# Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
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<tr>
<td>3/02/17</td>
<td>1.9</td>
<td>Updated POLARIS Workflow, including detailed workflows for Data Center Releases or Single Site Releases and for Multi-site Releases or Multi-site Infrastructure Changes added to the guide as Appendix A.5; updated images for POLARIS Landing Page, navigation to My Releases and for lists exceeding 100 items; additional guidance provided for IOC entries; correction to section 4.5.3: Cancelling and Existing Item; clarification provided on Back-out Plans and Rollback Plans</td>
<td>POLARIS Calendar Team</td>
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<tr>
<td>11/29/16</td>
<td>1.8</td>
<td>Updates to Section 4: Using the Software to clarify recommendation on the use of templates based on duration or recurrence of release/activity, and a note on CD2 Approval for entries with the Target Environment of IOC – Production. Addition of new section entitled Appendix A.4: Initial Operating Capability (IOC), which includes information provided by VHA Data Informatics on IOC Evaluations.</td>
<td>POLARIS Calendar Team</td>
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<td>Updated to include new feature for metric reports (see Section 4.6.5 View Metrics Reports). Updated images throughout to include new link to Metrics. Updated images for Target Environment to include addition of IOC – Production, and removal of checkboxes for Installation Instructions and Successful Readiness Review.</td>
<td>POLARIS Calendar Team</td>
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<td>1.6</td>
<td>Updates to section 1.2.3 Coordination and 4.3 Adding a New POLARIS Release to address when entries should be added to the calendar</td>
<td>POLARIS Calendar Team</td>
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<td>9/14/16</td>
<td>1.5</td>
<td>Addition of new section 1.1.1 Governance, updates to section 3.6 CRISP, VistA, or Other Software Patching Across Multiple Systems, and updated POLARIS workflow diagram</td>
<td>POLARIS Calendar Team</td>
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<td>7/25/16</td>
<td>1.4</td>
<td>Updated guide using current User Guide Template from the VA OI&amp;T VIP Assessment and Reporting SharePoint site; updated content addressing required POLARIS entries in relation to Master CO and CRISP patching; added instructions on how to delete templates; added updates to address entries with Calendar Review Status = Needs Revision; added NSD and updated instructions for troubleshooting and user feedback; updated workflow chart</td>
<td>POLARIS Calendar Team</td>
</tr>
<tr>
<td>6/01/16</td>
<td>1.3</td>
<td>Updated content describing options for searching for a release; added instructions for new form for entering Field Ops releases; new content for Calendar Review Status = Needs Revision; Postponed added to drop down list for Execution Status; and Accessibility View.</td>
<td>POLARIS Calendar Team</td>
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<tr>
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<td>1.2</td>
<td>Updated images and instructions to include: Summary field and Save as POLARIS Template in the New Item Form; new Release Templates on Quick Launch navigation bar; how to create and use templates to capture recurring items on the calendar; and updated excerpt of the data dictionary that appears in appendix to include new or missing fields/features or update content for Summary, Description, Save as POLARIS Template and Cancel button.</td>
<td>POLARIS Calendar Team</td>
</tr>
<tr>
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<td>1.1</td>
<td>Added new content for Search, Resources and Links, and User Feedback form. Updated images for the New Item form. Updated navigation within the document.</td>
<td>POLARIS Calendar Team</td>
</tr>
<tr>
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<td>1.0</td>
<td>Initial draft of the User Guide</td>
<td>POLARIS Calendar Team</td>
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Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User’s Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.
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4
1. Introduction

1.1. Purpose

The purpose of the POLARIS Enterprise Release Calendar (POLARIS) User Guide is to provide users with essential information to ensure full use of the release calendar. This manual includes a description of the system functions and capabilities, contingencies and step-by-step procedures for system access and use.

Per VAIQ 7669086, signed on January 19, 2016 by the Assistant Secretary for OI&T (paragraph 5):

*The POLARIS Enterprise Release Calendar shall begin a phased implementation across OI&T to become the single authoritative release calendar for all of OI&T. The POLARIS calendaring process and tool will be used to track software installations, hardware replacements, system upgrades, patch release and implementation, special works in progress, and other deployment events in the VA production environment….this Microsoft SharePoint-based application will serve as a central repository for production platform change information, release management coordination and deployment activity scheduling.*

1.1.1. Governance

POLARIS is the single authoritative release calendar for all of OI&T. POLARIS allows users to monitor, document, and track the status of releases as they are added to the schedule. The site also provides the means for users to extract data from the calendar for their reporting purposes.

The goals of the OI&T POLARIS Release Calendar and related processes are to:

- Provide a centralized, single authoritative release calendar for all of VA;
- Enhance visibility into, and coordination of, releases across VA; and
- Reduce and eliminate redundancy in review, approval, and communication processes.

The Governance Board for POLARIS sets requirements for use of the POLARIS calendar.

1.2. Document Orientation

1.2.1. Organization of the Manual

The following is a brief descriptive outline of the major sections within this guide. Please click on the hyperlink to navigate directly to that section.

1. **Introduction**: describes the purpose of this user guide, document orientation (i.e., assumptions, coordination, disclaimers, document conventions, references and resources), and National Service Desk (NSD) contacts.

2. **System Summary**: provides details on the system configuration; data flows; user access levels; and continuity of operations.

3. **Getting Started**: describes how the user accesses the site, the default view, how to exit the system, any caveats and exceptions, general patching; and how to report technical or content issues.

4. **Using the Software**: offers step-by-step instructions for using the features of the calendar, including adding a new calendar item; how to create a recurring item using a template and delete
an existing template; how to edit, reschedule, or cancel an item; how to view existing data from predefined views, create custom reports, and view metrics; how to search for a release; and links to additional resources and links.

5. **Troubleshooting:** provides special instructions for error correction, how to report technical or content issues, how to provide user feedback, and how to contact the POLARIS Calendar Agents for immediate assistance.

6. **Acronyms and Abbreviations:** a brief list of acronyms and abbreviations included in this guide.

7. **Appendix:** includes a glossary of the terms or metrics used to complete the new calendar item form, a description of the calendar approval process, and a matrix outlining the current and future roles and responsibilities of the calendar organization.

This guide was written for the users of POLARIS, who are responsible for the planning, development, and implementation of software releases, patches or upgrades, system administration, Information Technology (IT) security related updates, and other IT deployments.

The audience for the POLARIS User Guide includes project managers, implementation managers, release managers, management analysts, and the contractors supporting those projects. It may also include other representatives from NCA, OI&T [e.g., Product Development (PD), Product Support (PS), Service Delivery and Engineering (SDE), information technology centers] VBA, VHA, and VA executive leadership.

### 1.2.2. Assumptions

This guide was written with the following assumed experience/skills of the audience:

- User has a basic knowledge of the underlying requirements for release for his or her project;
- User understands the impact the release may have on other systems (e.g., dependencies, coordinating release during schedule maintenance to avoid service interruptions, resource constraints);
- User has an active Department of Veterans Affairs (VA) network account;
- User has basic knowledge of SharePoint (such as how to request access, levels of access, and navigation tools);
- User is using Microsoft SharePoint to view, record and store information related to their project;
- User has been provided with appropriate access to the POLARIS SharePoint site (e.g., contributor rights) and can access the site directly from the network on their Government Furnished Equipment (GFE) or via Citrix Access Gateway (CAG).

### 1.2.3. Coordination

The calendar items posted on POLARIS will be reviewed in various POLARIS Enterprise Release Calendar Review meetings held via teleconference. Participants in the teleconference may include representatives from National Cemetery Administration (NCA), Office of Information and Technology (OI&T), Veteran Benefit Administration (VBA), Veteran Health Administration (VHA), National Security Operations Center (NSOC), and contractors. The facilitator for each meeting will lead the group in reviewing planned activities for a predetermined range of dates. These meetings will provide an appropriate forum for the
participants to address any need for coordination for releases, any security issues, identify additional resources that may be required (e.g., testers), and raise other concerns for the group’s consideration. Review meetings will focus on calendar items that are relevant to a specific group to ensure all release activities are reviewed.

The project manager, authorized representative who created the entry on the calendar, or any other designated POCs for that release, is responsible for adding the calendar item, coordinating the schedule for the release with any other groups that may be affected by that release, attending the POLARIS Enterprise Release Calendar Review meeting to brief the participants on the status of the release, and keeping the calendar item up to date.

The POLARIS calendar team requests that release entries first appear when you have the first proposed deployment date; all entries should be entered a minimum of two to four weeks ahead of release date. Please also see Appendix A.4: Initial Operating Capability (IOC) regarding IOC entries. For VIP projects, EPMO PM creates the template before CD2 approval, and the operations counterpart submits it as an entry after CD2 approval. The dates and times for these entries may be changed up until the Calendar Review Status has been updated to Review Successful as a result of the briefing on the Calendar Review meeting.

A schedule of the POLARIS Review meetings and other POLARIS resources may be found under Documents and Links on the POLARIS SharePoint site.

1.2.4. Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.2.4.1. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

1.2.5. Documentation Conventions

This manual uses several methods to highlight different aspects of the material.

- Descriptive text is presented in a proportional font (as represented by this font). A proportional font is a font type in which the width of letters and symbols varies depending on the letter or symbol.
- Images of computer online displays (i.e., character-based screen captures/dialogs) are shown in a non-proportional font and enclosed within a box. Also included are Graphical
User Interface (GUI) Microsoft Windows images (i.e., dialogs or forms). A non-proportional font is a font whose letters and characters each occupy the same amount of horizontal space.

- This user guide was developed using the most recent template provided on the VA VIP SharePoint site, and uses pre-defined styles for all formatting (e.g., paragraph text, bullets, enumeration).
- Field name and user’s responses to online prompts (e.g., manual entry, taps, clicks) appear in **boldface** type.
- Notes are used to call the user’s attention to additional information relevant to the action described in that section, but that is not part of the step-by-step instructions.

### 1.2.6. References and Resources

The references listed in Table 1 provide information in support of release management activities for the POLARIS SharePoint site. Links to these references appear on POLARIS, are located within the VA firewall, and are not accessible to users outside the VA network. Please work with the project’s VA Program Manager, Implementation Manager, or other authorized point of contact (POC) to complete any activities required via these sources in support of the release.

Table 1: List of References

<table>
<thead>
<tr>
<th>Source</th>
<th>Purpose</th>
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<tbody>
<tr>
<td>VA- National Service Desk (NSD) Automated Notification Reporting list (ANR)</td>
<td>The ANR list is provided so users may validate the ANR number associated with the release activity. A link to this list appears in the New Item Form, as well as on the right side of the POLARIS Landing Page and left side of all other pages on the site.</td>
</tr>
<tr>
<td>CA Service Desk Manager (SDM)</td>
<td>CA SDM offers access to information in incidents, requests and change orders (COs). This reference is provided so users may validate the CO number(s) associated with the release activity. A link to this list appears in the New Item Form, as well as on the right side of the POLARIS Landing Page and left side of all other pages on the site.</td>
</tr>
<tr>
<td>Office of Business Process Integration’s (OBPI's) VBA Testing Request Tracker (TRT)</td>
<td>OBPI's Testing Request Tracker is an online tool to request testers for VBA's business lines. A link to this list appears on the right side of the POLARIS Landing Page and left side of all other pages on the site.</td>
</tr>
<tr>
<td>OBPI's Weekend Manager Schedule</td>
<td>OBPI's Weekend Manager Schedule provides the name and contact information for the current OBPI Weekend Manager. A link to this list appears on the right side of the Landing Page and left side of all other pages on the site.</td>
</tr>
</tbody>
</table>

### 1.3. National Service Desk and Organizational Contacts

Users may contact the National Service Desk via 1-855-673-4357 or National Service Desk - Austin (cdco-nsd@va.gov) to report incidents and break fixes.

Users may reach out to the POLARIS Calendar Agents with process questions or general use of the tool by sending a request to the VA IT POLARIS Calendar Agents mail group
(VAITPOLARISCalendarAgents@va.gov). Please identify the entry by ID and title, describe the issue or question, and provide a screenshot, if applicable.

Users may also provide feedback for future enhancements or process suggestions via the User Feedback Form, as described in Section 5.1 User Feedback.

2. **System Summary**

The POLARIS Enterprise Release Calendar items are presented to a distinct audience comprised of representatives from NCA, OI&T, VBA, VHA, NSOC, and contractors.

- **Major functions performed by the system** – POLARIS allows users to monitor, document, and track the status of releases as they are added to the schedule. The site also provides the means for users to extract data from the calendar for their reporting purposes. Links to additional resources, such as the Service Desk Manager (SDM) and Automated Notification Reports (ANR) are provided. Office of Business Process Integration’s (OBPI’s) VBA Testing Request Tracker (TRT) allows project managers to request and coordinate testing resources from the OBPI in advance of the deployment. The OBPI Weekend Manager Schedule provides POC information for those individuals assigned for upcoming weekends. OBPI’s TRT and Weekend Manager Schedule are resources employed by VBA business lines, and therefore are used only for VBA releases.

- **Description of the architecture of the system in non-technical terms, (e.g., client/server, Web-based)** – The system architecture is web based and consists of a Microsoft SharePoint 2010 site to manage and display the calendar and export data for reporting purposes.

- **User access mode** – The POLARIS SharePoint site is located on the VA network within the firewall. Data is added or updated in the calendar via a link on the POLARIS SharePoint site. The link is to a GUI with defined text fields for input by authorized users.

- **Responsible organization** – POLARIS is managed and maintained by Enterprise Operations (EO).

- **System name or title** – POLARIS Enterprise Release Calendar (POLARIS)

- **System environment factors** – POLARIS is designed to work with standard VA furnished computing equipment.

2.1. **System Configuration**

POLARIS is a SharePoint site used to monitor, document, and track the status of planned software installations, hardware replacements, system upgrades, patch release and implementation, special works in progress, and many other deployment issues. Data captured in the POLARIS Enterprise Release Calendar is stored on a VA SharePoint farm. Data flow for POLARIS is provided in Section 2.2: Data Flows below.
2.2. Data Flows

The POLARIS Workflow Diagram provides context for when a new calendar item should be created, reviewed, briefed, and updated throughout the development and implementation cycle (see Figure 1). It also depicts the timing for when Operational Readiness is confirmed, a process that is dependent on the Veterans Focused Integration Process (VIP) Workflow for Project development and release.

Figure 1: POLARIS Workflow Diagram

Weekly interactive reviews are conducted to collectively identify project risks and potential outages, look for schedule conflicts between current and planned installation activities, and systematically interview each activity representative. These reviews will bring varied release activities to the immediate attention of all levels of management and key technical personnel.

NOTE: Detailed workflows for POLARIS entries for Data Center or Single Site Releases and for POLARIS Entries for Multi-site Releases or Multi-Site Infrastructure Changes are provided in Appendix A-5: POLARIS Workflows.
2.3. User Access Levels
All users with valid VA network IDs/accounts have access that allows them to add calendar items, edit them, and review them.

2.4. Continuity of Operation
The description of the Continuity of Operation will be updated and included in a future iteration of the POLARIS User Guide.

3. Getting Started
POLARIS allows users to monitor, document, and track the status of planned software installations, hardware replacements, system upgrades, patch release and implementation, special works in progress, and many other deployment issues. It serves as a central repository for change information, release management coordination and deployment activity scheduling.

This full featured SharePoint site is a decision-making platform that is intended to be annotated and updated on a real-time basis. It inherently offers a working and easily accessible User platform, security safeguards and robust version/configuration management.

The primary purpose of POLARIS is to ensure successful release activities within the production environment. A successful release is defined as a production activity that:

- Delivers the desired functionality within the scheduled timeframe.
- Does not introduce a system defect.
- Does not adversely impact other system functionality, and
- Does not incur any unscheduled system downtime or unavailability

The POLARIS Enterprise Release Calendar supports VA’s Change Management and Risk Management activities.

Review of scheduled release activities are conducted in order to:

- Identify and resolve potential conflicts that could negatively impact the release activity or other components of the production system,
- Verify that proper notification of the release activity is “advertised” to IT and Business Line representatives
- Coordinate resources and schedules as needed for all release and validation activities as needed, and
- Ensure the installation plans, back-out plans, and criteria are complete and understood by the implementing organization.

3.1. Logging On
All users with valid VA network accounts have access to the POLARIS SharePoint site at VA offices via direct network access on their GFE, or through CAG or Virtual Private Network (VPN) access for remote users.
3.2. **System Menu**

The POLARIS’ system menu is provided via Microsoft SharePoint. Users may access alternative calendar views, and documentation via the Quick Launch bar on the left side of the landing page, and access individual calendar items by clicking on that item within the calendar.

3.2.1. **POLARIS Landing Page**

The POLARIS landing page default view includes the releases for the **Next 14 Days** in a SharePoint list, as well as links to the online form to add a new POLARIS release, predefined views of releases, an option to create a custom report, a link to view metrics reports, and links to additional resources (see Figure 2). See Section 4.5: Views and Reports for more information on how to access additional views or create custom reports.

Figure 2: POLARIS Landing Page

![Figure 2: POLARIS Landing Page](image)

**NOTE:** Users may click on the My Releases tab to the right of the Next 14 Days tab to navigate to that user’s list of releases.

3.3. **Changing User ID and Password**

All users with valid VA network accounts have access to the POLARIS Enterprise Release Calendar SharePoint site. A password is not required to access the calendar.

3.4. **Exit System**

Users may exit the POLARIS Enterprise Release Calendar SharePoint site by closing the window in the browser, or by clicking on the user’s **name** in the upper right-hand corner and clicking **Sign Out**.
3.5. Caveats and Exceptions

Users are advised to enter data for all required fields. Users may go back to add additional content to other fields at any time. Some data elements are mandatory, and the system will prompt the user to complete those required fields before allowing a submission.

Users should also note that once an item has been discussed on the POLARIS Review call and the Calendar Review Status has been updated to Review Successful or Needs Revision, the fields for Release Start Date, Release End Dates, and the Execution Status are locked for editing. If the date and time changes, the user must cancel that item and resubmit the release as a new item. The user may create a template from the existing entry, and then resubmit it as an entry with the new date and time. Users are advised to contact the POLARIS Calendar Agents for further assistance (VAITPOLARISCalendarAgents@va.gov).

If an entire entry is in error, or is an unintentional duplicate item, the user is advised to change the status to cancelled and provide the reason for the cancellation (see Section 4.4: Editing, Rescheduling, or Cancelling an Existing Item).

3.6. CRISP, VistA, or Other Software Patching Across Multiple Systems

The user may create a single POLARIS entry when a CRISP, VistA, or other software patch is installed across many servers or applications as part of a large master Change Order (CO); however, this is allowed only if the installation will occur within a targeted and distinct time period (typically within several hours on a specific date). The user will be required to provide a separate POLARIS entry for each targeted installation when this type of action spans a broad time range (for example, a 5-to-30-day window to install a patch).

For WinTel CRISP Patching, Application Configuration Items (CIs) should be listed on the master patch CO for any patching that is only documented via the master patch CO. If this is not done, then separate COs and POLARIS entries must be generated. Patch and hold, manual patching, or any deviation from the master CO schedule, will require separate child COs and POLARIS entries.

4. Using the Software

The user selects the appropriate form for the release from the links provided on the POLARIS landing page.

4.1. General Releases

For a general POLARIS release, the user should click on the Create a New POLARIS Release link to ensure that he or she is using the latest version. The user should complete the form in detail for each unique release. If the release is for a recurring activity, then the user may save the entry as a template to reuse. See Section 4.4: Creating Calendar Items by Using Templates for more details.
4.1.1. Weekly Entries
Any entry that exceeds a week in duration must have an entry for each week’s activity. These weekly entries may be facilitated by using a template.

4.1.2. Entries that Exceed Two Months
Any entry that exceeds two months in duration (e.g., enterprise infrastructure changes) must have an entry for each month’s activity. These monthly entries may be facilitated by using a template.

4.1.3. IOC Entries
Initial Operating Capability (IOC) Production testing activity is considered production activity. Each POLARIS IOC entry has a maximum expected duration of three months. If the duration of the IOC exceeds three months, the user is required to create additional entries for each three month increment. Sites may start and complete IOC testing at different times. Therefore, the user is required to create one entry per site for IOC using the Field Ops form. The entries should include a reference to IOC in the title. Users should update the Execution Status when testing is completed at the site to Completed Successfully. Please see Appendix A4: Initial Operating Capability (IOC) for additional information.

NOTE: IOC uses the term “sites” to describe the locations where testing will occur; however, in the POLARIS Field Ops form, users will select locations from a drop down menu in a field entitled Affected Locations.

4.2. Field Ops Releases
When a specific targeted release action is repetitive across multiple sites, then the POLARIS Field Operations entry form is required. If multiple weeks are required to complete all stations, then multiple forms are required; one per week. A template must be used to create the initial release entry, and this template should be used for each weekly entry. The user should click on the Create a New POLARIS Field Ops Release link to ensure that he or she is using latest version. The form should detail the entire release.

The Field Ops user would then open the template to submit it as an actual entry for each one-week timeframe. If the template has been completed in detail by the EPMO representative, then the Field Ops user will only need to edit three areas:

1. Ensure the POCs are correct,
2. Specify the week time span, and
3. Select the sites that will be deployed that week.

The Field Ops user then submits it as a POLARIS entry.

NOTE: The original template is still available to create the next entry for the next week.

Once each defined one-week deployment is complete, the Field Ops user will need to update any site changes and complete the Execution Status for that entry.
4.3. Adding a New POLARIS Release

The POLARIS calendar team requests that release entries first appear when you have the first proposed deployment date; all entries should be entered a minimum of two to four weeks ahead of release date. Any CO that has a documented scheduled start date or Major Implementation Date (MID) must have an active POLARIS entry. For VIP projects, EPMO PM creates the template before CD2 approval, and the operations counterpart submits it as an entry after CD2 approval. Users may change the date and time as needed up until the release activity has been briefed and the Calendar Review Status has been changed to Review Successful or Needs Revision.

A detailed list of activities that require a POLARIS entry, along with those that are excluded, may be found in the document entitled POLARIS Entries Required.

For general release activities, users should click on the Create a New POLARIS Release link on the left side of the screen (see Figure 3).

Figure 3: Create a New POLARIS Release

If the user clicks on the Create a New POLARIS Release, then the New Release form will appear, as shown in Figure 4.

Figure 4: New Release Form
If the user clicks on the **Create a New POLARIS Field Ops Release**, then the **New Field Ops Release** form will appear, as shown in Figure 5.

**Figure 5: New Field Ops Release Form**

The fields are very similar, with the exception that **New Field Ops Releases** form includes a field that allows users to identify multiple **Field Offices (locations)** affected by that release activity instead of the **Site(s)** field that appears in the **New POLARIS Release** form (see instructions and Figure 24: Affected Location(s) for more information).

Users are advised to complete the required fields in the **New Item** form first, and may go back to add additional content at a later time. Required fields for the **New Item** form are indicated by either a red asterisk that appears in the upper right corner of the field, or by a red dotted outline around the field (see Figure 6).

**Figure 6: Required Fields**

The information in the form is broken out into several subsections, including: **Points of Contact**, **Release Information**, **Status Information**, and **Release Documentation**.

At the top of the form, the user is required to provide the **Title** of the release. The **Event Identification (Event ID)** number will be automatically generated once the entry is submitted (see Figure 7).
4.3.1. Point of Contact Information

The user is required to complete the Name, Phone Number, and Email for the Project Manager POC at initial entry. The Project Manager is responsible for the development and management of the initiative.

The user may add the Implementation Manager POC and Post-Validation Tester POC once they are identified; however, it is recommended that those fields be completed as soon as possible and before the item is discussed during the POLARIS Enterprise Release Calendar Review meeting. The Implementation Manager is responsible for the hands-on installation of the release. This field is optional, and if left blank, the assumption is the POC for the Project Manager and POC for the Implementation Manager are the same individual.

Users may search for the name and contact information using the browse button, as shown in Figure 8.

Figure 8: Browse Icon

Once the user clicks on the browse button, the Select People – Webpage Dialog box will open. The user may type in the last name of the POC and click on the magnifying glass icon on the right to search in Active Directory (AD) and the results will appear in the dialog box under Display Name (see Figure 9).
The user should select the correct **name** for the POC and click **OK** (see Figure 10).

**Figure 10: Browse Results**
The POC’s Name will automatically be populated. The user must manually enter the Phone Number and Email (see Figure 11). The user may also manually enter an alternate phone number, which is especially important for releases that will occur outside standard business hours or during weekends or holidays.

**NOTE:** If the user or POC does not wish to post a personal number for a mobile device, he or she may forward the office number to that alternate phone number and confirm that with the Calendar Agent during the briefing for that release on the POLARIS Calendar Review meeting.

Figure 11: Required POC Fields

![Point of Contact Information](image)

**NOTE:** Phone number (alternate) and Ext. may be manually entered.

### 4.3.2. Release Information

In this section of the form, the user will be asked to provide specific details for the release, the schedule, and how it may impact other systems.

The user is required to add a summary of the release in the Summary field (see Figure 12). The summary should be brief, but with enough information so that when the Calendar Agent reads it to the participants on the POLARIS Review call, the Project Manager POC, Implementation Manager POC, Post-Validation Tester POC, and other users will recognize it. It should also be distinct from other calendar entries to avoid confusion.

Figure 12: Summary

![Release Information](image)

The user should add a Description in this freeform field that provides enough detail that other users may understand what is being installed (see Figure 13). Please note that the contents of the Description field will not appear onscreen during the POLARIS Review call, unless the Calendar Agent leading the meeting opens the item.
The user is required to select a **Category** for this release from the drop down menu (see Figure 14). Descriptions of these categories are provided under the field for quick reference.

The user will be required to provide a **System Name** from the drop down menu. If the user selects “other,” he or she will need to provide the name in the free form field to the right of the field (see Figure 15). In this context, the **System Name** refers to the name of the system, platform, or hardware. It should reflect the highest system level, the top program, or the base platform (e.g., AITC Infrastructure, NSOC, Mainframe).
The user will be required to provide an **Application Name** from the drop down menu (see Figure 16). The user may need to use the scroll bar for the list (not the one for the form), as indicated by the red arrow below, in order to see other items on the list. If the user selects **Other**, he or she will need to provide the name in the free form field to the right of the field for the Application Name selected.

**NOTE:** The **Application Name** drop down list is based on the **VA System Inventory (VAI)**.

The user may provide a **Version Number** in this free-form text field (see Figure 17).
The user will be required to provide the **Release Start Date & Time** and **Release End Date & Time**. The default entry for the **Release Start Date & Time** is the current date and time, and the entry for the **Release End Date & Time** is entered manually (see Figure 18).

The user may edit the **Release Start Date & Time** by clicking on the calendar icon, may change the month by clicking on the left or right arrows on the **Month, Year** heading in the pop-up calendar image, and clicking on the new date (see Figure 19). The user may edit the start time in the text field to the right of the calendar icon. Please note that all times should be recorded in Eastern Standard Time (EST).

Once the user provides a new **Release Start Date & Time**, he or she will be prompted to provide a **Release End Date & Time**. As the user rolls over that field, a prompt will appear that states, “Please enter a release end date on or after the chosen release start date.” The fields for **Release End Date & Time** have a red-dotted outline, as well (see Figure 20).

The user may edit the **Release End Date & Time** by clicking on the calendar icon, may change the month by clicking on the left or right arrows on the **Month, Year** heading in the pop-up
calendar image, and clicking on the new date, as shown in Figure 21. The user may edit the end time in the text field to the right of the calendar icon.

Figure 21: Edit Release End Date & Time

For **General Releases**, the user will be required to indicate which **Site(s)** will have the release installed (see Figure 22). The user may need to use the scroll bar for the list (not the one for the form), as indicated by the red arrow below, in order to see other items on the list. Please check all sites that are applicable.

Figure 22: Site(s)

For **Field Ops Releases**, the user will be required to indicate the **Affected Location(s)** (see Figure 23). The user may select all locations within a region (e.g., **All Region 1**), or identify individual locations by clicking on the checkbox to the left of the associated region or location. The user may need to use the scroll bar for the list (not the one for the form), as indicated by the red arrow below, in order to see other items on the list. Please check all locations that are applicable.
The user is required to identify the **Target Environment** via the drop down menu, as shown in Figure 24.

**Figure 24: Target Environment**

The user will be asked to identify if the release falls under EPS by selecting **Yes** or **No** via the drop down list, as shown in Figure 25. If **Yes**, the user is asked to select **Other** or **N/A** from the drop down list in the **Number** field and may provide a number or other reference in the **Other** free-form text field. This number should reflect the unique identifier for the product or project.

**Figure 25: EPS or VIP – EPS Options**

The user will be asked to identify if the release falls under VIP by selecting **Yes** or **No** via the drop down list, as shown in Figure 26. If **Yes**, the user will be asked to confirm **CD2 Approved** by selecting **Yes** or **No** via the drop down list.
NOTE: CD2 Approval is only required for Production and IOC-Production entries, but may not be required for other IOC related entries.

The user is required to include any Dependencies in a free-form text field or state that “there are no dependencies.” The form includes a note that describes dependencies as “any applications that could be impacted by this activity, including interfacing systems/subsystems” (see Figure 27).

The user is required to provide any Planned Downtime or note N/A in the free-form text field (see Figure 28).

The user is required to select a Primary Deployment Organization from the drop down menu, as shown in Figure 29. (This is the organizational unit responsible for the release/deployment/activity.) If Other is selected, please provide the name of the Primary Deployment Organization in the free-form text field to the right.
The user is required to select the **Customer/User Community** by checking the box to the left of the group’s name. If **Other** is selected, please provide the name of the group in the text field (see Figure 30).

The user is required to select the **Installation Scope** from the drop down list. If **Other** is selected, please provide a description of the Installation Scope in the text field (see Figure 31).

The user must provide details for a phone/conference bridge connection for coordinating an install activity in the **Conference Bridge** free-form text field (see Figure 32).
The user may add **Comments** in the free-form text field, as shown in Figure 33. Please include information that is relevant to the release/installation that may not have been provided in other fields.

**Figure 33: Comments**

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### 4.3.3. Status Information

The drop down list for the **Calendar Review Status** includes: **Pending Review, Review Successful, Needs Revision, Postponed, or Cancelled** (see Figure 34). The default entry for all new items is Pending Review. The Calendar Agent will update the status to **Review Successful** or **Needs Revision**, based on the results from the discussion on the Calendar Review meeting. If the status is changed to **Review Successful** or **Needs Revision**, then the release components are frozen. The user or Calendar Agent may update the status to **Postponed** or **Cancelled**, but the user must resubmit the release as a new item to reschedule it.

The Calendar Agent will update the **Calendar Review Status** to **Review Successful** if the following criteria have been met:

- Representative for the release was present on the POLARIS Review call to provide a status update;
- Deployment Schedule (date/time) has been reviewed and no conflict is apparent;
- Deployment Resources are identified and available for executing the release/activity;
- Installation Plan(s) created, available, and understood; and
- Back-out Plan(s) created, available, and understood.

The user may attach the Installation Plan(s), Back-out Plan(s), and other documentation that is relevant to the release/activity (see **Section 4.3.4: Release Documentation** for further instructions).

**Figure 34: Calendar Review Status**

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If additional information is identified as missing in the entry or was not represented during POLARIS Calendar Review Briefing, the record will be marked as **Needs Revision**. The **Release Start Date**, the **Release End Date**, and the **Execution Status** fields will be locked for editing. The reason for this will be marked in the POLARIS entry (see Figure 35), and the Project Manager POC, the Implementation Manager POC, and the user who created the entry will receive an email notification explaining what revision is needed.
NOTE: To update the date and time of a release that has a Calendar Review Status of Needs Revision, the user must cancel that entry and resubmit it under the new date and time. The user is advised to create a template from the existing entry before cancelling it, and base the new entry off of the new template. Please see Section 4.4.1: Creating a Template and Section 4.5.3: Cancelling an Existing Item for further instructions.

Figure 35: Reason for Needs Revision

NOTE: If the Calendar Agent sets the Calendar Review to Needs Revision and does not make a selection from the secondary drop down list or does not add content in the text field for Other, they will receive a validation error that states: "Please enter the cause for the revision of this release."

After the scheduled installation date, the user must provide an Execution Status from the drop down list (see Figure 36). Options include: Completed Successfully, In Progress, Partially Released, Backed Out, Postponed, or Cancelled.

Figure 36: Execution Status

NOTE: If the Calendar Review Status is Pending, the user may only update the Execution Status to Cancelled or Postponed. If the Calendar Review Status is Needs Revision and the user updates the Execution Status to Postponed, he or she will receive a validation error that states, "This release entry needs revision. Please contact a POLARIS agent for clarification or select another Execution Status."

The user is required to provide details for why a release/activity was not completed as planned in the Non-Completed Reason free-form text field (see Figure 37). This field is enabled and must be completed only if Calendar Review Status is Postponed or Cancelled or if Execution Status is Partially Released, Backed Out, or Cancelled.
4.3.4.  Release Documentation

The user may include links to the relevant CO Numbers in the free-form text field. Tips for the VA URL Shortener and the VA Service Desk Manager are provided for quick reference and validation (see Figure 38).

Links are allowed in the release documentation area. Please note the following restrictions:

- All user-provided links must be accessible VA-wide. Links to restricted sites are not permissible, and defeat the purpose of this calendar tool.
- Any user-provided links must point the reviewer directly and quickly to the data element which is required in the POLARIS calendar.
  - For example: Under the Back-out Plan, the user may provide a link to an installation instructions document which also contains the back-out plan; however, the user must specify “See paragraph 1.2.3 of the Installation Instructions located at hyperlink.”
  - If a reviewer is unable to quickly access or determine the location of the required information, then the entry may not be approved.

**NOTE:** If documentation is already available as part of the CO or another location, the user may reference it here (e.g., “see CO”). If the user plans to follow a standard operating procedure (SOP) that has already been documented elsewhere, the user may include a reference to the source for the SOP, or attach it to the form.
The user may include a link to the relevant ANR in the free-form text field. Tip for the **Active Automated Notification Report (ANR) List** is included for quick reference and validation (see Figure 39). If the release does not require an ANR and downtime was documented elsewhere on the POLARIS record, please provide a justification in the free-form text field.

**Figure 39: ANR**

The user may include a link to **Release Notes** in the free-form text field if not already included in the CO (see Figure 40).

**Figure 40: Release Notes**

The user must include one of the following: a link to the **Installation Instructions**; a reference to the instructions documented in the CO; mention an attached document on the POLARIS record; or a brief summary of the installation in the free-form text field (see Figure 41).

**Figure 41: Installation Instructions**

The user must include one of the following: a link to the **Back-out Plans**; a reference to the instructions documented in the CO; mention an attached document on the POLARIS record; or a brief summary of the back-out plan in the free-form text field (see Figure 42).

**Figure 42: Back-out Plans**

NOTE: Back-out and Rollback are often used in reference to this field. For EO, Back-out is to remove a recent change in infrastructure or software, whereas Rollback refers to removing data changes that have occurred, resulting from an associated change in infrastructure or software.
The user may document what equates a successful release readiness review for their release (see Figure 43).

**Figure 43: Successful Readiness Review**

![Successful Readiness Review](image)

The user may include additional attachments by clicking on the Click here to attach a file button, as shown in Figure 44. The user should provide details in the Comments field regarding any attached document (see Figure 33: Comments).

**Figure 44: Attachments**

![Attachments](image)

Once the user clicks on the Click here to attach a file button, the Attach File dialog box will be displayed. The user should click on the Browse button, as shown in Figure 45.

**Figure 45: Attach File Browse Button**

![Attach File Browse Button](image)

Once the user clicks on the Browse button, the user may search and select a file from the Documents Library or relevant network drive, and click on Open, as shown in Figure 46.
Once the user clicks on the **Open** button, the **Attach File** dialog box reappears with the file listed in the field to the left of the Browse button. The user should click on the **Attach** button to attach the selected file to the New Item entry form, as shown in Figure 47.

Figure 47: Attach File Button

Now that the fields have been completed, the user may click on the **Submit** button to complete the New Item entry form (see Figure 48).

Figure 48: Submit Button
The user may also cancel the entry by clicking on the **Cancel** button at the bottom of the form (see Figure 49).

**Figure 49: Cancel Button**

4.4. Creating Calendar Items by Using Templates

4.4.1. Creating a Template

The user may create a prepopulated new item form for a recurring calendar item by saving the entry as a template by clicking on **Save as POLARIS Template** instead of the **Submit** button (see Figure 50). There are no restrictions on duration (i.e., Release Start and Release End Dates) in a template.

**Figure 50: Save as POLARIS Template Button**

**NOTE:** The **Save** button in **Edit** mode will not save changes to an existing template (see Figure 51). The user must use the **Save as POLARIS Template** button to save any changes made to the template.

**Figure 51: Do Not Use Save Button for Template Changes**

The user may access an existing template by clicking on the **Release Template** link provided on the Quick Launch bar on the left side of the landing page. The user will see a list of the templates that he or she created, or can view a list of all templates by clicking on the **All Release Templates** tab, as shown in Figure 52.

**NOTE:** Templates for Field Ops releases will have an automatically generated filename with the naming convention of **FO RT – Event Title – YYYY-MM-DD**. Templates for other releases will have an automatically generated filename with the naming convention of **RT – Event Title – YYYY-MM-DD**. The date and time stamp will be appended to the filename and shown in military time, which will enable the user to differentiate between multiple templates that are created on the same day.
The user may open an existing template by clicking on it, and a completed calendar item will appear, with fields that have been prepopulated with content provided by the template’s author. The Event ID field remains blank (see Figure 53). The user should update the Start Date and End Date fields, and edit or add any additional information that is relevant to the release for that date. Once the user makes those updates, he or she should click on the Submit button (see Figure 49). A copy of the entry with the new Start Date and End Date will appear on the calendar with a Calendar Review Status of Pending Review, and will be assigned a new Event ID for that item. The template will remain available in the list of All Release Templates for future use.

The user may also create a template from an existing calendar entry first by opening that item from the Calendar View or List View in Edit mode and then clicking on the Save as POLARIS Template button instead of the Submit button.

Please note that the Event ID field will be populated because the template was created from an existing calendar entry. The Event ID number cannot be reused; however, the user may still use that template to create new calendar entries. The user should make updates to the Start Date and End Date fields and any additional changes, and then click on the Submit button to create the new calendar entry. The new calendar entry will be assigned a new Event ID, but the template will remain available to users to create additional templates and calendar entries.

Note: For Field Ops Releases, the user should confirm the POC information, specify the week time span, and select the sites that will be deployed for that week.
4.4.2. Deleting a Template

The user may delete a template that he or she created by hovering the cursor over the template name, clicking on the drop-down arrow, and selecting **Delete** (see Figure 54).

**Figure 54: Delete a Template**
4.5. Editing, Rescheduling, or Cancelling an Existing Calendar Item

4.5.1. Editing an Existing Item

Users may edit an existing item from a calendar view or SharePoint list view. The user should first click on the entry to open the detailed form, and then click on the Edit Item icon in the upper left corner of the form to enable editing mode (as shown in Figure 55) and scroll to the field to be edited. Once edits have been completed, the user should click on the Submit button to save the edits.

Figure 55: Edit Item Icon

4.5.2. Rescheduling an Existing Item

Please note that once the release has been approved (i.e., the Calendar Review Status having been set to Review Successful), the Release Start Date & Time and Release End Date & Time cannot be changed, nor can the user delete the item. Instead, the user must change the Execution Status to Cancelled (see Figure 36: Execution Status and Figure 37: Non-Complete Reason) and enter a New Item with the Release Start Date & Time and Release End Date & Time.

A user may change the Release Start Date & Time and Release End Date & Time only while the release is Pending Review. Once it is updated to Review Successful or Needs Revision, the Release Start Date & Time and Release End Date & Time fields are locked. The user may not delete the item. Instead, the user must update the status to Cancelled and provide a reason why it was not completed as scheduled. The user may then enter a New Item with the new Release Start Date & Time and Release End Date & Time.

4.5.3. Cancelling an Existing Item

If a user needs to cancel an item that has a Calendar Review Status of Pending Review, then the user should change the Execution Status to Postponed or Cancelled and provide the reason for the cancellation (see Figure 34: Calendar Review Status and Figure 37: Non-Complete Reason).
Once the **Calendar Review Status** has been changed to **Review Successful**, the item is frozen. If a user needs to cancel or reschedule a “**Review Successful**” item, then the user must update the **Execution Status** as **Partially Released**, **Backed Out**, **Postponed**, or **Cancelled** (see Figure 36: Execution Status and Figure 37: Non-Complete Reason).

### 4.6. Views and Reports

Users may review calendar items in a number of predefined views, or create custom reports by setting a series of parameters for the search. Links to predefined views are provided on the left side of the landing page, as well as a series of tabs provided at the top of the center of the screen. Step-by-step instructions for creating a custom report are also provided in this section.

#### 4.6.1. All Calendars, Analysis, and Review/Approval Views

Users may view calendar items in predefined views for **All Calendars, Analysis View**, or **Review/Approval View** by clicking on the corresponding link on the left side of the screen (see Figure 56).

*Figure 56: All Calendars, Analysis View, and Review/Approval View*

Users will also have the option to navigate to additional views from each of these views. For example, from **All Calendars**, users may view all releases for a predefined week, or view releases for one of the child calendars and by day of the week by clicking on the associated tabs, as shown in Figure 57.
Users may access releases scheduled within predefined range of dates from the Analysis View display, as well as view items on the EO Schedule or SWAT Review, by clicking on the tab above the SharePoint list. The default Analysis View shows a list of all releases on the calendar grouped by month. The user may expand or contract the list for a specific month by clicking on the +/- icon to the left of the Month of Releases heading, or may navigate to predefined expanded views for Next 7 Days, Next 14 Days, Next 30 Days, Next 60 Days, EO Schedule, or SWAT Review by clicking on the associated tab (see Figure 58).

### 4.6.2. Views by Predefined Range of Dates

Users may view calendar items by a predefined range of dates, as specified to the right of the My Releases tab across the top center of the screen (see Figure 59). For example, when the user clicks on Monthly Releases a list of releases for each month are displayed. The user may expand
or collapse a list of releases for a particular month by clicking on the button to the left of the Month of Release heading.

Figure 59: Predefined Range of Dates

The screen will display the scheduled releases for the specified dates in a calendar format, as seen in Figure 61. The user may adjust the timeframe by clicking on a different date in the calendar icon on the left side of the screen, go forward or back by a month by clicking on the left or right arrows on either side of the month and year in the calendar icon, or by clicking on the left or right arrows just to the right of the calendar icon.

For each of the tabs that appear on the Landing Page, the user may switch from the SharePoint list to a calendar view by clicking on the link that appears just below the tabs and above the list, as shown in Figure 60.

Figure 60: Link to Switch to Calendar View
The user may also change the scope of the calendar view by clicking on the Calendar Tools tab and then clicking on the Day, Week, or Month icon in the ribbon (see Figure 62).

**Figure 62: Change Scope of Calendar View**

### 4.6.3. Accessibility View

POLARIS also provides a stripped down version of the SharePoint list view of My Releases or All Releases formatted to meet Section 508 standards. Users should click on the link to Accessibility View that appears at the top of the screen, as shown in Figure 63.

**NOTE:** Users that benefit from Section 508 compliant views are encouraged to note the Event ID or Title for the release so that they may navigate directly to it more quickly.
When the user clicks on the link to **All Releases**, a SharePoint list view will appear with options to filter the list by Release ID or by Event Title (see Figure 64). The user can then open any release on the list by clicking on the release in the list.

### 4.6.4. Creating Custom Reports Using Parameters

Users may extract data from the POLARIS Enterprise Release Calendar to create a custom report by clicking on Reports and setting parameters for specific data using the parameter options on the right side of the screen.

The user selects which **Category** to search for by selecting from the drop down menu, as shown in Figure 65. The default selection is **Select All**. The user may clear the selections by clicking on the checkbox next to **Select All** and then select the **Category** to search for by clicking on the checkbox next to its name.
The user selects the **Calendar Review Status** from the drop down list, as shown in Figure 66. The default selection is **Select All**. The user may clear the selections by clicking on the checkbox next to **Select All** and then select the **Calendar Review Status** to search for by clicking on the checkbox next to the status name.

The user selects the **Execution Status** from the drop down list, as shown in Figure 67. The default selection is **Select All**. The user may clear the selections by clicking on the checkbox next to **Select All** and then select the **Execution Status** to search for by clicking on the checkbox next to the status name.
The user must **Specify Begin Date** by clicking on the calendar icon and then clicking on the **beginning date** for the search, as shown in Figure 68.

Next, the user must **Specify End Date** by clicking on the calendar icon and then clicking on the **end date** for the search, as shown in Figure 69. Once all of the parameters are set, the user clicks on **Apply** to generate the report.
The results are displayed on the screen as the **POLARIS Triage Report** (see Figure 70). This view provides a list of all calendar items that fall within those parameters. To view an individual item from this list, the user may **click on the Event ID number**.
Once the user clicks on the **Event ID** number, the details for that calendar item will be displayed, as shown in Figure 71.

**Figure 71: View Item from Triage Report**
4.6.5. **View Metrics Reports**

Users may also extract data from POLARIS to view metrics reports by clicking on Metrics, selecting the criteria for the metrics from the tabs, and specifying the start and end date for the report. The report will display a summary of metrics at the top, followed by a graphical depiction of the metrics, as well as a list of relevant calendar entries. Users may view metric reports for the following:

- Successful Release Report
- Postponed/Cancelled Release Report
- Non-Attendance Report
- Creation to Start < 72 Hours
- Creation to Start < 1 Week
- Creation to Start < 2 Weeks

The Postponed/Cancelled Release Report is provided below as an example. The user may refine the report by entering parameters for the **Begin Date**, **End Date**, and in the case of this report, **Select Chart Type** (e.g., column, pie), the click on the **Apply** button (see Figure 72).

**Figure 72: Postponed/Cancelled Release Report**

4.7. **Search for a Release**

There are a number of options for searching for a specific release using the SharePoint search functionality, as well as report features customized for POLARIS. The following options offer the best and most relevant results. Context or examples are provided so that the user may decide what works best for a unique set of circumstances.
4.7.1. Search for a Release by Event ID

The user may search for a calendar item by Event ID Number by clicking on the Reports link, clicking on the **Search by ID** tab, clicking on the drop down arrow on the right side of the screen to open the field, enter the number, and then click **Apply** (see Figure 73).

**NOTE:** This search is often used by the Calendar Agents to search for follow up messages during or after the POLARIS Calendar Review meetings.

![Figure 73: Search by ID Report](image)

The user may view additional information by clicking on the +/- icon to the left of the Event ID Number to display the **Title, Application Name, System Name, Implementation POC, and Post-Validation POC fields**, as shown in Figure 74.

**NOTE:** This search is often used by the Calendar Agents to search for follow up messages during or after the POLARIS Calendar Review meetings.
4.7.2. Search by Change Order Number

The user may also search for a calendar item by its associated Change Order Number by clicking on the Reports link, clicking on the Search by CO tab, clicking on the drop down arrow on the right side of the screen to open the field, enter the number, and then click Apply. The user may view additional information by clicking on the +/- icon to the left of the Event ID Number to display the Title, Application Name, System Name, Implementation POC, and Post-Validation POC fields. The results are shown in Figure 75.

**NOTE:** This search is often used by the Calendar Agents to validate if entries are complete and the CO workflows are up to date prior to the Calendar Review meetings.
4.7.3. **Search within a Defined SharePoint List View**

The user may search for a calendar item by Event ID number within a defined SharePoint List View by clicking on the down arrow to the right of the Event ID column and selecting the corresponding ID number, as shown in Figure 76, or selecting a filter from another column.

**NOTE:** A predefined view, such as the one used during the POLARIS Calendar Review calls, will only display items that match the filters applied. The user may clear the filter to expand the list of items to search from, but the predefined view will be altered and results will no longer be sorted by the original filters unless the user reinstates those selections.
NOTE: This search may be used to quickly access a calendar item by Event ID or other filter within a predefined list, such as the list view used during the POLARIS Review calls.

The SharePoint list view may only display some releases that match a filter if the results exceed 100 items. To navigate to the next or previous 100 items within that view, the user should scroll down to the bottom of the list and click on the left or right arrows, as shown in Figure 77.

4.8. Resources

Links to a document library and resource links, as well as a link to the VA SDM site are provided via the Quick Launch bar on the left side of the landing page.

4.8.1. Documents and Links

Additional POLARIS related information is provided via Documents & Links on the Quick Launch bar on the left side of the landing page. The user may access POLARIS documentation
by clicking on the **Resource Documentation** tab, as shown in Figure 78. POLARIS resource documentation includes, which includes an electronic copy of the current **POLARIS User Guide**, the **POLARIS Quick Start** guide, and other supporting documentation.

**Figure 78: Documents & Links – Resource Documentation**

The user may also access links to other VA resources referenced in the new item form, such as the ANR list, by clicking on the **Resource Links** tab and then clicking on the hyperlink in the list, as shown in Figure 79.

**Figure 79: Documents & Links - Resource Links**
4.8.2. VA Service Desk Manager (SDM)

The user may also access the VA SDM site via the link on the Quick Launch bar on the left side of the landing page. The link will take the user to his or her home page in SDM (see Figure 80).

Figure 80: VA Service Desk Manager

5. Troubleshooting

Users may contact the National Service Desk via 1-855-673-4357 or National Service Desk - Austin (cdco-nsd@va.gov) to report incidents and break fixes.

Users are advised to raise any content issues directly with the Project Manager’s POC prior to the POLARIS Review meetings or with the group for discussion during the POLARIS Review meeting.

Users may reach out to the POLARIS Calendar Agents with process questions or general use of the tool by sending a request to the VA IT POLARIS Calendar Agents mail group (VAITPOLARISCalendarAgents@va.gov). Please identify the entry by ID and title, describe the issue or question, and provide a screenshot, if applicable.

Users may also provide feedback for future enhancements or process suggestions via the User Feedback Form, as described in Section 5.1 User Feedback.

5.1. User Feedback

The user has the option of providing feedback directly to the POLARIS team via the User Feedback Form, which is accessible via the link on the Quick Launch bar on the left side of the landing page (see Figure 81.)
Once the user clicks on the Feedback link, the User Feedback Form will appear, as shown in Figure 82.

**Figure 82: User Feedback Form**
5.1.1. Fields for User Input

The user is required to provide the **Topic of Feedback** and **Description** in the free-form text fields (see Figure 83).

**Figure 83: Required Fields**

Users and the POLARIS team may add additional information in the **Comments** free-form text field. Each comment will include a date/time stamp and the author of the comment. Comments added by the POLARIS team will address any follow up actions taken in response to the feedback (see Figure 84).

**Figure 84: Comments**

The user may also attach a file to the User Feedback Form by clicking on the **Click here to attach a file** button (see Figure 85). One example of an attachment would be a screenshot of an error message.
Once the user clicks on the **Click here to attach a file** button, the **Attach File** dialog box will be displayed. The user should click on the **Browse** button, as shown in Figure 86.

**Figure 86: Attach File Browse Button**

Once the user clicks on the **Browse** button, the user may search and **select a file** from the **Documents Library or relevant network drive**, and click on **Open**, as shown in Figure 87.

**Figure 87: Browse Results for Attachment and Open Button**
Once the user clicks on the **Open** button, the **Attach File** dialog box reappears with the file listed in the field to the left of the Browse button. The user should click on the **Attach** button to attach the selected file to the User Feedback Form, as shown Figure 88.

**Figure 88: Attach File Button**

![Attach File Dialog Box](image)

The file name of the attachment will appear just below the **Click here to attach a file** button, as shown in Figure 89. The user may remove an attachment by clicking on the red X icon.

**Figure 89: File Attached**

![File Attached](image)

After the user completes the required fields, he or she may click on the **Submit** button to complete the User Feedback Form to save the entry or click on **Close the Form** to exit without saving (see Figure 90).

**Figure 90: Submit or Close the Form**

![Submit and Close Buttons](image)

### 5.1.2. Fields for POLARIS Team Input

The POLARIS team will identify what type of change may be required to address the issue identified by the user by selecting from the drop down menu for **Change Type**, as shown in Figure 91.
Figure 91: Change Type

At the initial entry, the **Issue Status** is automatically set as **Active**. The POLARIS team will meet on a recurring basis to review each user feedback entry to determine the appropriate next steps to address it. Follow up action will be monitored through to resolution, at which time the **Issue Status** will be updated to **In CCB Review**, **Resolved**, or **Closed** (see Figure 92).

Figure 92: Issue Status Drop Down List

User feedback will also be assigned a priority from the three options shown in the drop down list in Figure 93. The default setting is **Low (8 – 10 weeks)**, which may be elevated based on results of the feedback review and any follow up actions assigned by the POLARIS team.

Figure 93: Priority Drop Down List

The POLARIS team will assign a **Due Date** using the **calendar icon** as shown in Figure 94.
The POLARIS team will also assign the follow up actions to an individual by completing the **Assigned To** field. There are two options to enter and validate the POC’s name and contact information.

The POLARIS team member may enter the **last name** then a **comma** and the **first name** in the **Assigned To** field, and then click on the **Check Name Icon** on the right, or may search for the name and contact information using the **Browse** button (see Figure 95).

### 5.2. Special Instructions for Error Correction

Users may not delete a calendar item once it is entered. If a user has entered an item in error, or a duplicate item, the user is advised to change the status to cancelled and provide the reason for the cancellation.
6. Acronyms and Abbreviations

The following acronyms and abbreviations appear in this document. Please see Appendix A: POLARIS Glossary of Calendar Item Data for a list and descriptions for the fields that appear in the New Item entry form.

<table>
<thead>
<tr>
<th>Acronym or Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD</td>
<td>Active Directory</td>
</tr>
<tr>
<td>AITC</td>
<td>Austin Information Technology Center</td>
</tr>
<tr>
<td>ANR</td>
<td>Automated Notification Reporting</td>
</tr>
<tr>
<td>BPS</td>
<td>Benefit Product Support</td>
</tr>
<tr>
<td>CAG</td>
<td>Citrix Access Gateway</td>
</tr>
<tr>
<td>CI</td>
<td>Configuration Item</td>
</tr>
<tr>
<td>CO</td>
<td>Change Order</td>
</tr>
<tr>
<td>CRRC</td>
<td>Enterprise Project Structure</td>
</tr>
<tr>
<td>DOD</td>
<td>Department of Defense</td>
</tr>
<tr>
<td>EO</td>
<td>Enterprise Operations</td>
</tr>
<tr>
<td>EPMO</td>
<td>Enterprise Program Management Office</td>
</tr>
<tr>
<td>EPS</td>
<td>Enterprise Project Structure</td>
</tr>
<tr>
<td>EST</td>
<td>Eastern Standard Time</td>
</tr>
<tr>
<td>FOIA</td>
<td>Freedom of Information Act</td>
</tr>
<tr>
<td>GAL</td>
<td>Global Address List</td>
</tr>
<tr>
<td>GFE</td>
<td>Government Furnished Equipment</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>HITC</td>
<td>Hines Information Technology Center</td>
</tr>
<tr>
<td>ID</td>
<td>Identification</td>
</tr>
<tr>
<td>IT</td>
<td>Information Technology</td>
</tr>
<tr>
<td>NCA</td>
<td>National Cemetery Administration</td>
</tr>
<tr>
<td>NSD</td>
<td>National Service Desk</td>
</tr>
<tr>
<td>NSOC</td>
<td>Network Security Operations Center</td>
</tr>
<tr>
<td>OBPI</td>
<td>Office of Business Process Integration</td>
</tr>
<tr>
<td>O&amp;T</td>
<td>Office of Information and Technology</td>
</tr>
<tr>
<td>ORM</td>
<td>Office of Resource Management</td>
</tr>
<tr>
<td>PD</td>
<td>Product Development</td>
</tr>
<tr>
<td>PITC</td>
<td>Philadelphia Information Technology Center</td>
</tr>
<tr>
<td>PMAS</td>
<td>Project Management Accountability System</td>
</tr>
<tr>
<td>POC</td>
<td>Point of Contact</td>
</tr>
<tr>
<td>Acronym or Abbreviation</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>PS</td>
<td>Product Support</td>
</tr>
<tr>
<td>QITC</td>
<td>Quantico Information Technology Center</td>
</tr>
<tr>
<td>SDE</td>
<td>Service Delivery and Engineering</td>
</tr>
<tr>
<td>SDM</td>
<td>Service Desk Manager</td>
</tr>
<tr>
<td>SOP</td>
<td>Standard Operating Procedure</td>
</tr>
<tr>
<td>TRT</td>
<td>Testing Request Tracker</td>
</tr>
<tr>
<td>VA</td>
<td>Department of Veterans Affairs</td>
</tr>
<tr>
<td>VASD</td>
<td>VA Service Desk</td>
</tr>
<tr>
<td>VASI</td>
<td>VA System Inventory</td>
</tr>
<tr>
<td>VBA</td>
<td>Veterans Benefit Administration</td>
</tr>
<tr>
<td>VBMS</td>
<td>Veterans Benefits Management System</td>
</tr>
<tr>
<td>VDL</td>
<td>VA Software Library</td>
</tr>
<tr>
<td>VHA</td>
<td>Veterans Health Administration</td>
</tr>
<tr>
<td>VHAMC</td>
<td>VHA Medical Center</td>
</tr>
<tr>
<td>VIP</td>
<td>Veteran-Focused Integration Process</td>
</tr>
<tr>
<td>VIPR</td>
<td>Veteran-Focused Integration Process Request</td>
</tr>
<tr>
<td>VM</td>
<td>Virtual Machine</td>
</tr>
<tr>
<td>VPN</td>
<td>Virtual Private Network</td>
</tr>
<tr>
<td>VR&amp;E</td>
<td>Vocational Rehabilitation and Employment</td>
</tr>
<tr>
<td>WITS</td>
<td>Work Intake and Tracking System</td>
</tr>
</tbody>
</table>
### 7. Appendix

#### A.1. POLARIS Glossary of Calendar Item Data

The following fields/terms, descriptions, and definitions appear in the Enter New Item form on the POLARIS Enterprise Release Calendar. The fields are listed in the order they appear on the form. Not all fields are required.

<table>
<thead>
<tr>
<th>Field/Term</th>
<th>Description/Menu Options</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event ID</td>
<td>Required field; automatically populated field</td>
<td>Event ID is populated once the New Item is submitted.</td>
</tr>
<tr>
<td>Title</td>
<td>Required field; free-form text field</td>
<td></td>
</tr>
<tr>
<td>Point of Contact Information</td>
<td>This section includes the following fields for the Project Manager POC, Implementation Manager POC, and the Post-Validation Tester POC.</td>
<td>The POC information may be pulled directly from the VA Global Address List (GAL) or from Active Directory (AD); however, the user may need to manually enter the alternate phone number, especially for release activities that are scheduled outside of standard business hours, or during weekends or holidays.</td>
</tr>
<tr>
<td>Project Manager Point of Contact (POC)</td>
<td>Required field</td>
<td>Project Manager POC information is required at the time the initial entry is created, so the user is encouraged to have this information ready before beginning the entry. The Project Manager is responsible for the development and management of the initiative.</td>
</tr>
<tr>
<td>Implementation Manager POC</td>
<td>Not required at initial entry, but required during planning and before the briefing and execution of the release.</td>
<td>User is encouraged to provide the Implementation Manager POC information prior to briefing the status at the POLARIS Review meeting. The Implementation Manager is responsible for the hands-on installation of the release. This field is optional, and if left blank, the assumption is the POC for the Project Manager and POC for the Implementation Manager are the same individual.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Post-Validation Tester</td>
<td>Not required at initial entry, but required during planning and before the briefing and execution of the release.</td>
<td>For VBA releases, the user is encouraged to coordinate assignment of testers with OBPI as soon as possible and at least two weeks before the execution of this release by using the Testing Request Tracker (TRT). OBPI’s TRT is a resource employed by VBA business lines, and therefore is required only for VBA releases. For all releases, the user should provide the lead Post-Validation Tester POC information during the planning phase and prior to briefing the status at the POLARIS Review meeting. A link to the TRT is provided on the Quick Launch navigation bar on the left side of the screen on the POLARIS landing page.</td>
</tr>
<tr>
<td>POC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Required field for Project Manager (PM) POC; <strong>Check Name</strong> button or <strong>Browse</strong> option to validate manual entry; default for PM POC automatically populates user’s name</td>
<td><strong>Check Name</strong> validates entry against content in the GAL; <strong>Browse</strong> validates entry against content in AD.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Required field for PM POC; automatically populated; default for PM POC automatically populates user’s</td>
<td><strong>Check Name</strong> validation of POC name will automatically populate this field from content in the GAL; <strong>Browse</strong> validation of POC name will automatically populate this field from content in AD.</td>
</tr>
<tr>
<td>Phone Number (alternate)</td>
<td>Free-form text field; manual entry required; recommended format (###) ###-####</td>
<td>User is encouraged to provide this information for releases scheduled outside of routine business hours, weekends, or holidays. If the user does not wish to publish personal phone numbers, then he or she may confirm to the Calendar Agent on the POLARIS review call that the office number for the POC will be forwarded to a mobile device.</td>
</tr>
<tr>
<td>Ext</td>
<td>Free-form text field; manual entry required</td>
<td>Add as needed</td>
</tr>
<tr>
<td>Email</td>
<td>Required field for PM POC; automatically; default for PM POC automatically populates user’s</td>
<td><strong>Check Name</strong> validation of POC name will automatically populate this field from content in the GAL; <strong>Browse</strong> validation of POC name will automatically populate this field from content in AD.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Release Information</td>
<td>Fields in this section include: Description, Category, System Name, Application Name, Version Number, Release Start Date &amp; Time, Release End Date &amp; Time, Site(s), Target Environment, EPS Number, Dependencies, Planned Downtime, Primary Deployment Organization, Customer/User Community, Installation Scope, Conference Bridge, and Comments.</td>
<td>Most fields in this section are required, so the user is encouraged to have this information ready to create the initial entry.</td>
</tr>
<tr>
<td>Summary</td>
<td>Required field; free-form text field</td>
<td>The Summary should be brief, but with enough information so that when the Calendar Agent reads it to the participants on the POLARIS Review call, the Project Manager POC, Implementation Manager POC, Post-Validation Tester POC, and other users will recognize it. It should also be distinct from other calendar entries to avoid confusion.</td>
</tr>
<tr>
<td>Description</td>
<td>Required field; free-form text field</td>
<td>User must provide a brief description that will distinguish this release activity from others on the calendar. Contents of the Description field will not appear onscreen during the POLARIS Review call, unless the Calendar Agent leading the meeting opens the item.</td>
</tr>
<tr>
<td>Category</td>
<td>Required field; drop down list; list of options and descriptions provided for quick reference</td>
<td>User may select from the following options: VBA Business Program, VHA Business Program, NCA Business Program, IT Corporate Program, IT Infrastructure, IT Security, Client Technologies, or Scan Activity.</td>
</tr>
<tr>
<td>System Name</td>
<td>Required field; drop down list</td>
<td>If Other is selected, the user may provide the system name in the free form text field to the right of the System Name field.</td>
</tr>
<tr>
<td>Application Name</td>
<td>Required field; drop down list</td>
<td>Drop down list is based on the VA System Inventory (VASI). If Other is selected, the user may provide the application name in the free form text field to the right of the Application Name field.</td>
</tr>
<tr>
<td>Version Number</td>
<td>Free-form text field</td>
<td>User may provide the applicable release Version Number or N/A.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Release Start Date &amp; Time (EST)</td>
<td>Required field; default automatically populates current date and time (EST); select date from calendar icon; manual enter time in EST; field locked for updates if Calendar Review Status is updated to Needs Revision</td>
<td>All time references on the POLARIS Calendar should be provided in EST, regardless of site(s) for the release activity.</td>
</tr>
<tr>
<td>Release End Date &amp; Time (EST)</td>
<td>Required field; default automatically populates an hour from the Release Start Date &amp; Time (EST); select date from calendar icon; manual enter time in EST; field locked for updates if Calendar Review Status is updated to Needs Revision</td>
<td>All time references on the POLARIS Calendar should be provided in EST, regardless of site(s) for the release activity.</td>
</tr>
<tr>
<td>Site(s)</td>
<td>Check box next to name of site or multiple sites from the list provided</td>
<td>User may check one or more of the following options: AITC, HITC, PITC, QITC, CRRC, Terremark, VHAMC, and/or Regional Office.</td>
</tr>
<tr>
<td>Affected Location(s)</td>
<td>Check box next to name of Region or Location; user may select multiple locations from the list provided</td>
<td>User has the option to select all locations within a Region, or select individual locations that will be affected by the release.</td>
</tr>
<tr>
<td>Target Environment</td>
<td>Drop down list</td>
<td>User may select from the following options: Production, PreProd, Performance, Dark Domain, Certification, Integration, Prod Test, or IOC – Production.</td>
</tr>
<tr>
<td>EPS Number</td>
<td>Required field; Yes/No drop down options</td>
<td>If Yes is selected, the EPS Number and Other fields appear. The user may select N/A or Other. If Other is selected, the user must include a reference number in the text box.</td>
</tr>
<tr>
<td>VIP</td>
<td>Required field; Yes/No drop down options</td>
<td>If Yes is selected, the CD Approval field is displayed/enabled below it.</td>
</tr>
<tr>
<td>CD2 Approval</td>
<td>Yes/No drop down options</td>
<td>Displayed/enabled if VIP field input is Yes.</td>
</tr>
<tr>
<td>Dependencies</td>
<td>Required field; free-form text field</td>
<td>User lists any applications that may be impacted by this activity, including interfacing systems and subsystems. If there are no dependencies, the user is to state, there are no dependencies.</td>
</tr>
<tr>
<td>Planned Downtime</td>
<td>Required field, free-form text field</td>
<td>User is encouraged to provide any Planned Downtime in EST in this field. If there is no planned downtime, the user should enter N/A.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Primary Deployment Organization</td>
<td>Required field; drop down list</td>
<td>User selects the organizational unit responsible for the release/deployment/activity from the list. If Other is selected, the user may provide the explanation in the free form text field to the right of the Primary Deployment Organization field.</td>
</tr>
<tr>
<td>Customer/User Community</td>
<td>Required field; drop down list</td>
<td>User selects the Business Administration/Organization (e.g., VBA, VHA, NCA, VR&amp;E, ORM, OI&amp;T, Other) from the list. If Other is selected, the user may provide the explanation in the free form text field to the right of the Customer/User Community field.</td>
</tr>
<tr>
<td>Installation Scope</td>
<td>Required field; drop down list</td>
<td>User identifies if the release is part of the SIO's Coordinated Installation, or if this needs to be coordinated with another release activity (e.g., SIO CI, N/A, Other/explain). If Other is selected, the user may provide the explanation in the free form text field to the right of the Installation Scope field.</td>
</tr>
<tr>
<td>Conference Bridge</td>
<td>Free-form text field</td>
<td>User may provide the dial-in number for the conference bridge here (e.g., VANTS, Lync) for coordinated install activity.</td>
</tr>
<tr>
<td>Access Code</td>
<td>Free-form text field</td>
<td>User may provide the conference ID or access code here (e.g., VANTS, Lync) for coordinated install activity.</td>
</tr>
<tr>
<td>Comments</td>
<td>Free-form text field</td>
<td>User may provide additional details on the release in this field.</td>
</tr>
<tr>
<td>Status Information</td>
<td>Fields in this section include:</td>
<td>The default entry for Calendar Review Submission is Pending Review for all new items. Updates to the Execution Status and Non-Completed Reason fields are dependent upon a change in Calendar Review Status to Review Successful.</td>
</tr>
<tr>
<td></td>
<td>Calendar Review Status,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Execution Status, and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-Completed Reason.</td>
<td></td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Calendar Review Status</td>
<td>Required field; drop down list; Calendar Agent provides this input</td>
<td>Default entry for all new items is <strong>Pending Review</strong>. The drop down list includes: <strong>Pending Review</strong>, <strong>Review Successful</strong>, <strong>Needs Revision</strong>, <strong>Postponed</strong>, or <strong>Cancelled</strong>. The Calendar Agent updates the status to <strong>Review Successful</strong> or <strong>Needs Revision</strong>, based on results from the POLARIS Calendar Review meeting. Once this status is updated, the user or Calendar Agent may update the status to <strong>Postponed</strong> or <strong>Cancelled</strong>, as needed.</td>
</tr>
<tr>
<td>Execution Status</td>
<td>Triggered as required field once <strong>Calendar Review Status</strong> changes to <strong>Review Successful</strong>; drop down list; field locked if Calendar Review Status is set at Needs Revision</td>
<td>User makes a selection from the following options: <strong>Completed Successfully</strong>, <strong>In Progress</strong>, <strong>Partially Released</strong>, <strong>Backed Out</strong>, or <strong>Cancelled</strong>.</td>
</tr>
<tr>
<td>Non-Completed Reason</td>
<td>Triggered as a required field only if <strong>Calendar Review Status</strong> is <strong>Postponed</strong> or <strong>Cancelled</strong> or if <strong>Execution Status</strong> is <strong>Partially Released</strong>, <strong>Backed Out</strong>, or <strong>Cancelled</strong>; free-form text field</td>
<td>User must provide details as to why a release/activity was not completed as planned.</td>
</tr>
<tr>
<td>Release Documentation</td>
<td>Fields in this section include: CO Numbers, ANR, Release Notes, Installation Instructions, Back-Out Plans, Successful Readiness Review; tips and hyperlinks to the VA URL Shortener, the VA Service Desk Manager, and the Active ANR List; and allows the user to add additional Attachments, and the Submit button.</td>
<td>This series of fields are not required, but allow the user to provide hyperlinks to the CO Numbers, ANR, and additional release documentation that may not be included in the CO.</td>
</tr>
<tr>
<td><strong>Tip: VA URL Shortener</strong></td>
<td>Hyperlink</td>
<td>User is encouraged to use this tool to shorten links provided in the free-form text fields for Release Documentation</td>
</tr>
<tr>
<td>CO Numbers</td>
<td>Free-form text field</td>
<td>User provides the <strong>CO Numbers</strong> for the release/activity here. Users are encouraged to provide the reference here, rather than in a comment or description field, for quick reference.</td>
</tr>
<tr>
<td><strong>Tip: VA Service Desk Manager</strong></td>
<td>Hyperlink</td>
<td>User is encouraged to validate <strong>CO Numbers</strong> from this list.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ANR</td>
<td>Free-form text field</td>
<td>User provides the ANR number here, rather than in a comment or description field, for quick reference. If an ANR is not required (e.g., no downtime), the user is advised to provide a justification in this field.</td>
</tr>
<tr>
<td><strong>Tip: Active Automated Notification Reports (ANR) List</strong></td>
<td>Hyperlink</td>
<td>User is encouraged to validate ANR numbers from this list.</td>
</tr>
<tr>
<td>Release Notes</td>
<td>Free-form text field</td>
<td>User may provide link to Release Notes if they are not already attached to the CO. Separate multiple links by a comma with no line breaks or commas.</td>
</tr>
<tr>
<td>Installation Instructions</td>
<td>Free-form text field</td>
<td>The user is required to provide link(s) to Installation Instructions in the text field, reference the source for a Standard Operating Procedure (SOP) or reference “see CO” as appropriate. Separate multiple links by a comma with no line breaks or commas. This field cannot be blank.</td>
</tr>
<tr>
<td>Back-out Plans</td>
<td>Free-form text field</td>
<td>The user is required to either provide link to Back-out Plans in the text, reference the source for a SOP or reference “see CO” as appropriate. Separate multiple links by a comma with no line breaks or commas. This field cannot be blank. (Please note that Back-out and Rollback are often used in reference to this field. For EO, Back-out is to remove a recent change in infrastructure or software, whereas Rollback refers to removing data changes that have occurred, resulting from an associated change in infrastructure or software.)</td>
</tr>
<tr>
<td>Successful Readiness Review</td>
<td>Free-form text field</td>
<td>User may provide link to related documentation in the text field. Separate multiple links by a comma with no line breaks or commas.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Button to open Browse dialog box</td>
<td>User may add Attachments that do not fall under the other categories in this section to the New Item by clicking here to open the Browse dialog box to select the file to be attached.</td>
</tr>
<tr>
<td>Field/Term</td>
<td>Description/Menu Options</td>
<td>Additional Information</td>
</tr>
<tr>
<td>-------------------------</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Save as POLARIS Template</td>
<td>Button</td>
<td>User may create a prepopulated new item form for a recurring calendar item, such as a routine maintenance release or activity that occurs on a weekly or monthly basis, by saving the entry as a template by clicking on Save as POLARIS Template. The template is saved to a document library and is accessible by all users. Event ID remains blank until the user clicks on the Submit button.</td>
</tr>
<tr>
<td>Submit</td>
<td>Button</td>
<td>User must click on the Submit button to save the New Item entry or any edits made to an existing item from the New Item form.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Button</td>
<td>User may cancel an entry before it is added to the calendar by clicking on the Cancel button. (Please note that this does not cancel and existing item on the calendar, rather it will only cancel a draft entry if the user has not already clicked on the Submit button for that item. To cancel an existing item, the user or Calendar Agent must edit the Calendar Review Status or Execution Status.)</td>
</tr>
</tbody>
</table>
A.2. Calendar Approvals Process

The approval process described below is from the POLARIS Enterprise Release Calendar Review perspective, and is independent of the Change Order and other required OI&T review processes.

1. Preliminary: External to the calendar process, releases are subject to organizational release requirements such as ESE Release Requirements, operational acceptance, CCB, etc. Those projects subject to VIP must pass CD#2 approval.

2. Calendar Review – The following “point of release” requirements must be met
   a. Deployment Schedule – Approved by calendar team
   b. Deployment Resources – Available to execute the release
   c. Installation Plan – Created by the planning team. Understood and approved by the organization responsible for executing the release. Success criteria are clear.
   d. Back-out plan – Created by the planning team. Understood and approved by the organization responsible for executing the release.

3. Back-out criteria:
   a. For all releases planned for up to three (3) hours to install, then one (1) hour past plan is general criteria to execute the back-out plan.
   b. For releases planned for more than three (3) hours to install, the release plan shall include interim schedule targets and clear criteria for when to execute the back-out plan.
   c. In all cases, the release shall be planned, and back-out criteria defined, such that back-out for a failed release may be executed within the total deployment timeslot allotted.
   d. The release manager has responsibility and authority to understand the planned release components and to make the decision (if needed) to execute back-out.

4. Timing of Calendar Approvals: The initial Calendar Review status is “Pending Review.” Final ok is granted at the weekly calendar meeting, upon successful review of the above items. After calendar approval, the release components shall remain frozen. If changed after the calendar review, the release shall be cancelled and re-submitted through the review process.
A.3. POLARIS Organization Roles and Responsibilities (Current and Future)

The following matrix describes the current and future POLARIS organization, as well as the roles and responsibilities for each member or group.

<table>
<thead>
<tr>
<th>Role</th>
<th>Current</th>
<th>Future</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Project Manager, Application Manager, or Implementation Manager (also called “user” in this guide) | Individual who is responsible for the development and management of the initiative which requires a calendar entry. | Individual who is responsible for the development and management of the initiative. | • Enter initial calendar entry  
• Update calendar entry details  
• Solicit approval from release team as appropriate  
• Coordinate final readiness and ensure the details are populated in the calendar  
• Perform change advisory by briefing the release at weekly calendar meeting(s) to confirm final operational readiness  
• Execute the release as scheduled  
• Update the release status after execution |
| Executive Sponsor | Originally led by the DAS, EPMO; recently transitioned to the Executive Director, EO | Executive Director, EO | • Decisions and guidance. Final approval of key decisions  
• Signatures for implementation mandate  
• Escalation point, as needed  
• Support ongoing staffing and governance representation (currently the POLARIS/Wichita team)  
• Responsible for the calendar mission |
<table>
<thead>
<tr>
<th>Role</th>
<th>Current</th>
<th>Future</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| OI&T Governing Body             | Originally comprised of OI&T staff detailed to create POLARIS, and currently co-led by the EO Release Supervisor and VBA Transformational Calendar Lead. | Future governing body will include representation across OI&T and the enterprise (e.g., EO application, EO infrastructure, FO, EPMO, VHA, VBA, NCA, OCIS, OI&T Corporate), and may or may not include the original POLARIS/Wichita team. | • Data definitions and requirements  
• Define and publish metrics  
• POC for transition and compliance for their organizational area  
• Prioritize changes to the calendar tool  
• Meet at least weekly  
• Escalation point if calendar entry approval status is controversial and cannot be resolved as part of review meeting  
• Direction for next phase OI&T calendar, for enhanced functionality  
• Phased deployment across OI&T  
• Ensure accomplishment of the mission and scope, as defined by CIO and executive sponsor |
<table>
<thead>
<tr>
<th>Role</th>
<th>Current</th>
<th>Future</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Calendar Analysts     | Individuals who currently serve as agents or analysts for VBA, EO calendars and other calendars | To be transitioned to full EO ownership; team will be comprised of EO Supervisor, and six (6) or more analysts and technical writers | • Prepare weekly agenda for calendar review meeting  
• Conduct the weekly calendar review meeting  
• Update approval entries in the calendar during or immediately after confirmation meeting  
• Monitor and pursue the following:  
  o Changes that need to be on the calendar (e.g., review ANRs, COs). This is will be based on the receiving organization  
  o Releases not ready for approval (administrative entries)  
  o Check that required artifacts exist prior to confirmation meeting  
  o Release capacity limit reached, where applicable  
  o Communicating “cut-off time” for inclusion in weekly meeting  
  o Release status not updated after executing  
  o Incidents feedback loop – initial analysis  
  o General data integrity  
• Facilitate Emergency or “out of process” changes  
• Collect or review feedback requests  
• Assist users needing assistance  
• Periodically review resource links, to ensure they are still active and appropriate |
<table>
<thead>
<tr>
<th>Role</th>
<th>Current</th>
<th>Future</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Hosting and Development     | EO Supervisor plus three (3) System Administrators, Developers| No change | • Hosting platform  
  • Implement changes and bug fixes, as defined and prioritized by the POLARIS governing body  
  • Monitor “load” on application  
  • Develop phase two calendar for enhanced functionality  
  • Import data from existing calendars where able (to facilitate transition)  
  • Operate as any other OI&T application |
A.4. Initial Operating Capability (IOC)

Information from VHA Data Informatics on IOC Evaluations:

It is essential that POLARIS entries for Initial Operating Capability (IOC) Production milestones with the IOC Entry and IOC Exit dates are added to the calendar upon project initiation, or as soon as possible, and that this information is updated regularly. Assistance from the POLARIS user community in providing this essential information will greatly enhance the ability of OI&T and VHA to successfully plan limited resources to support the multiple project IOC Production events and deployment to field sites.

IOC Production Testing is a milestone that requires a VA software capability to meet the minimum operational capabilities, per the documented requirements. The operational capability consists of support, training, logistics, and system interoperability within the VA operational environment. IOC is the gauging point to identify any refinement needs before proceeding to Full Operational Capability (FOC). IOC Entry is a specific date when the VA software capability will begin a limited deployment to IOC field sites. IOC Exit is a specific date when a set number of VA IOC sites successfully complete required exit criteria for testing the VA software capability in Production environments. Polaris entries that select the Target Environment of IOC – Production define the IOC Entry through use of the POLARIS entry Release Start Date. IOC Exit is represented by the Execution Status entered by the project team.
A.5. POLARIS Workflows

Figure A-5-1 represents the process for creating, reviewing, and approving a POLARIS calendar entry for data center releases or single site releases.

Figure A-5-1: POLARIS Workflow for Data Center Releases or Single Site Releases
Figure A-5-2 represents the process for creating, reviewing, and approving a POLARIS calendar entry for multi-site releases or multi-site infrastructure changes.

**Figure A-5-2: POLARIS Workflow for Multi-site Releases or Multi-site Infrastructure Changes**
## Template Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2016</td>
<td>1.7</td>
<td>Updated to align with new VIP policies and processes</td>
<td>VIP Business Office</td>
</tr>
<tr>
<td>December 2015</td>
<td>1.6</td>
<td>Updated to align with current OI&amp;T Documentation Standards, edited to conform with latest Section 508 guidelines, and remediated with Common Look Office tool</td>
<td>Process Management</td>
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<tr>
<td>June 2015</td>
<td>1.5</td>
<td>Edited to conform with Section 508 guidelines and remediated with Common Look Office tool</td>
<td>Process Management</td>
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<tr>
<td>May 2015</td>
<td>1.4</td>
<td>Reviewed and approved by PMAS Process Improvement Lockdown. Updated instructional test</td>
<td>Process Management</td>
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<tr>
<td>November 2014</td>
<td>1.3</td>
<td>Updated to conform with latest Section 508 guidelines and remediated with Common Look Office tool</td>
<td>Process Management</td>
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<tr>
<td>April 2014</td>
<td>1.2</td>
<td>Changed title page to clarify that version number refers to software version</td>
<td>Process Management</td>
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<tr>
<td>April 2011</td>
<td>1.1</td>
<td>Formatted to current ProPath documentation standards and edited to conform with latest Alternative Text (Section 508) guidelines</td>
<td>Process Management</td>
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<tr>
<td>June 2009</td>
<td>1.0</td>
<td>Initial Version</td>
<td>PMAS Business Office</td>
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