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EMI Component Release Check List

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Introduction

Follow the steps below to release a new version of an EMI component into one of the EMI major releases. From now on, component release will be refered to as CR.

The EMI software component release workflow is also described in this workflow diagram.

Summary

1. The SA1 Release Manager creates a CR task in the EMI release tracker and assigns the task to the corresponding PT.
2. Do you know how to fill in a CR Task? Check the Change Management Policy and fill in the necessary fields.
3. `FOR EACH` change you plan to release `DO`
    1. Make sure there's an RfC in your PT tracker describing the change. Follow the Change Management Policy to know what needs to be defined in an RfC.
    2. Implement the change by submitting the new code into your VCS.
    3. Move the corresponding RfC status to `Fixed`.
4. Have you finished implementing your changes? Then tag your code.
5. Create a new ETICS configuration containing the new tag. Follow the Build Configuration and Integration Policy to know more about ETICS configurations and ETICS configuration name syntax.
6. Send the new ETICS configuration to the SA1 Release Manager so she adds it into the `emi_B_1_rc` project configuration, which is the project configuration containing all the new components scheduled for the release.
7. Check the nightly build results of `emi_B_1_rc` to make sure your ETICS configuration builds without errors.
8. Lock your ETICS configuration.
9. Register your packages by building your ETICS configuration against the `emi_B_1_prod` project configuration. Follow the Packaging Policy to know which package formats need to be provided.
10. Copy the URL of the new registered packages in the CR task. Note that only the packages owned by the PT in the component release should be included. You must include the URL to all supported package formats.
11. Do you have a Test plan for your component? Check the Testing Policy and use this template to create a test plan for your component.
12. Add the URL to your Test Plan in the CR task in the `Test Plan Link` field.
13. Add the URL to your Test Plan in the QC Test Plan twiki.
14. Test your software component:
    1. Deployment tests: deploy the new version of your component in your PT machines.
    2. System tests: in order to run some of the tests in your Test Plan, you may need to interact with the services deployed in the EMI Testbed.

3. `WHILE` there are RfCs in status `Fixed` `DO`
    - ◊ Make sure the RfC is properly implemented (there should be a test defined for that!)
    - ◊ Change the status to `Certified` or `Not Certified` (if you didn't have the means to verify the implemented RfC)

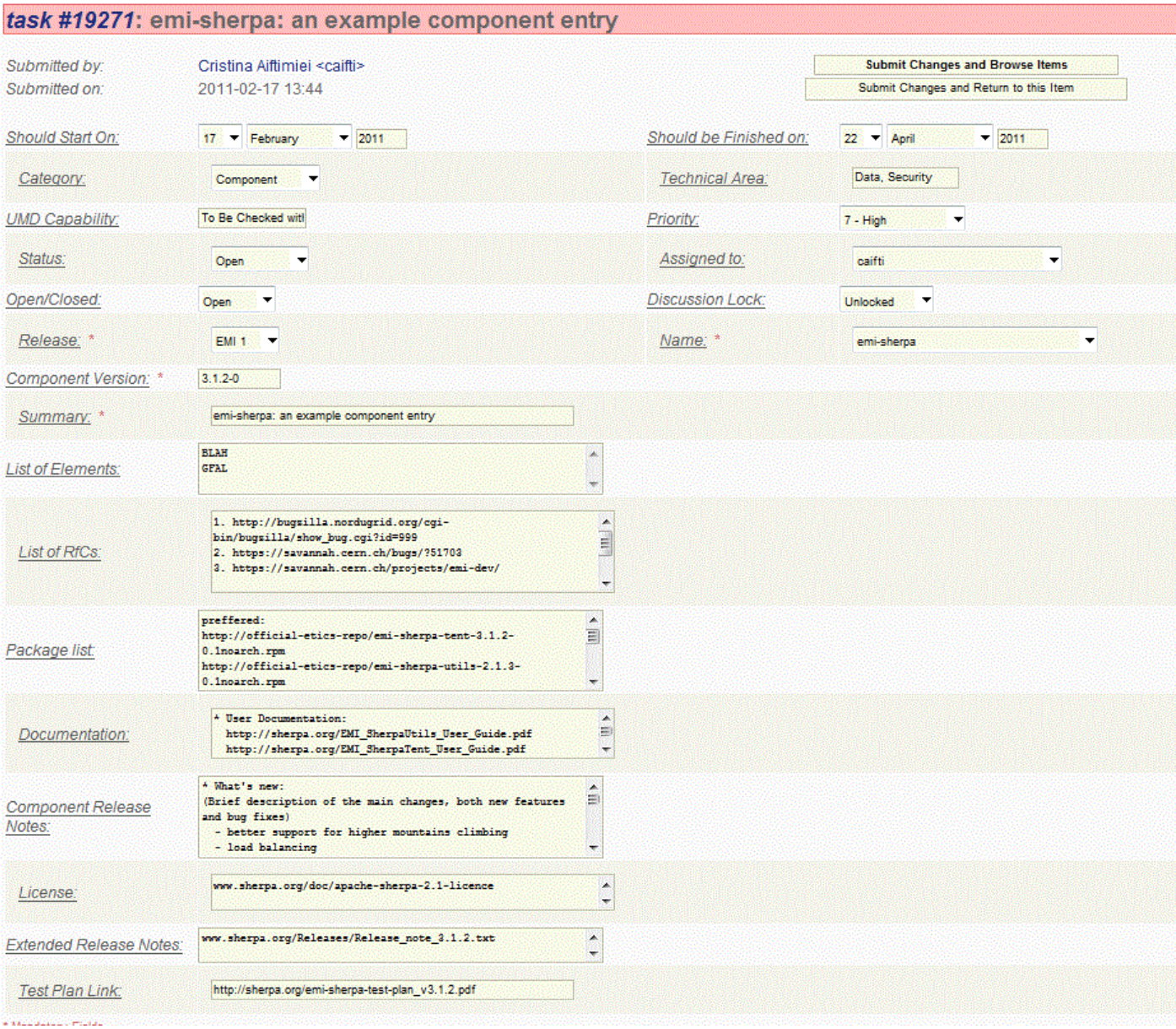
15. Write the TestReport.
16. Attach the Test Report in the CR task.
17. Is your Minimum Required Documentation up to date? Check the Documentation Policy to know what needs to be included in each document.
18. Document the CR task:
    1. Release Notes
    2. Links to Minimum Required Documentation.
19. Certify that your CR has followed all SA2 policies by filling in the Certification Report.
20. Attach the Certification Report to the CR task.
21. Move the status of the CR task to `Certified`.
22. SA1 QC checks the CR task against the Production Release Criteria.
23. SA1 QC attaches the Verification report to the CR task.
24. SA1 QC moves CR task to `Verified`.
25. If the SA1 Release Manager is happy with the QC report, she signs and copies the packages from the CR task to the Release Candidate Repository.
26. The SA1 Release Manager opens a GGUS ticket assigned to `EMI Testbeds`. The ticket must mention the CR tasks to be released.
27. SA2.6 team deploys the release candidates in the EMI Testbed.
28. Inter-component testing is performed in the EMI Testbed with the new release candidates. It has to be understood who will run the automatic tests, monitor the results and take the decision that the release candidates can be moved to Production. *To be discussed with PEB*
29. The SA1 Release Manager moves the packages from the Release Candidate repository to the Production repository and the CR task to `Released`.
30. The PTs moves the RfCs to `Closed`.

Release Process in detail

Define your CR

The SA1 Release Manager creates a CR task in the EMI release tracker and assigns the task to the corresponding PT

An example for the fake component `emi-sherpa` is provided below.



The fields of the task are described in the Change Management Policy - Component Release section.

Work on your CR

Each change that you plan to include in your component release must to be tracked in the relevant RfC item in the tracking system used by your PT. As soon as an RfC is created, please change its status to `Accepted` or `Rejected` (or the corresponding status name in your tracking system).

A URL pointing to each RfC item intended to be released must be included in the CR task, in the field `List of RfCs`.

Once you have committed your code into your VCS, make sure the corresponding RfC status is `Fixed` (or the corresponding status name in your tracking system).

For more details, please check the Change Management Policy.

Build your packages

You must use ETICS to build your packages. In order to use ETICS you must follow the Build Configuration and Integration Policy. You basically need to create an ETICS configuration for your component containing a VCS tag. All the details to know how to define the configurations are included in the mentioned policy.

In order to know which package formats are supported, please check the Packaging Policy. You need to provide tar.gz, src.tar.gz, rpm and src.rpm. You also need to provide a metapackage which will contain only first level dependencies to be able to install all the packages needed by your component.

Once all your changes are committed and your subsystem is building fine in ETICS, you can lock your configuration and register your packages in ETICS.

Once the packages are available in ETICS, copy and paste the list of URLs to download the packages comprising your CR into the `Packages` field of the CR task.

You must include all supported package formats: tar.gz, src.tar.gz, rpm and src.rpm in the CR task. Only the packages provided by your PT and which actually change in the release have to be added.

Test your CR

In order to test your release, follow the Testing Policy.

Basically you need to have a Test Plan. You can use this Template to know which information must be included in the plan.

A link to the test plan must be included in the CR Task.

Once your tests are done, fill in the Test Report and attach it to the CR task.

Document your CR

Now you can proceed to finish documenting your CR task. You should fill in the following fields:

- `Documentation`: Link to the relevant documentation (user guides, troubleshooting guides, etc...)
- `Release Notes`: non-technical text written in good english giving an overview of the change introduced by the packages. The text should be prepared by the PT responsible for the component. It should contain the following structure:
    - What's new: Brief description of the main changes, both new features and bug fixes.
    - Installation and configuration: More details on installation and configuration stating very clearly if the service must be reconfigured and/or restarted.
    - Know issues: Known issues present in the release, possibly with a workaround.
- `Extended Release Notes`: This is an optional field where you can include a URL in case you are also maintaining the release notes in an internal twiki page.

Certify your CR

In order to certify your release, follow the Certification Policy.

Fill in the Certification Report and attach it to the CR task.

You can now change the `Status` of the CR task to `Certified`.

QC verifies the CR

Your job has finished here. QC will check your CR against the Production Release Criteria and will attach a QC report to the CR task. An example of QC report can be found below:

```
********************
EMI QC report
********************

- Component:

- Savannah task:

- EMI Major Release:

- Platform:

- Author:

- Date:

*************
Summary
*************

List of RfCs:
- Available [ yes/no ]

List of packages:
- Available [ yes/no ]

Test Report:
- Available [ yes/no ]
- Succesful [ yes/no ]
- Remarks

Certification Report:
- Available [ yes/no ]
- Succesful [ yes/no ]
- Remarks

Release Notes:
- Available [ yes/no ]
- Structure OK [ yes/no ]
- Contents OK [ yes/no ]

Minimum Required Documentation URLs:
- Available [ yes/no ]
- Up to date [ yes/no ]
```

QC will then change the `Status` of the CR to `Verified`.

CR installed in the testbed

The SA1 release manager will take the packages in the CR task and will populate a Candidate Relese repository. The SA1 release manager will then create a GGUS ticket where she will request the `EMI Testbed` that new release candidates are ready to be deployed. SA2.6 will deploy the new release candidates in the testbed.

The scope of the inter-component tests needs to be defined. It's not clear how inter-component tests will be automated and monitored in the testbed. The idea is that after one week, if no major problems are found, the

installed release candidates are ready to go to production. This stage still needs to be discussed and clarified.

CR released to production

The SA1 team will move the packages in the Candidate Release repository into the EMI Production repository. When this is done, the CR task `Status` will be moved to `Released` and the associated RfCs to `Closed`.

Note that the release manager can decide not to release the CR if the verification report provided by QC shows that the Production Release Criteria is not met.

Logbook

- *28th February 2011* : First version of the check list approved by PEB.

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