INTERSYSTEMS LEARNING SERVICES

InterSystems Change Control

InterSystems
Creative data technology

InterSystems Change Control

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ICC 340:
CCR Tier 0 –
Project Management

InterSystems
Creative data technology

Objectives

- Demonstrate how groups can be used to organize projects.
- Identify ways in which email notifications can be configured.
- Leverage CCR dashboard to maintain key metrics.
- Access CCR reports.
- Related Records.

Part 1: Groups

Groups

- Groups were implemented to allow better organisation and movement of work.
- Groups are simple containers to associate related changes:
  - The linkage is conceptual.
    - Time based.
    - Functional area.

Groups (cont.)

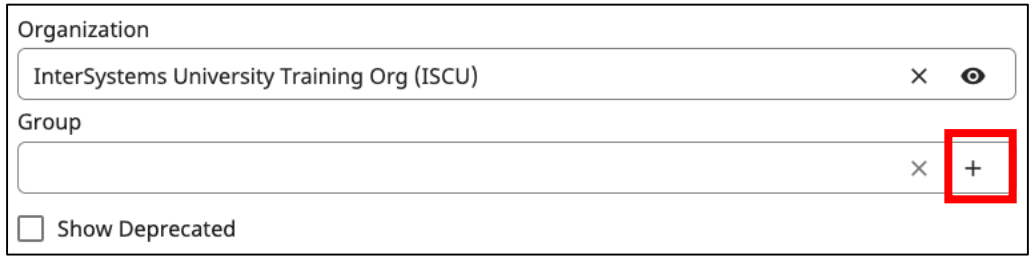
- Groups provide tracking of all related changes in a central place.
  - This makes it easier to get a high-level view of the changes related to a larger project, identify the stragglers.
  - Groups allow coordination of changes as they move to the next environment.
- Groups can be locked and retired.

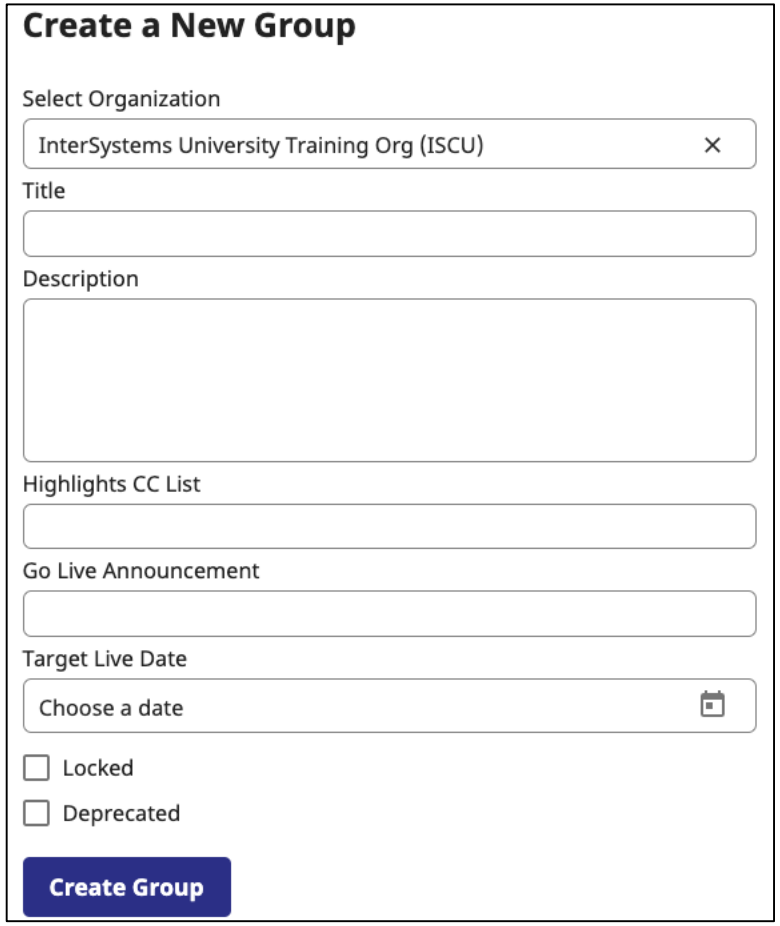
Groups (cont.)

- Especially useful when scheduling regular deployment of changes.
  - Have proved invaluable upgrades.
  - Business as usual changes are packaged tracked over multiple upgrade runs.
- Both InterSystems and customer changes are easily tracked.
- Groups are defined against organization.
  - They can apply across multiple Systems owned by organization.
  - Particularly helpful when coordinating large projects which span multiple Systems and organizations.

Creating Groups

1. Menu > Groups.
2. Select organization.
3. Click + next to Group field.
4. Provide at least title and description.
5. Click Create Group.

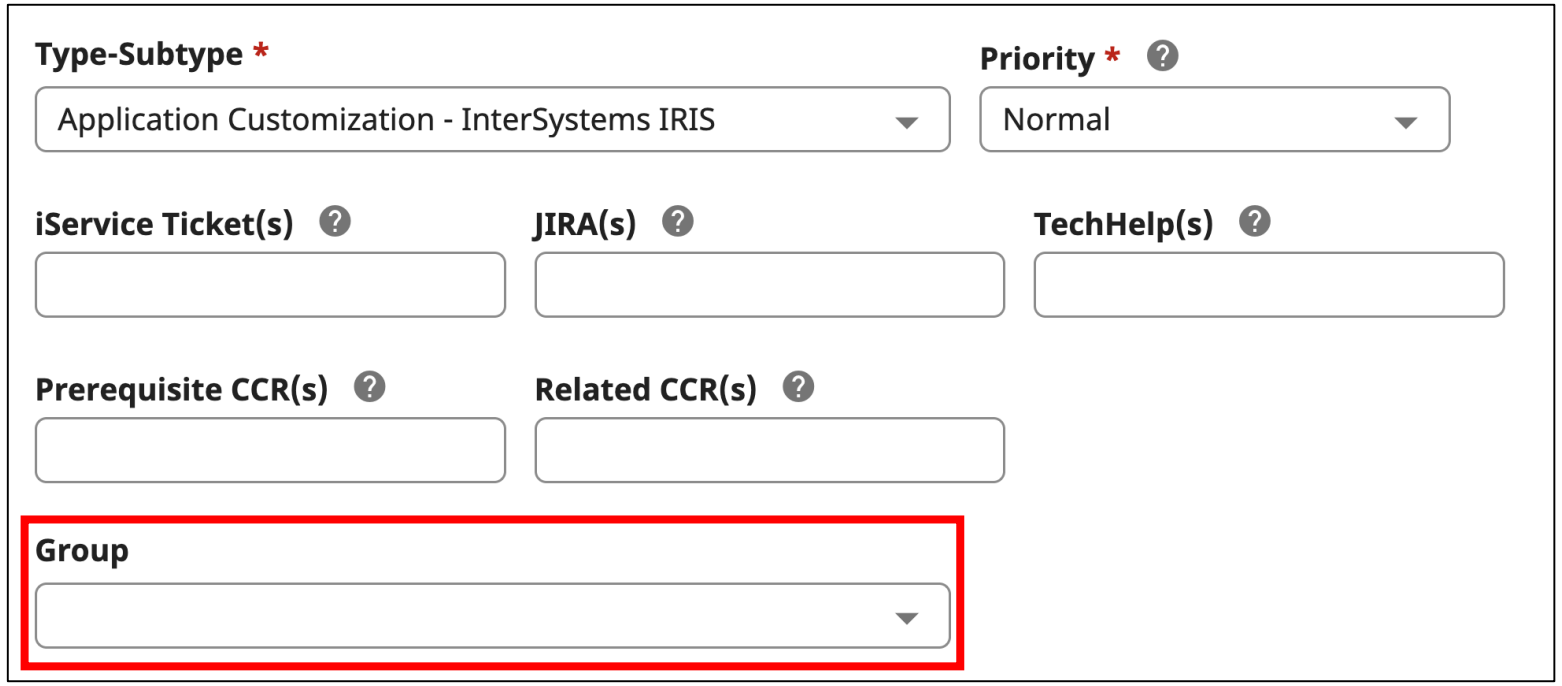




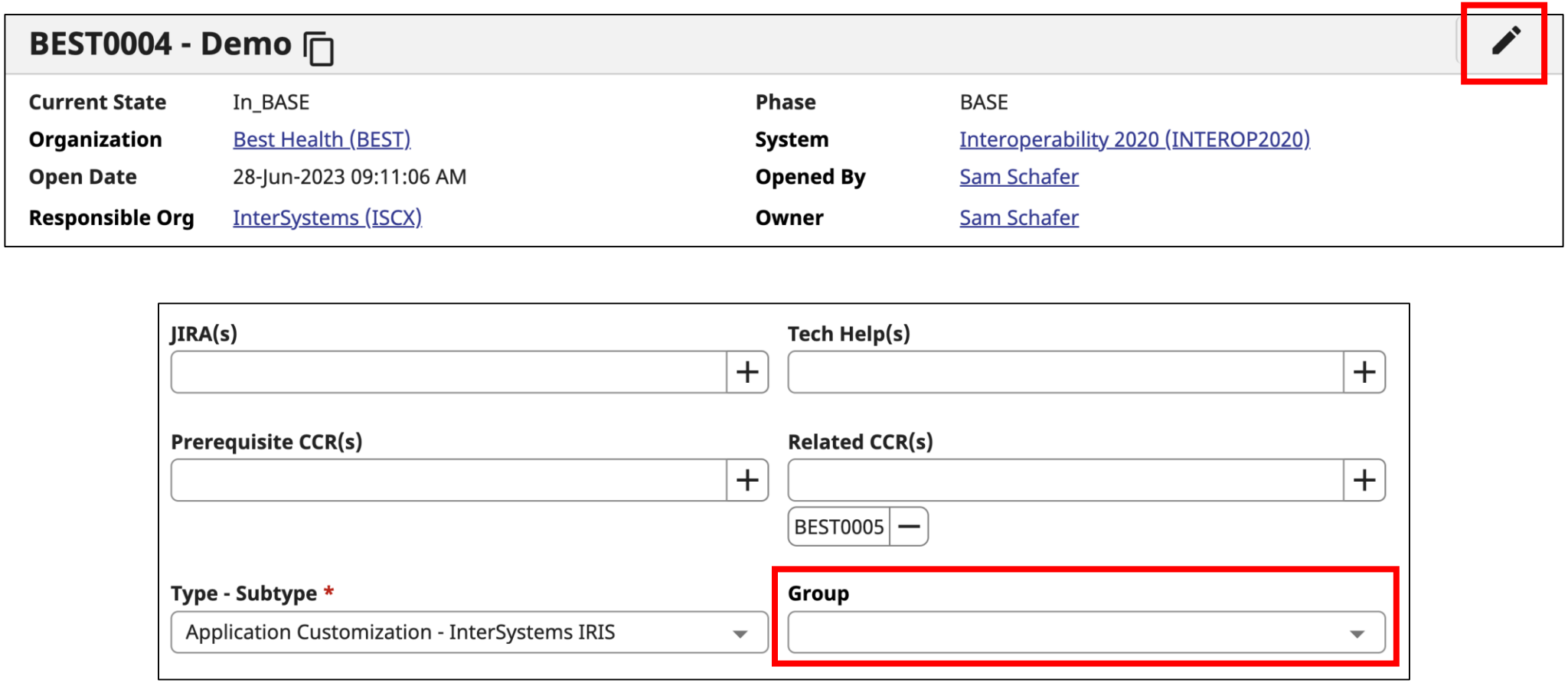
Assigning CCRs to a Group

- A CCR can be added to a group:
  - At time of CCR creation.
  - By editing CCR details section of desired CCR.
  - Using Groups page.
    - Allows adding multiple CCRs at one time.

Assigning CCRs to a Group: Creation Time

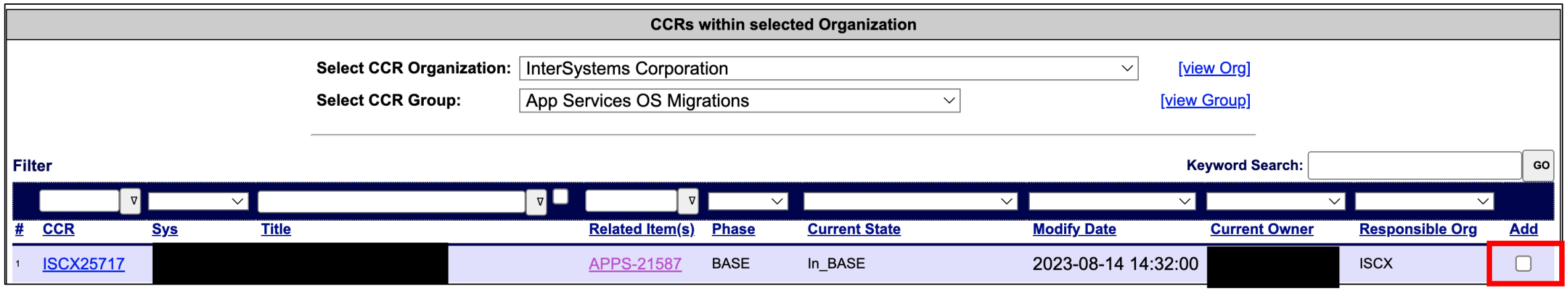


Assigning CCRs to a Group: Editing CCR Details



Assigning CCRs to a Group: From Groups Page

1. Menu > Groups.
2. Select desired group from drop-down menu.
3. Click add Multiple CCRs button.
4. Select checkboxes in column named Add.
5. At bottom, click Add to Group button.



Maintaining Groups

- Locked.
  - Prevents CCRs from being added to or removed from group.
- Deprecated.
  - Removes group from menus by default.
- Target Live Date.
  - For tracking purposes only.

Group Merge

- 2+ CCRs in same state and for same system can be merged.
- Merges cannot be undone.
  - All merged changes must be progressed together; all or none.
- Merge Target = CCR that all other CCRs will be combined into.
  - Documentation appended, Perforce changelists moved over.
  - Merge Target then progressed through rest of workflow.
  - Merged CCRs enter inactive Merged state.

2 CCRs in this Group - Add multiple CCRs

#	CCR	Sys	Title *(Tooltip: Description)*	Phase	Current State	Modify Date	Current Owner	Org	Merge	Remove
1	ISCX17969	TESTSYS	Update of CCR Client Tools	BASE	In_BASE	2021-09-23 14:16:45	Leavitt,Timothy	ISCX	Merge Target	☐
2	ISCX8910	Video	Redirect to mobile site from mobile devices	BASE	BASE_Pending_Peer_Review	2021-09-23 14:16:04	Burstein,Lee	ISCX	Merge Target	☐

Quiz: Finalizing Groups

Question:

Once a group contains all appropriate CCRs and a project manager wants to prevent that list from being changed, what should be done to the group?

A. Freeze the group.

B. Deprecate the group.

C. Lock the group.

D. Set the ‘Target Live Date.’

Quiz: Finalizing Groups (cont.)

Answer:

C. Lock the group.

Once a group has been locked on the Group Details page, then the group field is read-only for those CCRs already in the group, and the group name is not present in the group dropdown for CCRs not in that group.

Quiz: Legacy Groups

Question:

Once all CCRs in a group have gone LIVE and there is no longer a need to use that group or report on it, what final step should be taken?

A. N/A – Legacy groups clean up themselves.

B. Deprecate the group.

C. Lock the group.

D. Set the ‘Target Live Date.’

Quiz: Legacy Groups

Answer:

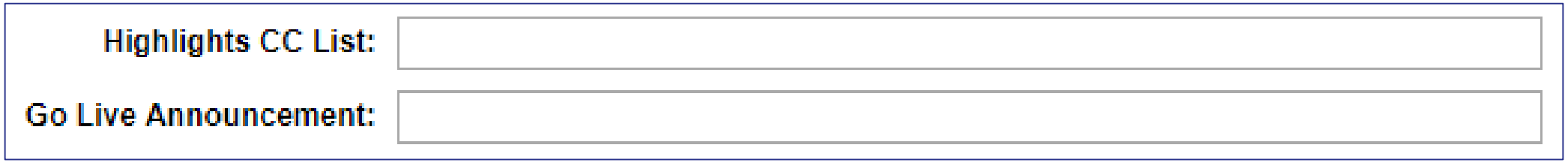
B. Deprecate the group.

Deprecating a group will remove it from the list on the Group Details page and in the group selection dropdown shown when editing a CCR.

Part 2: CCR Email Notifications

Email Notifications

- Notification types include:
  - CC List.
    - Every transition generates an email indicating the new state and who performed the transition.
  - Highlights CC List.
    - Emails sent when CCRs enter the following states: In_PREP, BASE_Complete, TEST_Ready_For_Customer, UAT_Ready_For_Customer, LIVE_Complete, Closed, Pending_Customer_Override, Cancelled, Merged.
  - Go Live Announcement.
    - Email containing title, description and notes sent once CCR goes though markLIVECompete.



Email Notification Levels

- Organization.
  - TAM for org in iService is added to ‘CC’ emails for every CCR in the org.
  - Emails can be added to the ‘Highlight CC’ recipient list on the Org Details page.
- System.
  - Primary and secondary architects are added to ‘Highlight CC’ emails for every CCR in the System.
  - Emails can be added to the ‘Highlight CC’ recipient list on the System Details page.
  - Emails can be added to the ‘Go Live Announcement’ recipient list on the System Details page.

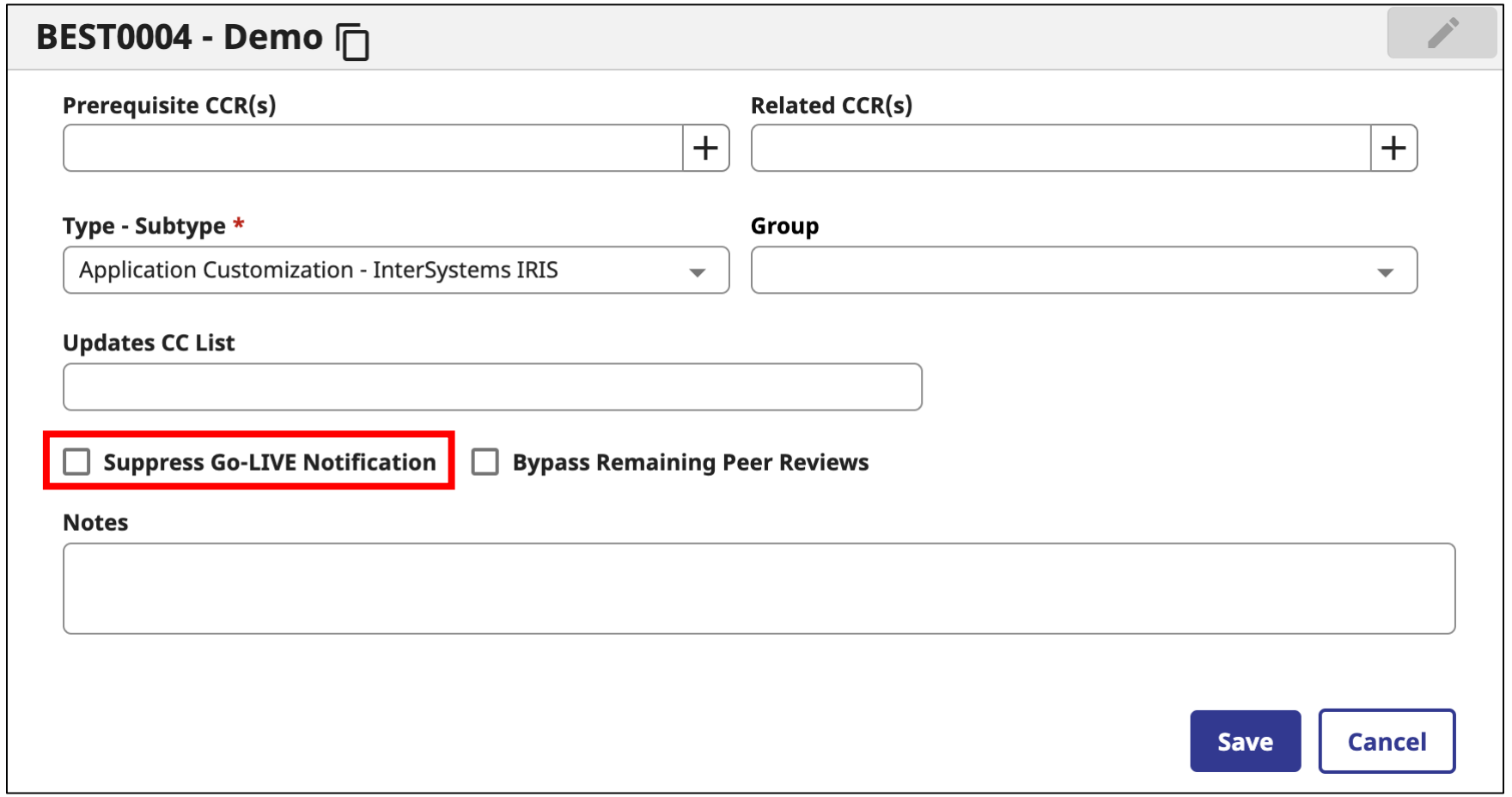
Email Notification Levels (cont.)

- Group.
  - Emails can be added to the ‘Highlight CC’ recipient list on the Group Details page.
  - Emails can be added to the ‘Go Live Announcement’ recipient list on the Group Details page.
- CCR.
  - Emails can be added to the ‘Update CC’ recipient list in the CCR Details pane of any given CCR.

Suppress Go-LIVE Notifications

- Some changes do not warrant go-LIVE announcements because no change to user functionality.
  - Renewing license key.
  - Updating unit tests.
  - Backend maintenance.
- Each CCR has flag to prevent sending go-LIVE announcement.
  - Edit CCR Details section > select Suppress Go-LIVE Notification > Save.

Suppress Go-LIVE Notifications (cont.)



Quiz: Email Notification Option

Question:
What should a user do if they are only interested in knowing when new changes affect all the LIVE Environments for a given organization?

A. Add themselves to the ‘Highlight CC’ email field for the org.
B. Add themselves to the ‘Highlight CC’ email field for each System in that org.
C. Add themselves to the ‘Go Live Announcement’ email field for each group in that org.
D. Add themselves to the ‘Go Live Announcement’ email field for each System in that org.

Quiz: Email Notification Option

Answer:

D. Add themselves to the ‘Go Live Announcement’ email field for each System in that org.

‘Highlight CC’ will send emails at earlier stages and will generate extra emails (so A. and B. won’t work); CCRs are not required to be in a group (so D. won’t work).

Quiz: Go-LIVE Notifications

Question:

On which transition of a CCR are go-LIVE notifications sent if suppress go-LIVE notifications has not been selected?

A. markLIVEComplete.

B. markMoveToLIVEComplete.

C. close.

D. authorizeAndStartMoveToLIVE.

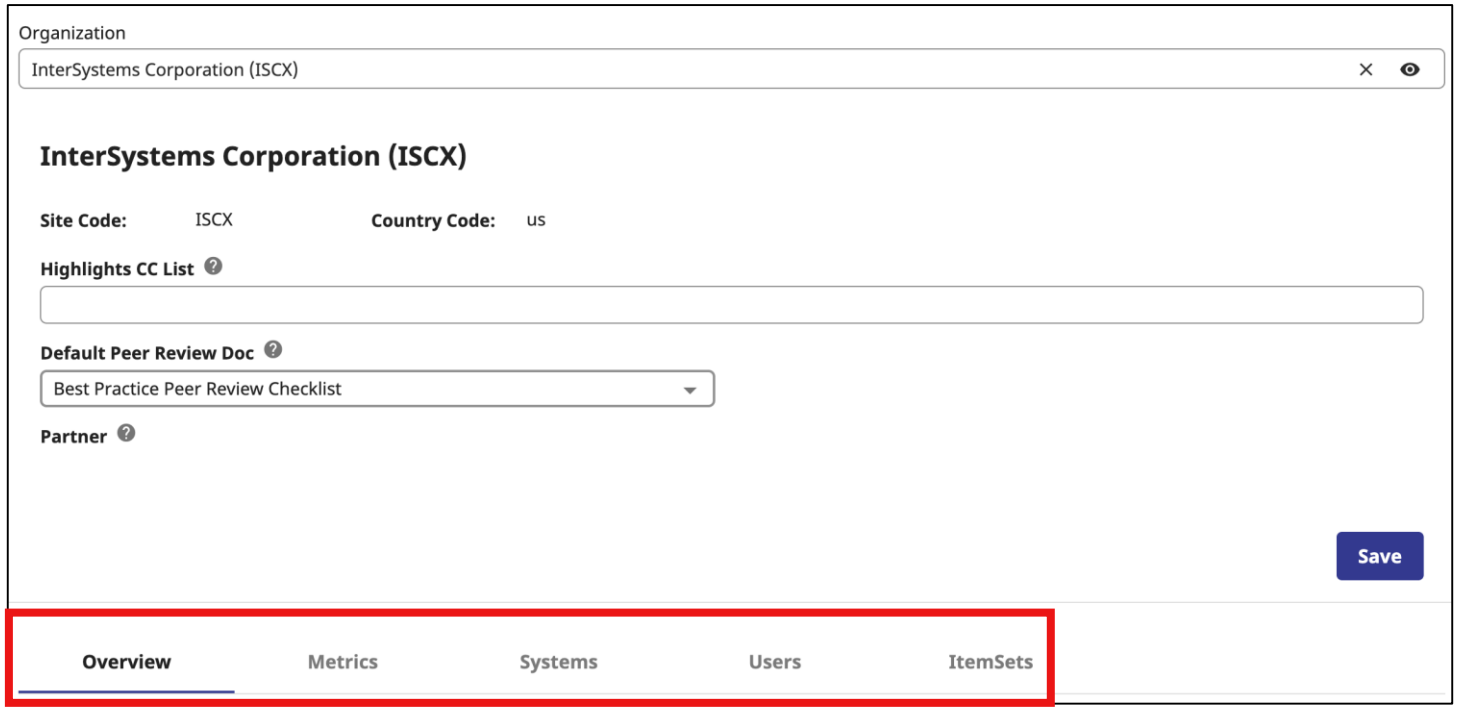
Answer:

A. markLIVEComplete.

Part 3: Organization Dashboard

Organization Dashboard

- Menu > Organizations.
- Shows key metrics and warnings about CCR usage.



Organization Dashboard: Overview Tab

- Shows warnings for 5 key metrics.
  - Ideal value for each is zero.
- Inactive and not deprecated Systems.
  - Indicates candidate Systems for deprecation.
    - Only deprecate Systems for applications that no longer exist.
- Stale CCRs.
  - Highlights CCRs that are open without recent activity.
  - Could indicate CCRs abandoned and not properly cancelled, leading to merge-conflicts in the future.

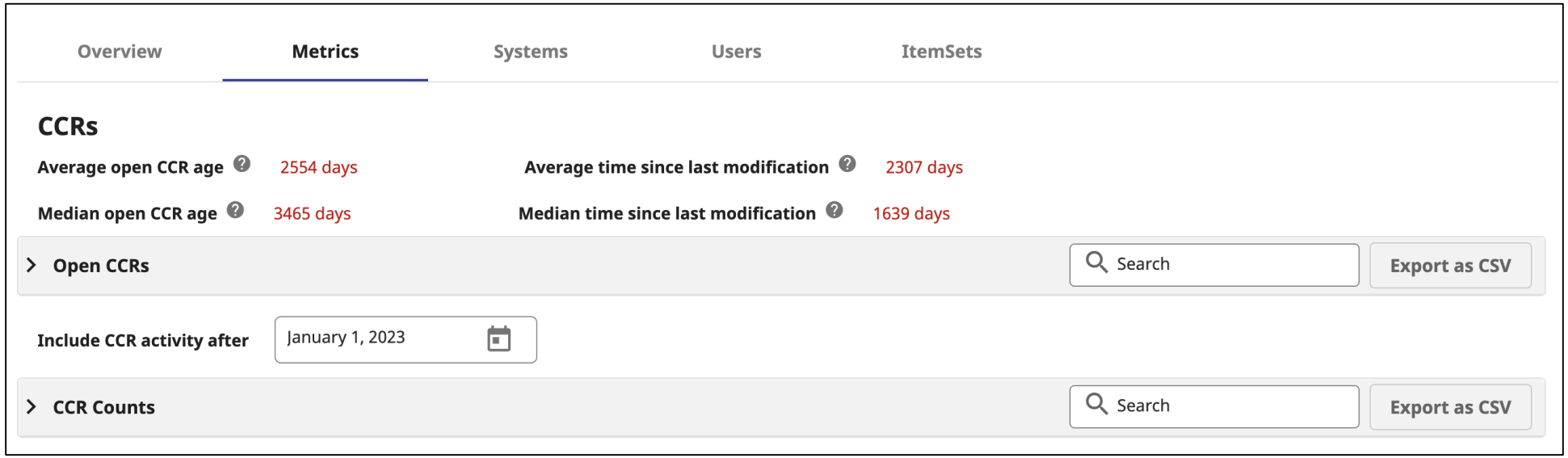
Organization Dashboard: Overview Tab (cont.)

- Undeployed ItemSets.
  - ItemSets should always be deployed immediately.
  - See ICC400 for high-risk nature of undeployed ItemSets.
- Perforce alerts.
  - Alerts should be understood, corrected, and cleared.
- Inactive Perforce users.
  - Only users regularly using CCR should have Perforce licenses.

Organization Dashboard: Overview Tab (cont.)

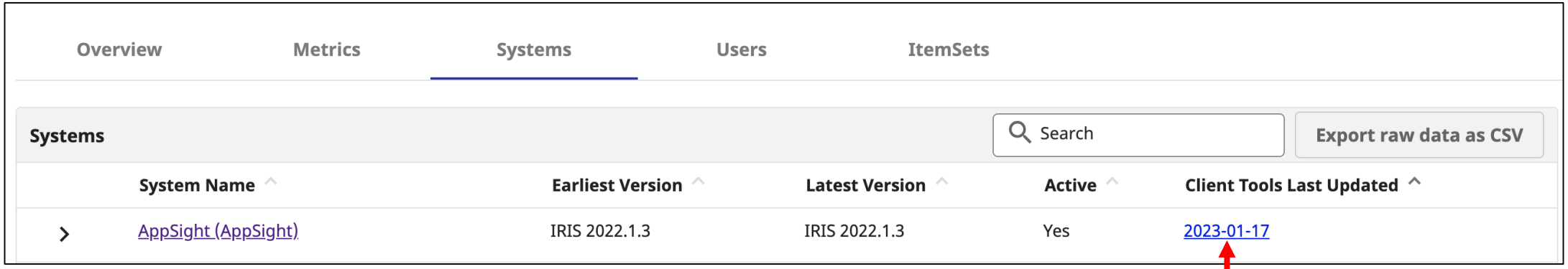
Organization Dashboard: Metrics Tab

- Shows more detailed metrics on CCR age and time since modification.
- Lists:
  - Open CCRs
  - CCR counts per System.



Organization Dashboard: Systems Tab

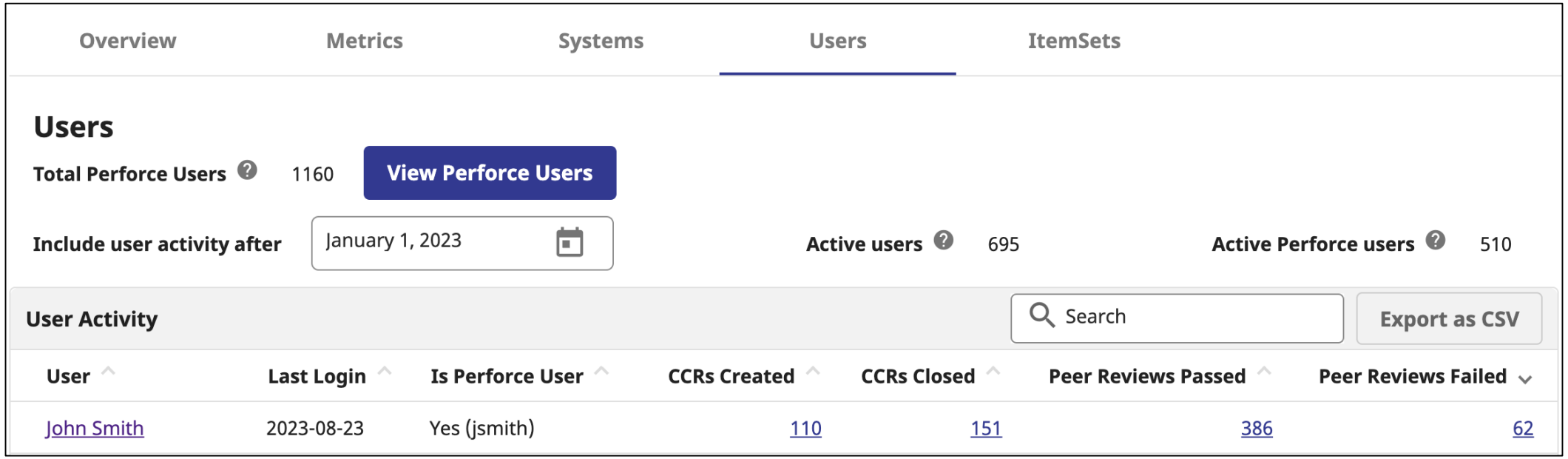
- Shows key information for each System.
  - Including last time Client Tools updated.



InterSystems employees can click to get list of Client Tool changes since last update.

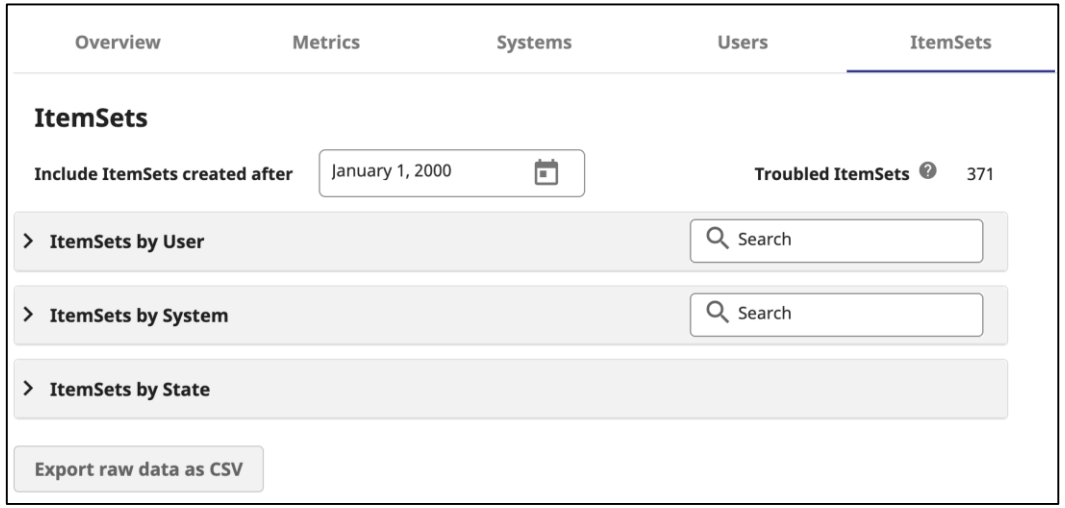
Organization Dashboard: Users Tab

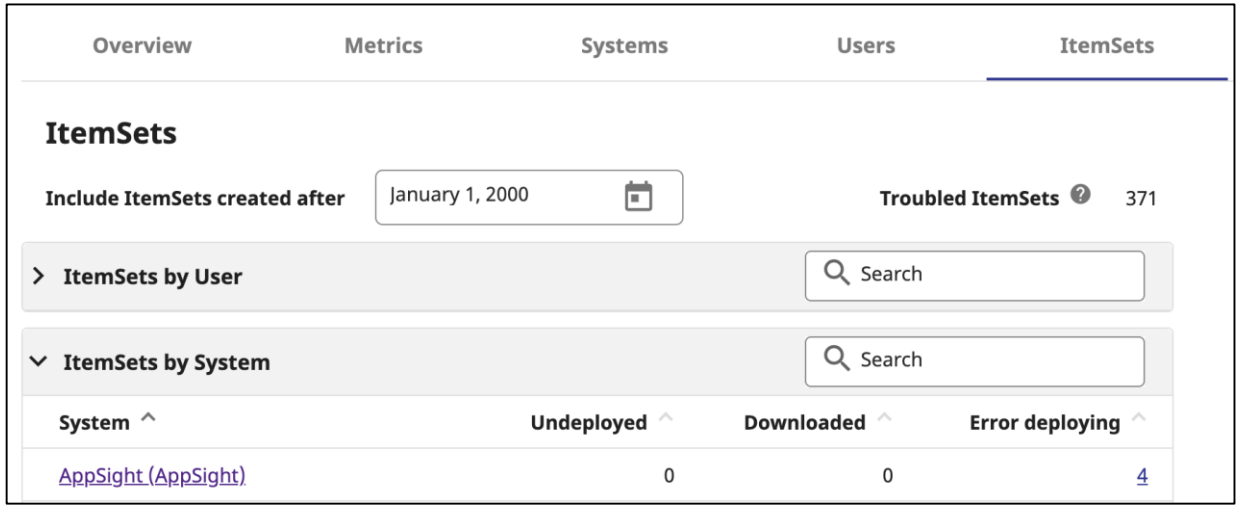
- Shows metrics per user.
  - Peer Reviews Passed / Failed = # of times that user performed passPeerReview or failPeerReview.
    - High number of passed with low number of failed indicates potentially poor peer reviews.



Organization Dashboard: ItemSets Tab

- Shows count of ItemSets in states:
  - Undeployed.
  - Downloaded.
  - Error deploying.
- Click number to view affected CCRs.





Part 4: CCR Reports

CCR Reports

- Downloadable reports available on CCR reports page.
  - Menu > CCR Reports.
  - Formats include HTML, PDF, CSV.

CCR Reports (cont.)

- Reports available:
  - Active CCRs by Organization.
    - All currently active CCRs for organization.
  - Status Report By Organization.
    - CCRs that have gone LIVE or are scheduled to go LIVE during a specified date range, as well as all other active CCRs and cancelled CCRs, regardless of date range.
  - Documentation Review By User.
    - Report of documentation fields for CCRs modified in date range for each user in specified Responsible Organization.

CCRs in Status Report By Organization by Section

- Date From and To fields behave differently in each section of report.
- CCRs Moved to LIVE since Date From.
  - LIVEMoveTimeTarget field between Date To and Date From fields
  - Current phase is LIVE.
- CCRs schedule for move to LIVE between Date From and Date To.
  - LIVEMoveTimeTarget field between Date To and Date From fields.
  - Current phase is UAT.

CCRs in Status Report By Organization by Section (cont.)

- CCRs in UAT not yet scheduled for move to LIVE.
  - LIVEMoveTimeTarget not specified.
  - Current phase is UAT.
- All other sections do not use date fields.

Quiz: CCR Reports

Question:

Which report highlights CCRs scheduled for future go-live?

A. Active CCRs by organization.

B. Status Report by organization.

C. Documentation Review by user.

Answer:

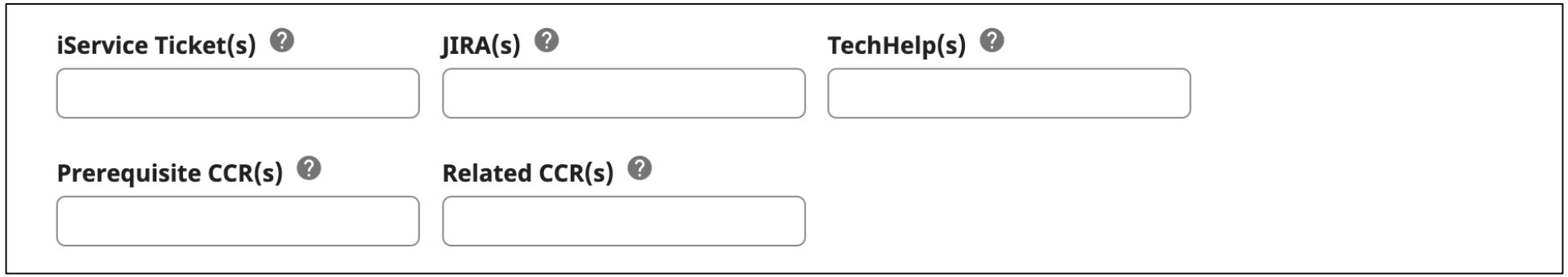
B. Status Report by organization.

This will list a section for CCRs scheduled to go LIVE in the future. You can specify the date range in which you would like to limit your search.

Part 5: Related Records

Linking CCRs to JIRA

- JIRA field on CCR defaults to InterSystems JIRA server.
  - Contact InterSystems to link to non-InterSystems JIRA server.
    - Can override at organization or per-System level.



Summary

- What are the key points for this module?