



INTERSYSTEMS LEARNING SERVICES

InterSystems Change Control



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InterSystems Change Control

CCR Tier 0 - Standard Changes

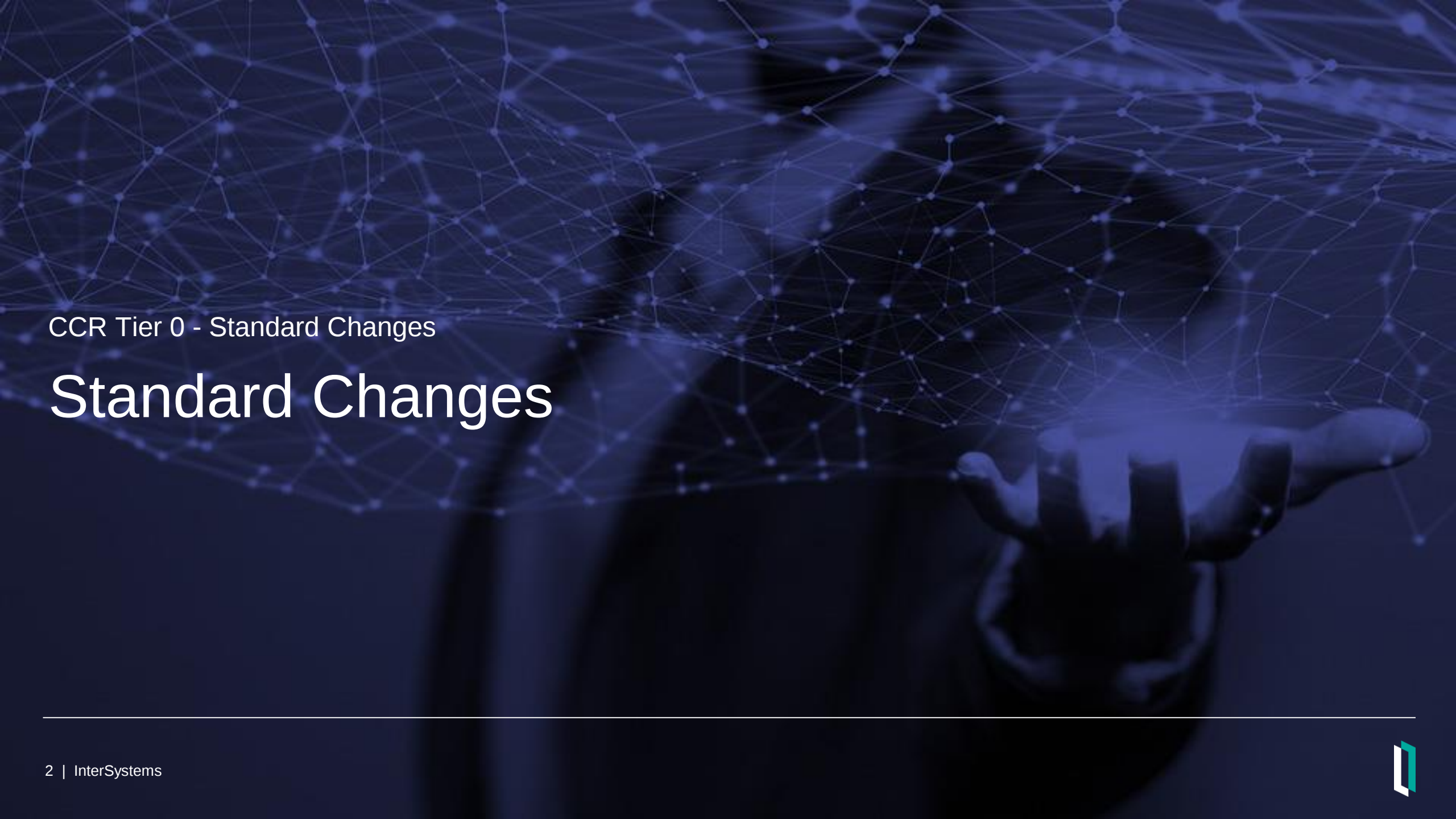
Objectives

Explain what Standard Changes are and how they differ from Normal Changes under ITIL

Demonstrate how to configure a Standard Change in CCR

Explain the properties of Standard Changes in CCR



The background of the slide features a dark blue, monochromatic image of a person's hand reaching out towards the viewer. Overlaid on this image is a complex, glowing digital network of interconnected nodes and lines, resembling a molecular structure or a data network. The overall aesthetic is high-tech and futuristic.

CCR Tier 0 - Standard Changes

Standard Changes

Standard Changes

Under the ITIL delineation of types of Changes, a Standard Change is one that is:

- Well known, documented and proven
- Generally Simple and Recurrent
- Low Risk
- Previously Authorized

Standard Change (ITIL Definition)

“A pre-authorized change that is low risk, relatively common and follows a procedure or work instruction.” Standard Changes are not required to follow the normal [Change Control] process and can be recorded in a different way.”

Example: Resetting a user's password



Standard Changes (cont)

Normal change control process significant and unnecessary overhead for standard changes

- Causes many organization to not put any control over standard changes

By using Standard Changes:

- Routine changes and tasks that impacts services or users are brought under control
- ... without creating a complex environment that will slow down the process
- ... providing significant benefit for Support when troubleshooting is required



Management of Standard Changes

Standard changes are often associated with Service Requests

There is typically a Catalog of Standard Changes

Standard Changes have to respect specific criteria

Standard Changes have to be approved and regularly reviewed

- Particularly Data Fixes

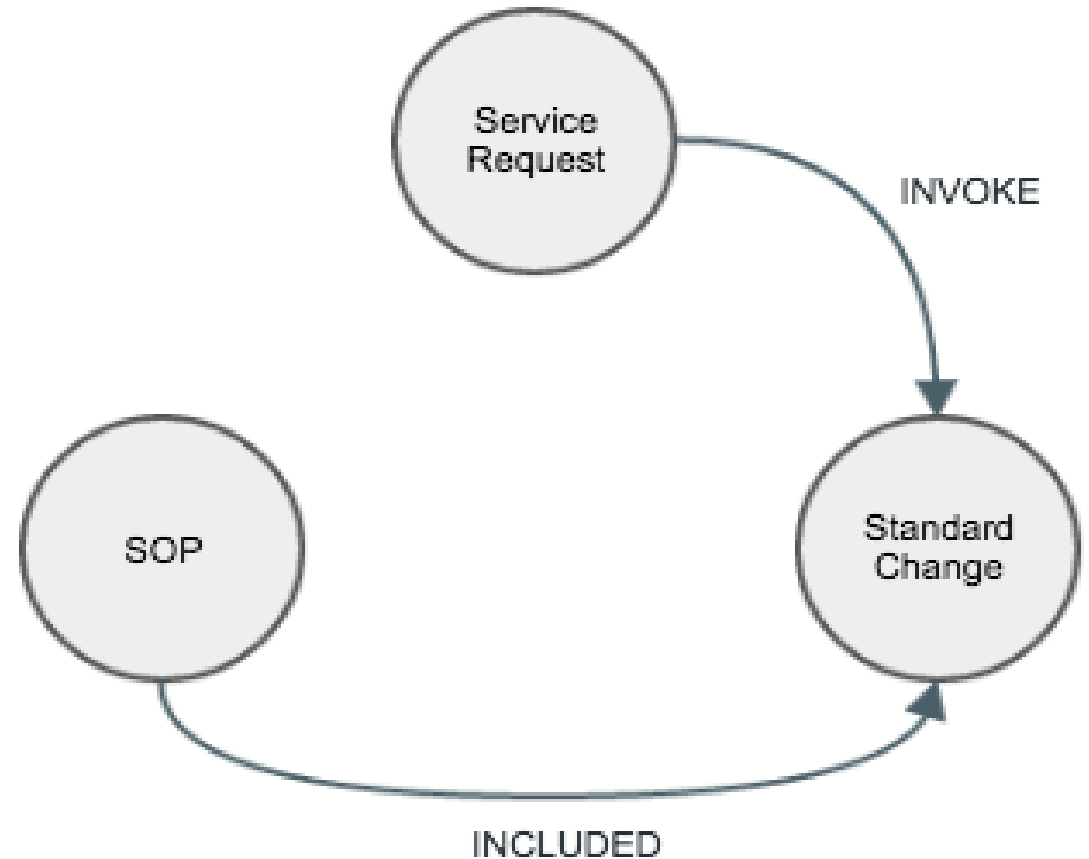
Standard Changes may be “demoted” to a Normal Change

- Use of Standard Changes should be Recorded
- e.g. in iService today and eventually in CCR

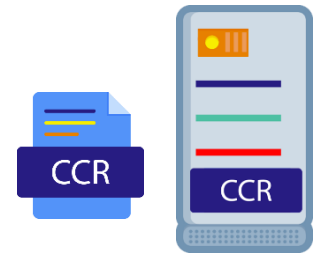


Relationship between SR, SC and SOP

1. User issue a Service Request (SR)
2. Standard Change is invoked (if present)
3. Standard Operating Procedure (SOP) is followed to implemented the standard change



Standard Change Approval



Customers and InterSystems staff can approve standard changes.

- This can vary based on the owner of the configuration item
- Standard change approved when its SOP is approved

Example: for hosted sites ISC would create and approve most standard changes:

- Restart CUPS Service
- Run DataFix (to be considered)
- Purge Log Files
- Collect Performance Statistic Information



Benefits of Standard Changes

Allow to put control on routine changes with minimal overhead

Used in conjunction with Standard Operating Procedure (SOP) to provide a cookbook on how to implement a recurrent change

Can expedite incident resolution and root cause analysis providing an historical record of invoked standard changes.

Move towards “Change Control for Everything”



Quiz: Identifying Standard Changes

Question:

Which of the following can be considered a Standard Change? Select all that apply.

- A) Purge Log Files
- B) Development Change
- C) Synchronize Mirror Members
- D) New Data Fix
- E) Change to Site TrakCare Components
- F) Stop and Start HealthShare Production

***low-risk, regularly
occurring, well understood,
repeatable***

Answer:

A), C) and F)

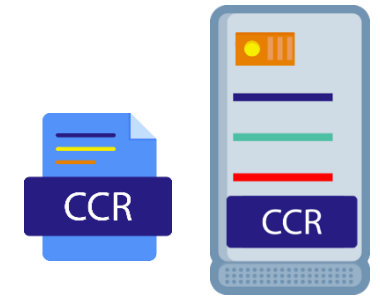




CCR Tier 0 - Standard Changes

Standard Changes within CCR

Standard Changes within CCR



CCR supports documenting standard changes

Can promote a CCR to be a standard change

- Documentation within that CCR then used as SOP for implementing change again
- CCR becomes read-only

To become a standard change, a CCR must be:

- Tier 0
- Closed

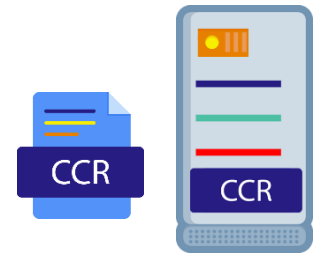
Can action and view history of standard changes

Executing standard change:

- Does not require new CCR (as it has already been completely specified)
- Does not require additional approval (as it has already been pre-authorized)



Accessing Standard Changes



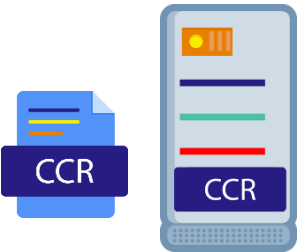
The Standard Change Details link can be found on the CCR Web Application Homepage:

Useful Links

- > [CCR Reports](#)
- > [User Details](#)
- > [Organization Details](#)
- > [System Details](#)
- > [Group Details](#)
- > [Standard Change Details](#)
- > [Release Details](#)
- > [Peer Review Document](#)
- > [Main Documentation](#)
- > [CCR Environment/Flow Diagram](#)
- > [CCR Process States](#)
- > [Perforce Usage Documentation](#)
- > [TrakCare/CCR Usage Documentation](#)
- > [ICC Training Catalog PDFs](#)
- > [CCR FAQs](#)
- > [Known Issues](#)
- > [Download ISC Quick Launch](#)



Standard Change Details



Standard Change Details shows catalog of standard changes for organization.

Details for Standard Change in CCR Application

Select CCR Organization:

InterSystems (ISCX)

[\[view Org\]](#)

[\[create Standard Change\]](#)

Active Standard Change List for 'InterSystems'

Sort1:

Expiration Date (Reverse)

Sort2:

CCR

Filter Preferences

Options:

☐ Include Expired

Reset

Update

Quick Sort & Filter

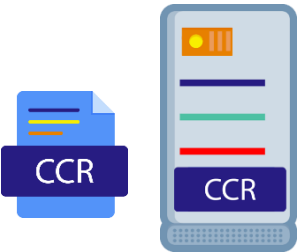
Keyword:

SEARCH

#	CCR	Title (Tooltip: Description)	Expiration Date	Last Actioned	Last User	Last System	Last Environment
1	ISCX12368	[ePAF] Assign A New Person as "PAF Central" in Approval Paths	2020-03-26				Action
2	ISCX14600	Refresh TRAIN Environment	2020-01-16	2019-07-16	Schafer,Samuel	CCR	LIVE Action



Standard Change Details (cont.)



ISCX14600 - Refresh TRAIN Environment

Authorized By

Speed,Benjamin

Expiration Date

2020-01-

Notes

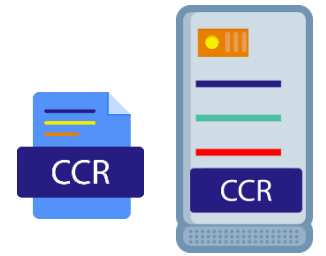
Save

Description	TRAIN code base no longer reflects that of LIVE. Rolling back after every training loses any changes deployed since the last refresh. Refresh TRAIN to reflect the current state of LIVE.
Modified Items	Entire source workspace of TRAIN for CCR namespace: C:\Jenkins\workspace\APPS_CCR\custom_ccrs\us\ISCX\CCR\LIVE\ All items within CCR namespace of TRAIN that exist in the source workspace.
Impacted Areas	CCR application behavior on TRAIN. Any changes deployed to live since last refresh will now be reflected in TRAIN.
Implementation Plan	***Only implement on Train*** 1) On a windows machine, retrieve files from perforce branch //custom_ccrs/us/ISCX/CCR/LIVE/ and copy to C:\Jenkins\workspace\APPS_CCR\custom_ccrs\us\ISCX\CCR\LIVE\ on ccrtrain.intersystems.com 2) In CCR namespace of TRAIN, run do Refresh^%buildccr
Backout Plan	Rollback ccrtrain.intersystems.com to Gold Snapshot
Testing Plan	1) Verify able to log in to https://ccrtrain.intersystems.com/ccr/login.csp and nothing blatantly out of place and no errors thrown 2) Verify able to create a new CCR for ISCU/TESTSYS but stop short of actually creating it 3) Verify able to view one of the existing CCRs 4) Verify at least 3 changes since last refresh (or if less than 3 changes made, verify all) exist in CCR. Focus on ones that may be more important.

Standard Change Action History				
Time Executed	User	System	Environment	Notes
2019-07-16 10:20:00	Schafer,Samuel	CCR	LIVE	Tested ISCX15201, ISCX15227, ISCX15099
2019-05-09 12:05:00	Schafer,Samuel	CCR	LIVE	Performed on TRAIN



Standard Change Fields



Expiration Date.

- Must regularly review and authorize standard changes.
- Time period of authorization finite and usually 6 months or less.
- System Alert displayed 1 week before expiration date.

All updates to fields audited.

- Rest of CCR read-only

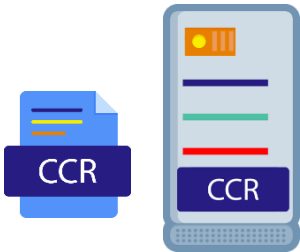
View audit log in Changes to CCR Fields pane in CCR full view by clicking title of CCR

ISCX14600 - Refresh TRAIN Environment

Authorized By	Spead,Benjamin
Expiration Date	2020-01-
Notes	
Save	



How To: Create New Standard Change



Details for Standard Change in CCR Application

on: InterSystems (ISCX)

1

[create Standard Change]

[\[view Org\]](#)

Create a new Standard Change for the above organization
(*) indicates a required field

Note: a Standard Change can be created from a CCR which records a recurrent change, is Closed, and is low risk.
Do not promote a CCR to a Standard Change unless these criteria are met.

2

*CCR ID:

*Authorized By

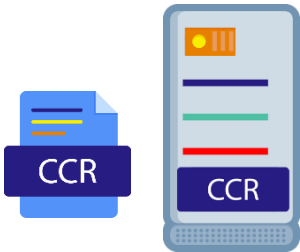
*Expiration Date

Notes

Save



How To: Immediately Expire Standard Change



- 1. Update Expiration Date field to date in past.
- 2. Click save.

ISCX14600 - Refresh TRAIN Environment

Authorized By

Speed,Benjamin

Expiration Date

2020-01-

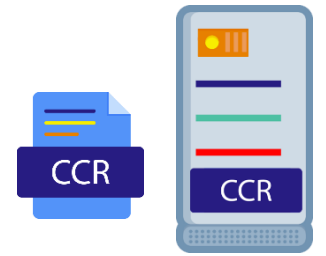
Notes

Save

Description	TRAIN code base no longer reflects that of LIVE. Rolling back after every training loses any changes deployed since the last refresh. Refresh TRAIN to reflect the current state of LIVE.
Modified Items	Entire source workspace of TRAIN for CCR namespace: C:\Jenkins\workspace\APPS_CCR\custom_ccrs\us\ISCX\CCR\LIVE\ All items within CCR namespace of TRAIN that exist in the source workspace.
Impacted Areas	CCR application behavior on TRAIN.



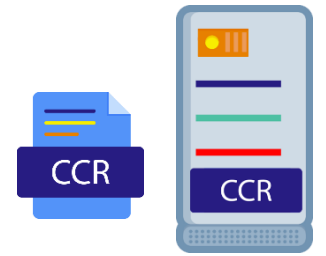
How To: Renew Change Expiring Soon



1. Review all fields and verify still accurate.
2. Receive authorization including next expiration date.
 - Generally standard changes should expire in 6 months
3. Progress new Tier 0 to closed.
 - May help to use clone transition.
4. Promote new CCR to standard change.



How To: Update Standard Change CCR Fields

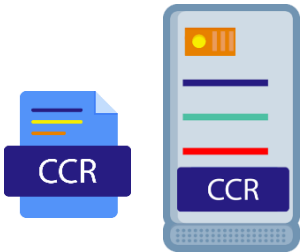


If need to update any CCR fields such as Implementation Plan:

1. Expire current standard change.
2. Progress new Tier 0 to closed.
 - May help to use clone transition.
3. Promote new CCR to standard change.



How To: Action Standard Change



Active Standard Change List for 'InterSystems'

Filter Preferences

Options:

☐ Include Expired

Reset

Update

Keyword:

SEARCH

▼

	Expiration Date	Last Actioned	Last User	Last System	Last Environment	
on as "PAF	2020-03-26					Action
nt	2020-01-16	2019-07-16	Schafer,Samuel	CCR	LIVE	Action

ISCX14600 - Refresh TRAIN Environment

2

*System

CCR (CCR)

*Environment

*Time Executed

Notes

Save



Quiz: CCR Standard Changes

Question:

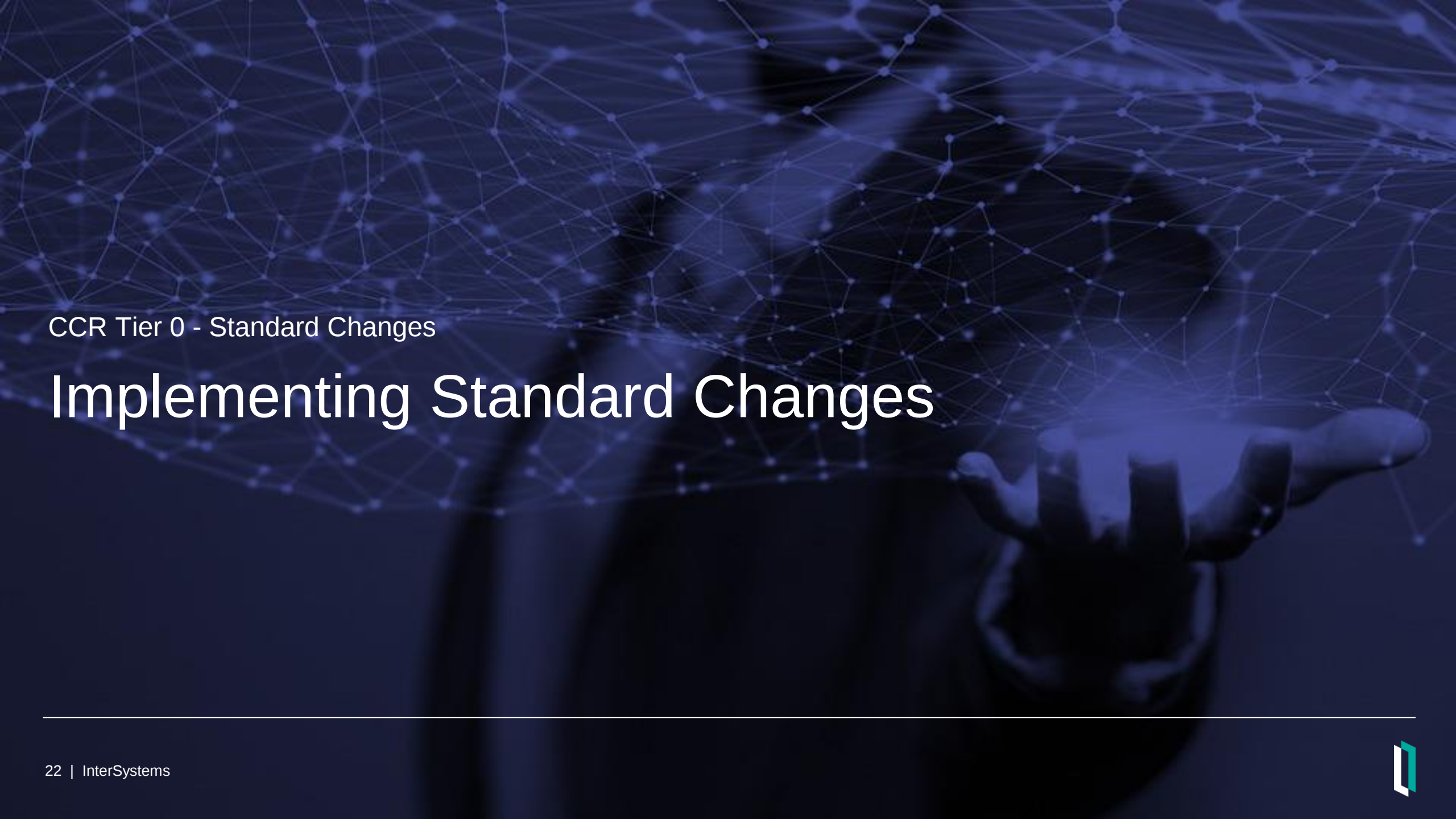
Which of the following is True about CCR Standard Changes? Select all that apply.

- A) Standard Changes are pre-authorized to be executed in a System
- B) Any closed Tier 0 CCR can be promoted to be a Standard Change
- C) The contents of a CCR become read-only when the CCR becomes a Standard Change

Answer:

A), B) and C)

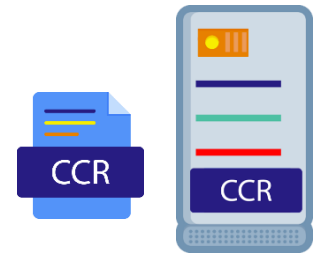


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CCR Tier 0 - Standard Changes

Implementing Standard Changes

How to implement standard changes



1. Explain to the customer the value of standard changes and how InterSystems implements them
2. Share catalog of suggested Standard Changes
 - Covers the typical routine changes for day to day operation (Subset for hosted sites)
3. InterSystems should populate standard changes for components it is responsible for
4. Ask the customer to populate standard changes for components they are responsible for
 - InterSystems may assist with definition of the SOP if required





CCR Tier 0 - Standard Changes

Course Conclusion

Are there any Questions?

