Claims Processing & Eligibility System (CP&E)

EDI Re-Open and Vendor Streamlining

Deployment, Installation, Back-Out, and Rollback Guide



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**Artifact Rationale**

This document describes the Deployment, Installation, Back-out, and Rollback Plan for new products going into the VA Enterprise. The plan includes information about system support, issue tracking, escalation processes, and roles and responsibilities involved in all those activities. Its purpose is to provide clients, stakeholders, and support personnel with a smooth transition to the new product or software, and should be structured appropriately, to reflect particulars of these procedures at a single or at multiple locations.

Per the Veteran-focused Integrated Process (VIP) Guide, the Deployment, Installation, Back-out, and Rollback Plan is required to be completed prior to Critical Decision Point #2 (CD #2), with the expectation that it will be updated throughout the lifecycle of the project for each build, as needed.

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# Introduction

This document describes how to deploy and install the EDI Re-Open and Vendor Streamlining projects to enhance the Health Administration Center (HAC) claim system. This document describes how to deploy and install the EDI Re-Open and Vendor Streamlining enhancements. The document also includes how to back-out the product and rollback to a previous version or data set, and is a companion to the Project Management Plan (PMP) for this effort.

## Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom the EDI Re-Open and Vendor Streamlining enhancements will be deployed and installed, as well as how it is to be backed out and rolled back, if necessary. The plan also identifies resources, communications plan, and rollout schedule. Specific instructions for installation, back-out, and rollback are included in this document.

## Dependencies

There are no known dependencies.

## Constraints

The EDI Re-Open and Vendor Streamlining enhancements will be deployed to the original production server located at the Englewood, CO. The system will comply with architecture, security, Section 508, and other standards mandated by VA OIT; these compliance epics are documented and validated in Rational. There are no additional constraints that are unique to the product.

## Documentation Disclaimer

The appearance of external hyperlink references that may appear in this manual does not constitute endorsement by the Department of Veterans Affairs of this website or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

# Roles and Responsibilities

Refer to the Responsible Accountable Consulted Informed (RACI) Chart (CPEE\_RACI-0.1 .DOCX) located in the Env\_Depl\_Impl folder under the HAC\_CPE\_Documentation (#2 Component Setup) in HAC\_CPE\_DOC Streams under Source Control (see References).

# Deployment

The deployment is planned for September 2018

This section provides the schedule and milestones for the deployment.

## Timeline

Deployment and installation will be scheduled to occur on Sunday in order to minimize user disruption.

Refer to the CP&E Upgrade Project Schedule; release plans and timelines are defined in the EDI Re-Open and Vender Streamlining projects within the Community Care product repository in Rational CCM.

## Site Readiness Assessment

The EDI Re-Open and Vender Streamlining enhancements are being deployed to the existing production server located at Englewood, CO. There is no client-side installation.

### Deployment Topology (Targeted Architecture)

The EDI Re-Open and Vender Streamlining projects are enhancements to the existing CP&E application; therefore, existing equipment will be used. There will be no impact on the current CP&E Architecture.

### Site Information (Locations, Deployment Recipients)

The EDI Re-Open and Vender Streamlining enhancements are being deployed to the existing production server located at Englewood, CO.

### Site Preparation

The EDI Re-Open and Vender Streamlining enhancements are being deployed to the existing production server located at Englewood, CO, and no special preparation is necessary.

## Resources

### References

The EDI Re-Open and Vender Streamlining enhancements source code is formatted in a KIDS build and can be found in two locations:

* In the VMS Directory HAC\_HFS$:[DSMMANAG.CHAMPVA] on the DEV server**.** The file names are CPE\_1\_0\_001\_V2.KIDS, CPE\_1\_0\_002\_V2.KIDS, CPE\_1\_0\_007.KIDS, CPEDEF\_1\_0\_008.KIDS, and CPEDEF\_1\_0\_009.KIDS
* In Rational Configuration Management go to Source Control and click on Streams, then click on HAC\_CPE\_SRC, then click HAC\_CPE\_Source (#2: Component Setup), then click on folder KIDS\_Builds.

### Hardware

The EDI Re-Open and Vender Streamlining source code is being deployed to the existing production server located at Englewood, CO. The EDI Re-Open and Vender Streamlining projects are enhancements to the existing CP&E application; therefore, existing hardware will be used.

See Section 2 Roles and Responsibilities for details about who is responsible for preparing the site to meet these hardware specifications.

### Software

The EDI Re-Open and Vender Streamlining projects are an enhancement to the existing CP&E application; therefore, existing Cache and VMS software will be used.

### Communications

Technicians will use email and conference calls for communication during the deployment; Email and/or conference calls will be utilized to notify the stakeholders of the successful release of the product. Users will be warned to stay out of system during installation, which will occur outside normal business hours on a Sunday.

# Installation

## Pre-installation and System Requirements

The EDI Re-Open and Vender Streamlining enhancements must be installed outside normal business hours. Users must be off the system. Communicate the scheduled downtime to users one week prior to installation. Monitor connections to the system programmatically to ensure there are no users connected.

Prior to installing the EDI Re-Open and Vender Streamlining enhancements, ensure the appropriate technicians are available to assist with back-out and rollback, if necessary.

See Section 3.3.2 Hardware and Section 3.3.3 Software above for hardware and software requirements.

## Platform Installation and Preparation

No new hardware or other resources are required. If using the KIDS build, list the routines in the package using ‘Routine Summary List’ and create a backup KIDS build with current versions of these routines for rollback.

NOTE: All the routines in KIDS build are to be in a Checked-In status, currently tracked on the White Board and in Rational. If there is a conflict with routines between other projects the Project Manager needs to be informed.

If uploading the KIDS build or the routine source codes from Rational, ensure that a backup of all the routines is performed.

The routines required for backup are listed in Section 4.10 below.

There are changes or file modifications related to EDI Re-Open and Vender Streamlining projects have been identified at this time. If there are any data dictionary or file modifications, then a backup will be required.

## Download and Extract Files

If downloading from the DEV server, the appropriate technician will retrieve the KIDS build from the VMS folder, located at HAC\_HFS$:[DSMMANAG.CHAMPVA]**.** The file names are CPE\_1\_0\_001\_V2.KIDS, CPE\_1\_0\_002\_V2.KIDS, CPE\_1\_0\_007.KIDS, CPEDEF\_1\_0\_008.KIDS, and CPEDEF\_1\_0\_009.KIDS.

If downloading from Rational, the appropriate technician will retrieve the KIDS build files from Rational Configuration Management. Go to Source Control and click on Streams, then click on HAC\_CPE\_SRC, then click HAC\_CPE\_Source (#2: Component Setup), then click on folder KIDS\_Builds. The files to download are CPE\_1\_0\_001\_V2.KIDS, CPE\_1\_0\_002\_V2.KIDS, CPE\_1\_0\_007.KIDS, CPEDEF\_1\_0\_008.KIDS, and CPEDEF\_1\_0\_009.KIDS.

## Database Creation

It is not necessary to create a database as part of this installation.

## Installation Scripts

There are no installation scripts.

## Cron Scripts

A Cron script is a term for a routine or script that runs chronologically (i.e., runs on a regular time table).

There are no Cron scripts for this installation.

## Access Requirements and Skills Needed for the Installation

The appropriate technician will perform the installation and already has the required access needed.

## Installation Procedure

Once files are downloaded into the VMS directory (see 4.3 Download and Extract Files), the following steps will need to be taken from the Kernel Installation & Distribution System menu under the XPD MAIN menu:

1. Load a Distribution

* From the Kernel Installation & Distribution System menu, select the Installation menu.
* From this menu, select the option Load a distribution and select the following file:
  + HAC\_HFS$:[DSMMANAG.CHAMPVA] CPE\_1\_0\_001\_V2.KIDS.
* From this menu, select the option Load a distribution and select the following file
  + HAC\_HFS$:[DSMMANAG.CHAMPVA] CPE\_1\_0\_002\_V2.KIDS.
* From this menu, select the option Load a distribution and select the following file
  + HAC\_HFS$:[DSMMANAG.CHAMPVA] CPE\_1\_0\_007.KIDS.
* From this menu, select the option Load a distribution and select the following file
  + HAC\_HFS$:[DSMMANAG.CHAMPVA] CPEDEF\_1\_0\_008.KIDS.
* From this menu, select the option Load a distribution and select the following file
  + HAC\_HFS$:[DSMMANAG.CHAMPVA] CPEDEF\_1\_0\_009.KIDS.

1. Verify Checksums in Transport Global

* From this menu, you may choose to use the option Verify Checksums in TransportGlobal.
* When prompted, select CPE\*1.0\*001.
* When prompted, select CPE\*1.0\*002
* When prompted, select CPE\*1.0\*007
* When prompted, select CPEDEF\*1.0\*008
* When prompted, select CPEDEF\*1.0\*009

1. Print Transport Global

* This is an optional step.

1. Compare Transport Global to Current System

* Compare Transport Global to Current System - This option will (allow you to view all changes that will be made when this patch is installed. It compares all components of this patch routines, DDs, templates, etc.).

1. Backup a Transport Global

* For CPE\*1.0\*001
  + This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
  + The message in the mail box will have a subject like this: “Backup of CPE\*1.0\*001 install on …”
* For CPE\*1.0\*002
  + This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
  + The message in the mail box will have a subject like this: “Backup of CPE\*1.0\*002 install on …”
* For CPE\*1.0\*007
  + This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
  + The message in the mail box will have a subject like this: “Backup of CPE\*1.0\*007 install on …”
* For CPEDEF\*1.0\*008
  + This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
  + The message in the mail box will have a subject like this: “Backup of CPEDEF\*1.0\*008 install on …”
* For CPEDEF\*1.0\*009
  + This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.
  + The message in the mail box will have a subject like this: “Backup of CPEDEF\*1.0\*009 install on …”

1. Install Package(s)

* Use the Install Package(s) option and select CPE\*1.0\*001.
  + The name is displayed when the KIDS build is loaded
* Use the Install Package(s) option and select CPE\*1.0\*002.
  + The name is displayed when the KIDS build is loaded
* Use the Install Package(s) option and select CPE\*1.0\*007.
  + The name is displayed when the KIDS build is loaded
* Use the Install Package(s) option and select CPEDEF\*1.0\*008.
  + The name is displayed when the KIDS build is loaded
* Use the Install Package(s) option and select CPEDEF\*1.0\*009.
  + The name is displayed when the KIDS build is loaded
* Choose all the defaults at the prompts.

## Installation Verification Procedure

The Product Owner will test the software in Production immediately after installation by running the VistA Patch Checksum Verification to verify that the system installation was successful. (See 4.10 System Configuration for Checksum values).

## System Configuration

The following routines are included in this patch. The second line of each of these routines are similar to this:

;;1.0;;\*\*[Patch List]\*\*;JULY 4, 1990; Build 10

Select BUILD NAME: CPE\*1.0\*001

CH835F1 value = 18382562 Missing patch number

CH835TRG value = 1089298 Missing patch number

CHCSTAT value = 1100176 Missing patch number

CHFBC1 value = 120153463 Missing patch number

CHFBC1D value = 79209054 Missing patch number

CHFBC1E value = 86846735 Missing patch number

CHFBC2A value = 269995850 Missing patch number

CHFBCQ value = 212570083 Missing patch number

CHGAS2 value = 115534799 Missing patch number

CHGAS22 value = 69600439 Missing patch number

CHGAS23 value = 63174125 Missing patch number

CHGASIP value = 57789729 Missing patch number

CHGASP value = 84288557 Missing patch number

CHGASP1 value = 39204808 Missing patch number

CHGASP2 value = 34812978 Missing patch number

CHGCDC71 value = 36256173 Missing patch number

CHGCDC75 value = 29365743 Missing patch number

CHGCDP7 value = 70182755 Missing patch number

CHGCDP70 value = 69672244 Missing patch number

CHGCDP71 value = 6472840 Missing patch number

CHGCDP73 value = 9545809 Missing patch number

CHGCDV7 value = 84573137 Missing patch number

CHGCDV70 value = 78655126 Missing patch number

CHGCDV71 value = 97858452 Missing patch number

CHGCDV73 value = 41057918 Missing patch number

CHGCU136 value = 29538273 Missing patch number

CHGCU165 value = 21489649 Missing patch number

CHGDQ2 value = 148464535 Missing patch number

CHGQA2 value = 103228089 Missing patch number

CHGVQ370 value = 193653035 Missing patch number

CHGVQ529 value = 95299725 Missing patch number

CHIGDQ3 value = 92490075 Missing patch number

CHIGDQ30 value = 93005718 Missing patch number

CHMEAE5 value = 66632491 Missing patch number

CHMF351D value = 92007784 Missing patch number

CHMF351P value = 160583754 Missing patch number

CHMF351U value = 188599366 Missing patch number

CHMFA001 value = 71632708 Missing patch number

CHMFA002 value = 6171486 Missing patch number

CHMFA008 value = 70667528 Missing patch number

CHMFA010 value = 183351728 Missing patch number

CHMFA011 value = 108999861 Missing patch number

CHMFA012 value = 5938662 Missing patch number

CHMFA013 value = 31867973 Missing patch number

CHMFA01E value = 53887455 Missing patch number

CHMFA01F value = 11506960 Missing patch number

CHMFA020 value = 46913361 Missing patch number

CHMFA02E value = 1591638 Missing patch number

CHMFA110 value = 24048241 Missing patch number

CHMFA141 value = 1176475403 Missing patch number

CHMFA150 value = 14196240 Missing patch number

CHMFA801 value = 48835476 Missing patch number

CHMFADR1 value = 125736532 Missing patch number

CHMFADR2 value = 313160862 Missing patch number

CHMFADR4 value = 267954745 Missing patch number

CHMFADRV value = 95427897 Missing patch number

CHMFAUT1 value = 926239251 Missing patch number

CHMFBC1 value = 71408427 Missing patch number

CHMFBC2A value = 59668588 Missing patch number

CHMFEDISTP1Routine not in this UCI.

CHMFEDISTP2Routine not in this UCI.

CHMFEDISTP3Routine not in this UCI.

CHMFEDISTP5Routine not in this UCI.

CHMFPDO3 value = 3983713 Missing patch number

CHMFPDO4 value = 3806748 Missing patch number

CHMFSR21 value = 75695939 Missing patch number

CHMFSRT value = 24434762 Missing patch number

CHMFUTLE value = 22325360 Missing patch number

CHMGA008 value = 4747313 Missing patch number

CHMIS011 value = 44216186 Missing patch number

CHMIS012 value = 104726391 Missing patch number

CHMIS021 value = 134201726 Missing patch number

CHMIS023 value = 76037373 Missing patch number

CHMKAG5Q value = 16143009 Missing patch number

CHMKPDI2 value = 5463803 Missing patch number

CHMKPPR1 value = 15716696 Missing patch number

CHMKPPR2 value = 12433776 Missing patch number

CHMRESET value = 14943433 Missing patch number

CHMRGRNT value = 43149143 Missing patch number

CHMRSQC value = 163107973 Missing patch number

CHMRSQC1 value = 413169972 Missing patch number

CHMRSQP value = 48317458 Missing patch number

CHMXDR01 value = 189040768 Missing patch number

CHMXF001 value = 82841599 Missing patch number

CHMXMPD2 value = 4066483 Missing patch number

CHMXMPDI value = 13926804 Missing patch number

CHMXPU03 value = 15971422 Missing patch number

CHMXPU04 value = 363274241 Missing patch number

CHMXPUTL value = 8196849 Missing patch number

CHMXPUTL5 Routine not in this UCI.

CHMXQCNT value = 88415948 Missing patch number

CHPRD1 value = 36462532 Missing patch number

CHTFLIB2 value = 8402489 Missing patch number

done

Select Build CPE\*1.0\*002

CH835F1 value = 18382562 Missing patch number

CH835F2 value = 777476 Missing patch number

CH835F3 value = 857631061 Missing patch number

CH835FU1 value = 969866689 Missing patch number

CHBPEBSD value = 120816035 Missing patch number

CHFBC2A value = 269995850 Missing patch number

CHFBCQ value = 212570083 Missing patch number

CHFBCUTL value = 175630513 Missing patch number

CHGCDC72 value = 84855070 Missing patch number

CHGCDC75 value = 29365743 Missing patch number

CHGCDV70 value = 78655126 Missing patch number

CHGCDV73 value = 41057918 Missing patch number

CHGCU130 value = 5343138 Missing patch number

CHGCU136 value = 29538273 Missing patch number

CHGCU137 value = 90918351 Missing patch number

CHGVQ370 value = 193653035 Missing patch number

CHGVQ529 value = 95299725 Missing patch number

CHGVQ600 value = 50077321 Missing patch number

CHMEAE5 value = 66632491 Missing patch number

CHMF351D value = 92007784 Missing patch number

CHMF351P value = 160583754 Missing patch number

CHMFA010 value = 183351728 Missing patch number

CHMFA011 value = 108999861 Missing patch number

CHMFA013 value = 31867973 Missing patch number

CHMFA01D value = 5815956 Missing patch number

CHMFADR1 value = 125736532 Missing patch number

CHMFADR4 value = 267954745 Missing patch number

CHMFSRT value = 24434762 Missing patch number

CHMFUTLE value = 22325360 Missing patch number

CHMXF001 value = 82841599 Missing patch number

CHMXG001 value = 44193226 Missing patch number

CHMXPU04 value = 363274241 Missing patch number

CHMXWB21 value = 1706402409 Missing patch number

CHMXWB24 value = 198779379 Missing patch number

CHMXWBUT value = 2866878 Missing patch number

CHPRD1 value = 36462532 Missing patch number

CHROLIB1 value = 69472958 Missing patch number

Done

Select Build CPE\*1.0\*007

CHFBCN1 value = 37021870 Missing patch number

CHFBCN2A value = 54860501 Missing patch number

CHFBCUTL value = 175630513 Missing patch number

CHGCP2 value = 112464962 Missing patch number

Done

Select Build CPEDEF\*1.0\*008

Checksums

Routine Old New

CHGVQ374 n/a 52486016

CHGVQ529 n/a 96655644

CHICDAA n/a 21795998

CHMF211 n/a 19437100

CHMFA001 n/a 72728138

CHMFA011 n/a 109646699

CHMFA01E n/a 56190231

CHMFA117 n/a 18605118

CHMFA14V n/a 1259638550

CHMFA161 n/a 125268710

CHMFA171 n/a 144462687

CHMFA181 n/a 144749004

CHMFA802 n/a 65124332

CHMFAUT5 n/a 869373

CHMFAUT6 n/a 19873430

CHMFAUT7 n/a 561885712

CHMFAUT8 n/a 82440393

CHMFCLNC n/a 1633009

CHMFSTP1E n/a 50545843

CHMFSTP1F n/a 50316510

CHMFUTLE2 n/a 8032653

CHMKAG5P n/a 46050394

CHMXF004 n/a 39610261

CHMXF005 n/a 62033224

CHMXF006 n/a 79465935

CHMXF008 n/a 67312527

CHMXF009 n/a 66632527

CHMXPU041 n/a 332153380

CHROLIB1 n/a 69472958

CHRPBAR21 n/a 15993577

Select Build CPEDEF\*1.0\*009

Checksums

Routine Old New

CHFBC1 n/a 118079245

CHFBCQ n/a 206724924

CHGCU130 n/a 13827194

CHGCU136 n/a 36956124

CHGCU137 n/a 90992077

Sites should use CHECK1^XTSUMBLD to verify checksums.

## Database Tuning

This section is not applicable. No database changes are being made.

# Back-Out Procedure

Back-out pertains to a return to the last known good operational state of the software and appropriate platform settings.

## Back-Out Strategy

Although it is unlikely, due to care in collecting approved requirements, SQA review and multiple testing stages (Primary Developer, Secondary Developer, Component Integration Testing and User Functional Testing) a back-out decision due to major issues with this build could occur during Site Testing, Production Testing or after National Release to the Field. The strategy would depend on during which of these stages the decision is made. If during Site Testing, unless the build produces catastrophic problems, the normal response would be for a new version of the test build correcting defects to be produced, retested and upon successfully passing development team tests, would be resubmitted to the site for testing.

The back-out build, if required, should safely remove any new fields created by the build in the data dictionary file and platform settings.

## Back-Out Considerations

The appropriate management is authorized to jointly decide if the back-out is required and accept any associated risks.

If this is necessary, a decision will be made on what actions are required to address those defects noted. It is imperative that the occurrence or defect be documented. There are developer forms displaying the routine(s), that highlight the modifications that were made.

### Load Testing

There are no load testing results.

### User Acceptance Testing

The Business Customer/Product Owner will arrange, manage, and perform User Acceptance Testing (UAT).

## Back-Out Criteria

The Business Customer/Product Owner will test the installed changes in Production and jointly decide if a back-out is required.

## Back-Out Risks

Installation/back-out should take place outside normal business hours to minimize impact to users.

## Authority for Back-Out

The Business Customer/Product Owner is authorized to jointly decide if the back-out is required and accept any associated risks.

## Back-Out Procedure

The appropriate technician will load the package created in section 4.8 step 5, using the following steps below:

1. Choose the PackMan message containing this patch, subject like this: “Backup of CPE\*1.0\*001 install on …”

2. Choose the INSTALL/CHECK MESSAGE PackMan option.

3. From Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following options. When prompted for the INSTALL NAME, enter the local patch from section 4.8, step 5.

4. From the Installation Menu, select the Install Package(s) option and choose the patch to install.

5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//'

6. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//'

7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//'

8. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

\***NOTE: Do the above steps for any package(s) you want to back out**

## Back-out Verification Procedure

The Business Customer/Product Owner will test the software in Production immediately after back-out to verify that the previous system state was successfully restored.

# Rollback Procedure

Rollback pertains to routine source code. This section includes the specific steps to roll back to the previous state of the routine source code and/or platform settings, if required.

## Rollback Considerations

The Business Customer/Product Owner is authorized to decide if the rollback is required and accept any associated risks.

## Rollback Criteria

The Business Customer/Product Owner will test the installed changes in Production and decide if a rollback is required.

## Rollback Risks

Installation/rollback will take place outside normal business hours to minimize impact to users.

## Authority for Rollback

The Business Customer/Product Owner is authorized to decide if the rollback is required and accept any associated risks.

## Rollback Procedure

Refer to section 5.6.

## Rollback Verification Procedure

The Business Customer/Product Owner will test the software in Production immediately after rollback to verify that the previous routine source code was successfully rolled back to its state prior to the installation of the product.