

ODM Best Practices by DJ Des Jardins

CHANGE MANAGEMENT & NEW DEVELOPMENT

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ODM Best Practices

By Jardins Enterprises

The following **ODM Best Practices** cover some of the more important general industry standard best practices with a focus on the unique aspects of the solutions being developed.

Although these Best Practices are **not** “dependent” on any specific Development or Change Management Governance Methodology, it does refer to and directly support the various **ODM Development & Change Management Methodologies** developed by Jardins Enterprises.

1 General Guidance

1.1 Intention

The intention of this document best practice is to provide the following to your ODM Development & Change Management Activities:

1. To be a living **Document** and to evolve over time.
 - a. Initially it should be reevaluated Quarterly.
 - b. When current Solutions are “compliant” with these Best Practices then reevaluation can occur Yearly.
2. **Define** Terms and Concepts to facilitate cross-role conversation.
3. **Formalize** approaches and techniques to be used for ODM Change Management & Development
4. **Standardize** common tasks to simplify processes, Change Management, and Development to **Reduce Risk**

1.2 Assumptions

ODM Practitioners are familiar with and are adhering to one of the ODM Change Management Governance Methodology. Options available:

- **Three-Tiered, Decision Governance Framework Based Methodology**
 - **Use Recommended, but not required.**
- **Three-Tiered, Branch Based Methodology**
 - **Used for ALL initial new solution development.**
 - **Can be used in lieu of DGF.**

1.3 Definitions

Decision Service – has multiple meanings depending on context:

1. ODM Solution Management construct as identified in Decision Center consisting of a Single “Main” project and o-many “Standard” projects. [Project Structure]
2. A deployed ruleset or Endpoint that is exposed as an “executable” service [Decision Operation]

Decision Solution – One or many related **Decision Service Constructs** [Decision Operations] within a single **Decision Service** [Project Structure] that may, or may not, share common rule artifacts.

DGF – IBM’s ODM **Decision Governance Framework**, a ready-to-use prescriptive method for change management and governance.

Business Rules – Rules that directly implement and support Business Policies. These are usually written and managed by the Business.

Operational Rules – Rules not directly responsible for implementing Business Policies (aka Business Requirements). Examples are rules that: build concepts, reset control flags, initialize values, etc. These are usually written and managed by IT.

Concepts – Physical or virtual Attributes or Objects created from the context of the input parameters, most often created with Rules. Intermediate data used to simplify, or make possible, the writing of Rules that implement a Business Policy

Change Activity – A quantifiable unit of work to be performed by 1 or more individuals resulting in rules being changed.

- **DGF:** A physical construct created within a Decision Service to isolate rules development and testing until it is complete and ultimately merged back into the *in-development* **Release**
- **Branch Based Governance** : Performed on one of the following depending on *Methodology* and *Tier*:
 - Directly on the *in-development* **Release Branch**
 - In a **sub-branch** of the *in-development* **Release Branch**
 - Directly on the **MAIN Branch**

Validation Activity – A conceptual unit of work to be performed by 1 or more individuals that tests, validates the rule changes.

- **DGF:** A physical construct created within a Decision Service that must be “Completed” for the associated **Release** to be “Completed”
- **Branch Based Governance:** Performance of Functional or Regression testing on appropriate depending on *Methodology* and *Tier*:
 - Directly on the *in-development* **Release Branch**
 - In a **sub-branch** of the *in-development* **Release Branch**
 - Directly on the **MAIN Branch**

Release – A quantifiable designation of a set of requirements once completed will be placed into Production.

- **DGF:** A physical construct created within a Decision Service that must be “Completed” for new rules to be deployed.
- **Branch Based Governance (Release Branch):** A **Branch** of the Decision Service

Current Release:

- **DGF:** The *Completed* release that is currently deployed to and in (or planned to be in) Production.
- **Branch Based Governance (Current Release Branch)** – Depending on whether **Cooldown Period** is to be used:
 - The **MAIN Branch** of the Decision Service
 - The **Candidate Release Branch** of the Decision Service

In-Progress Release – A **Release** that is currently being changed. Actively under Change Management.

Candidate Release Branch – The Tier 2 or Tier 3 Branch that is identified to be Deployed **next** and is in final steps of certification before being deployed.

Operational Framework – The Decision Operation(s) and associated ruleflows, functions, XOM, BOM, variables, and operational rules that support the Business Rules and implement the Production Decision Operations. *May also be used for UAT, Functional & Regression Testing if specialized Testing Frameworks are unwarranted.*

Enhanced Testing Framework – The Decision Operation(s) and associated ruleflows, functions, XOM, BOM, variables, and operational rules that supports the full testing of single or multiple “internal” decisions using the Decision Runner capabilities. *Used for Functional & Regression Testing*

Concept Testing Framework – The Decision Operation(s) and associated ruleflows, functions, XOM, BOM, variables, and operational rules that support the full testing of single or multiple Concepts using the Decision Runner capabilities.

Structural Changes – Changes to the **Operational Framework** that could include changes to: Ruleflows, Functions, Variable Sets, Parameters, Adding/Deleting a Project, Project References, etc.

Cooldown Period – The time between Deploying the **Candidate Release Branch** and merging the **Candidate Release Branch** with the **Main Branch** when using **Branch Based Governance**

See Section 2.6 for a Definition of the various ODM Roles

2 Change Management Governance

2.1 Select appropriate Governance Model

Key considerations when determining which “technological” approach to use for the Change Management Governance of a specific Decision Service. Not an all-inclusive list of characteristics, meant to provide a general comparison.

2.1.1 ODM’s Decision Governance Framework (DGF)

- The organization has decided that all “Production” Decision Services will use the **DGF**.
- Formal “sign-off” or review is required at regular intervals of the development of the changes.
- Rule Authors tend NOT to be very technical and would benefit from Governance Automation
- **Tier 2** or **Tier 3 Releases** are Longer in duration.
 - Solution is not extremely volatile.

2.1.2 Branch Based Governance

- Organization has decided that the **DGF** will not be used for any Decision Services
- Initial Solution Development
 - Moved to DGF prior to deployment to UAT, Stage, and/or Production.
- Decision Service can be categorized as: POC, Testing or any “Non-Production” implementation
- This is the **First Release** of the Solution (initial Development)
- **Rule Authors** are also the **ODM Developers**
- **Tier 2 Releases** will happen in quick succession, or a significant number of **Tier 1 Releases** will occur regularly.
 - Solution is extremely volatile.