, technical document, or MRD. You might also attach to a feature an email from a customer emphasizing the importance of including the feature in your next product release. For more information on file attachments and the Siebel File System, see the *Siebel Applications Administration Guide*. To attach a file to a feature:

1. Choose Screens → Feature → Feature → Features.
2. In the list applet, select the feature to which you wish to attach a file.
3. On the viewbar, choose Attachments.
4. Select the list applet and choose Edit → Add New Record.
5. In the dialog box, locate the file you wish to attach and click Select.

Use a similar process for attaching files to other release items.

To add a comment to a feature or other release item

1. Choose Screens → Feature → Feature → Features.
2. In the Comment field, click the ellipsis button.
3. Click New.
4. Enter your comment and click Close.

Use a similar process for adding comments to other release items.

To set up a query that returns features without linked MRDs (or other release items)

During the release process, the release manager and product marketing managers should monitor the features targeted to the current release to ensure:

- The features are properly specified with MRDs.
- The features are being implemented by engineering.
- The features are being tested with QA test plans.
- The features are being documented in tech pubs documents.

Simple queries can be run to return any features do not meet these criteria. For example, to set up and execute a query that returns features without any corresponding MRD records:

1. Choose Screens → Feature → Feature → Features.
2. Choose Query → New Query.
3. In the Release field, select the current release.
4. In the MRD field, enter NOT(EXISTS(LIKE*)).
5. Choose Query → Execute Query.

Follow a similar process to set up and execute queries that return features without corresponding engineering tasks, test plans, or technical publications documents.

To set up a query that returns engineering tasks (or other release items) without linked features

During the release process, engineering managers should monitor their development plans to ensure they are not exerting unnecessary effort by working on tasks that do not have corresponding features requested by product marketing. To set up and execute a query that returns engineering tasks without linked features:

1. Choose Screens → Feature → Engineer Task → Engineer Tasks.
2. Choose Query → New Query.
3. In the Release field, select the current release.
4. In the Related Feature field, enter NOT(EXISTS(LIKE*)).
5. Choose Query → Execute Query.

Follow a similar process to set up and execute queries that return MRDs, test plans, or technical publications documents without corresponding features.

To defer a feature (or other release item) to a later release

As circumstances change and priorities shift, you may want to defer features or other release items to a future release. To associate a feature with a different release:

1. Choose Screens → Feature → Feature → Features.
2. Select the feature you wish to defer in the list applet.
3. Update the release field to reflect the new target release.

Use a similar process for re-targeting other release items.