Module 5- Technical Analyst Tasks

OBJECTIVE: The objective of this module is to provide all of the necessary information that is specific to Technical Analysts.

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NEED ADDITIONAL INFORMATION?

For further questions on this process please contact Ken Beck at 4-3243 or at beckken@sonoma.edu

This documentation may be found online at: www.sonoma.edu/it/cms/asr
Chapter 1: Overview

Introduction: This module covers the aspects of Footprints ASR related to the work of the Technical Analyst. The table below shows the different types of ASR ticket workflows, highlighting Technical Analyst tasks.

<table>
<thead>
<tr>
<th>Workflow Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Only</td>
<td>Resolved without AIS intervention. Not discussed in this module.</td>
</tr>
</tbody>
</table>
| Most Technical Tickets | Do not require user testing and apply to production steps. Request Types include Problem, Clone, etc. The flow for Tech Analysts is:  
  1. Tech Approver assigns ticket to Tech Analyst.  
  2. **Tech Analyst works on ticket.**  
  3. **Tech Analyst completes ticket.** |
| Fixes/Bundles/Releases | Require user testing and apply to production steps, but workflow is simpler than for COMRs because only standard code changes delivered from authorized support organization are being applied. Technical Analyst is from Change Control team. |
| COMRs/LOMRs            | Code changes, including Request Type = Software Change Request, and many Reports and Projects, which are developed locally.  
  - Technical Analyst is usually not from Change Control team.  
  - Require user testing in test environment.  
  - Require functional approval before applying to production.  
  - Require QA of code and documentation before applying to production.  
  - Usually assigned to Change Control to apply to production.  
  The flow for Tech Analysts is:  
  1. Tech Approver assigns work to Tech Analyst.  
  2. **Tech Analyst develops solution and applies to test environment.**  
  4. **Tech Analyst packages code and documentation for QA.**  
  5. Tech Approver QAs code and doc and assigns to Change Control.  
  6. Change Control applies to production.  
  7. Change Control completes ticket. |
| Data Fixes             | SQL Update Data Fixes go through the same steps as COMRs: Technical Analyst applies to test environment, Functional Analyst tests and approves for production, Technical Analyst documents in ASR ticket, submits for QA, Technical Approver assigns Change Control Analyst to apply to production. |

See the next page for the complete workflow for each type of ticket, with steps color coded by role.
Open New Ticket.

Functional Approver assigns functional resource to work on ticket.

Functional Approver Approves for Functional Work.

Functional resource completes work.

End.

Open New Ticket.

Functional Approver assigns themselves.

Technical Analyst implements Change on Test Database.

Technical Analyst applies to production.

End.

Open New Ticket.

Functional Approver assigns themselves.

Functional Approver requests Technical Assistance.

Technical Approver assigns Technical Analyst.

Technical Analyst implements Change on Test Database.

Technical Analyst applies to production.

End.

Open New Ticket.

Functional Approver assigns themselves.

Functional Approver requests Technical Assistance.

Technical Approver assigns Technical Analyst.

Technical Analyst implements Change on Test Database.

Technical Analyst applies to production.

End.

Open New Ticket.

Functional Approver assigns themselves.

Functional Approver requests Technical Assistance.

Technical Approver assigns Technical Analyst.

Technical Analyst implements Change on Test Database.

Technical Analyst applies to production.

End.

Open New Ticket.

Functional Approver assigns themselves.

Technical Approver assigns Change Control Analyst.

Change Control Analyst implements Change on Test Database.

Change Control Analyst applies to production.

End.

Open New Ticket.

Functional Approver assigns themselves.

Technical Approver assigns Change Control Analyst.

Change Control Analyst implements Change on Test Database.

Change Control Analyst applies to production.

End.

Administrative Information Services

STAFF - http://www.sonoma.edu/it/cms/documentation/

Last Updated: 10/29/14
Miscellaneous Topics:

**File Directories:** Use the same directories and processes as before, but create subdirectories with the name ASR_nnnn instead of the old ART_nnnn. Zero-fill the ASR ticket number to 4 digits, so it will sort properly (at present rates, it'll be around 10 years before we go over ticket # 9999). For instance:

**COMR Approval directories:**
- CMS on SSU-4 (O:)
  - COMR Approval
  - HRSA
    - HRSA_COMR_INPROGRESS
      - ART_4321
      - ASR_0123

**Repliweb Staging directories:**
- hr
  - BSL_070
    - ART_4321
    - ASR_0123

The same should be done in the COMR Approval Change Tracking spreadsheet, and anywhere else where “ART” ticket numbers have been stored.

The old O:\RqstAttach directory should no longer be used. It was necessary to store attachments for ART tickets. Footprints/ASR allows attaching files directly to the ASR ticket instead.

**Security Updates:** For tickets requiring security changes to implement, you should make sure that the Security Team and Peter Flores are assigned to the ticket. How to do this will be described later in this document.

**SQL Updates:** Since SQL updates must be tracked for audit purposes, Technical Analysts should make sure that any SQL updates they perform are documented in an ASR ticket with Request Type = “Data Fix” that has the AIS Team and the Technical Analyst assigned. A report will be run identifying these tickets, which will be matched against the log of database updates.

**Only Lou Ann & Geoff Assign Tech Analysts:** Although the system will allow Functional Approvers to assign Technical Analysts to a ticket, they should not do so. Only AIS management should assign AIS people. If you find that you are assigned to a ticket in Status = “Tech – Requested Technical Assistance” (instead of “Tech – Assigned to Technical Analyst”), then check the History. If you were assigned to the ticket by an unauthorized person, push back and/or inform AIS management.
Chapter 2: Tickets Assigned to Technical Analyst

**Introduction:** A Technical Analyst assigned to an incoming ASR ticket will receive an email notification like the one below. You can click on the link to view or edit the ticket.

**From:** Footprints Admin.Software Request [mailto:fphelp@sonoma.edu]
**Sent:** Thursday, January 10, 2008 9:21 AM
**To:** beckken@sonoma.edu
**Subject:** Assigned ASR Ticket to Analyst ISSUE=86 PROJ=9
**Importance:** High

When replying, type your text above this line.

**ASR# 86 set to Status= Tech - Assigned to Tech Analyst**
Technical or Functional Analyst: This ticket has been assigned to you to work on.
(For others receiving this email, this is FYI only).

Click here to view ASR Ticket in Browser

**ASR Ticket Title:** IB not working in TST
**ASR Ticket Number:** 86
**Priority:** Medium  **Status:** Tech - Assigned to Tech Analyst

**Approving Area:** EES - Employee Services  **Request Type:** Problem
**Date Required:** 01/10/2008

**Submitter:** montaltm
**Assignees:** AIS Team, Ken Beck, HR EES Team, Meryl Montalto
**Contact:** CC:

**Notes/Description:**
Entered on 01/10/2008 at 09:13:38 by Meryl Montalto:
In order to sign off on 060 we need to use IB for Manage Hires.

I have had Carey clear out the messages twice, and have been unsuccessful in processing any manage hires thru IB. I cant sign off on 060 until this is tested.

**Attached Files:**

The ticket will also appear in the “My Assignments” list on the Footprints/ASR Home Page of the assigned Technical Analyst, and can be viewed or edited from there.
**Working on the Ticket:** The following table outlines the steps to take when you work on the ticket.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>When you are ready to start work on the ASR Ticket, edit the ticket and change the Status to “Tech – In Progress”.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td>Some optional fields that you can update at any time: Estimated Start Date. Estimated Completion Date. Estimated Hours. Percent Complete. Description/Note: Appends above the previous entries. You cannot change previous entries. Additional Time Spent: You can add time spent and comments. You can edit and report on previous entries.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>Click on the <strong>Go</strong> button to save your changes.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>

No email notifications are sent if you do not change Status.

No email is sent if you change to Status “Tech – In Progress”.

After the ASR ticket is In Progress, only the Technical Analyst or Technical approver can cancel the ticket. Before this, anyone assigned to the ticket or on a team assigned to the ticket can cancel it.
**Finishing Work on the Ticket:** The following table outlines the steps to take when you have completed development or other work on the ASR ticket.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>For software changes and SQL updates, which require user testing in a test environment, first apply your change to the test environment and then change the Status of the ASR ticket to “Ready for User Testing”. For other technical tickets, such as Problems, that do not require user testing in a test environment, after the work is done, change the Status of the ASR ticket to “Completed”, to close the ticket.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Make sure the “Apply to Test DB” field is set to the test database that you applied the change to, before you say it’s “Ready for User Testing”, so the users will know where to test.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>You must enter a Description/Note before you can save a ticket with Status = “Completed”. This is optional for tickets with Status = “Ready for User Testing”.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>4</td>
<td>Click on the Go button to save your changes.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>

When you save a ticket with one of these Status changes, email notification will be sent to everyone Assigned to the ticket, plus any Contacts or CCs.
**Security Changes:** If the ticket requires security changes, then assign the Security Administrator and Team, so that he can be notified:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Edit the ticket, go to the Project Members box in the Assignees section, scroll down to and open the Security team, select the Security Administrator, and either double click or click the right arrow to assign.</td>
</tr>
</tbody>
</table>

### Assignees

- **Security Team Assignee**
  - Peter Flores

- **AIS Change Control Team Assignee**
  - Jason Wenrick

- **AIS Management Team Assignee**

<table>
<thead>
<tr>
<th>Assignees</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIS Team</td>
</tr>
<tr>
<td>Ken Beck</td>
</tr>
<tr>
<td>SA General Team</td>
</tr>
<tr>
<td>Sammy SA</td>
</tr>
<tr>
<td>Security Team</td>
</tr>
<tr>
<td>Peter Flores</td>
</tr>
</tbody>
</table>

2 Afterwards, the Security Team and Administrator will be in the Assignees box as shown. Anyone on the Security Team can edit the ticket, but only Peter will receive email notifications.

3 You may enter a note describing the security changes needed, if you wish (or attach a document).

4 If you want to notify the Security Administrator at this time, you can check the “Assignees” box under “Send Email To”. This will send email to all Assignees when you save the ticket. If you do not notify now, the Security Administrator, and all other Assignees, will still be notified at the normal times (start of User Testing, Approve for Production, COMR sent to Change Control, and when Completed).

2 Click on the **Go** button to save your changes.
**Other Status Changes:** Technical Analysts may occasionally use these other Status values:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Set Status to desired value: <strong>Place on Functional Hold</strong> will send the ticket back to the Functional Approvers. Use this if it is not really a technical ticket. <strong>Place on Technical Hold.</strong> Only Tech Analysts or Tech Approvers can place a ticket on hold when it is in a “Tech” status. <strong>Canceled.</strong> Only Tech Analysts or Tech Approvers can cancel a ticket in Status = “Tech In Progress” or “Tech On Hold”.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td>You must enter a Description/Note before you can save a ticket with any of these statuses.</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>Click on the <strong>Go</strong> button to save your changes.</td>
<td><img src="image3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>

When you save a ticket with any of these Status changes, email notification will be sent to everyone Assigned to the ticket, plus any Contact or CCs.
Chapter 3: Tickets Approved for Production

Introduction: ASR tickets for code changes and SQL updates must go through User Testing and be Approved for Production by the Functional Approver before the change can be applied to production. When the ticket is approved for production, the Technical Analyst will receive an email like this:

From: Footprints Admin.Software Request [mailto:fphelp@sonoma.edu]
Sent: Thursday, January 17, 2008 11:23 AM
To: ken.beck@sonoma.edu
Subject: ASR Ticket Approved For Production ISSUE=102 PROJ =9
Importance: High

When replying, type your text above this line.

ASR# 102 set to Status = Prod - Approved
Technical Analyst: Please do the following:
1. Prepare the code and documentation to be moved to production and
2. Change the Status to COMR Ready for QA.
(You may have to do something different to move non-PeopleSoft changes to production).

(For others receiving this email, this is FYI only).

Click here to view ASR Ticket in Browser

ASR Ticket Title: Tracking SSU Club Involvement using Extracurricular Activities
ASR Ticket Number: 102
Priority: Medium Status: Prod - Approved

Approving Area: Academic Advising Request Type: Software Change Request
Date Required: 01/30/2008

Submitter: beckwita Assignees: AIS Team, Carey King, SA Campus Community Team, Amanda McGowan
Contact: CC:

Notes/Description:
Entered on 01/17/2008 at 09:49:58 by Amanda McGowan:
Specs attached.

Attached Files: SON_CC121_Extracurricular_Activities.doc

To view or edit the ticket, either click on the link in the email or go to My Assignments in ASR.
**Getting Code Changes and SQL Updates Applied to Production:** The following table outlines the steps to take with the ASR ticket to apply the code change or SQL update to production.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>For software changes requiring QA of code and documentation, first, prepare your code and documentation in the COMR_INPROGRESS folder. For SQL updates, document the SQL code to be run and the intended results in the ASR ticket. Then change the Status of the ASR ticket to “COMR Ready for QA”. For software changes that do not require QA and that you can complete yourself, after you move the change to production, change the Status of the ASR ticket to “Completed”, to close it.</td>
<td><img src="https://example.com/screenshot1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>2</td>
<td>You must enter a Description/Note before you can save a ticket with Status = “Completed”. This is optional for tickets with Status = “COMR Ready for QA”.</td>
<td><img src="https://example.com/screenshot2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>3</td>
<td>Click on the Go button to save your changes. When you save a ticket with Status = “COMR Ready for QA”, email notification will be sent to the Technical Approvers, who will perform the QA, and then assign the ticket to Change Control to move to production. When you save a ticket with Status = “Completed”, email notification will be sent to everyone Assigned to the ticket, plus any Contacts or CCs, asking them to verify in production.</td>
<td><img src="https://example.com/screenshot3.png" alt="Screenshot" /></td>
</tr>
</tbody>
</table>
**Other Statuses related to Applying Changes to Production:** The following additional ASR Ticket Status values are available after a ticket has been approved for production, but would not generally be used by Technical Analysts.

<table>
<thead>
<tr>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Prod – Scheduled” Status is used when a change is scheduled to be applied to production by SOSS. This would normally be used by Change Control. When using this Status, the field “Apply to PRD Ticket #” becomes mandatory (used for the SOSS Remedy ticket number). No email notifications are sent when the Status is changed to “Prod – Scheduled”. Change Control will change the Status to “Completed” after the change has been applied to production. Then email notifications will be sent to everyone Assigned to the ticket, plus any Contact or CCs. “Canceled” Status is available for the remote possibility that it might be decided to abandon the change right before it is moved to production. The Description/Note field becomes mandatory when you cancel a ticket. Email notifications of canceled tickets are sent to everyone Assigned to the ticket, plus any Contact or CCs.</td>
<td><img src="image.png" alt="Screenshot of ASR Ticket status changes" /></td>
</tr>
</tbody>
</table>