



INTERSYSTEMS LEARNING SERVICES

InterSystems Change Control



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InterSystems Change Control

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





CCR Tier 0 – Project Management

Linking to Related Records

CCR Related Records

- CCRs should point to the request which originated the change and/or other related records
- Originating Request Types:
 - TRC – Customer requests
 - Prodlog – Internal Application requests
 - TechHelp – Internal Infrastructure requests

Priority	Normal	CCR Tier	0 - Documentation Only
TRC(s)	I219834	Prodlog(s)	12345
JIRA(s)	TC-1000	TechHelp(s)	67890
Prerequisite CCR(s)	ISCX10000	Related CCR(s)	ISCX1001
Type	Software	Subtype	Other



CCR Related Records (cont)

- Related Record Fields:
 - JIRA – Development Records
 - Prerequisite CCRs – CCR(s) which must precede the current CCR
 - The current CCR’s workflow will be blocked from passing any of its Prerequisite CCRs
 - Related CCRs – CCRs related to the current CCR
- All Related Records can be edited at CCR creation time or by clicking ‘edit’ on the CCR Details pane

Priority	Normal	CCR Tier	0 - Documentation Only
TRC(s)	I219834	Prodlog(s)	12345
JIRA(s)	TC-1000	TechHelp(s)	67890
Prerequisite CCR(s)	ISCX10000	Related CCR(s)	ISCX1001
Type	Software	Subtype	Other



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)

Answer:

(C) – When a Prerequisite CCR is listed, the current CCR will be blocked from transitioning past it's Prerequisite CCR





CCR Tier 0 – Project Management

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 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 for TrakCare upgrades
 - BAU changes are packaged tracked over multiple upgrade runs
- Both ISCX and Client changes are easily tracked
- Groups are defined against Organization
 - They can apply across multiple Systems
 - Particularly helpful when coordinating large projects which span multiple Systems



Creating Groups

1. Home > Group Details
2. Select the Org
3. Click “Create Group” on the right
4. Provide a Title and Description
5. Click Save

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

***Group Title:**

Description:

Highlights CC List:

Go Live Announcement:

Locked: ☐

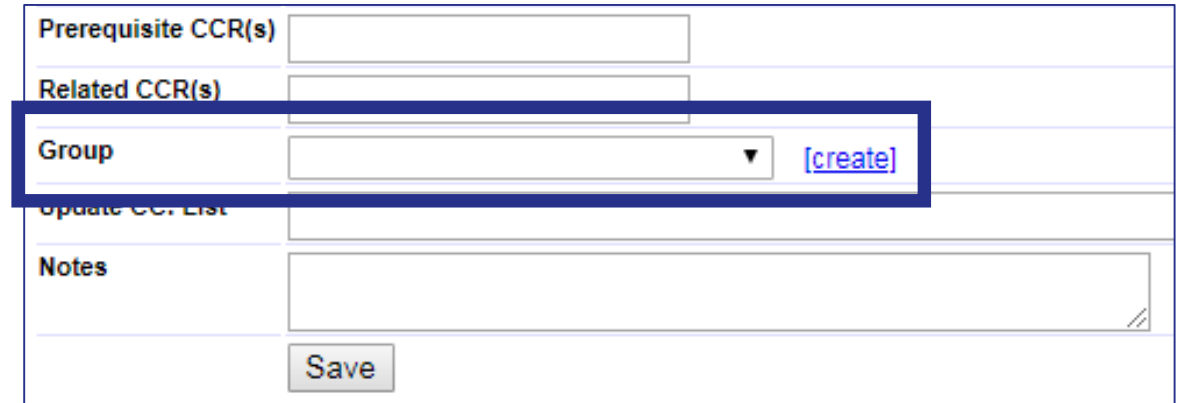
Deprecated: ☐

Target Live Date: 



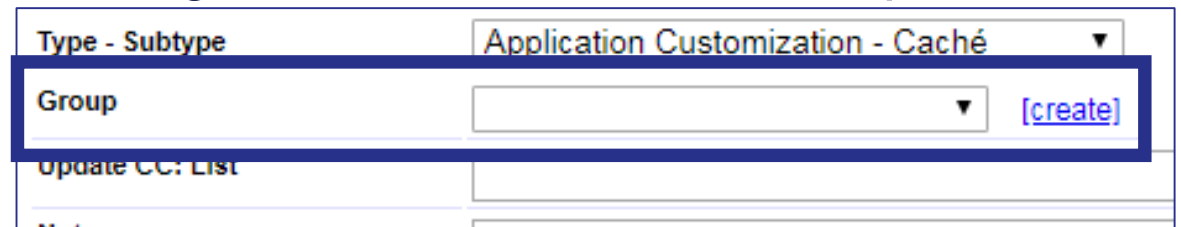
Assigning a CCR to a Group

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



This screenshot shows a web form for creating a new CCR. The form includes several input fields: 'Prerequisite CCR(s)', 'Related CCR(s)', 'Group', 'Update CC: List', and 'Notes'. The 'Group' field is a dropdown menu, and a blue '[create]' button is located to its right. A dark blue rectangular box highlights the 'Group' dropdown and the '[create]' button. At the bottom of the form is a 'Save' button.

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



This screenshot shows a web form for editing an existing CCR. The 'Type - Subtype' dropdown is set to 'Application Customization - Caché'. The 'Group' field is a dropdown menu, and a blue '[create]' button is located to its right. A dark blue rectangular box highlights the 'Group' dropdown and the '[create]' button. Below the 'Group' field is an 'Update CC: List' button.



Mass Group Management

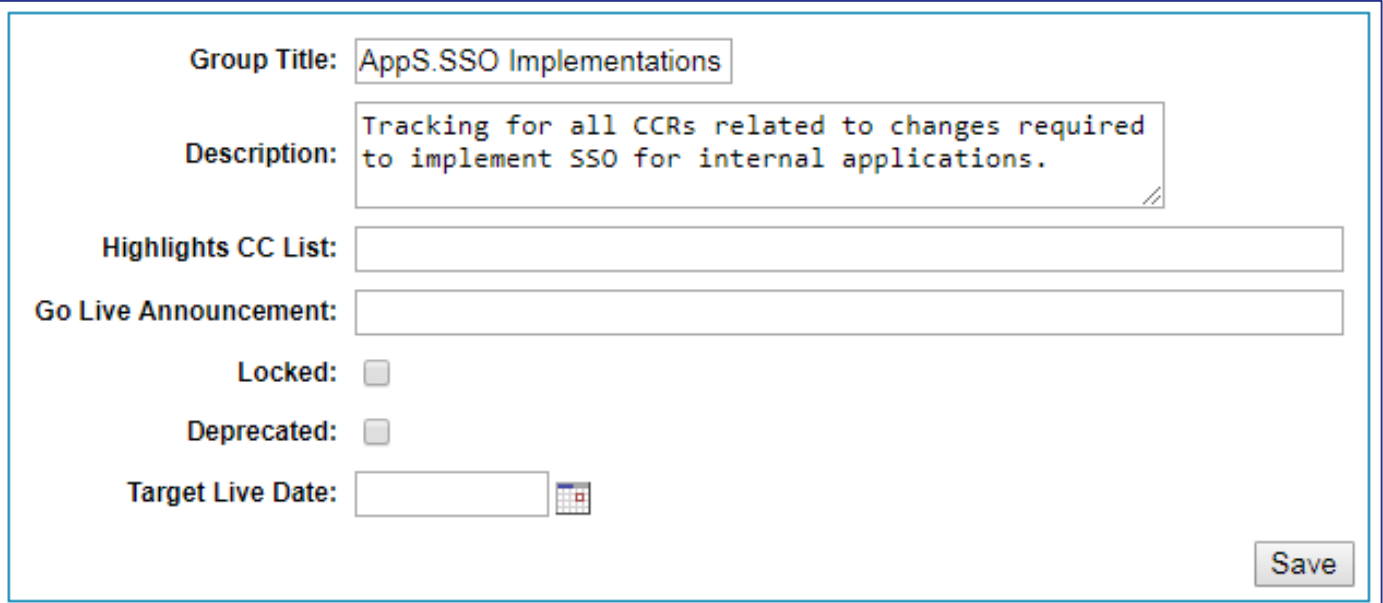
- The Group Management page provides a link to add multiple CCRs at once (any active CCR for that Organization)
- CCRs can also be removed en masse via the “Remove” checkbox
- In addition the page can be used to view/sort all CCRs in that group in order to identify changes that may be lagging behind or require attention

22 CCRs in this Group - Add multiple CCRs									
#	CCR	Sys	Title (Tooltip: Description)	Phase	Current State	Modify Date	Current Owner	Org	Merge Remove
1	ISCX13086	TRC	Date format on TRC extract is not in a format that can be sorted on in Excel	LIVE	Closed	2018-01-25 04:02:34	Oliveira,Simone	ISCX	☐
2	ISCX13100	TRC	Fix Infinite loop hole on Crisis Mail	UAT	In_UAT	2018-03-13 06:36:40	Stewart,Chris	ISCX	Merge Target ☐
						2018-	..		



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

- Group Title:** A text input field containing "AppS.SSO Implementations".
- Description:** A text area containing "Tracking for all CCRs related to changes required to implement SSO for internal applications." with a small icon in the bottom right corner.
- Highlights CC List:** An empty text input field.
- Go Live Announcement:** An empty text input field.
- Locked:** A checkbox that is currently unchecked.
- Deprecated:** A checkbox that is currently unchecked.
- Target Live Date:** A date picker field showing an empty box next to a calendar icon.
- Save:** A button located at the bottom right of the form.



Group Merge

- All changes in the same State can be merged to a single CCR and progressed
- All documentation is combined onto the single change
- This prevents conflicts, dependencies and manual effort for Tier 1/Tier 2 CCRs
- NOTE – merges can *not* be undone

22 CCRs in this Group - Add multiple CCRs									
#	CCR	Sys	Title (Tooltip: Description)	Phase	Current State	Modify Date	Current Owner	Org	Merge Remove
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						2018-	..		



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

Answer:

(C) – 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'

Answer:

(C) – Once a Group has been Locked on the Group Details page, then the Group field is Readonly 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:

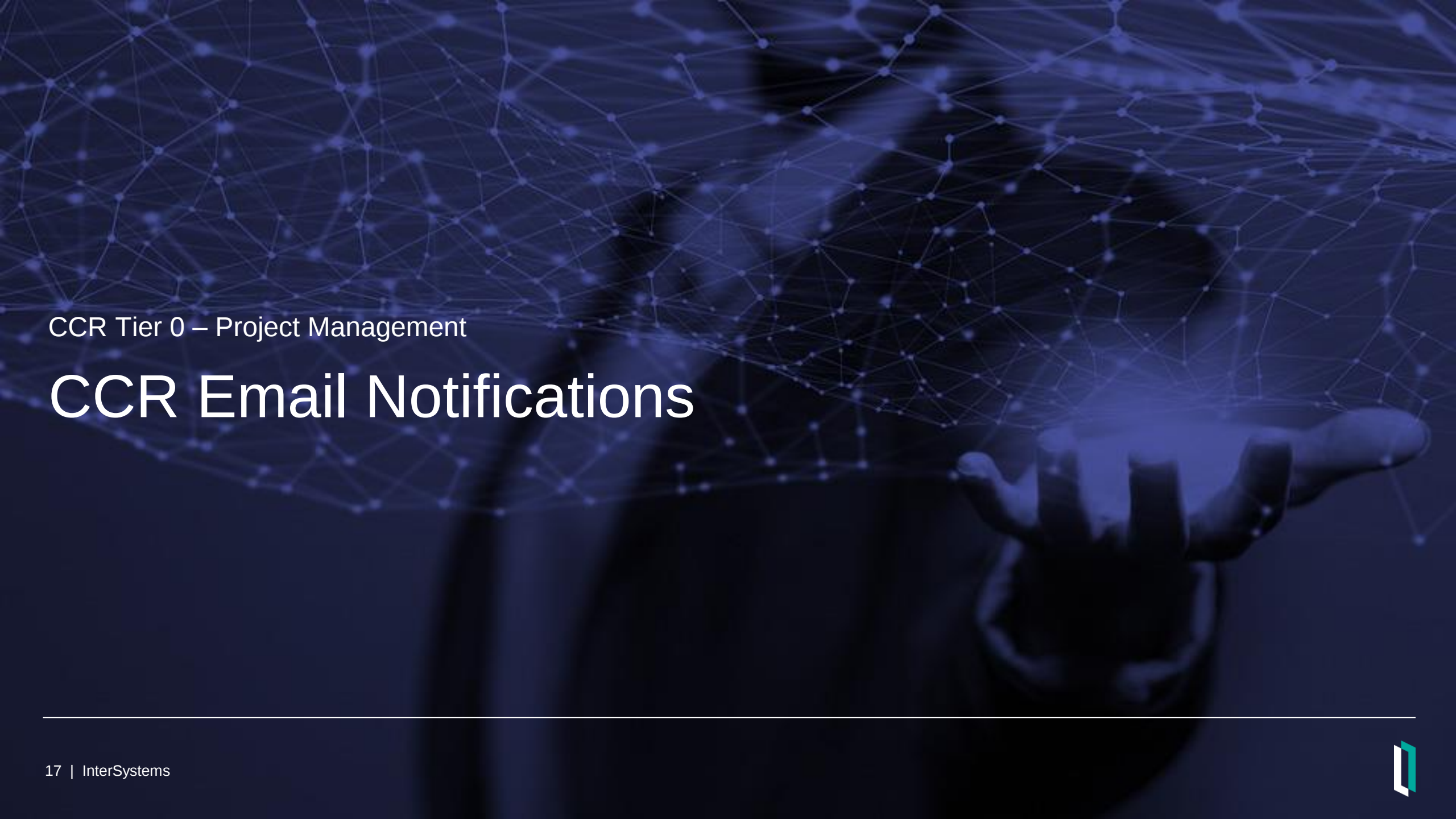
Once all of the CCRs in a Group have gone LIVE and there is no longer a need to use that Group or report on it, what final step should be taken?

- A) N/A – Legacy Groups clean up themselves
- B) Deprecate the Group
- C) Lock the Group
- D) Set the 'Target Live Date'

Answer:

(B) – 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





CCR Tier 0 – Project Management

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 through markLIVEComplete

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
- 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 of 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

Answer:

(D)

- '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)





CCR Tier 0 – Project Management

CCR Reports

CCR Reports

- There are a number of Zen Reports available on the CCR Reports page
 - These can be viewed in HTML or PDF format
- These are useful for:
 - Project Managers
 - Change Control Managers
 - Change Control Board (CCB) meetings

Active CCRs for InterSystems (ISCX) Generated on 21 Mar 2018 Page4 of 38						
CCR PREP (BASE) Environment						
CCR	Title	Assoc TRCs	Resp Org	Current State	Target Move Date/Time	Downtime
ISCX4924	CCR Server recognizes X509 from clients		ISCX	In PREP		
ISCX13173	Update CCR client tools		ISCX	In PREP		
Active CCRs for System: Connect Connect BASE Environment						
CCR	Title	Assoc TRCs	Resp Org	Current State	Target Move Date/Time	Downtime
ISCX5110	Enable Brightcove video embedding		ISCX	BASE Complete		No Impact



CCR Reports (cont)

- Active CCRs by Organization
 - Lists all currently active CCRs for a specific Organization
- Status Report by Organization
 - Lists CCRs that have gone LIVE or are scheduled to go LIVE during a specified date range, as well as CCRs updated during that date range and their current Phase
- Documentation Review by User
 - Used to check the quality of CCR authored field content authored during a specified date range

Active CCRs by Organization	InterSystems (ISCX)				HTML PDF			
Status Report by Organization	InterSystems (ISCX)	From:	2018-02-19		To:	2018-03-21		HTML PDF
Documentation Review by User	Responsible Organization							
	InterSystems (ISCX)							
	CCR Organization	Modified Between:	2018-03-14		And:	2018-03-21		HTML PDF



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) – 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



The background of the slide features a blurred image of a person in a dark suit, with their right hand extended forward. Overlaid on this image is a complex, glowing blue network of interconnected dots and lines, resembling a molecular or digital structure. The overall color palette is dark blue and black.

CCR Tier 0 – Project Management

Course Conclusion

Are there any Questions?

