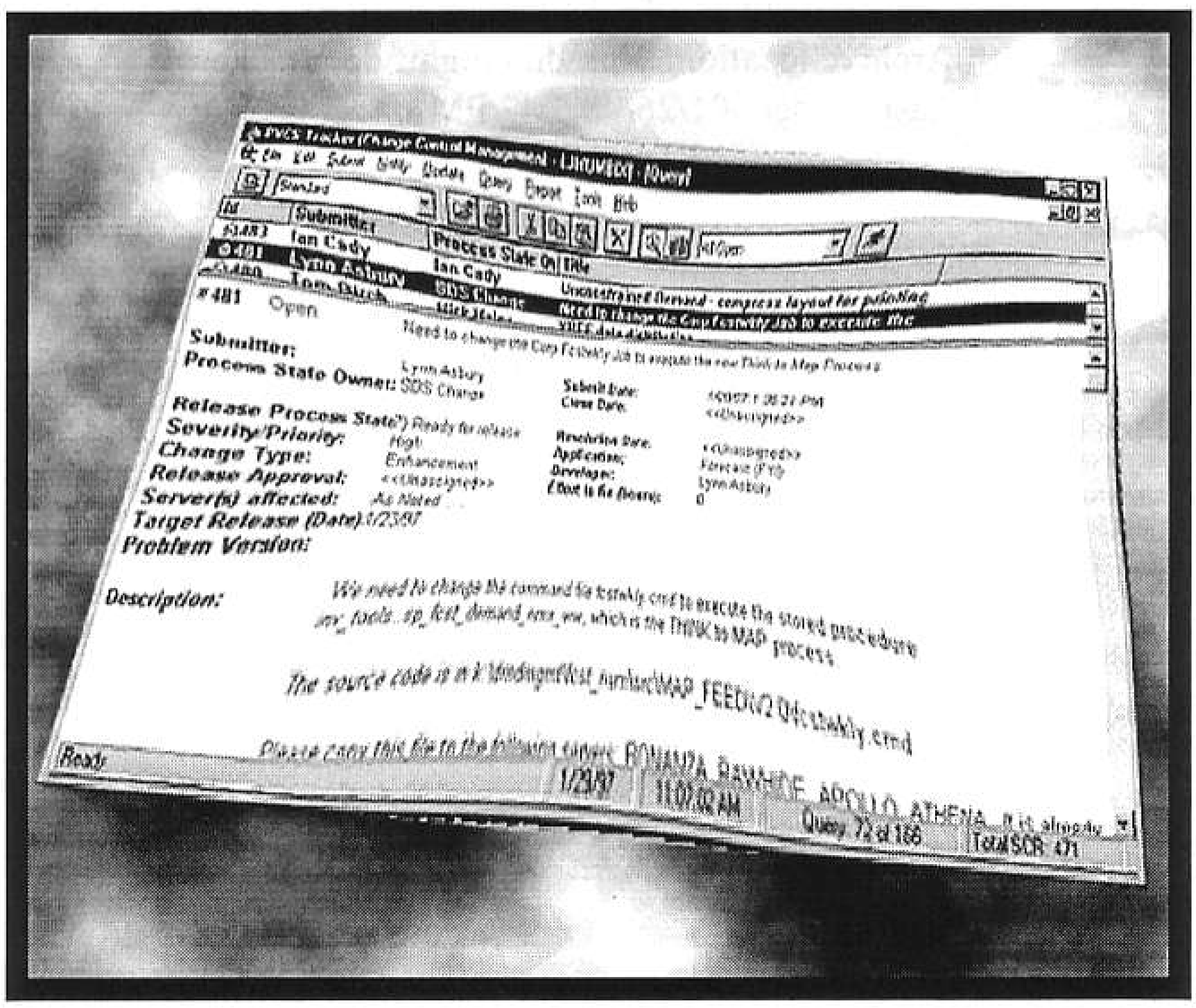
Using Tracker

FOR CHANGE CONTROL



intel. Systems Manufacturing I.T.
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About This Manual

This is a work-in-progress document. If you have questions or concerns about what's covered (or what's not), please let me know. Or submit an SCR to the documentation, c/o Len Humbird.

These procedures are meant for anyone who makes a change that affects production. This includes *all I.T. developers*, business owners, change managers, and people interested in how software is released to production.

Revision History

Date	Version	Author	Changes
01/14/1997	0.1	Len Humbird	New Document (SCR 280)
01/31/1997	0.11	Len Humbird	User Comments and general enhancements.
08/07/1997	0.12	Len Humbird	Added Data Store Change Control Process

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Archive location: \\ \tracker
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Getting Started with Tracker

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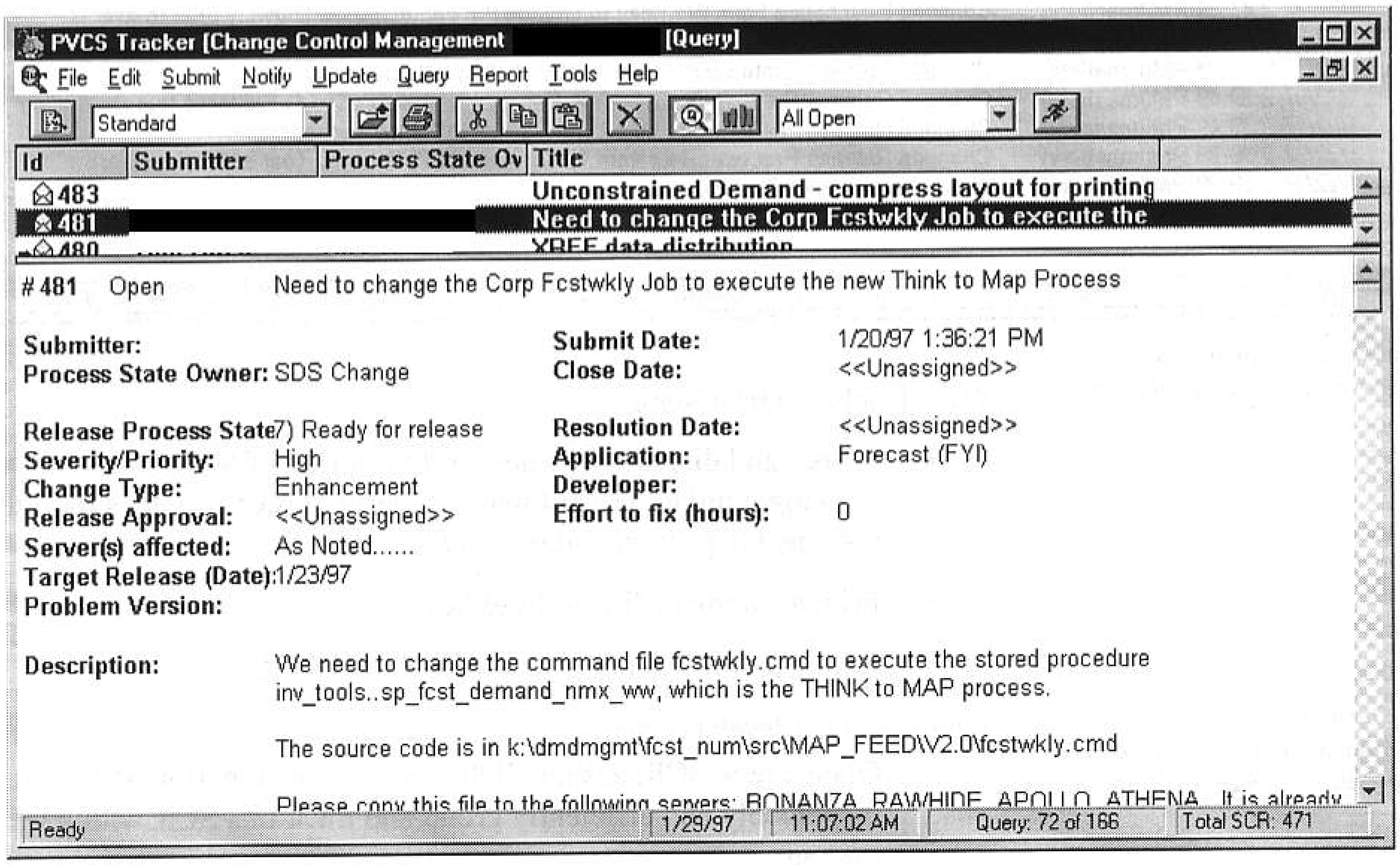
Overview

What is Tracker?

Tracker is a problem tracking application. It is used primarily by developers in Systems Manufacturing I.T., but takes input from and provides reports to anyone who wishes to be part of the development, testing/QA and production release process.

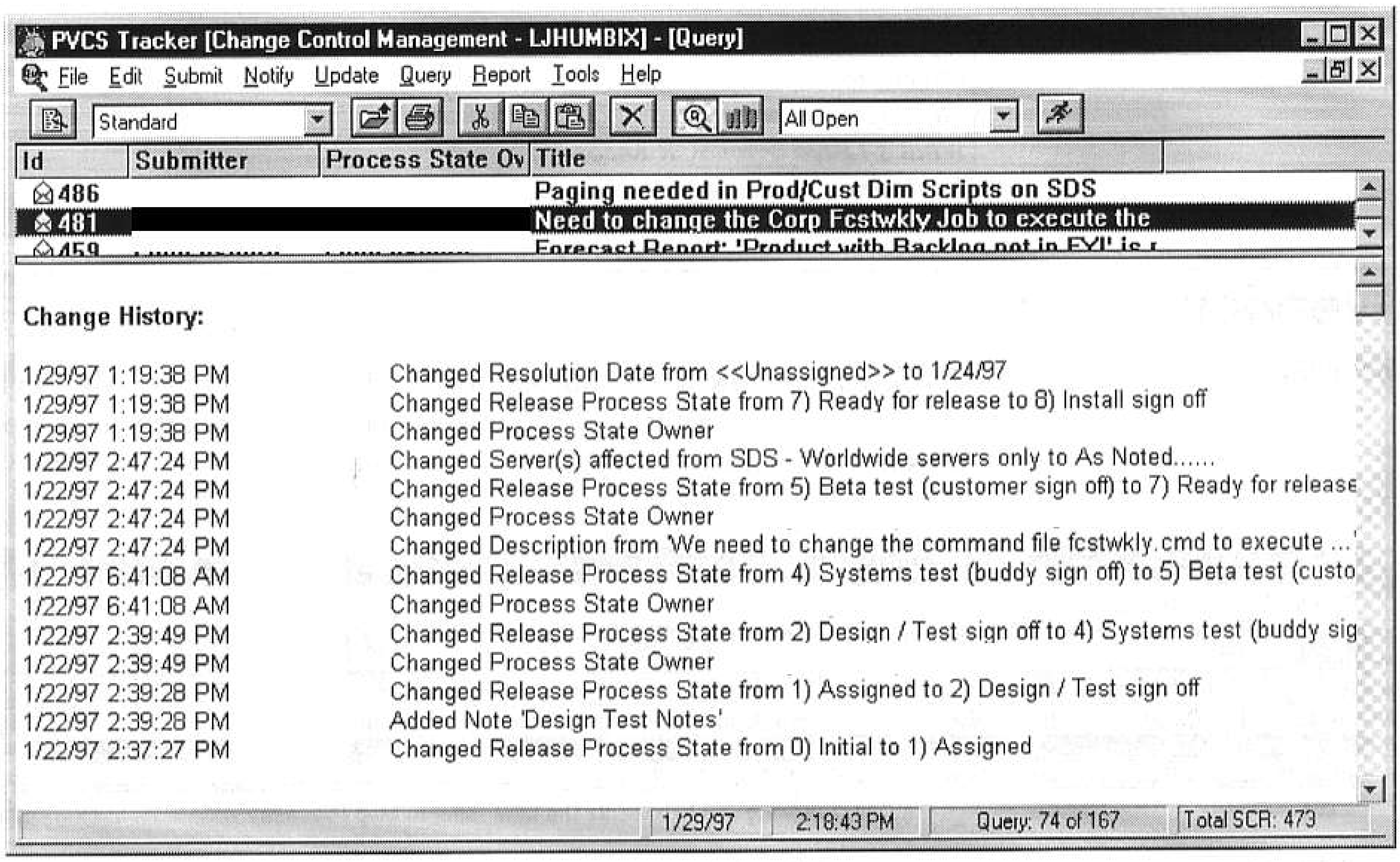


Tracker is used to ensure that reported problems, requests for enhancements, etc., are given a priority, a responsible person and an expected outcome.

SCR: System Change Request.

Tracker's SCR screen tells you at a glance:

- A who submitted the SCR and when
- A brief description and a detailed description
- Who is the responsible person
- What is it's current process state
- The change history



Browser: Someone who uses Tracker only to gather information.

With Tracker, a browser can:

- Search and display a list and/or description of SCRs based on the tracking number, project name, severity, process state, submitter, responsible person, and other parameters.
- Print a summary list of these SCRs.
- Print a detailed report on each of these SCRs.

Developer: An I.T. tools/infrastructure user who is responsible for implementing changes.

With Tracker, a developer can:

- Open a new SCR, assign all the relevant information useful for responsibly and efficiently group and track this SCR within the system.
- Update the SCR record as new situations arise, assign a new responsible person.

Why use Tracker?

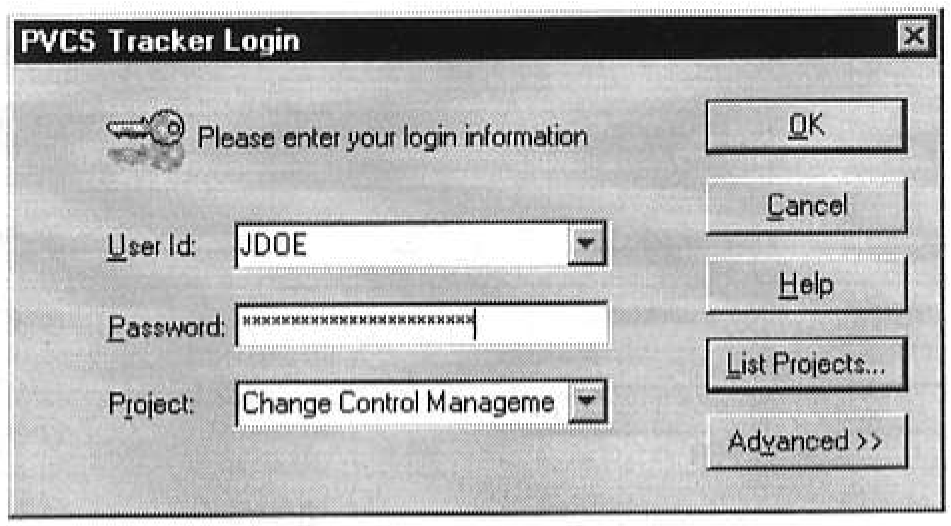
These procedures are meant for anyone who makes a change that affects production. This includes *all Systems Manufacturing I.T. tools and infrastructure developers*, plus business owners, change managers, and other people who interested in getting software and data store changes released into production.

An SCR and the associated sign-offs are required for any change to production. *This also applies to emergency bug fixes.*

The Tracker database will be reviewed weekly by the CCB Team for housekeeping and patterns of misuse. In addition the managers will review it once per week to understand pending requests, workload, and net change. It is your responsibility to keep your SCRs in the correct state and data entry complete.

Starting Tracker

Find the Tracker program group and program item from your Program Manager and double-click it to start Tracker. When Tracker comes up, you will need to enter your user name and password.



Which Project?

Three projects are available, however only one will let you log in.

- **Change Control Management** (default) - This is the current SDS Tracker database. This is the only one you should be using.
- **Datastore Change Control** (disabled) - This is the old SDS tracker database.
- **Demand Management Team** (disabled) - This is the enhancement database for demand management tools.

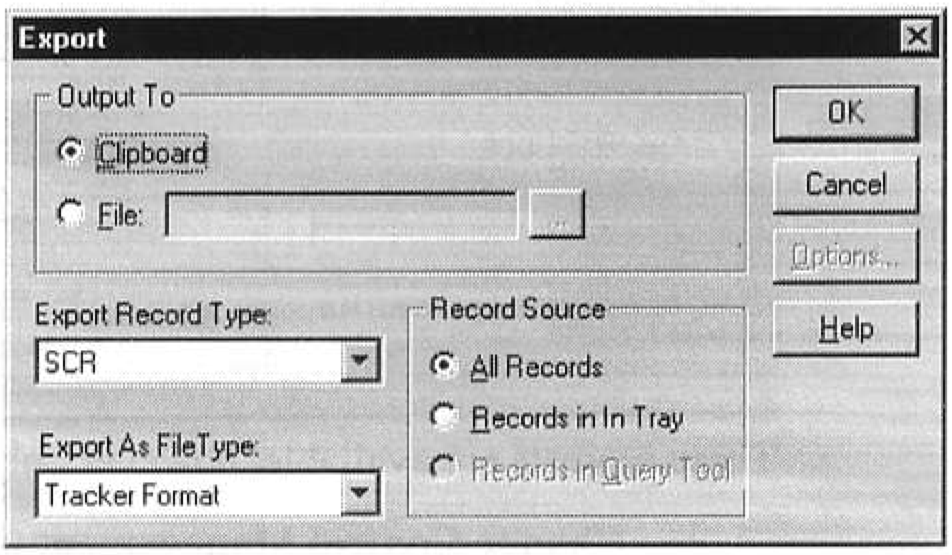
What's Listed in an SCR Record?

To be defined.

Exporting Tracker Information

You can use Tracker's Export function to save tracker report information to a format suitable for word processing or spreadsheet manipulation.

Select Export from the File menu. This dialog appears.



Data Store Change Control Process

In This Chapter...

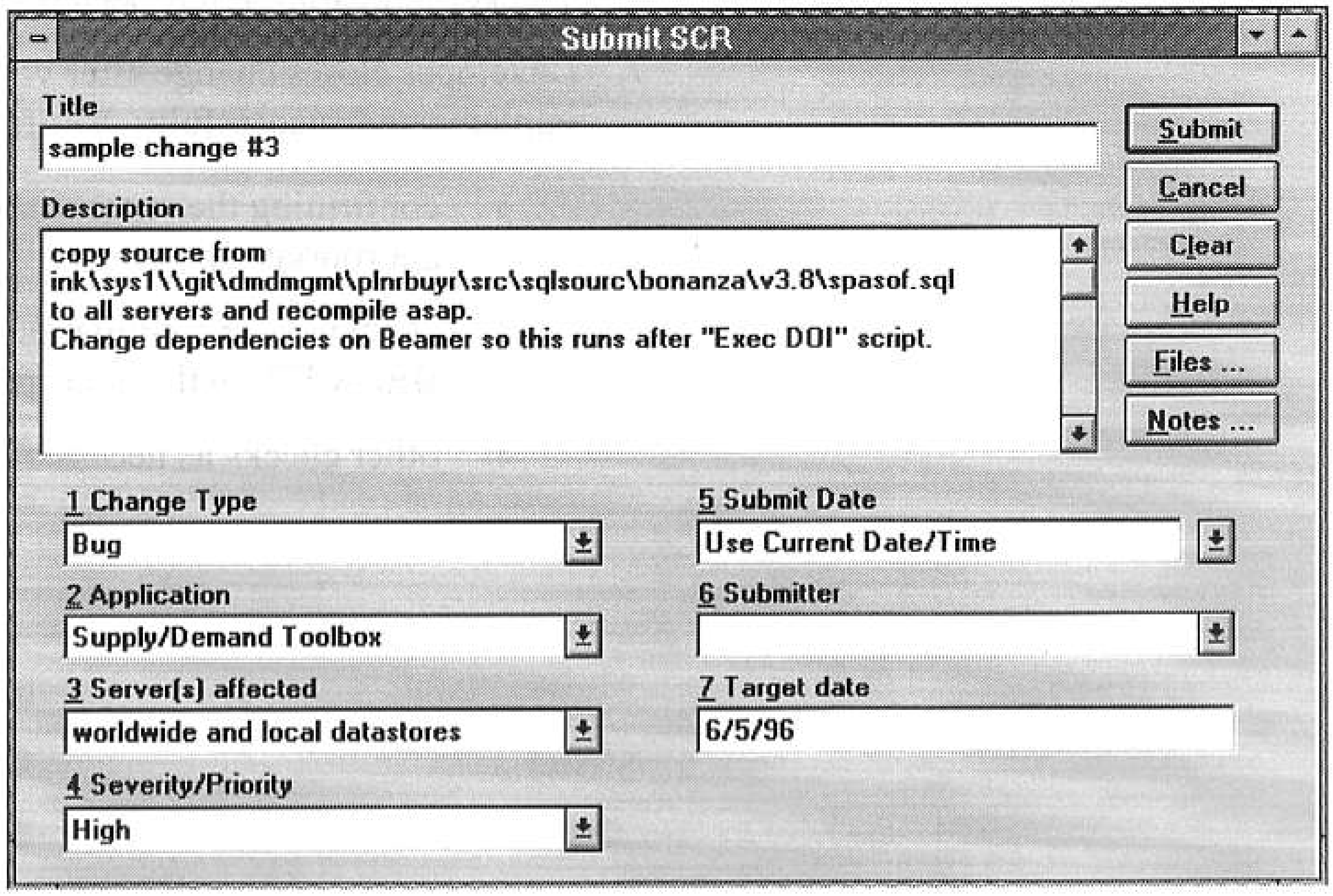
Goals

As part of the improvement process for the Shared Data Store's management of data, table creation, loading and stored procedure generation, we will also want to improve the change control of some of these elements. The aims of the revised change control process are:

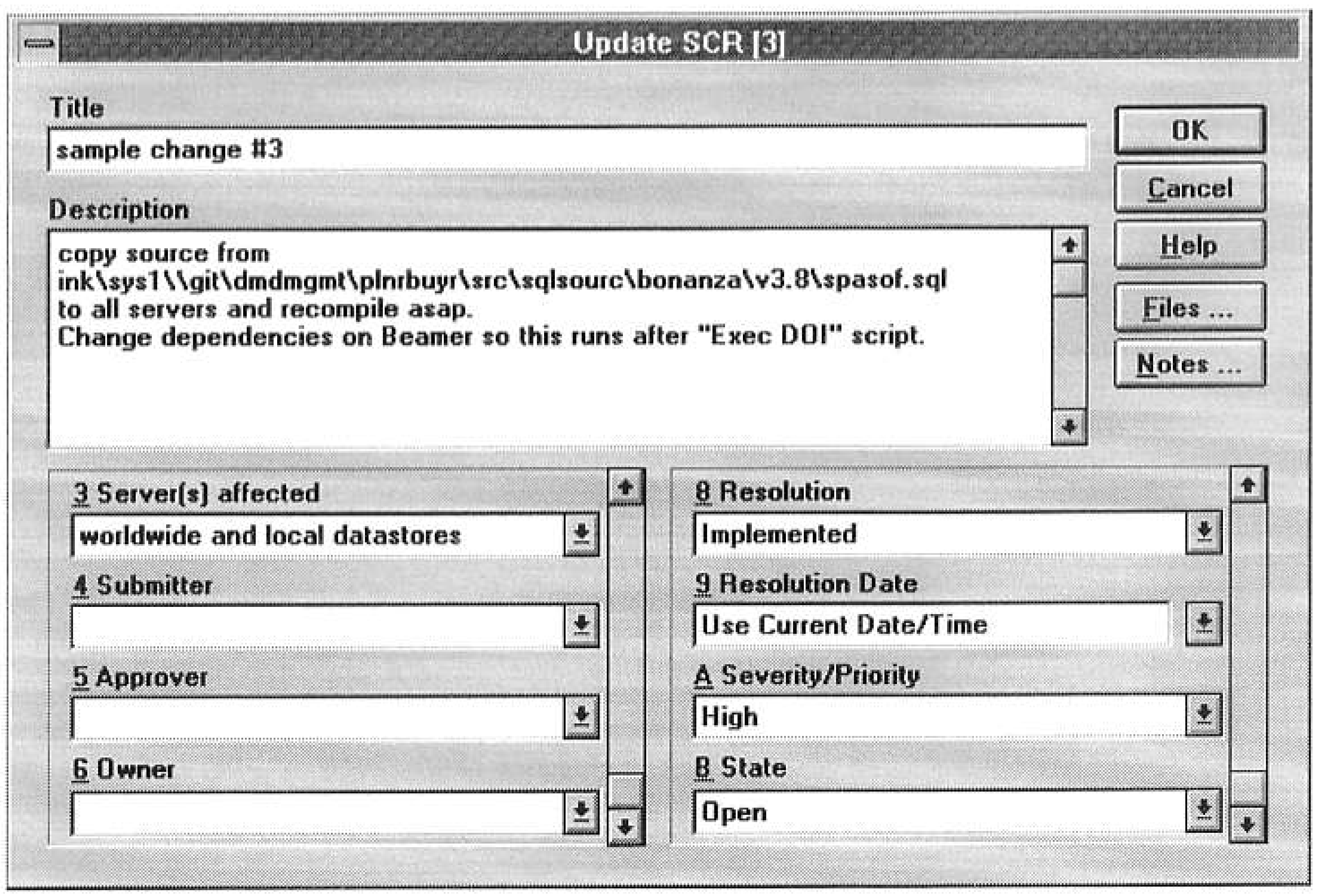
- Be successful at managing change controls
- Change control should be a repeatable process that implements changes in a timely manner while maintaining a stable production environment for the users
- Improved Visibility
- All changes and information relating to them should be logged in a place that developers, implementors and managers have access to.
- Reduce number of changes
- Changes should be able to be batched, and reviewed by others to ensure that they are not redundant, and are being applied at the appropriate time.

Tracker Forms

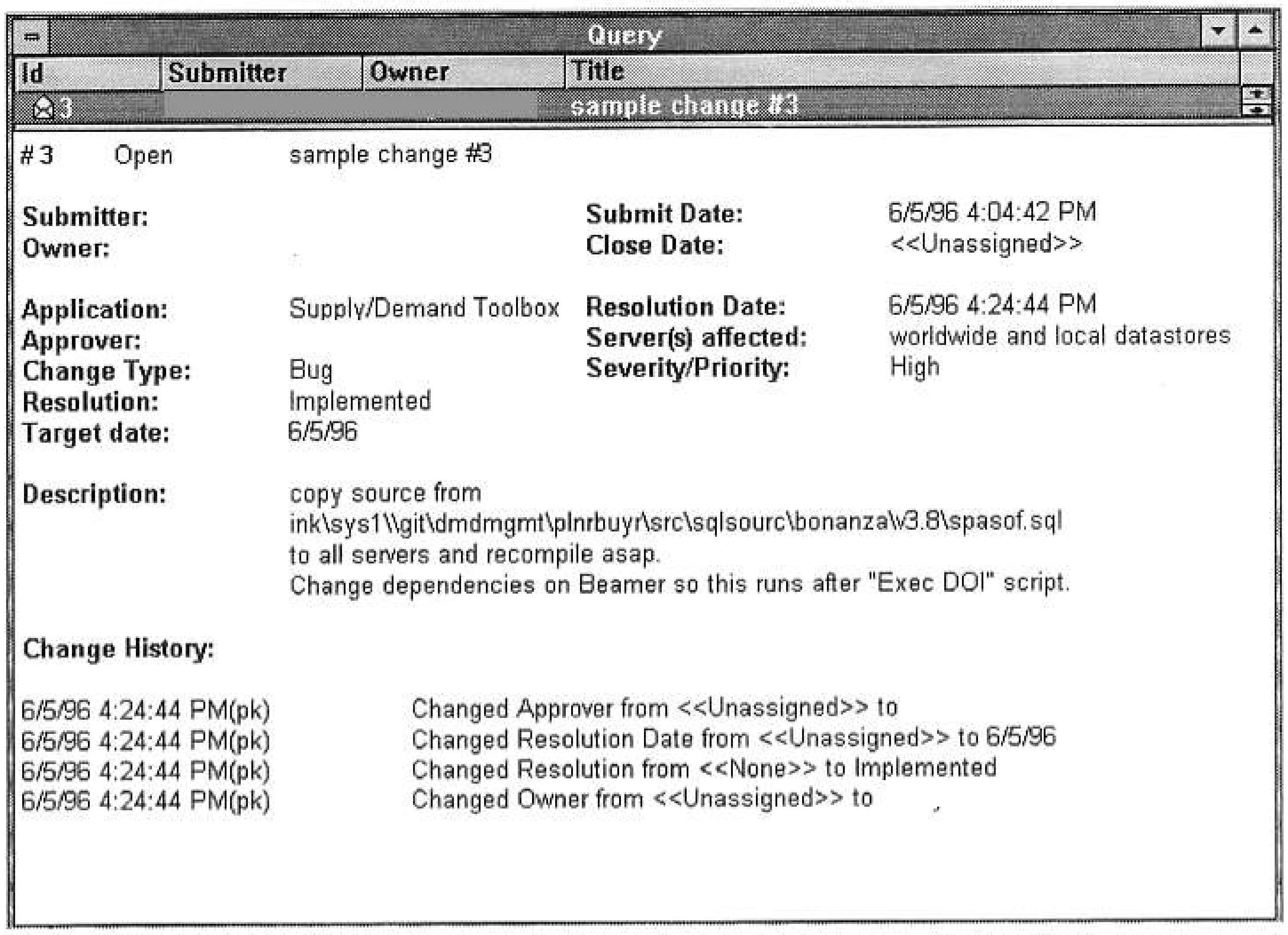
The Submit form for a change request



The Update Form for a change request



The Query form showing status of the change request on Tracker, after approval and implementation, but prior to Close.



Submitting and Updating an SCR

In This Chapter...

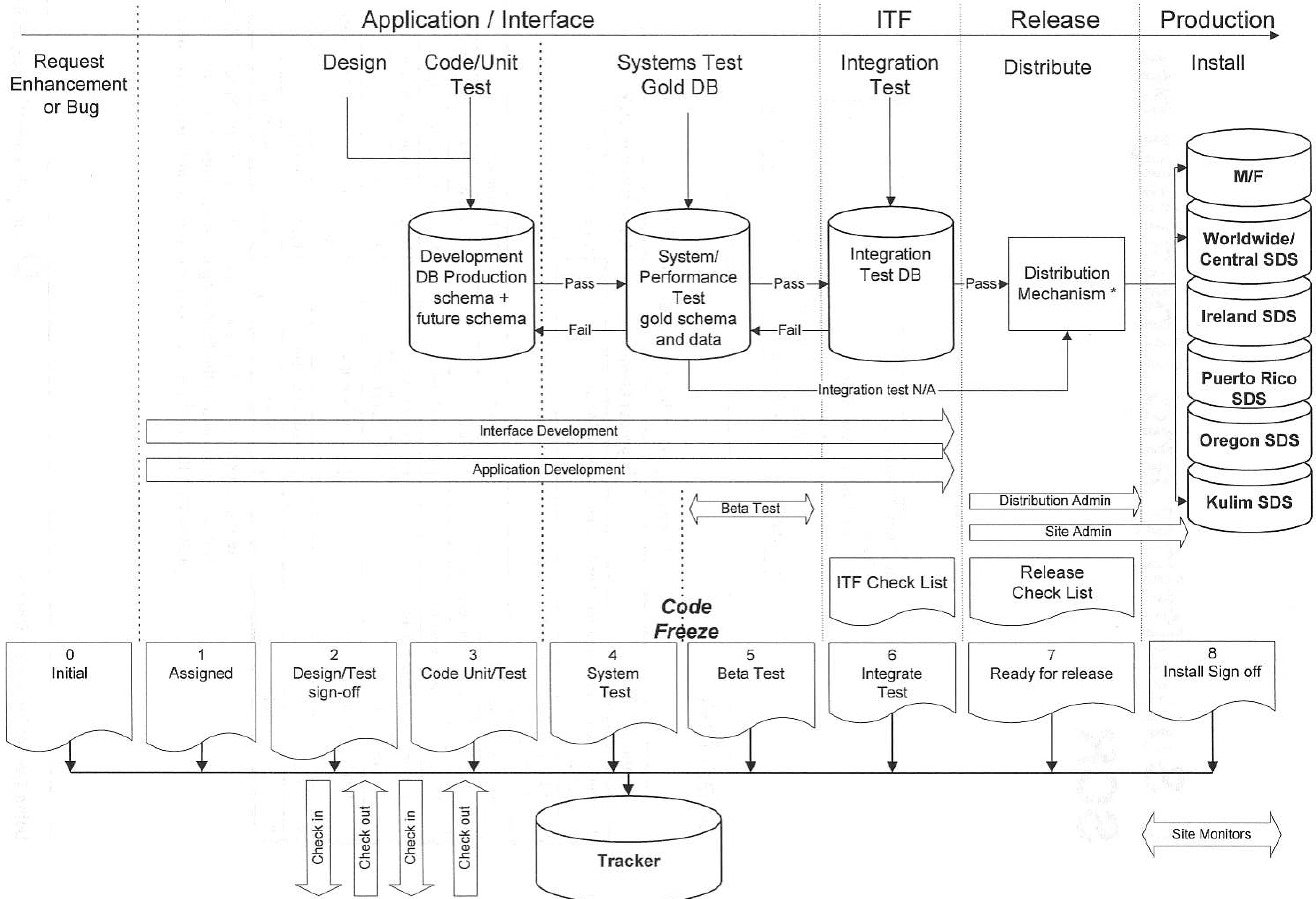
Overview

The release process has several distinct phases:

	Phase	Typical Owner	Action/Deliverable
0.	Initial Request for enhancement or description of bug	*Your Manager*	Change request.
1.	Assigned. Priority Set and Developer Assigned	Developer	Assignment to Developer.
2.	Design/Test sign-off	Developer	Test document.
3.	Code/Unit Test; Programmer sign-off	Developer	Unite tested code. Assign new Owner.
4.	System Test (buddy sign-off)	Co-Developer	System tested code. Assign new Owner.
5.	Beta test (Customer sign-off)	Business Owner/Dev.	Beta tested code. Assign new Owner.
6.	Integrate Test (ITF)	ITF Tester (TBD)	Tested code.
7.	Ready for release	Release Manager	Code placed into production. Assign new Owner.
8.	Installed	Infrastructure Team.	Installed software.
9.	Verified Installed	Developer	Assurance of completion.

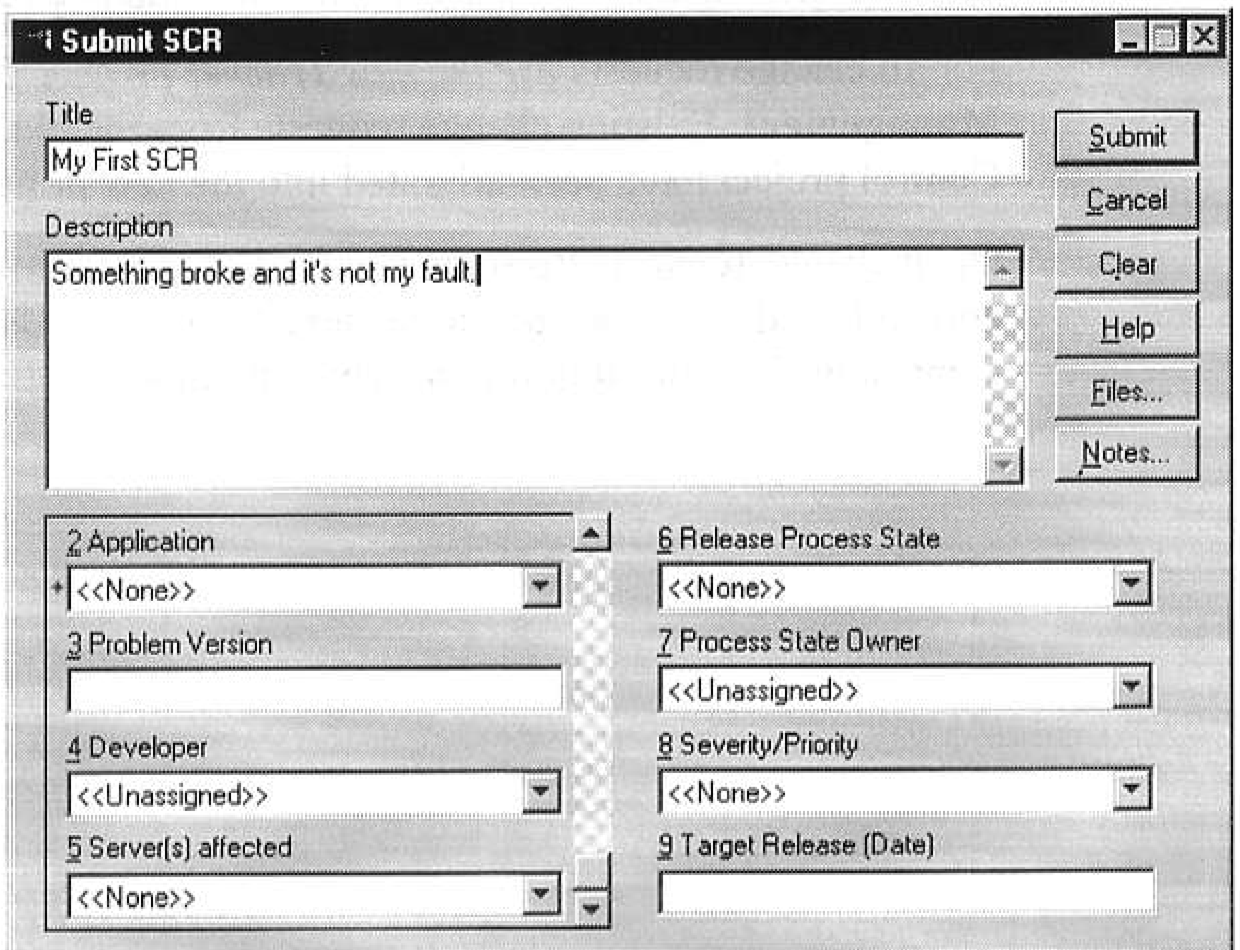
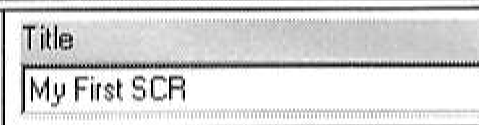
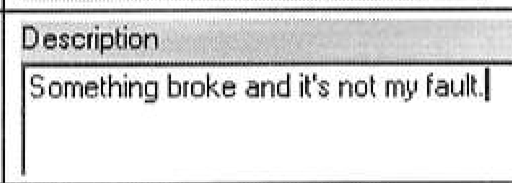
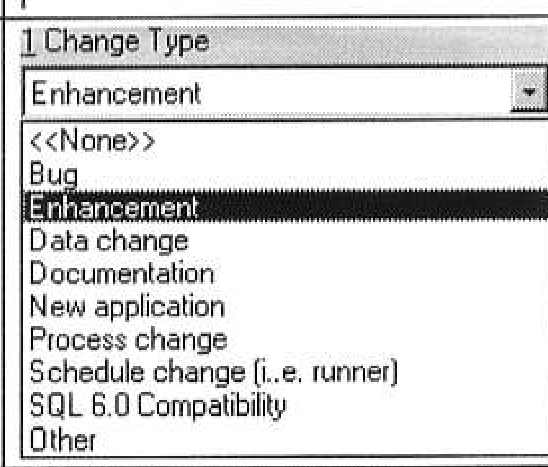
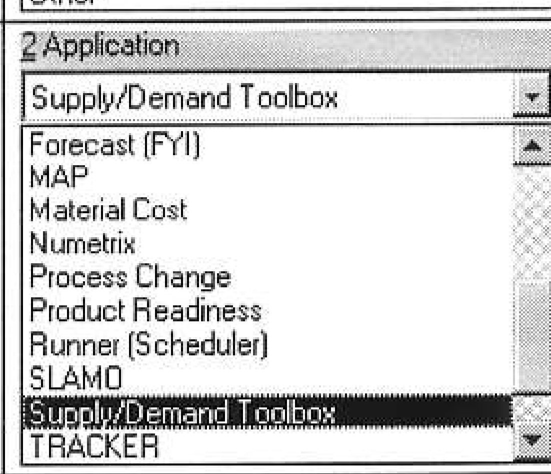
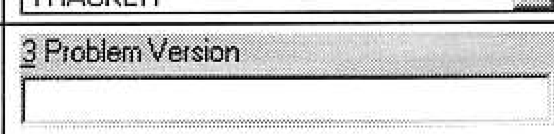
These phases are visually depicted in Tracker's Release Process State drop-down box, and in the following diagram. This also correlates the phases with the traditional coding, test, release and production steps.

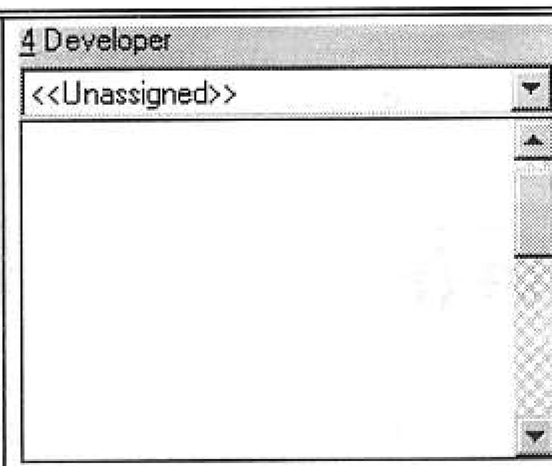
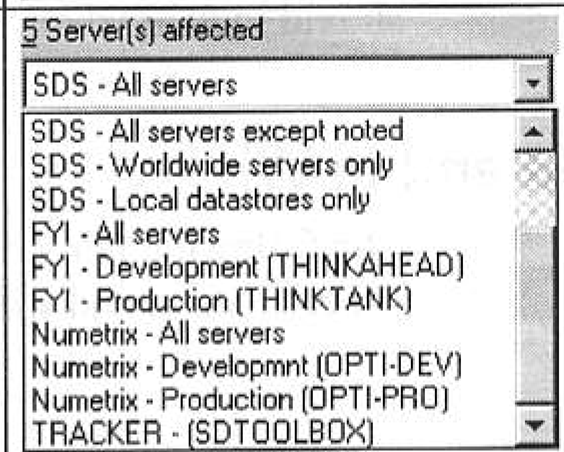
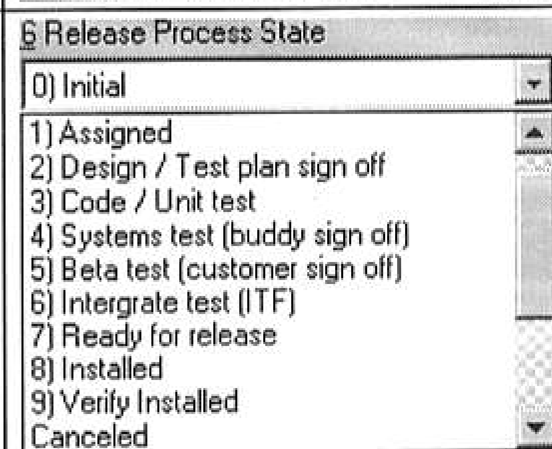
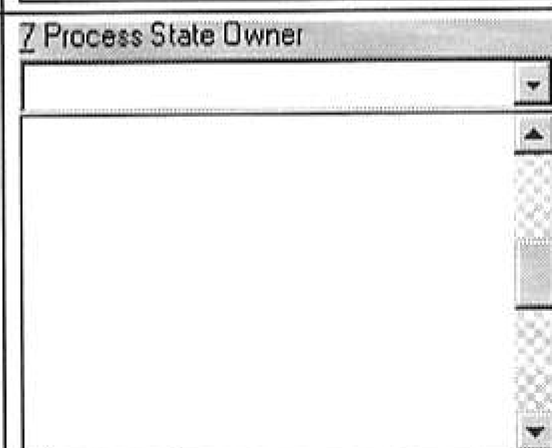
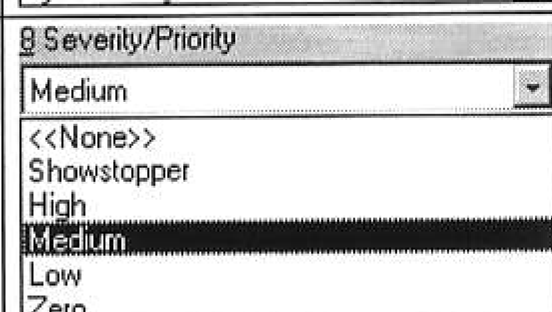
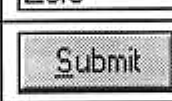
SDS Application Release Process



How to Submit a New SCRs

Follow these steps to enter a new tracker record:

<table>
<tr><td colspan="2">1. Select Submit SCR from the Submit menu. The new Submit dialog window appears.

</td></tr>
<tr><td>2. Enter a descriptive Title.</td><td>
</td></tr>
<tr><td>3. Enter a Description of work or comments.</td><td>
</td></tr>
<tr><td>4. Change the SCR Type (this is required).</td><td>
</td></tr>
<tr><td>5. Specify the Application (this is required).</td><td>
</td></tr>
<tr><td>6. Enter the Problem Version. This is the software version on which you are reporting the SCR.</td><td>
</td></tr>
</table>

7. Assign the **Developer**, if known at this time.	
8. Assign **Server(s) affected**, if known at this time.	
9. Set the **Release Process State** (this is normally set to "Initial"). *If you create an SCR and you're reasonably certain that you're going to be the developer, Set the initial state to "Assigned," and put your name in the Process State Owner field.*	
10. Set the **Process State Owner** (this defaults to *you*). *If you set the Release Process State to "Initial," The Process State Owner should be your manager.* ***The key to making Tracker an action-oriented tool, where SCRs move through the system, is assigning the correct owner to an SCR.***	
11. Set the **Severity/Priority**. (The method is still to be determined.)	
12. Click:	

Assigning the Owner

The key to making Tracker an action-oriented tool, where SCRs move through the system, is assigning the correct owner to an SCR.

When In-Trays are configured properly, setting new ownership on an SCR will cause it to appear in the respective owner's In-Tray.

If you are the owner or the submitter, you have the ability to close the SCR.

How to Update (Promote) an SCR

The process for filling in an Update SCR window is nearly identical to a new SCR. Some fields are different. This section highlights the areas you should look at when you update an SCR.

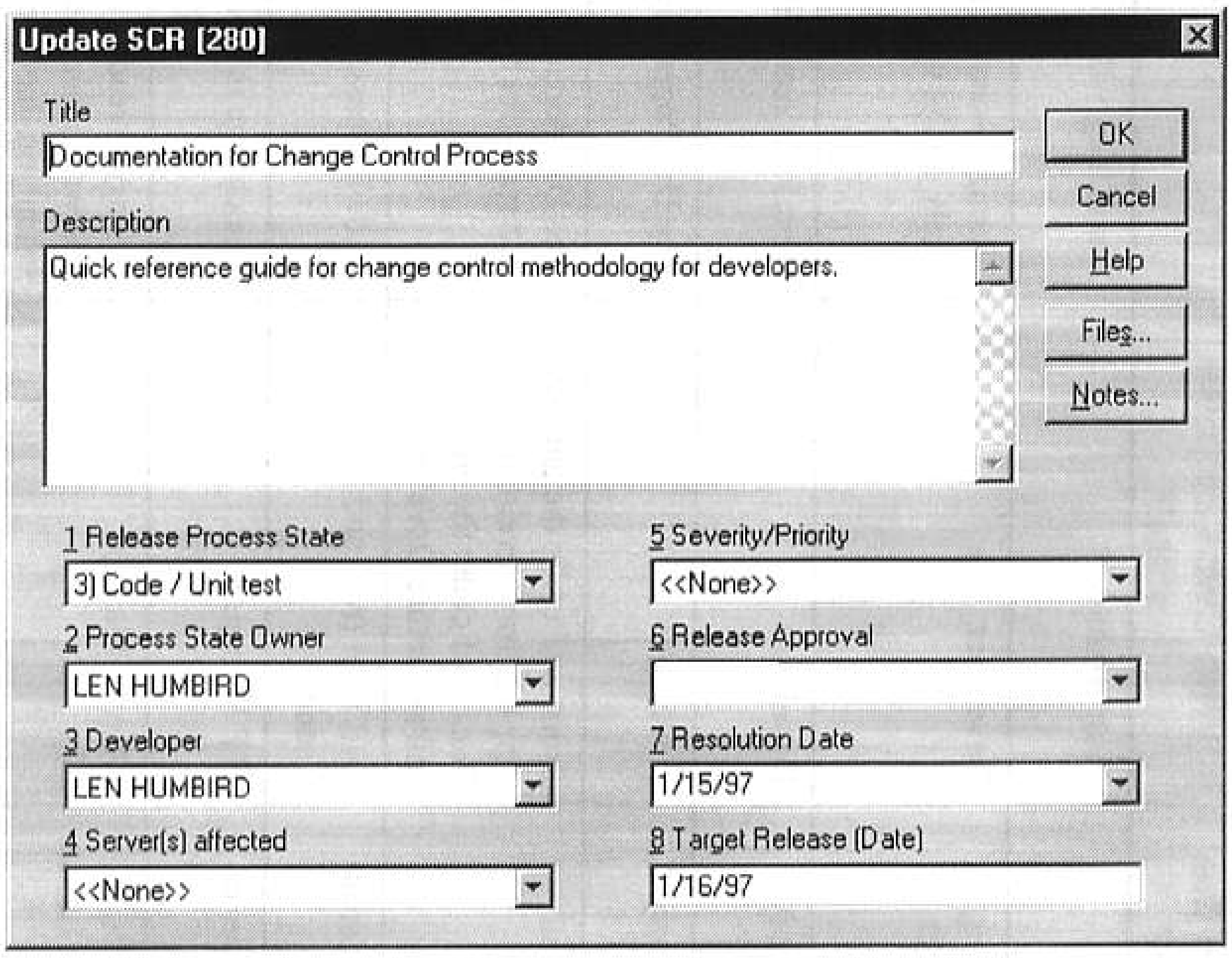
When to Promote and to Whom

The following table shows the guidelines on when to promote an SCR's Process State, and who becomes the new owner.

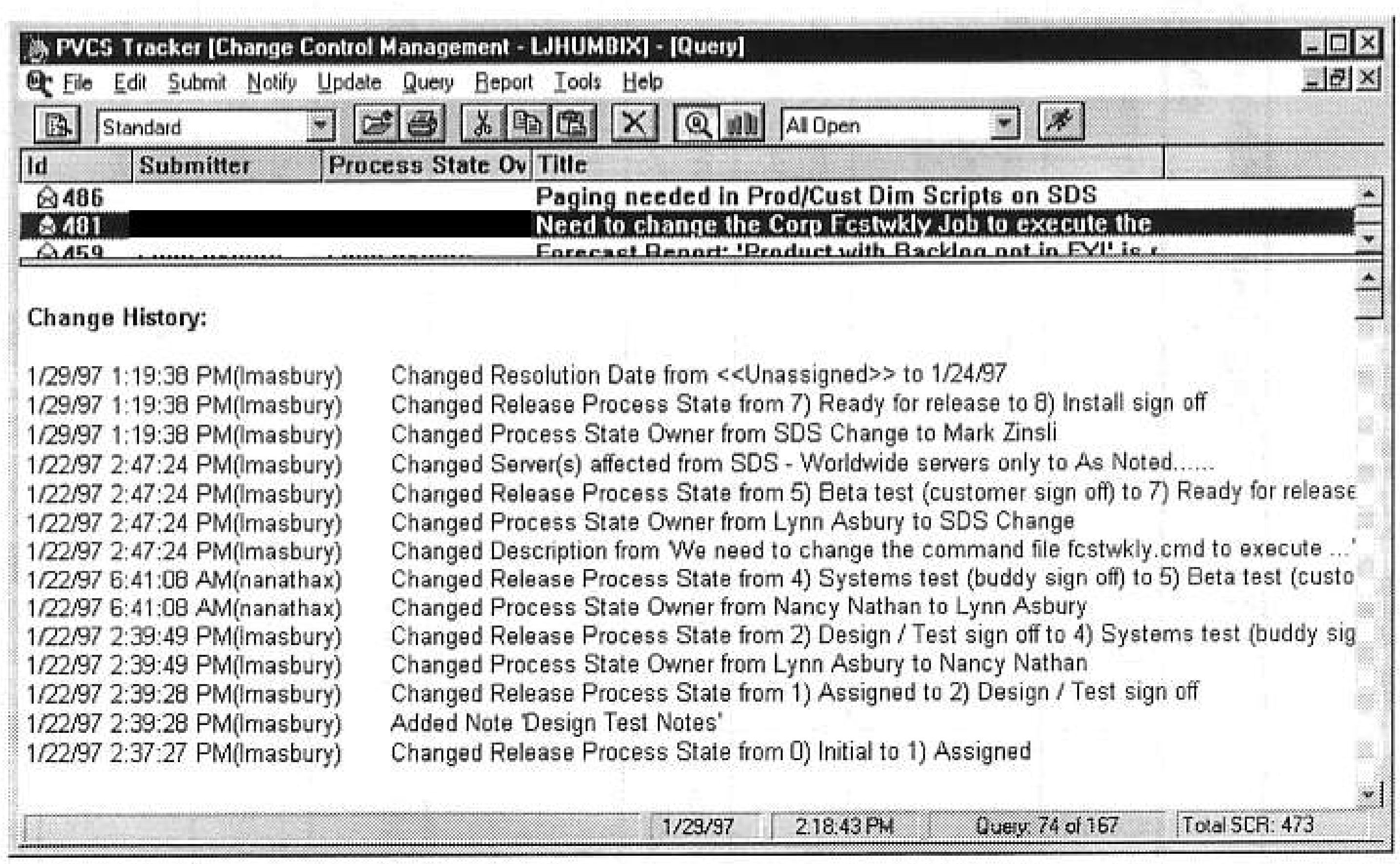
From:	To:	Required?	Who makes the change?	Who Owns the new state?	When to make the change?
	0) Initial		Anyone	Your Manager*	Something will potentially change a production system
0) Initial	1) Assigned	✓	Manager assigning work or developer assigns self	Developer	Manager wants the developer to start on the work or Developer would likely do the work in the near future
1) Assigned	2) Design/ Test Plan Sign-off	✓	Developer currently developing	Developer	Developer has written down a test that proves the change will work
2) Design/ Test Plan Sign off	3) Code/Unit test	✓	Developer currently developing	Developer	The Developer is coding or Unit testing
3) Unit test	4) System test		Developer currently developing	Front-end code: the Buddy Application Developer. Back-end code: the Buddy Infrastructure Developer.	The Developer has completed a Unit level Test, the code is checked in and ready for Systems Test
4) System test	5) Beta test		The Project Leader or Manager	End User (rep) and Project Leader	Code has passed Systems Test and User are trained on new change.
5) Beta test	6) ITF		The Project Leader or Manager	ITF Manager	The change is ready to release but needs to be tested with other systems
6) ITF	7) Ready for Release	✓	Developer, Systems Tester or Project Leader	Release Manager	Change is ready for production (proof of passing test) Don't confuse this with scheduled for release. The Release managers will release it when you have told them to release it and it fit into a release window.
7) Ready for Release	8) Installed	✓	Release Manager	Release Manager	
8) Installed	9) Verify Installed				
Any state numbered 0-7	Postponed		The Project Leader or Manager	The Project Leader or Manager	Change is delayed due to other changes or lack of definition
Initial (0) or Assigned (1)	Duplicate		The Project Leader or Manager	Tracker Administrator	Change is redundant with another SCR and the other SCR is in progress
Initial (0) or Assigned (1)	Do not Fix		The Project Leader or Manager	End User	Change was rejected
States 0-2	Not Reproducible		Developer, Project Leader	End User	Bug was not reproducible

How to Change the Process State

1. Double-click entry in your In-Tray to view work required.
2. After work is completed, promote **Release Process State** to the next higher number. (You can also go backward in the Process States to re-open an SCR.)
3. Assign new **Process State Owner**; notify new owner via cc:Mail.
4. Click OK.



As an SCR passes through the various Process States, a record of changes accumulates and can be viewed at the bottom of the SCR. Each time the record is touched, that event is recorded in the change history.



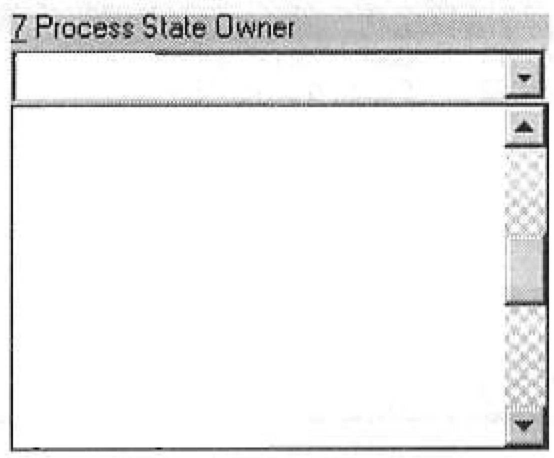
Spawning New SCRs off an Existing SCR

Although the preferred method is to take a customer SCR and update it with a better description of the change, you can spawn a new SCR from the original. If you split or spawn more SCRs from an original SCR, make reference to the parent SCR # in the children SCRs. This will allow the Release Manger to close all related SCRs at one time. Ownership of a parent SCR would remain with the Project Leader.

Who Is the Process State Owner?

If you know that you will be doing the work in the near future, assign yourself as the ***Developer****, then set the* ***Release Process State*** *to* assigned.

In most cases the project leader or manager owns the process of assigning the work. By setting the state owner to a manager it will call attention to the manager that there is a pending task to be scheduled or assigned.



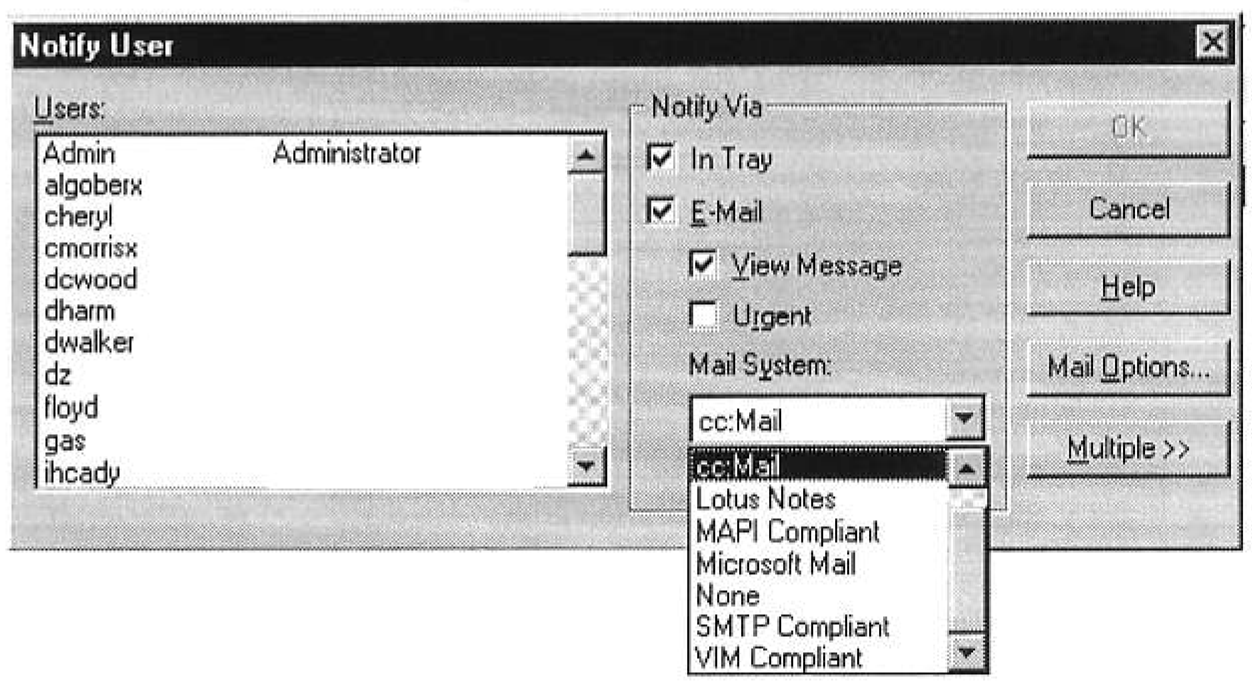
If you are the owner or the submitter, you have the ability to close the SCR.

Notify by cc:Mail

Be sure to also contact that developer in person or by phone!

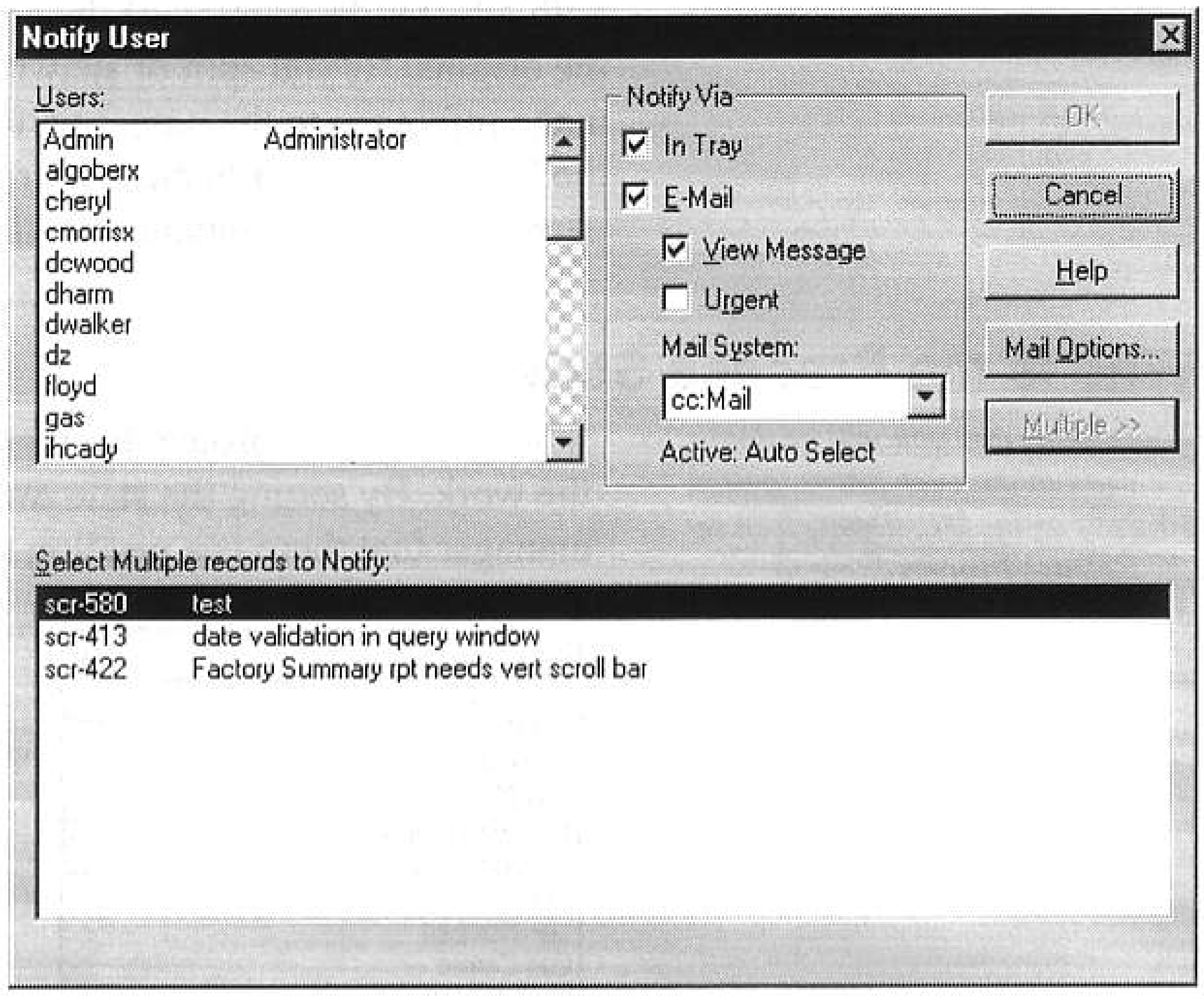
For important or time-critical SCRs, you can send a cc:Mail through Tracker that notifies the new Process State Owner. Follow these steps:

1. Select "Notify User" from the Notify menu.



2. Select the developer's name from the Users List. To send to more than one developer, hold down the <Ctrl> key and click other names.
3. Click the "E-Mail" check box.
4. Select "cc:Mail" as the Mail System.

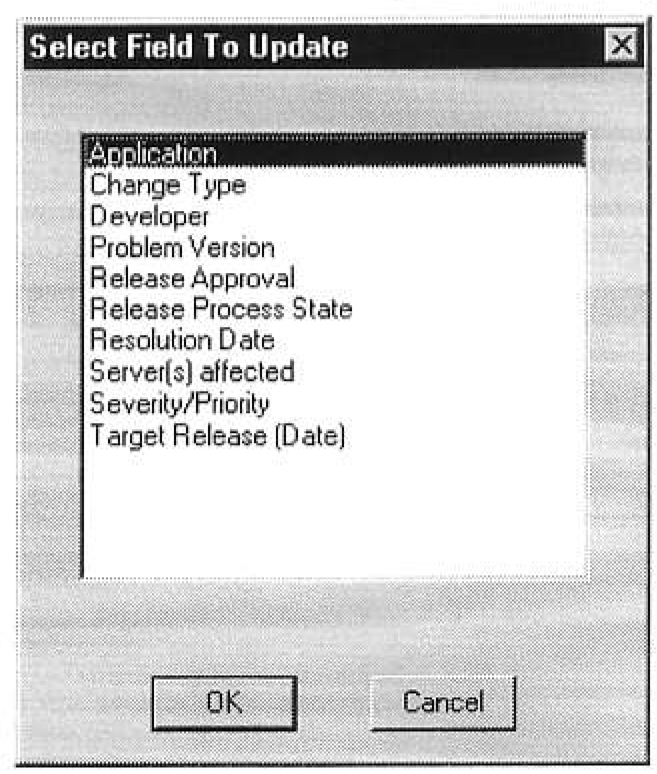
5. To send notification on more than one SCR, click the Multiple button and select from the extended dialog box



6. Click OK.

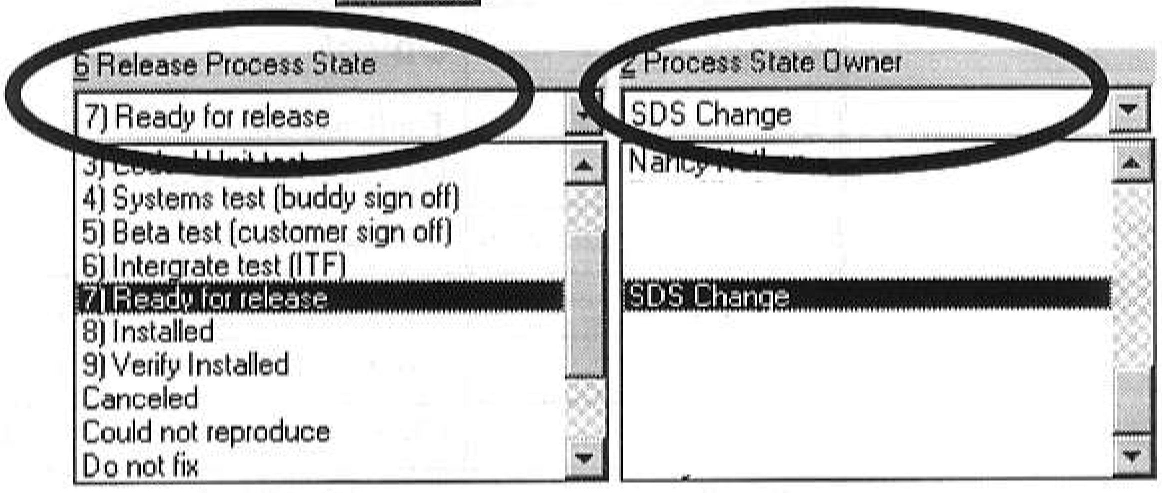
More Fields

Only high or normal usage fields were put on the Submit and Update Forms to simplify general Tracker use. If you need to update a field that does not appear on the form, select More Fields from the Update menu.



How to Submit a Data Store Change Request

1. Double-click entry in your In-Tray to view work required.
2. Promote **Release Process State** to *Ready for release.*
3. Assign **Process State Owner** to *SDS Change*.
4. Click OK.



Data Store change requests will be ignored unless you set the Process State Owner to "SDS Change."

5. When the Infrastructure staff implements the change request, they will change the Release Process State to #8 to **Installed**. This is your cue (as the requestor) to perform the install verification step.

Getting a Change Into Production

Who's Authorized to Release into Production?

In order to better manage the Installed signed off state in Tracker the following persons can be assigned as the Release state owners.

Name	Object

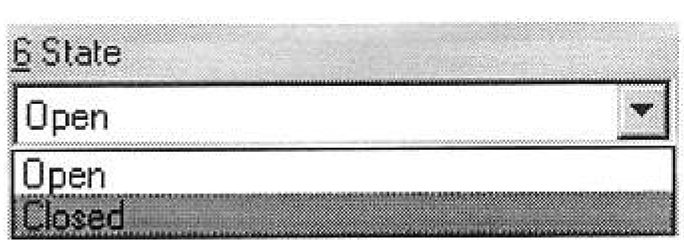
* will appoint a delegate when they are not available to authorize a release.

How to Close a Project

The following procedure can only be done by a release manager.

Follow these steps to close a project in Tracker:

1. Double-click entry in your In-Tray to view records to close.
2. After work is completed, promote **Release Process State** to *Installed.*
3. Set the **State** to "*Install sign off.*"
4. Set the **Release Approver** to "signed off".
5. Set the **State** to "*Closed.*"
6. Set the **Resolution State** to today.
7. Set the **Close Date** to today.



Managing Your In-Tray

In This Chapter...

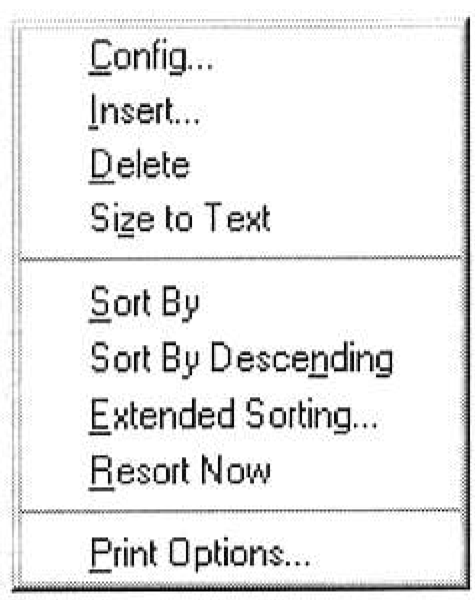
Overview

Here are some tips to help you set up your In-Tray for efficient usage.

- To delete all item in your In-Tray Select *Clear* from the Edit Menu.
- To delete an individual record click the *X* button or *Shift-F5*.

How to Customize the In-Tray

Position the mouse over the column heading and press the right mouse button. This menu becomes visible:



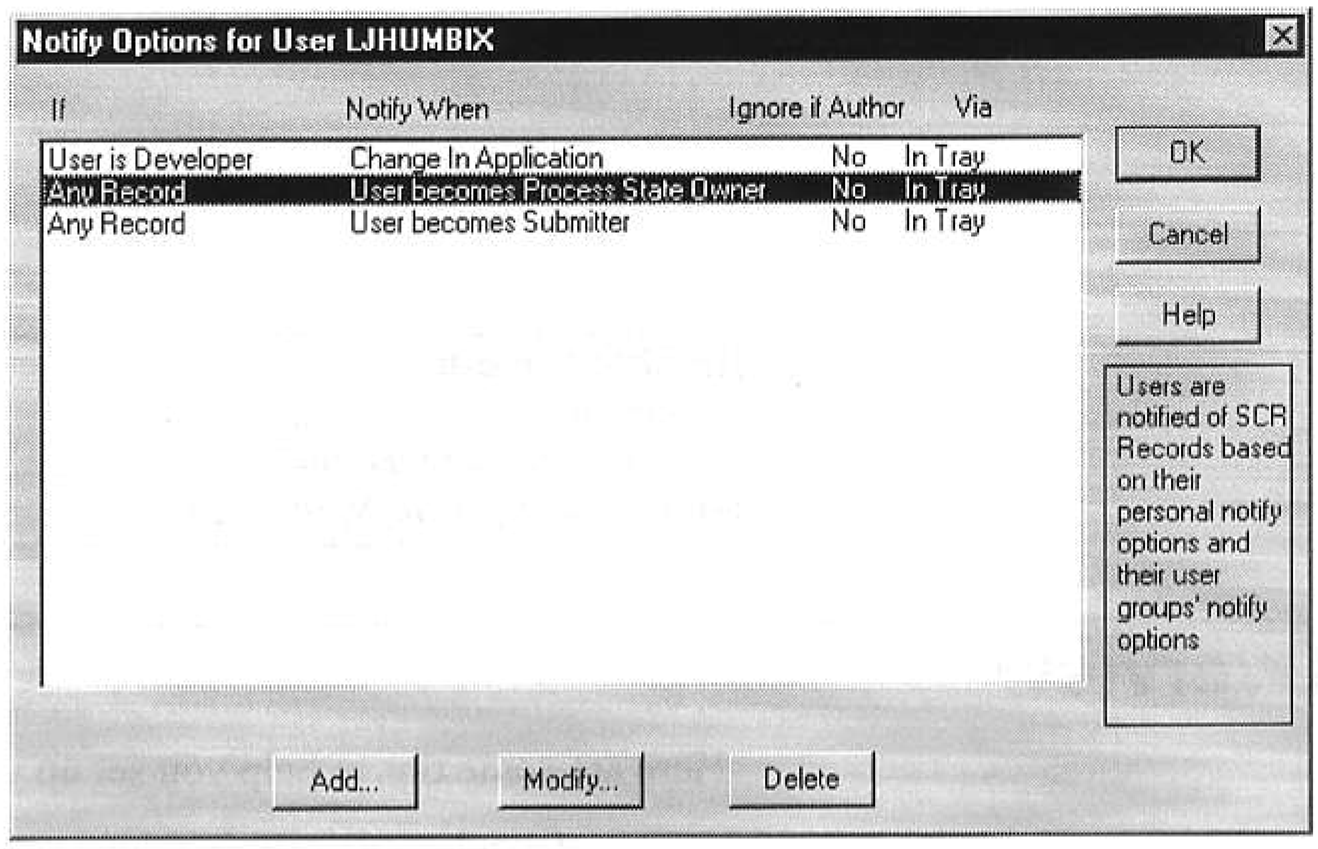
With this menu, you can:

- Add, change or delete columns of displayed information
- Change the display and sorting method
- Change the printing options. (See "Printing an SCR Record" on page 29.)

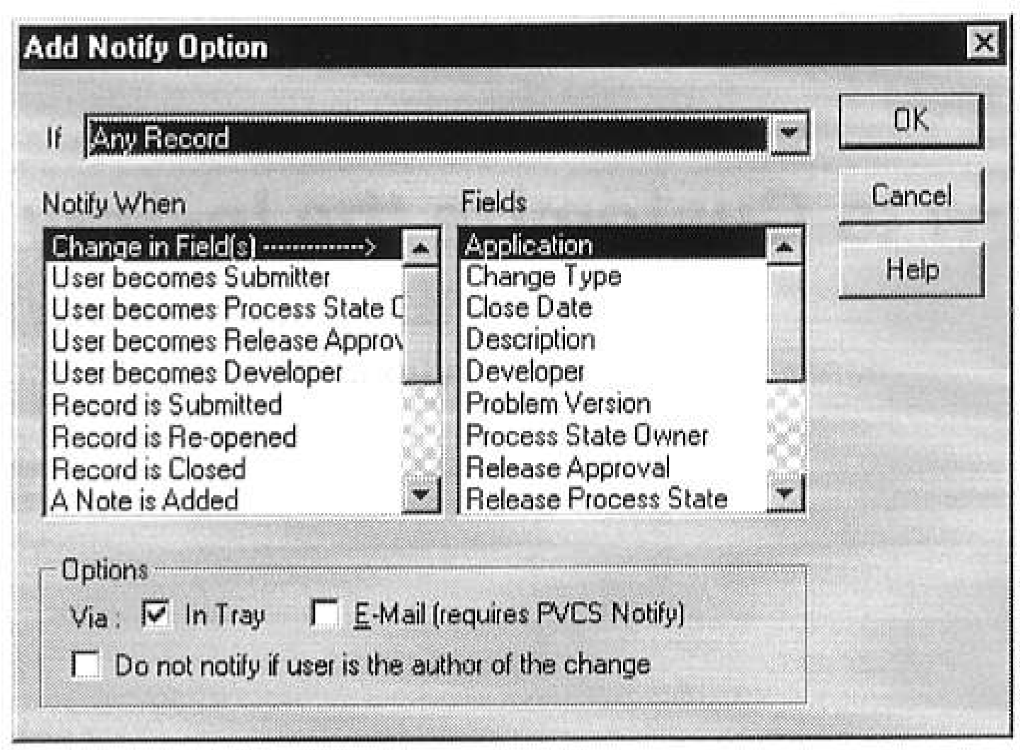
How to Set Up Your Notify Options

To set up how you will be notified in the future follow th4ese steps:

1. Clear out your In-Tray.
2. Select *Notify Options* under the Notify Menu.



1. Click Add. This dialog appears:



2. Select the "If" drop down and select "User is Process State Owner." This will notify you when someone else has assigned you as the owner.

3. Add others if you want to see more notification conditions.

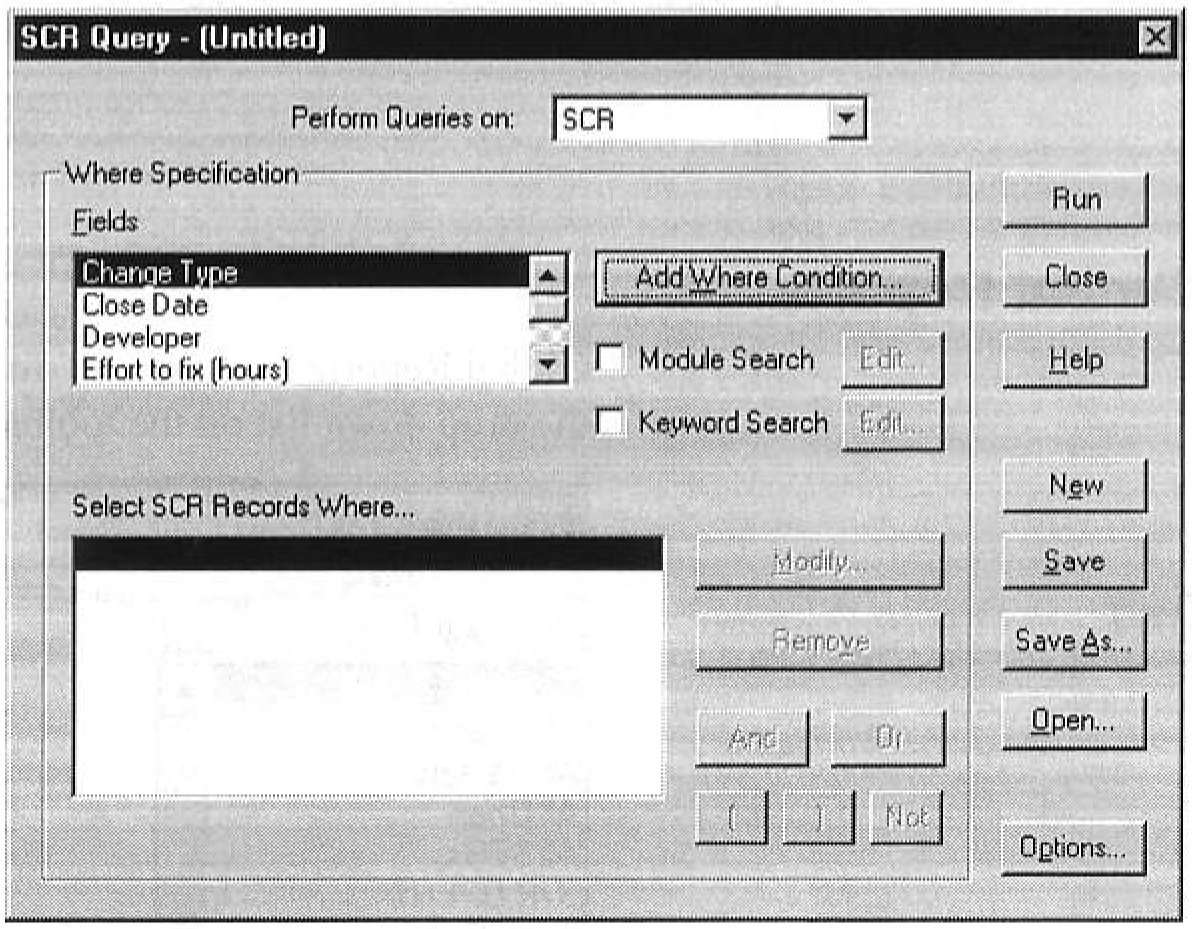
Managing Your Queries

In This Chapter...

How to Make a Query

Follow these steps to run a query:

1. Select Query from Query menu.



1. Select the field(s) that you would like to use to limit the data in your query.
2. Add a where clause to your field(s).
3. Run the report to test it.
4. Save the report if you like the results.

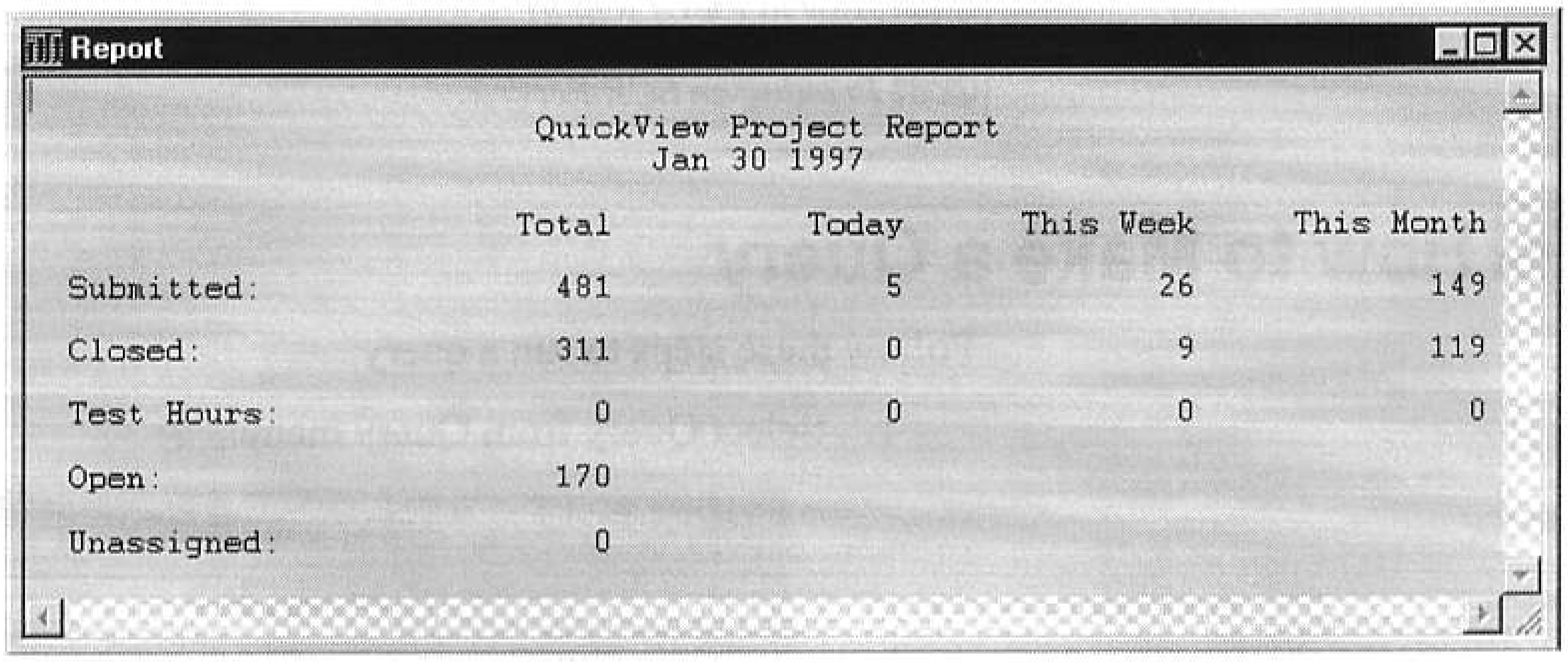
Note: Set the User Access to yourself rather than to "Public." Public reports should be reserved for global activities such as assigning work, releasing software, closing records. Ask the Tracker administrator for assistance if you need to make it public.

How to Run a Report

There are several types of reports that you can run. This section highlights some of the most used report types.

Quick Report

The Quick Report shows a short summary of activity for the current Tracker project.

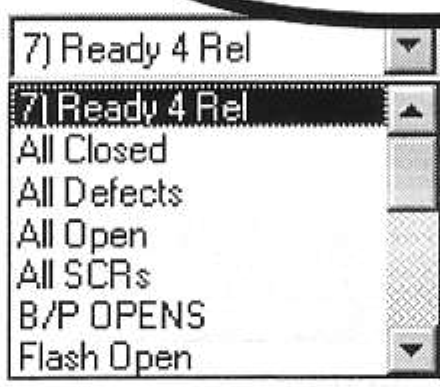


	Total	Today	This Week	This Month
Submitted:	481	5	26	149
Closed:	311	0	9	119
Test Hours:	0	0	0	0
Open:	170			
Unassigned:	0			

Global Reports

Global Reports are "canned" format reports. They are accessible from the drop down list on the toolbar:

Be sure the Query icon is selected.



- My Closed - to see what work you have completed.
- My Defects - to see the current SCRs that you own.
- My Opens - to see the current open SCRs with you listed as the owner.

"My Opens"

All user should use "My Opens" as the default.

For example: A manager sees SCR's in the Initial state waiting for them to assign a developer and new owner. Developers see an SCR's in the Assigned state with them as the developer and the owner. A release manager sees SCR's in the Ready for Release State with them as an owner or the generic SDS change as the owner.

Ready for Release

Release manager should use this report to see SCR's in this state. They can also use this to determine what is going into a release.

My Close

Release Mangers should run this to see SCR's that they have closed

My Defects

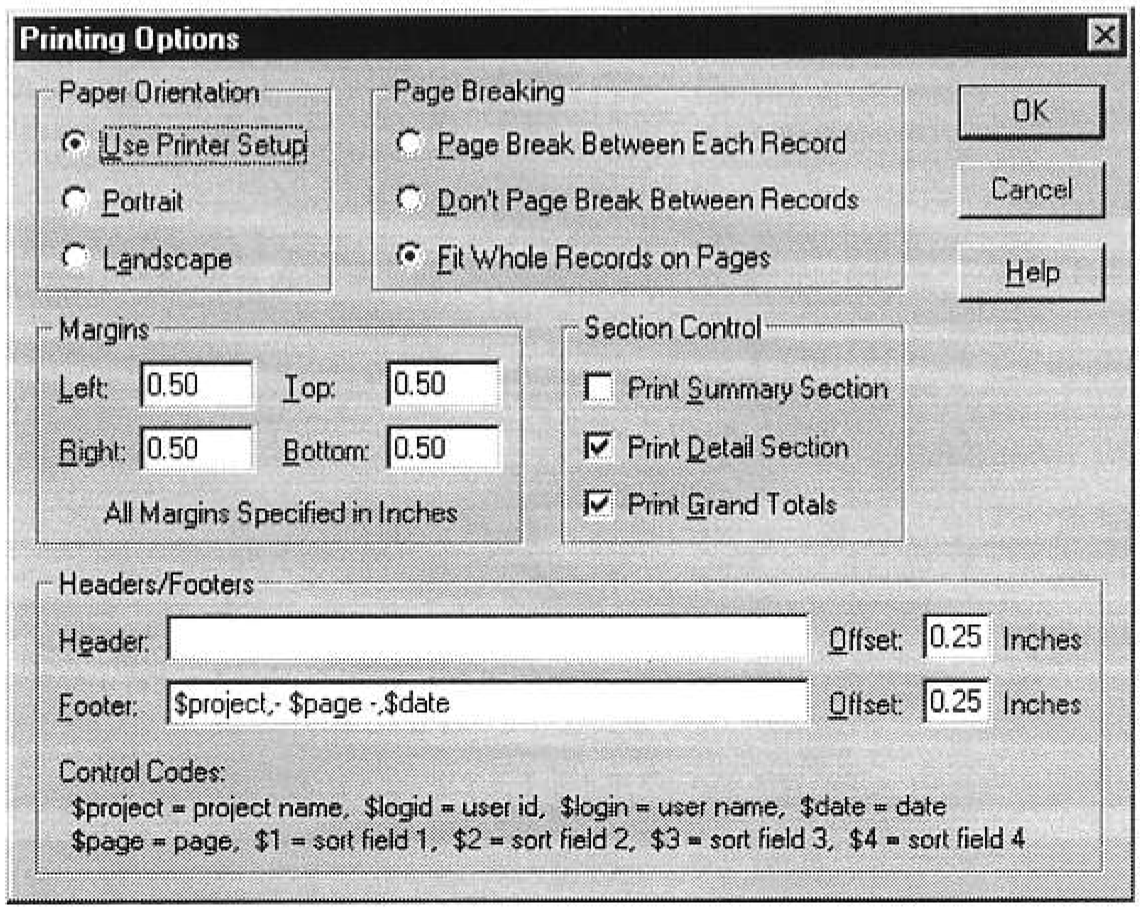
All should use this to see all of your SCR's in any state

Application Open (i.e., ToolBox, Flash B/P, Numetrix, Runner etc.) Use these reports to see a particular applications open's. This is useful to see work to be done for an application and there is a team of people working on the application.

More information to be defined.

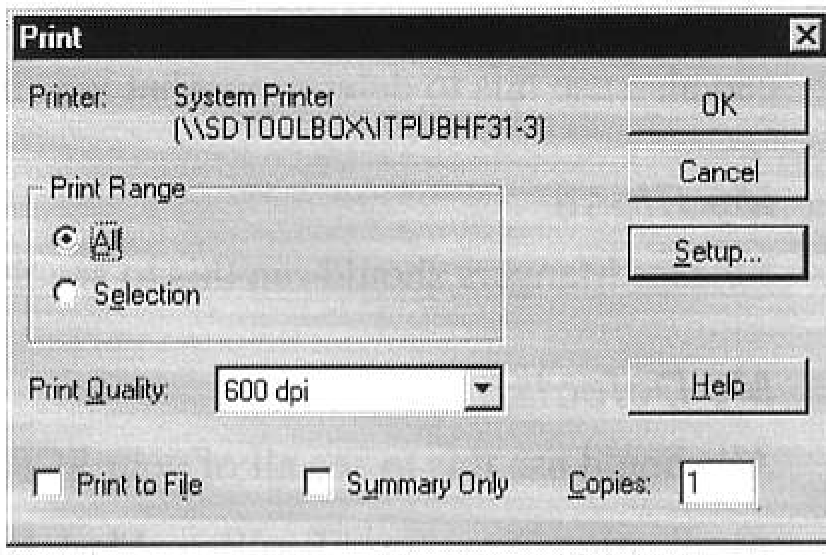
Printing an SCR Record

First, set up your printing options. Position the pointer over the column headings in your In-Tray, press the right mouse button, and select "Printing Options" from the drop-down menu. This dialog appears:



- If you want a one-line-per-SCR report, click "Print Summary Section."
- If you want the detail portion of the SCR (bottom window pane), click "Print Detail Section."
- The "Print Grand Totals" will show the total number of records at the end of the printout.

When you are ready to print, select "Print" from the File menu. This dialog appears:



- The "All" button will print all the reports listed in the In-Tray or Query window.
- The "Selection" button will print only the highlighted SCR in the In-Tray or Query window. This option is not available when printing reports.
- The "Summary Only" button will prevent the SCR detail from printing. Use this option if you just want to print a list of the SCR numbers, title, and any other sort criteria you have selected for the Summary portion (top window pane). This is good when, for example, all you want to see is the order and priority of SCRs.