INTERSYSTEMS LEARNING SERVICES

InterSystems Change Control

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For Support questions about any InterSystems products, contact:

InterSystems WorldWide Response Center
Telephone: +1-617-621-0700
Tel: +44 (0) 844 854 2917
Email: support@InterSystems.com

ICC 110: Change Control at InterSystems

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Objectives

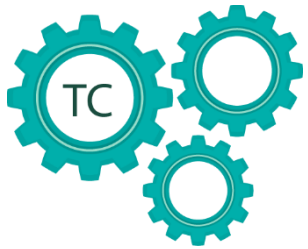
- Name the tools related to change control which are used by InterSystems and explain which teams use them.
- Explain the importance of change control across the lifecycle of InterSystems products.
- Identify change control related milestones within the InterSystems ARIES implementation methodology.

Review:
Terms Related to “Change” at InterSystems

- Contract change.
  - Process to change a contract with another group.
- Customer change management.
  - Process to change a business process for our customers.
- Change request.
  - Process for an enhancement request.
- Change control.
  - Process for a change to system or environment.
- Consistent use of terminology key to effective communication.

Part 1: InterSystems Change Control Tools

Change Control Tools within InterSystems

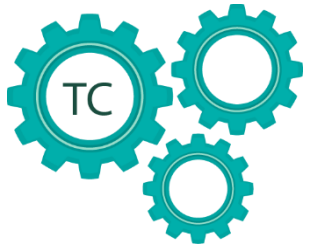
- Perforce Helix
- TrakCare Change Control (TCC) 

- JIRA
- Change Control Record (CCR)

Change Control Tools: Perforce Helix

- Commercial Version Control System (VCS).
- Versions InterSystems Products and Implementation Projects.
- Customers engaging in InterSystems change control processes will receive Perforce Licenses.
- Enterprise Perforce server located in Cambridge, MA.

Change Control Tools:
TrakCare Change Control (TCC)



- Functional layer of TrakCare.
- Interface for all configuration that is programmatically imported into TrakCare or exported out of TrakCare.
  - On the file system, TrakCare configuration stored as XML files.
    - Format called ElementXML.
- Implemented within the TrakCare product and updated via patch, adhoc and release process.

Change Control Tools: JIRA

- Commercial workflow application.
- Tracks all HealthShare and TrakCare product changes.
- Internal to InterSystems network.
  - Not customer accessible.
- Manages versioning and flow of product code changes.
  - Integration with Perforce and InterSystems Data Platform Source Control Hooks.
- Manages versioning and flow of TrakCare product configuration changes.
  - Integration with Perforce and TrakCare Change Control (TCC).

Change Control Tools:
Change Control Record (CCR)

- Custom workflow application built on our own technology.
- Tracks all customizations to InterSystems products installed around the world.
- Manage versioning and flow of onsite custom code changes.
  - Integration with Perforce and InterSystems Data Platform Source Control Hooks.
- Manage versioning and flow of onsite custom configuration changes.
  - Integration with Perforce and TrakCare Change Control (TCC).

Change Control Tools: Change Control Record (cont.)

- Transports all changes performed on customer's environments back to InterSystems Perforce server.
  - Uses CCR ItemSet framework.
- Full support of normal changes and standard changes.
- Multiple Tiers and workflow configuration options.
  - Very adaptable to meet the specific needs of the phase of the project.

Quiz: Change Control Tools

Question:

For each of the following, match the usage description to the appropriate tool: Perforce Helix, TrakCare Change Control (TCC), JIRA, or Change Control Record (CCR).

A. Tracks HealthShare and TrakCare product changes.

B. Version Control System for product code and site customizations.

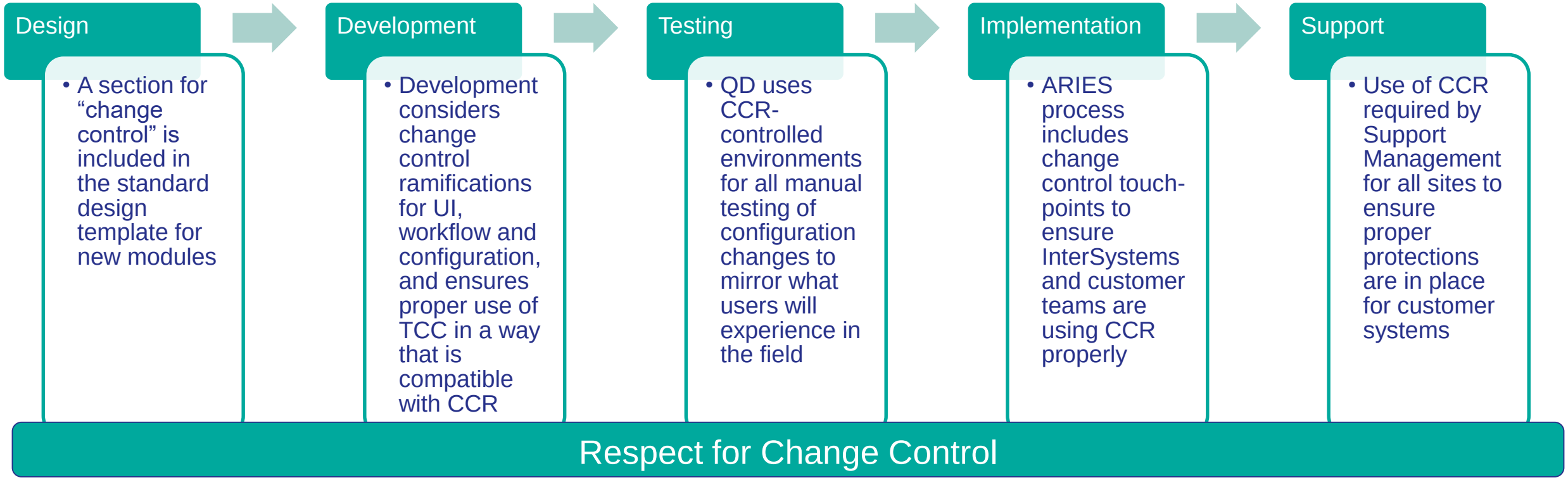
C. “Interface” for TrakCare configuration.

D. Tracks implementation-specific customization.

Part 2: InterSystems Products and the Culture of Change Control

Change Control and the TrakCare Lifecycle

- Change control considered at all points along product lifecycle.
  - Smooth implementation and business as usual experience relies on TCC and CCR being fully functional.



Part 3: Change Control and ARIES

Introduction to ARIES

- InterSystems customer engagement methodology.
  - Designed to achieve efficient, fast and successful customer experience.
    - During the sales and delivery cycle of an enterprise solution.
    - Through to routine operational running of InterSystems products.
- ARIES Stages:

ARIES and Change Control

- Change control leveraged at key points within ARIES Stages.
- Launch.
  - Initialize CCR with customer and system details.
  - Introduce customer to the importance of change control and CCR.
- Setup.
  - Change control should be used to record all changes during the setup stage.
  - Move from BASE-only change control workflow to BASE>TEST for Validation.

ARIES and Change Control

- Adoption.
  - Role-specific CCR training as part of larger ARIES train the trainer strategy.
- Sustain.
  - BAU operational policies and procedures will include CCR usage details.
  - TrakCare Support relies on change control on a day-to-day basis.
- It is critical to foster a culture of change control through an implementation project.

Quiz: Use of CCR within ARIES

Question:

At what ARIES Stage is CCR first enabled for use by InterSystems and customer project teams?

A. Discovery.
B. Launch.
C. Setup.
D. Adoption.
E. Sustain.

Answer:

C. Setup.

Part 4: Change Control and the Customer's Responsibilities

Tips for Customers to Succeed

- Create culture of change control within your organization.
  - Understand the importance of change control processes.
  - Ensure appropriate training on change control processes for everyone working on systems.
- Promptly report any issue found within InterSystems source control hook functionality, CCR or TCC to your support team.
- See ICC100: Introduction to Change Control for additional tips, especially:
  - Appoint a change control manager.

Quiz: Customer Responsibilities

Question:

What role within the Customer’s organization is responsible for ensuring compliance with change control related policies?

A. Implementation manager.

B. Architect.

C. Peer reviewer.

D. Change control manager.

E. Project manager.

Quiz: Customer Responsibilities

Answer:

D. Change control manager.

For more about roles in change control, see ICC100.

Summary

- What are the key points for this course?