



INTERSYSTEMS LEARNING SERVICES

InterSystems Change Control



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ICC 340:
CCR Tier 0 –
Project Management



Objectives

- Explain the value in properly populating the fields for related records for a CCR.
- Demonstrate the way groups can be used to organize large projects.
- Identify the ways in which email notifications can be configured.
- Access CCR reports to get insights into changes being made for a specific organization.



Part 1: Linking to Related Records



CCR Related Records

- Specify ticket containing original request, if one exists.
 - InterSystems applications supported:
 - iService.
 - JIRA.
 - TechHelp.
 - Prodlog.
 - Customer systems currently not supported in these fields.
 - Include links in CCR Description or Notes fields.

iService Ticket(s)	
JIRA(s)	
TechHelp(s)	
Prodlog(s)	
Prerequisite CCR(s)	
Related CCR(s)	



CCR Related Records (cont.)

- Specify prerequisite and related CCRs.
 - Prerequisite = CCRs that must progress ahead of this one in terms of Phase.
 - Example: Cannot perform authorizeAndStartMoveToTEST until specified CCR is in In_TEST state.
 - Related = clickable link to specified CCRs.
 - Specified CCRs automatically have this CCR added to their Related CCRs field.
- Fields can be edited at any point, including while creating the CCR.



Quiz: Related Records

Question:

Which is the only related record field which will have a direct impact on the CCR's workflow?

- A. TRC(s).
- B. JIRA(s).
- C. Prerequisite CCR(s).
- D. Related CCR(s).



Quiz: Related Records (cont.)

Answer:

C. Prerequisite CCR(s).

When a prerequisite CCR is listed, the current CCR will be blocked from transitioning past its prerequisite CCR.



Part 2: 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 [create Group].
4. Provide title and description.
5. Save.

Create a new Group for the above organization
(* indicated a required field)

***Group Title:**


Description:

Highlights CC List:

Go Live Announcement:

Locked:

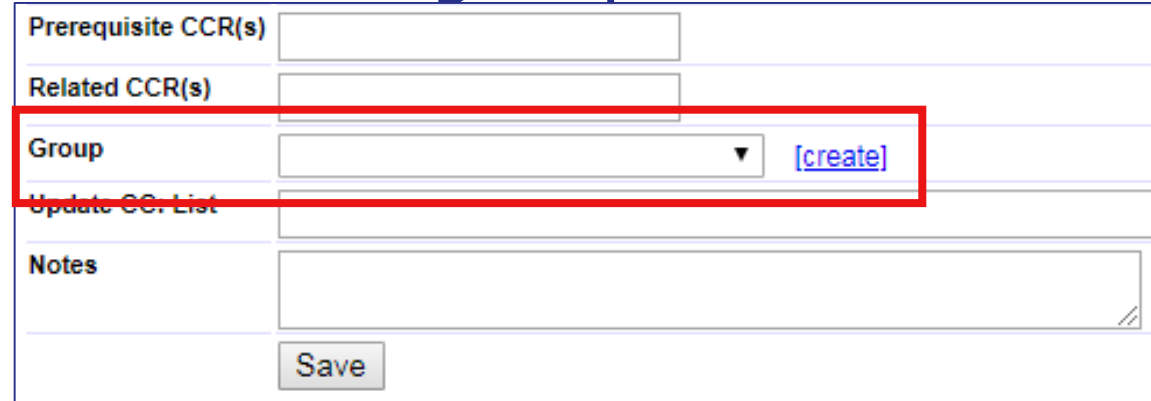
Deprecated:

Target Live Date: 



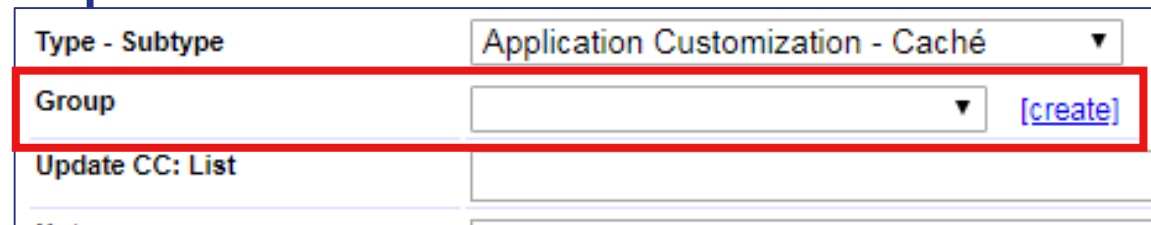
Assigning CCRs to a Group

- A CCR can be added to a group at the time of creation:



A screenshot of a web form for creating a CCR. The form includes several fields: 'Prerequisite CCR(s)', 'Related CCR(s)', 'Group', 'Update CC: List', and 'Notes'. The 'Group' field is a dropdown menu with a '[create]' link to its right. A red rectangular box highlights the 'Group' field and the '[create]' link. Below the 'Notes' field is a 'Save' button.

- An existing CCR can be added to a group by clicking 'edit' on the CCR Details pane:



A screenshot of a web form for editing an existing CCR. The form includes a 'Type - Subtype' dropdown menu showing 'Application Customization - Caché', a 'Group' dropdown menu with a '[create]' link to its right, and an 'Update CC: List' field. A red rectangular box highlights the 'Group' field and the '[create]' link.



Mass Group Management

- Menu > Groups.
- Add any active CCR for organization that owns group using Add multiple CCRs on group management page.
- CCRs can also be removed by selecting checkboxes in remove column then click Unassign From Group button.
- Sort table of CCRs in group by clicking headings.



Mass Group Management (cont.)

Details for Group in CCR Application

Select CCR Organization: [\[view Org\]](#)
Select CCR Group: [\[create Group\]](#)
[\[Show Deprecated\]](#)

Group Title:

Description:

Highlights CC List:

Go Live Announcement:

Locked:

Deprecated:

Target Live Date:

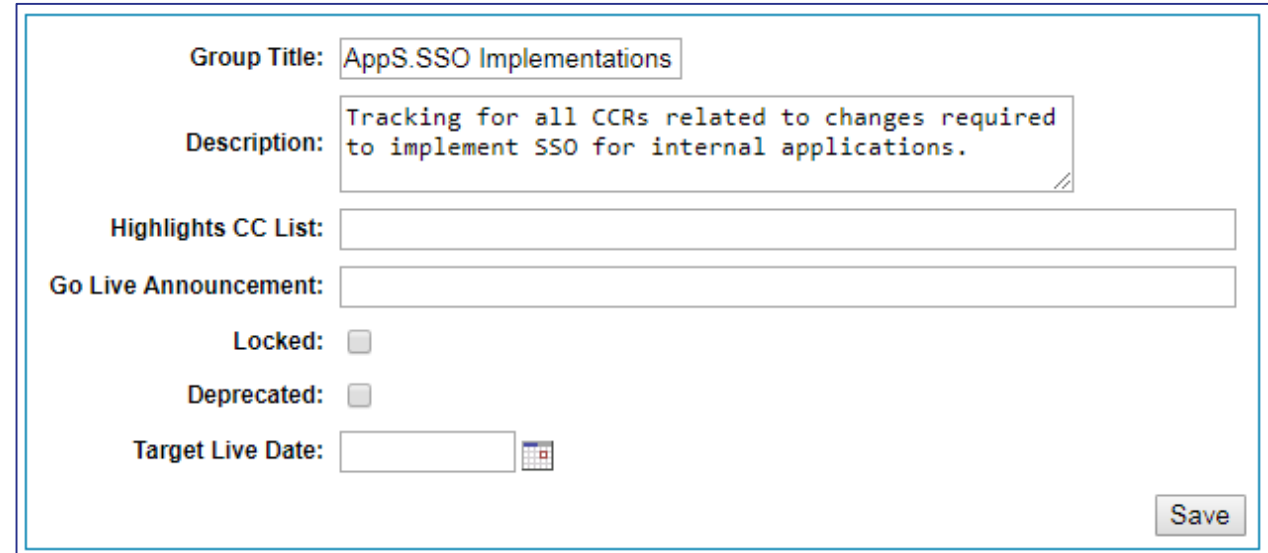
2 CCRs in this Group - [Add multiple CCRs](#)

#	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	<input type="checkbox"/>
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	<input type="checkbox"/>



Maintaining Groups

- Locked.
 - Prevents CCRs from being added to or removed from a group.
- Deprecated.
 - Removes the group from the dropdown on the Group Details page and from the list of available groups on the CCR edit page.
- Target Live Date.
 - For tracking purposes only (this doesn't trigger any behavior in CCR).



The screenshot shows a form for editing a group. The fields are as follows:

- Group Title:** AppS.SSO Implementations
- Description:** Tracking for all CCRs related to changes required to implement SSO for internal applications.
- Highlights CC List:** (empty text box)
- Go Live Announcement:** (empty text box)
- Locked:**
- Deprecated:**
- Target Live Date:** (empty date picker)

A **Save** button is located in the bottom right corner of the form.



Group Merge

- 2+ CCRs in same state and for same system can be merged.
- Documentation and Perforce changelists combined into target CCR.
- Prevents conflicts, dependencies and manual effort for Tier 1/2 CCRs.
- Merges cannot be undone.
 - All merged changes must be progressed together; all or none.
- Merge Target = the 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	<input type="checkbox"/>
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	<input type="checkbox"/>



Quiz: Grouping CCRs

Question:

What is the highest structure level at which CCRs can be grouped?

- A. Groups are defined against a given user and can only contain CCRs for that user.
 - B. Groups are defined against a given System and can only contain CCRs for that System.
 - C. Groups are defined against a given org and can only contain CCRs for that org.
 - D. Groups are defined against a given org and can only contain CCRs of the same Tier for that org.
-



Quiz: Grouping CCRs (cont.)

Answer:

C. Groups are defined against a given org and can only contain CCRs for that org.

Groups allow CCRs against different Systems within the same org to be tracked together for large projects requiring cross-System integration.



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 of the 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 3: 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.

Highlights CC List:

Go Live Announcement:



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.



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).



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.



Summary

- What are the key points for this module?

