Keeping Your Environments in Sync – Best Practices for Successful Environment Management

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Session Goals

- Understand Veeva CRM release management
- Understand how not to let environment management derail you
- Understand how Veeva can help you with release management processes
Dreams for my Environment
If you could dream up the perfect environment, it would…

- Require no database administrators
- Need no server administrators
- Upgrade itself
- Have plenty of development and test boxes to work with
- Give a full test version of production environment including data with a mouse click
- Allow for migration of changes between environments in hours, not days
- Make it super easy to load data into any environment
- Allow the business to concentrate on running the business and not keeping up IT infrastructure
Release Management in the Cloud:

Promise Vs. Reality
The Promise of Cloud

- Scalability, reliability, and security
- Easy to set up
- Flexibility thru configuration not custom development
- No infrastructure costs
- Easy to manage
- Delivering an application that keeps pace with the new and changing demands of the business
Release Management Process (Theoretically)

- All configuration changes against Production adhere to proper change control
- Predicable cadence of minor and major releases
- Process for immediate/urgent changes
Release Management Process (what usually happens)

- Ad-hoc changes are made outside of change control with no documentation
- Release timeframes get extended….feels like traditional software again (slow)
- Ad hoc changes conflict with releases and result in ad hoc fixes and poor user experience
Environment/Release Management Challenges

- **High and Unpredictable Cost**
  - Large teams to manage multiple parallel design and test environments

- **Change Control**
  - When do you need it? When can you streamline?

- **Cumbersome Processes**
  - Data, data testing, configuration, documentation, version control, config QA, meta-data migration, data migration, environment differentials, and comparisons

- **Error Prone Process/Risks**
  - An error could have a costly impact on the end user community or compliance

- **Tracking**
  - Release management information may be stored across multiple systems
  - Environment management information may not be stored anywhere

- **Delays**
  - Delays in environment management result in a release cadence that is no better than what traditional software offers
Environment Management: How Things Fall Apart
It Was Only a New Field …

▪ Your business sponsor calls your IT Admin. “We need a new field on our Professional Account page layout. Can you put it in production today? Compliance is requesting that we have this in as soon as possible.”

▪ What is the appropriate solution/response from your IT Admin?
  
  a) Create the field in production
  
  b) Create the field in production and all of the sandboxes
  
  c) Tell the business sponsor to wait for the calendar scheduled release date
  
  d) “Are you hungry? I am going to lunch.”
Which Environment Should I Train In …

- Your organization’s annual POA is right around the corner. At the POA, trainers will be reviewing newly configured functionality, Call Objectives, which is scheduled to be released to production 1 week after the POA.

- What is the appropriate environment for the trainers to review the newly configured Call Objectives functionality from?
  
  a) Production  
  b) Full sandbox  
  c) Developer sandbox – limited data/non-production  
  d) Developer Pro sandbox with limited production data
Spaghetti Incident …

- Your organization has a full set of orgs - 1 full, 3 Developer and 3 Developer Pro sandboxes. None of the (7) sandboxes match one another, or production.

- With an upcoming release scheduled, what should your environment manager do first?
  
a) Refresh all sandboxes
  
b) Delete the sandboxes and start from scratch
  
c) Backup each sandbox configuration; then refresh
  
d) Do nothing
Release the Kraken …

- Compliance has requested a trigger be added to the Medical Inquiry object. The purpose will be to change the record type & page layout for submitted medical inquiries so that fields are hidden.

  - Prior to releasing to production, what is the appropriate means for testing this new customization:

    a) Online only in a sandbox
    b) Offline only in production
    c) Offline and online in a sandbox
    d) No need to test, my developer said it worked fine …
Environment Management:

Getting Back on Track with Best Practices
Process: Change Management

- Change control board
- PMO toolkit
- Scheduled release schedule
- Emergency release process
People: The Environment Manager

- Dedicated resource
- Charged with keeping track of activities in all environments
- Must sanity check deployment schedules against available environments
- Performs or oversees all environment migrations
Tools: Choose Wisely

- Change sets
- Eclipse
- Ant toolkit
- Third-party tools
- Meta-data API
Veeva Environment Management Services

How We Can Help
Environment Management Services

- Environment management analysis
  - Review of current process, roles, and tools leveraged and identify areas for improvement

- Environment management process definition
  - Veeva services has managed 1000’s of migrations between sandboxes and production environments; Veeva core competency
  - A Veeva deployment architect will help define an optimized environment management process to support immediate, minor, and major releases

- Environment management execution
  - Veeva will execute meta-data and logic data migrations to support your releases as a service

Objective: increase the speed & quality of environment management to support your defined releases
Environment Management as a Service

- We use our own environment management and release management tools to support Veeva CRM implementations

- We use a cloud-based architecture
  - No desktop installs in your environment
  - Secure

- Developed by Veeva Professional Services
  - We developed our own tools and own the source code

- Environment/Release info stored in customer’s Veeva CRM org
  - Easily accessible audit trail and reporting
  - Can be linked to PMO Toolkit requirements and issues
Veeva Environment Management Tools

- **Process**
  - Step by step process (check list) to manage end-to-end environment management

- **People**
  - Veeva services has managed 1000’s of migrations between sandboxes and production environments; Veeva core competency
  - A Veeva deployment architect will help define an optimized environment management process to support immediate, minor, and major releases

- **Tools**
  - We have the in-house tools to help manage complex environment management for Veeva CRM customers