

Release Management for System Integrators: PEGA

Planning, coordinating, and controlling the deployment of software releases or updates into different environments. It involves activities such as scheduling releases, managing dependencies, conducting testing, and ensuring smooth transitions between development, testing, staging, and production environments. Effective release management aims to minimize disruptions, track changes, and provide a reliable and consistent deployment pipeline.

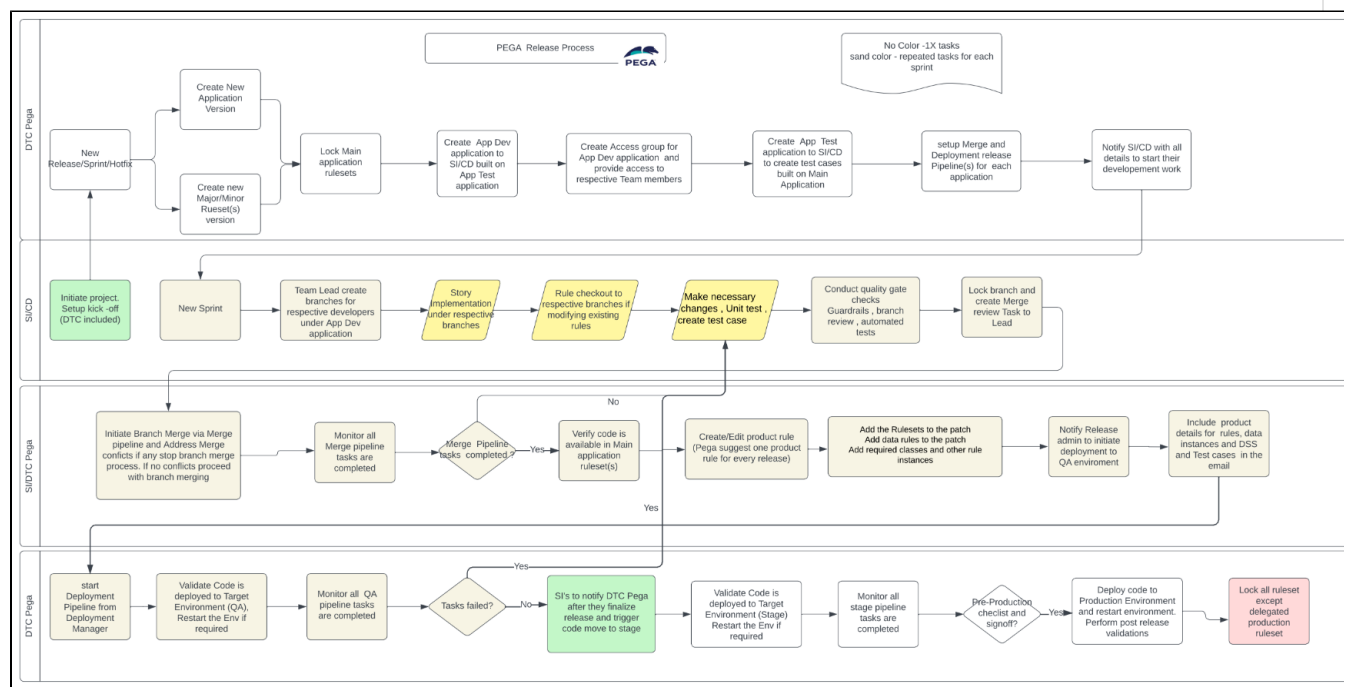
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Additional Resources

Release/Deployment Management

The DTC Pega COE provides release management support for all modules being developed. SI/CD can expect the following path for module releases:



The DTC Pega COE team handles deployments to the Test, Stage, and Production environments using Pega Deployment Manager. **Releases are scheduled between Mondays and Thursdays based on team availability. All releases will be done using Pega Deployment Manager.** Please reach out to the Pega COE team for information on deployment manager if needed.

SI/CD should have and be prepared to provide the following documentation as part of the release process:

Resource	Purpose	Responsible Party
Deployment Checklist	Outlines requirements that must be met to move to production	DTC COE Team will Provide
Results of System and Regression Testing	ALL module functionality supported in a release must be completely tested prior to release. This includes functional testing of new capabilities to ensure that changes do not negatively impact existing functionality.	SI/CD to Provide to COE Team
User Stories	To ensure validation of end user requirements	SI/CD to Provide to COE Team
Evidence of UAT Testing	UAT testing ensures the end user expectations are met and module is ready for production	SI/CD to Provide to COE Team

Module Playbook	This ensures DTC COEs understanding of the modules functionality in order to provide adequate sustainment.	SI/CD to Provide to COE Team
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The tasks involved in the deployment/release process are described in detail below:

1. Once development is completed, SI/CD should ensure minimum requirements for release have been met and request for release to DTC COE team via a SNOW change management request, including evidence of completed deployment checklist tasks to COE team for review:

Minimum Requirements:

- 70% development team test cases coverage (will be executed on the platform) **Any % of test cases not executed through platform automation must be accounted for with manual test cases**
- 85% guardrail score
- 0% technical debt
- Statement of business owner approval
- Completed deployment checklist (evidence for review)

Additional Notes:

- Allow 1 week minimum for code review by the Pega COE team (first-come, first-served basis). Urgent approvals require prior notice.
- Communicate planned release schedules to the DTC COE team for resource allocation

2. COE team will review and verify requirements have been met

3. Once it has been verified that deployment requirements are met, DTC COE Team will merge into trunk for development, ensure rule sets are locked and create package for migration. The package will then be migrated to upper environments from development to testing for system testing.

4. Once in test environment, SI/CD should complete system and regression testing. SI/CD should be prepared to share the results of testing to include user stories. Once testing is complete, the business team should notify the DTC COE Team via email. If additional development is needed to address concerns from testing, this must be completed in the development environment, as no code changes are permitted in the upper environment. Upon completion of the additional development, SI/CD should revert to step 1 for review by the DTC COE Team.

5. Upon email receipt of the email verifying testing is complete, DTC COE Team will migrate package to staging. SI/CD should organize and complete UAT testing. Upon completion of UAT Testing, the business team should notify the DTC COE Team via email with attached evidence of UAT Testing.

6. Release Execution: The DTC COE team schedules and deploys the release upon receiving UAT completion email. Releases are targeted for zero downtime, except for major updates (e.g., database changes or library updates). However, Business Owners should be prepared be available for smoke testing approximately one hour prior to release, to ensure all functionality is working appropriately.

The DTC COE team will schedule releases Monday-Thursday only and based on availability of required parties.

7. Once in sustainment, DTC COE Team will remove all SI/CD and business owners from development, testing & staging environments.

Dark Releases for New Modules

DTC supports and recommends dark releases to Production prior to going live in Production for larger or more complex modules.

What Does This Mean for Integrator teams?

The module and its users are considered "dark," meaning that they are not actively creating records, data, etc. in Production. All workflow rules, process builder scripts, community, integrations, and other configurations are not visible to an active user and no real data is being created.

By pushing these configurations early and regularly, the current state of the project is integrated with existing configurations, has an interim sign off from the customer, and has met DTC standards. The resulting benefit is that this process gives the project great milestone accomplishments.

This same concept can be applied and utilized via feature toggles for existing applications. This can increase stability for the application in production and allow teams to control their own migration windows based on external integrations that do not occur on the same cadence as the DTC release schedule.