



## **Database Instance Usage Strategy**

**Last Revised:**

**4/26/2006**

## REVISION CONTROL

**Document Title:** CSU-CI Database Instance Usage Strategy  
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**File Reference:** CSU-CI Database Instance Usage Strategy.doc

Date	By	Action	Pages
10/28/2005	Joseph Dobzynski	New Document Created	All
04/26/2006	Angela Stockmon	Non-Production Clone Request Guideline	10

## Review/Approval History

Date	By	Action	Pages

This document will delineate all CSU-CI database instances usages for development, patch/fix installation, upgrade installation, and training.

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## 1.0 Purpose

The CSU-CI Database Instance Usage Strategy supports and coordinates custom development, system testing, database migration, user training, and issue resolution. Databases are used for limited purposes by specific individuals and are refreshed on a regular basis or at particular times. Migration paths are defined for CSU-CI custom development and module implementation; CMS Baseline updates, fixes, and releases; and Oracle/PeopleSoft upgrades.

## 2.0 Resources

**CSU-CI Non-Production Login Page** – A dynamic website that links to and stores information about non-production databases. This page will contain release information, date of last refresh, date of next refresh, system messages, and system testing information. The login page will be maintained by Information Technology Services.

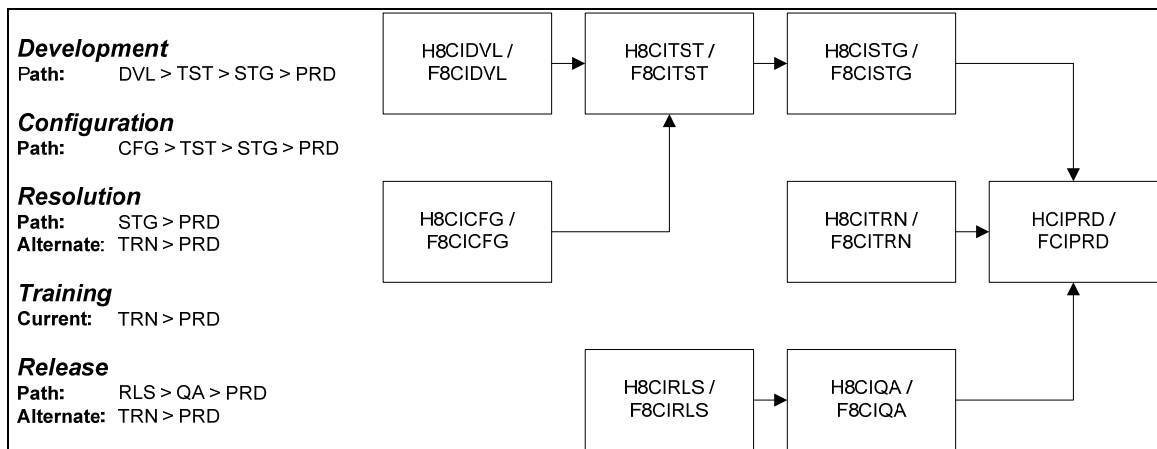
## 3.0 User Groups

**CMS Technical Support (CMS)** – Application System Analysts and CMS Technical Support.

**Subject Matter Experts (SME)** – System users for each module with knowledge of PeopleSoft functionality and CSU-CI business process.

**Campus Users (Users)** – Campus community of users designated to use PeopleSoft functionality.

## 4.0 Diagram



## 5.0 Databases

The CSU-CI Database Instance Usage Strategy will use eight databases. Each database will be supported by CMS and utilized by various individuals to support the four migration paths.

### 5.1 Development

<b>Name:</b>	H8CIDVL / F8CIDVL
<b>Users:</b>	CMS
<b>Refresh:</b>	3 to 6 months; Tools Release; As Needed
<b>Paths:</b>	Development, Configuration
<b>Users:</b>	<b>CMS</b> will design and build CSU-CI customizations.
<b>Notes:</b>	Tools releases must be manually installed to prevent development corruption.

### 5.2 Configuration

<b>Name:</b>	H8CICFG / F8CICFG
<b>Users:</b>	CMS / SME
<b>Refresh:</b>	3 months; Tools Release; As Needed
<b>Paths:</b>	Configuration
<b>Users:</b>	<b>CMS</b> will support configuration and data migration. <b>SME</b> will store verified configuration changes.
<b>Notes:</b>	CFG is considered the prime configuration instance. All configuration changes must be made here first and migrated to TST for system testing. Data can also be migrated back to CFG depending on configuration size considerations.  Tools releases must be manually installed to prevent data corruption.

### 5.3 Testing

<b>Name:</b>	H8CITST / F8CITST
<b>Users:</b>	CMS / SME
<b>Refresh:</b>	1 month; As Needed
<b>Paths:</b>	Development, Configuration
<b>Users:</b>	<b>CMS</b> will support system testing. <b>SME</b> will perform system testing.
<b>Notes:</b>	TST is considered the prime testing instance. New configuration and custom development are tested initially before migration to STG.

#### 5.4 Staging

<b>Name:</b>	H8CISTG / F8CISTG
<b>Users:</b>	CMS / SME / Users
<b>Refresh:</b>	1 – 2 weeks; As Needed
<b>Paths:</b>	Development, Configuration, Resolution
<b>Users:</b>	<b>CMS</b> will support system testing and resolve production issues. <b>SME</b> will perform system testing and resolve production issues. <b>Users</b> will assist system testing.
<b>Notes:</b>	STG is considered the secondary testing instance. New configuration, custom development, and critical batch processes are system tested by all user groups before migration to PRD.  STG is considered the prime resolution instance. Production errors requiring isolated testing will utilize STG for refresh and resolution.

#### 5.5 Training

<b>Name:</b>	H8CITRN / F8CITRN
<b>Users:</b>	CMS / SME / Users
<b>Refresh:</b>	As Needed
<b>Paths:</b>	Training, Resolution
<b>Users:</b>	<b>CMS</b> will resolve production issues. <b>SME</b> will perform system training and resolve production issues. <b>Users</b> will receive system training.
<b>Notes:</b>	TRN is considered the prime training instance. Users will be trained on new configuration and module implementation before implementation in PRD.  TRN is considered the secondary resolution instance. Production errors requiring isolated testing will utilize TRN for refresh and resolution should STG be unavailable.  TRN is considered the tertiary release instance. Emergency patches and fixes will be installed and tested in TRN prior to migration to PRD.

## 5.6 Release

<b>Name:</b>	H8CIRLS / (F8CIRLS Pending)
<b>Users:</b>	CMS / SME
<b>Refresh:</b>	On Release
<b>Paths:</b>	Update
<b>Users:</b>	<b>CMS</b> will perform unit testing and support system testing. <b>SME</b> will perform system testing.
<b>Notes:</b>	RLS is considered the prime release instance. CMS will install new patches, fixes, updates, releases, and upgrades for unit testing. SME will perform initial system testing prior to secondary testing in QA.

## 5.7 Quality Assurance

<b>Name:</b>	H8CIQA / (F8CIQA Pending)
<b>Users:</b>	CMS / SME / Users
<b>Refresh:</b>	On Release
<b>Paths:</b>	Update
<b>Users:</b>	<b>CMS</b> will support system testing. <b>SME</b> will perform system testing. <b>Users</b> will assist system testing.
<b>Notes:</b>	QA is considered the secondary release instance. CMS will install new patches, fixes, updates, releases, and upgrades for full system testing. SME will coordinate system testing with Users prior to migration to PRD.

## 5.8 Production

<b>Name:</b>	HCIPRD / FCIPRD
<b>Users:</b>	CMS / SME / Users
<b>Refresh:</b>	N/A
<b>Paths:</b>	All
<b>Users:</b>	<b>CMS</b> will support production. <b>SME</b> will support and utilize production. <b>Users</b> will utilize production.
<b>Notes:</b>	PRD is the system of record.

## 6.0 Migration Paths

The CSU-CI Database Instance Usage Strategy will employ five migration paths. Each migration path will be supported by CMS and utilized by all users to ensure smooth migration of system functionality into Production.

### 6.1 Development

<b>Path:</b>	Development > Testing > Staging > Production
<b>Uses:</b>	The development, testing, and migration of CSU-CI customizations.
<b>Functions:</b>	<b>Development</b> will be used to design and build customizations. <b>Testing</b> will be used to refine customizations. <b>Staging</b> will be used for system testing and final approval. <b>Production</b> will utilize new customizations.
<b>Notes:</b>	Development is interrupted for PeopleSoft Tools installations with exception of critical production issue resolution involving adjustment of CSU-CI customizations. CMS should only be focusing on production support and release testing during this time.

### 6.2 Configuration

<b>Path:</b>	Configuration > Testing > Staging > Production
<b>Uses:</b>	The development, testing, and migration of CSU-CI functionality.
<b>Functions:</b>	<b>Configuration</b> will be used to store verified configuration data. <b>Testing</b> will be used to refine configuration and business process. <b>Staging</b> will be used for system testing and final approval. <b>Production</b> will utilize new functionality.
<b>Notes:</b>	Configuration should only occur for fully planned implementations of new functionality or for routine configuration updates and changes. New configuration should be tested in Testing prior to entry into Configuration.

### 6.3 Training

<b>Path:</b>	Training > Production
<b>Uses:</b>	The training of all CSU-CI functionality.
<b>Functions:</b>	<b>Training</b> will be used to train users on CSU-CI functionality. <b>Production</b> will utilize CSU-CI functionality.
<b>Notes:</b>	Training may occur during configuration or customization rollout depending on project scope. Training will be utilized as backup for production issue resolution and emergency update/fix installation.

#### 6.4 Resolution

<b>Path:</b>	Staging > Production (Alternate: Training > Production)
<b>Uses:</b>	The resolution of all CSU-CI production issues.
<b>Functions:</b>	<b>Staging</b> will be used to troubleshoot production issues. <b>Production</b> will receive issue resolution. <b>Training</b> will be used as backup for issues resolution.
<b>Notes:</b>	Resolution may require the use of more than one database if one resolution may impact another resolution. Resolution should occur both for production issues and for testing major processes for a particular term.

#### 6.5 Release

<b>Path:</b>	Release > QA > Production (Alternate: Training > Production)
<b>Uses:</b>	The migration of all non-CSU-CI functionality.
<b>Functions:</b>	<b>Release</b> will be used for initial installation and unit testing. <b>QA</b> will be used for subsequent installation and system testing. <b>Production</b> will be receive non-CSU-CI functionality. <b>Training</b> will be used as backup for installation and testing.
<b>Notes:</b>	Release migration will follow a two-step process to ensure everything is installed correctly and properly tested. This path is used for all PeopleSoft and CMS updates, patches, fixes, and upgrades. It ensures CSU-CI development is not affected.

## **7.0 Non-Production Clone/Refresh Guidelines**

### **7.1 Standard Clone Procedures**

Requests for all non-production database clones/refreshes will be made through the IT Help Desk. All clones/refreshes will be performed within twenty-four (24) hours of receiving the request.

### **7.2 Emergency Clone Procedures**

Requests for emergency clones/refreshes must be discussed with the appropriate IT programmer/analyst prior to submission of the request to the IT Help Desk. The reasons for the emergency clone/refresh should be detailed with all non clone/refresh solutions explored. This request will then be filed by the IT programmer/analyst. A four (4) hour global notification window will be required to allow all individuals to export any configuration and test cases currently being used.