Migration to QA and Production; Knowledge Transfer (documentation and training)

After functional sign off is recorded (it must be recorded in either ACE or request by the functional lead; verbal sign off is not good enough to proceed with migration to QA and production), the migration process begins.

Information Systems uses a home grown [Change Management](#) application for project migration from a dev/test environment through to production.

It is the developer's responsiblity to set up the development project in Change Management. Please refer to [Guidelines for Change Management](#) for further information.

It is also the developer's responsiblity to request for Quality Assurance (QA) with the App Admins (in the [IST-AppAdmin request queue](#)). Always copy the Project Lead/Manager and BackUp Production Support on these requests.

If there are any special instructions that the App Admin must execute with the project migration (eg. a SQL script that must be run, a new role to be created, etc.), they must be included in this request. These instructions should be documented on the Design and Technical Specification.

Once the App Admin passes the development objects through to the QA instance (ie: all development standards have been met), the Project Lead/Manager and/or BackUp Production Support will perform QA testing.

QA testing ensures that:

- all development objects migrated properly to QA
- any associated scripts or special instructions for the App Admins are run appropriately in QA before they are done in production
- appropriate requirements and specifications have been posted for the customization and updated accordingly
- appropriate status updates have been reflected in ACE and/or ATHR request, especially functional sign off and specification sign off (if this comes from an emergency production request in the request queue, there should still be spec sign off and functional testing sign off messages from the functional user against the request)
- all appropriate information is in Change Management (statuses, request numbers, ACE task numbers, and a link to the specfiications)
- request numbers are attached to CM and recorded in ACE against the task. If this request is emergency production support in the request queue, the QA request numbers should be linked to this one as Children.
- test scripts have been completed and stored in the appropriate location
- the customizations are designed in a way that do not pose a significant upgrade risk

Testing in QA can be tricky for larger, more complex projects. It is sometimes necessary to ask for the developer's assistance with testing to ensure all objects have migrated appropriately. From time to time, there may be obstacles in the QA dbase preventing the person performing QA from running through a full test. In this situation, the person performing QA should:

1. if the object is an SQR, compare code on boss to ensure there are no differences in the QA directory and the test directory
2. if the objects reside in App Designer, compare the projects in TS and QA to ensure all objects migrated to QA. For larger projects, it's advisable to also request a Compare Report of the project between both instances (of course, there is a still a risk that something would be missed if it wasn't added to the project in the first place)

The project team's access in the QA environment is equivalent to their production access. Nobody on the project team will have access to modify development objects, run scripts, etc. Please refer to Production Access for further information.

If QA testing passes, the Project Lead/Manager or BackUp Production Support will request for the change to be migrated to production, by changing the status in CM and submitting a new request in the App Admin queue (including any implementation instructions).

The App Admins will proceed with migration to production, executing any special instructions that may have been included in the request.

Once the project has been migrated to production, a final test should be run in production, if possible, to ensure everything migrated properly. Security should be granted, if applicable, as documented on the Design specification for the project.

The information necessary to provide support for the customization should be communicated in a timely manner to technical and functional staff.