

# APEX Application Lifecycles |> Managing the Change

Dietmar Aust Opal-Consulting, Germany / Cologne www.opal-consulting.de



#### Introducing Opal Consulting

- ➤ Building Oracle based Web Applications since 1997
  - Portal, Forms, Reports, OWA Toolkit, now APEX!
- ➤ Dipl.-Inform. Dietmar Aust, Freelance Consultant
  - Master's Degree in Computer Science (MSCS)
- > 1997-2000: Consultant at Oracle Germany
- ➤ Since 09/2000: Freelance Consultant
- Blog: <a href="http://daust.blogspot.com/">http://daust.blogspot.com/</a>
- > Regular presenter at ODTUG, DOAG



#### **Introducing Opal Consulting**

Website (<u>www.opal-consulting.de</u>) built on APEX and Oracle XE as a proof of concept





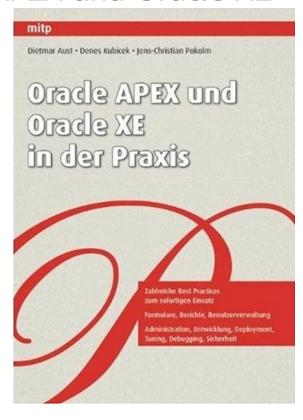
#### Introducing Opal Consulting

Giving APEX trainings regularly in Germany together with Denes Kubicek

Co-authored a book in German on APEX and Oracle XE

best practices

http://apex-xe-praxis.de/





#### Why are you here?

- > This topic is NOT SEXY, NOT COOL
- You don't get any FREE BEER;)
- > Why are you here?
- ➤ It saves TIME, MONEY ... and your NERVES
- > It increases the quality of your software
- ➤ It increases the maintainability and transparency of your software
- Please spend more time with your family ;)



#### Why are you here?

- ➤ Everybody needs an Application Lifecycle Management (ALM) but nobody takes the time ... the costs are high ... and well hidden ;)
  - A good ALM / configuration management takes a lot of effort != trivial!



#### Why are you here?

- No standards in the Oracle world, the Java world seems to agree on Maven
  - Apache Maven is a software project management and comprehension tool. Based on the concept of a project object model (POM), Maven can manage a project's build, reporting and documentation from a central piece of information.
  - http://maven.apache.org
  - ANT (popular build tool)
  - Maven could be seen as ("ant with convention over configuration")



#### Agenda

- > The background project
- > Challenges faced
- ➤ The components of a successful application lifecycle management (ALM)
- > Implementation from A-Z with demo



#### The Background Project

- ➤ Mainly developed at the German Telecom Shops for the Shop Management Application called "Spots".
- > Concept evolved over the last three years
- > Works really well (for us)
- > Good understanding of the relevant issues



#### The Background Project

#### Complexity

- 2-3 Developers
- Development since 05/2007
- Single schema SHDB\_200
- Tablespace names identical on dev, test, prod
- 200 Tables, 100 Packages, 3000 database objects
- APEX application with 140 pages

#### > Releases

- Usually four releases per year
- In average 100 (50-250) changed / newly created objects
- Usually four internal revisions with the test team



#### Technical Challenges

- > Concurrently changing database packages
  - Overwriting changes
- > Current state / version unclear
  - installation files
  - application files: APEX, WAR, JS, CSS
  - application version in database instance (dev, test, production)?
  - was script xyz (DDL or DML) already run on instance test?



#### Non Technical Challenges

- Which requirements were implemented in this patch?
  - = > Release Notes!
- > When did we install which version?
  - The problem we have now ... could we have already fixed it?
- > Keeping up with the documentation
  - Delta Release was fine ... complete system spec was outdated



## Non Technical Challenges

- Needed answers to the typical PJM related questions to organize our daily work
- > At the end of the day the developer is asked
  - What is the scope of the release?
    - Must / Should / Could / Won't
  - Who is doing what?
  - What are the open issues / questions?
  - What did we estimate for each task?
  - Are we in time/budget?
  - We are running late ... why?

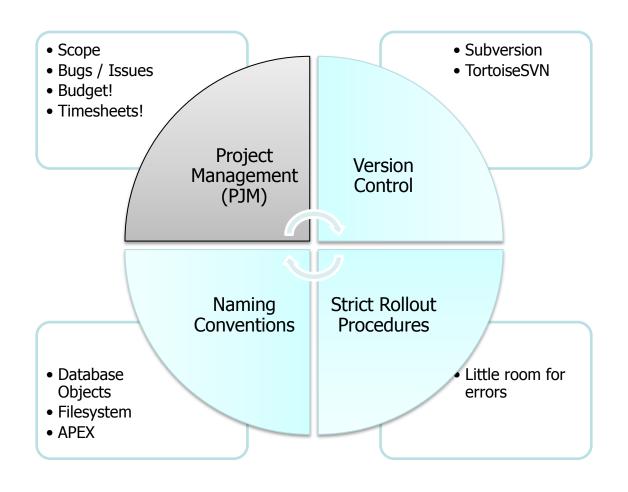


#### The Approach

- > => We needed an approach that was
  - Simple (only few rules, KISS)
  - Transparent (don't make me think, the good RTFM error ;)
  - Consistent
  - Safe (don't make more mistakes than necessary ;)
- > Which "objects" should be considered?
  - Files
  - Database objects
  - APEX objects
  - Documentation
  - Requirements



## The Components Of A Successful ALM





#### The Components: PJM

- > PJM application for managing the scope
  - Lightweight, as a tool for developers
- > Relevant features
  - Which requirements are included in version xyz?
    - Generate a list easily
    - We work on the requirements and spec online in the tool when meeting with the customer
  - Budgets, estimations and timesheets integrated
  - Milestones
  - Open issues, easy to generate a list for the next
     meeting with the client

#### The Components: PJM

#### > Demo:

- Show PJM application
  - A tool for developers
  - Upcoming milestones

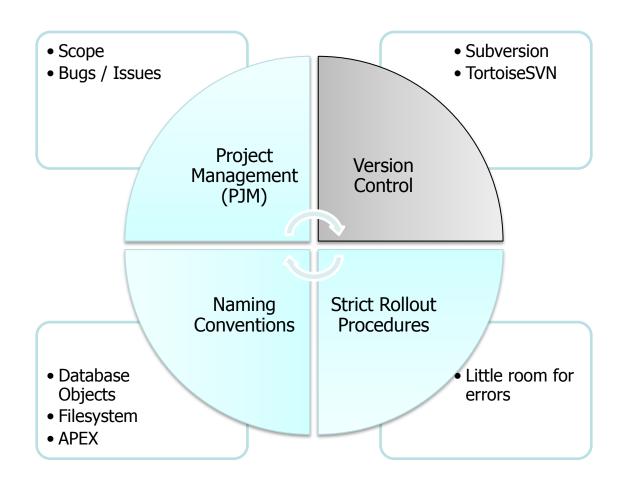


- Subrequirements, estimations, etc.
- Open questions for the next customer meeting
- Implemented features in Revision 1?
- Timesheets
  - Unplanned activities
  - Timesheet export for the customer





# The Components: Version Control

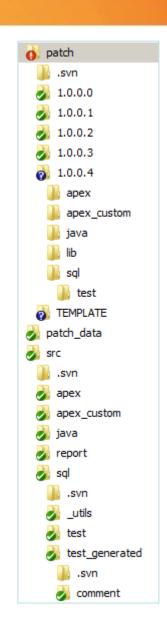




#### The Components: Version Control

- ➤ Subversion + TortoiseSVN
  - http://tortoisesvn.net
  - Integration with Windows Explorer
  - Icon overlays, context menus
- > Version control of database objects
  - Using the simple checkin/checkout mechanism in Toad
  - Exclusively locking a database object for modification

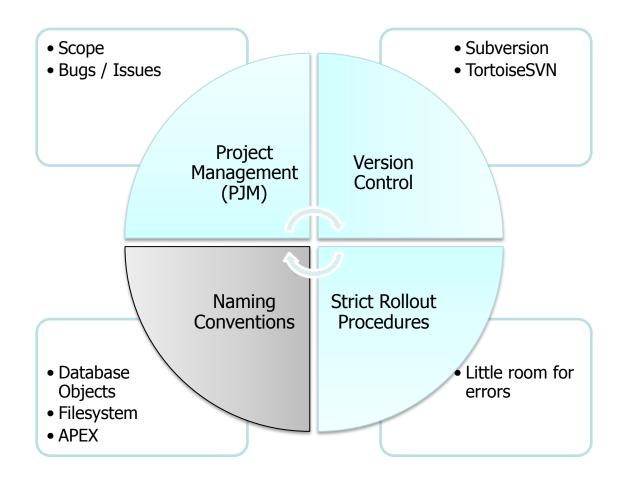




#### The Components: Version Control

- > All files are under version control
- > Changing database objects
  - Set an exclusive lock
  - Modify it directly in the database
  - Register the modified objects in the patch script immediately
    - Only for "true" ddl , e.g.: alter table add column
    - Empty files for the rest
  - Release the lock
  - Use subversion to control the filesystem







> Table names in plural

- > Packages in singular
  - CGUD conventions for functions / procedures
    - create, get, update, delete

```
FM_BOOKINGS
FM_COUNTRIES
FM_LOCATIONS
FM_RESOURCES
FM_RESOURCE_TYPES
FM_USERS
```

```
☐ ☐ FM_BOOKING
☐ ☐ Spec
☐ f() create_booking: number
☐ p() update_booking
☐ p() delete_booking
☐ f() get_booking: fm_bookings%rowtype
☐ Body
☐ FM_BOOKING_UI
☐ Spec
☐ f() is_valid_booking: varchar2
☐ f() generate_booking_link: varchar2
☐ Body
☐ Body
☐ Body
```



- Other object types have their type appended
  - Views: \_v
  - Materialized views: mv
  - Triggers: \_trg
  - Primary keys: \_pk
  - Indexes: \_idx
  - **-** ...



- Data type of column can be guessed by its name
  - Boolean: is\_valid\_number
  - Date: created\_on, valid\_until
  - Varchar, i.e. user name: created\_by, updated\_by
- > We don't use **name** columns any more
  - Either we mean a (internal and unchangeable)
     code or (a possibly to be changed) title



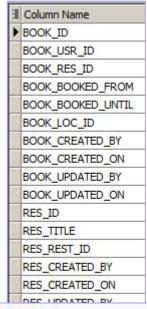
➤ Sample table: FM\_BOOKINGS

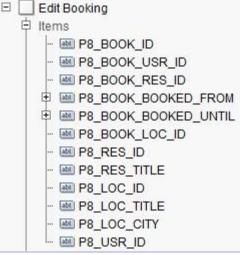
1	Column Name	ID	Pk	Null?	Data Type
١	BOOK_ID	1	1	N	NUMBER
50	BOOK_USR_ID	2		N	NUMBER
	BOOK_RES_ID	3		N	NUMBER
7	BOOK_BOOKED_FROM	4		Υ	TIMESTAMP(6) WITH LOCAL TIME ZONE
	BOOK_BOOKED_UNTIL	5		Y	TIMESTAMP(6) WITH LOCAL TIME ZONE
	BOOK_LOC_ID	6		N	NUMBER
	BOOK_CREATED_BY	7		Υ	VARCHAR2 (250 Byte)
	BOOK_CREATED_ON	8		Υ	DATE
	BOOK_UPDATED_BY	9		Υ	VARCHAR2 (250 Byte)
	BOOK_UPDATED_ON	10		Y	DATE

- > Prefix notation for columns
  - All columns are prefixed with the table short name / alias



- > Prefix notation for columns
  - Impact on views, APEX page items
  - = => TRANSPARENCY !!!
  - Sample: Edit Page on View FM\_BOOKINGS\_RL\_V
    - A reference to page item P5\_ID has to be explained / documented
    - References to P5\_BOOK\_ID or P6\_USR\_ID are transparent and self-documenting
    - No difference between data model and page items





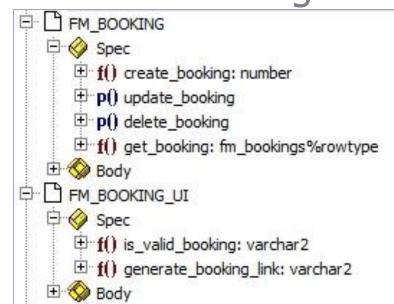


- > Use domains for common columns
  - i.e. columns containing numbers should always be called NO
  - i.e. columns containing descriptions should always be called **DESC**
  - Use the same data type and length consistently



> Separate packages for UI and business logic

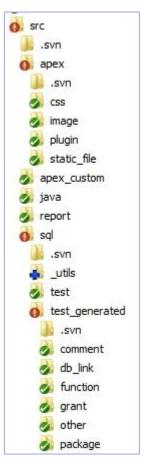
- Business packages
  - Use automated testing
- > UI-packages
  - Specific logic just for our APEX applications



- Generate a html link to another page
- Page validations, referencing application state (v('P5\_ID')) or using collections

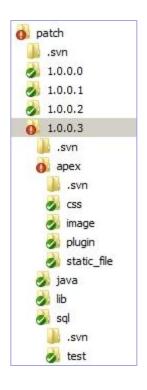


- > File system layout SRC
  - Source files
    - Organization by source type, then module or schema
  - Src
    - apex (import into workspace)
      - static\_file, image, css, plugin
    - apex\_custom (virtual directory on the web server)
    - sql
      - schema1
      - schema2



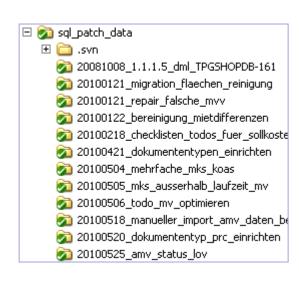


- > File system layout PATCH
  - Versions:
    - Major.Minor.Patch.Revision
      - Only communicate the first three
  - patch (new software release)
    - 1.0.0.0
      - apex
      - sql/schema1
      - sql/schema2
    - 1.0.0.1
    - 1.0.0.2





- ➤ File system layout PATCH\_DATA
  - patch\_data
    - (just a DML modification)
  - Not formalized yet, but
    - All patches are listed and under version control
    - Each execution is recorded in the database





- > Naming conventions for all files
  - In most cases: <object\_name>.sql (e.g. for table, view, trigger, foreign key constraint, type, procedure, function)
  - Exception: (packages or types, they have a spec and body)
    - package\_name.pks
    - package\_name.pkb
  - All scripts are in lowercase => can be run on Windows and \*nix
  - Data manipulations scripts: <table\_name>\_data.sql
    - Insert, Update, Delete
    - Insert into FM\_BOOKINGS => fm\_bookings\_data.sql

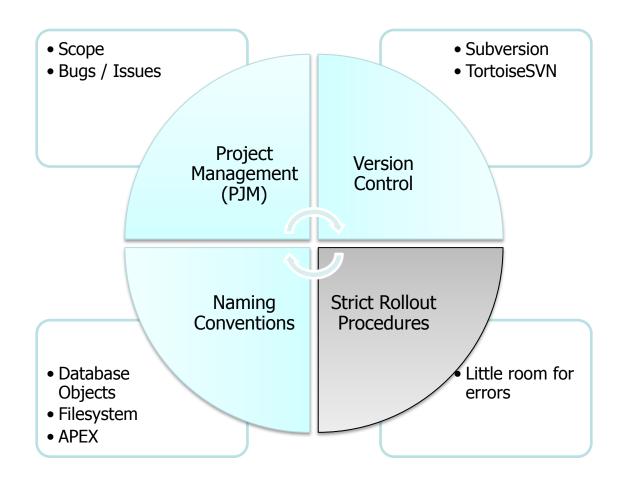


- > Naming conventions for all files
  - Easy to find changes:
    - When did we manipulate the configuration table?



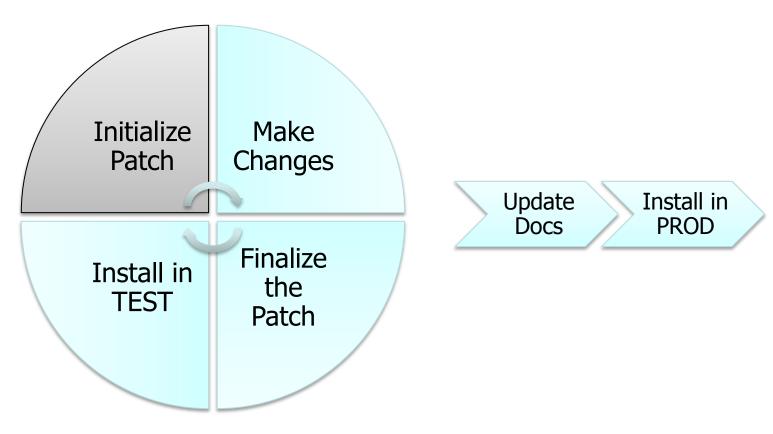
- dir /s \*data.sql
- When did we add the column xyz to table shdb\_standorte?







#### Rollout from A-Z



Multiple iterations for internal testing



#### Rollout from A-Z: Initialize Patch

- Use a template to create the patch directory (zip file or ANT script)
  - Patch 1.0.0.x as a copy of the TEMPLATE directory
  - Change version number in the patch script

```
_patch.sql
```



➤ Increase version number in your APEX application

Application	<u>Name</u>	
20100629	ALM - Application Lifecycle Management Sample (v1.0.0	
102	Master Application (v0.5.0.0)	
107	OC-Jasper Reports Integration - Plugin Sample (v1.0.0.0)	

Application:	20100629
* Name	Management Sample (v1.0.0.0)
Application Alias	F20100629
* Version	v1.0.0.0
Image Prefix	fil
Media Type	
Proxy Server	



➤ Reference #APP\_VERSION# in the page template footer

```
Footer

<div id="footer"><div class="content">
    Version #APP_VERSION#
    #REGION_POSITION_05#
    <div id="customize">#CUSTOMIZE#</div>&nbsp;
</div></div><#FORM_CLOSE#
</body>
</html>
```

> Then it will appear in the application



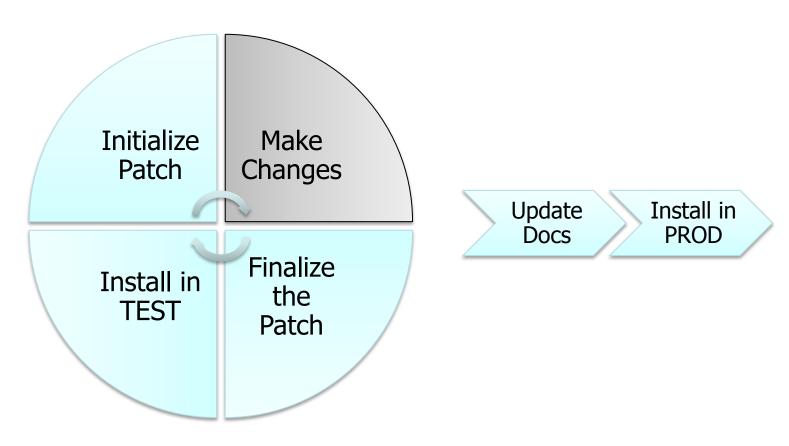


#### > Demo:

- Create new patch 1.0.0.4
  - Change version number
- Modify APEX Application Version
  - 1.0.0.4



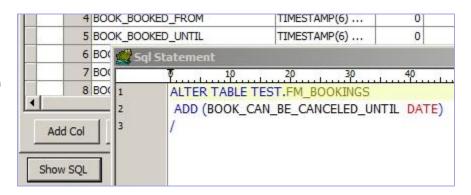




Multiple iterations for internal testing



Modify a table using toad and display the generated sql



➤ Add the file fm\_bookings.sql to the sql/test directory and reference it in the \_patch.sql script

```
prompt ************************
prompt ** Tables
prompt ****************
prompt **** FM_BOOKINGS
@@sql/test/fm_bookings.sql
@@lib/_pause
```



- ➤ If you modify any other object it only needs to be registered in the \_patch.sql script.
  - Package, View, Procedure, Trigger and others can be completely generated from the database and copied over the empty files later.
  - And create the empty files for that in the sql/test directory



- > The patch.sql script defines an order how the objects have to be installed:
  - Types, Tables, Foreign keys, Views, Procedures, Functions, Packages Headers, Packages Bodies, Trigger, Data (DML) scripts, other scripts
- > All scripts within a certain section have to be in alphabetical order (!!!) – helps with Subversion and things are easier to find
  - Show patch.sql script from Spots



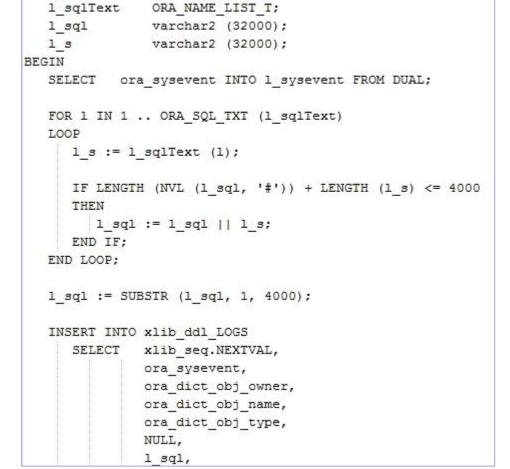


AFTER DDL

DECLARE

ON TEST.SCHEMA

Experimental DDL trigger to record changes



CREATE OR REPLACE TRIGGER TEST.XLIB DDL TRIGGER

1 sysevent varchar2 (25);





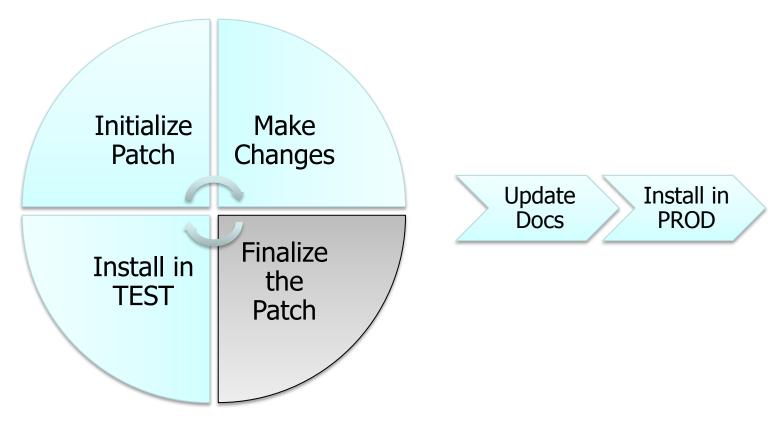
#### > Demo:

- Add column to FM\_BOOKINGS
  - BOOK\_CAN\_BE\_CANCELED\_UNTIL
- Add column to view
   FM\_BOOKINGS\_RL\_V
- Change package FM\_BOOKING





### Rollout from A-Z: Finalize the Patch



Multiple iterations for internal testing



#### Rollout from A-Z: Finalize the Patch

- > Extract the sources into the filesystem (again)
  - Subversion will highlight (!) the changed files
  - Copy them manually into the sql/test

directory

- mig\_tables.pks
- 🧭 mig\_util.pkb
- mig\_util.pks
- shdb\_abonnement.pkb
- shdb\_abonnement.pks
- shdb amv verhandlung.pkb
- shdb\_amv\_verhandlung.pks
- shdb amv verhandlung ui.pkb
- shdb\_amv\_verhandlung\_ui.pks
- 🚮 shdb\_anmietvertrag.pkb
- shdb anmietvertrag.pks
- 🚮 shdb\_anschluesse.pkb
- 🚮 shdb\_anschluesse.pks
- 📝 shdbi attribut.pkb



### Rollout from A-Z: Finalize the Patch

- > Export application file with version
  - f20100629 alm demo v1.0.0.4
- Copy all other relevant files (CSS, images, etc.) to the patch directory

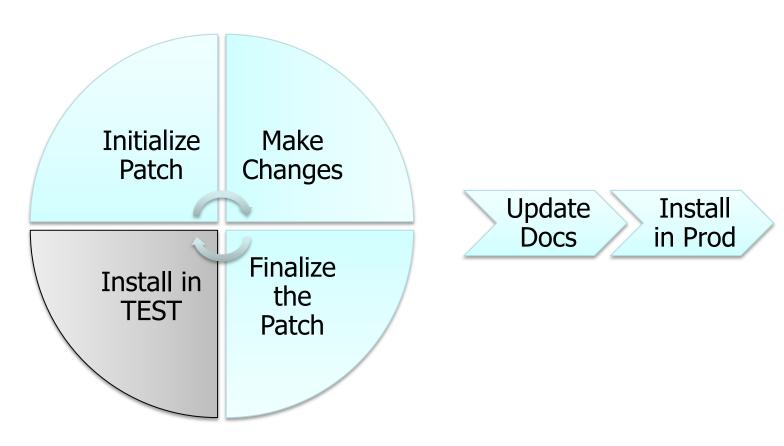


- > Demo:
  - Extract Sources again
  - Copy the modified files





### Rollout from A-Z: Install in Test



Multiple iterations for internal testing



#### Rollout from A-Z: Install in Test

- > Install the patch on the test system
  - Set restore point for flashback
    - SELECT name FROM v\$restore\_point;
    - create restore point BEFORE\_REL\_1\_0\_0\_3;
  - Install patch
  - Flashback database if required
    - shutdown immediate;
    - startup mount;
    - flashback database to restore point BEFORE\_REL\_1\_0\_0\_3;
    - alter database open resetlogs;
  - drop restore point BEFORE\_REL\_1\_0\_0\_3;

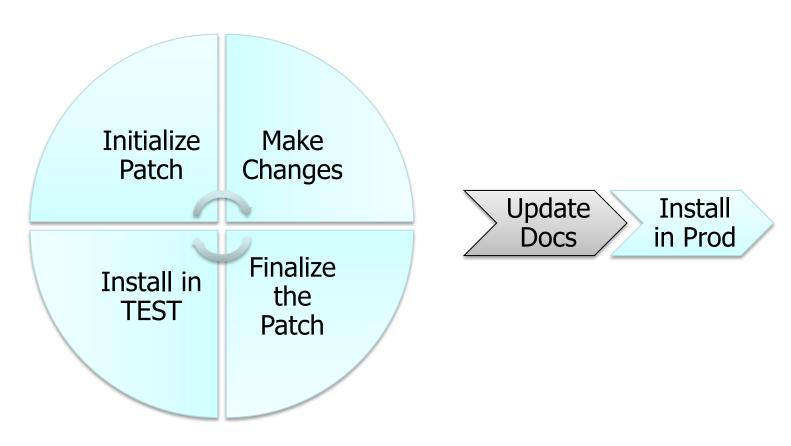


#### Rollout from A-Z: Install in Test

- > After testing, reverting and patching again (with modifications), the script is now complete
- Commit the current state of the directory
  src/sql/test\_generated to subversion, so you
  can see the differences in the next patch



## Rollout from A-Z: Update Docs



Multiple iterations for internal testing



## Rollout from A-Z: Update Docs

Patch Version will be registered in table xlib\_conf\_values as VERSION

> Release history in operation guide or overall release

notes

#### Release Historie

Release	Datum der Einbringung in Wirkbetrieb
Spots 3.0.0	19.04.2010
Spots 2.3.1	19.01.2010
Spots 2.3.0	13.11.2009
Spots 2.2.0	28.10.2009
Spots 2.1.0	31.08.2009
Spots 2.0.0	12.06.2009
Shop DB 1.1.0.4	11.06.2008
Shop DB 1.0.0	16.08.2007
Shop DB 0.6	14.06.2007

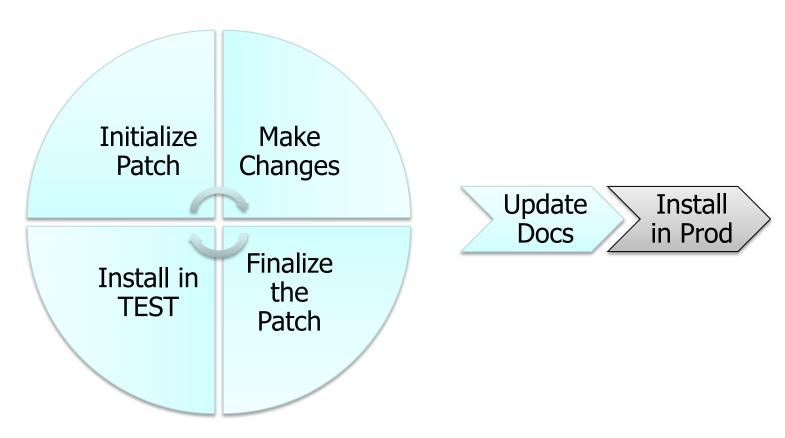


## Rollout from A-Z: Update Docs

- Update central use case document with delta documentation
  - Just copy/paste => no manual integration
- The technical documentation should be generated completety
  - Data model from data dictionary (use table and column comments!)
  - APEX from APEX dictionary
  - Database packages with pl/doc



### Rollout from A-Z: Install In Prod



Multiple iterations for internal testing



#### Rollout from A-Z: Install In Prod

- > Export current APEX application
- Backup database or set restore point for flashback
- ➤ When \_patch.sql is run, the application was set offline
  - => only machines with registered IP-adresses could connect (or when run in the builder environment)



#### Rollout from A-Z: Install In Prod

- > Set the application offline
  - Entry in configuration table
  - Application process to block users
- > Internal testing (within the app builder)

```
* is the current user authenticated to the workspace as a developer
* or administrator?
**

FUNCTION is_run_in_builder return boolean
is

BEGIN
return apex_application.g_edit_cookie_session_id is not null;
END;
```

> After final testing set application online again



- ➤ Each execution of a script must be logged in the target system
- > Install scripts => can be run multiple times
- > Adaptive code
  - Dependant on instance type => not different versions of code on different systems!!!
  - Table XLIB\_CONF\_VALUES has configuration parameter INSTANCE\_TYPE := DEV | TEST | PROD

- ➤ All things need an order !!!
  - Numbering of requirements, use cases, menu items, sorting in alphabetical order
  - => helps with Subversion, automatic merging of files, easier to look for specific entries

#### ➤ Use Apache rewrites for the end-user URL



- > apex\_images
  - Don't store files there !!!
- Use a custom virtual directory instead, e.g.: apex\_custom
- Keep the workspace id identical on all systems



- > Keep the application id identical on all systems, don't use application aliases!!
  - Possible problems
    - User bookmarks reference to old application id
    - Interactive Reports loose the private reports
    - Script based deployment not possible in pre 4.0 environment
    - In APEX 4.0 you can use APEX\_INSTALL to install into a different workspace, application and parsing schema
    - In APEX 4.0 you can fix the interactive report problem by modifying the offset with APEX\_INSTALL

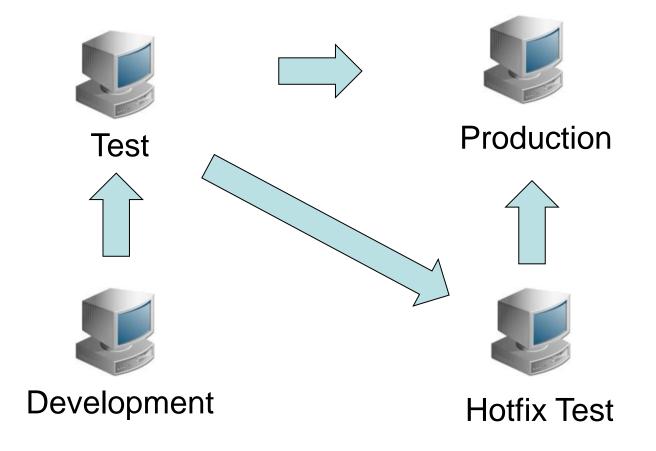


## Parallel Development

- ➤ Working with multiple developers on different versions of the application
- > Use cases:
  - Hotfix of a production issue
  - Parallelizing development efforts
- > Different than ususal
  - Use central repository
  - Branching / Merging not advisable => use a separate application and copy over later

## Parallel Development

➤ Easy solution: Use multiple Oracle instances





## Further developments

- > Implementation with Maven 2 / 3
  - Add a target for SQL or PL/SQL projects
- > Automatic generation of documentation
  - Data model
  - Application metadata from APEX
- > Automated testing of business logic
- > Automatic patch installer



## Kaleidoscope 2011





#### WHY SHOULD I ATTEND Kscope11?

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**DATABASE DEVELOPMENT:** Design/Data Modeling, Coding, Maintenance, Best Practices

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## Q&A

# Q & A

- > Contact:
  - Opal-Consulting Dietmar Aust
  - Web: <a href="http://www.opal-consulting.de">http://www.opal-consulting.de</a>
  - Blog: <a href="http://daust.blogspot.com/">http://daust.blogspot.com/</a>
  - E-Mail: dietmar.aust@opal-consulting.de

