Lecture Notes on Software Configuration Management

15-413

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Outline of the Lecture

- ***** Software Configuration Management (SCM)
 - Motivation: Why software configuration management?
 - Definition: What is software configuration management?
- * Terminology and Methodology
 - What are Configuration Items, Baselines, etc. ?
 - What goes under version control?
- ***** Software Configuration Management Plans
 - Standards (Example: IEEE 828-1990)
 - Basic elements of IEEE 828-1990
- ***** Configuration Management Tools
- * CVS at a glance
 - The basics of CVS
 - Examples for the most common use cases

Why Software Configuration Management?

* The problem:

- Multiple people have to work on software that is changing
- More than one version of the software has to be supported:
 - Released systems
 - Custom configured systems (different functionality)
 - System(s) under development
- Software must run on different machines and operating systems
- ⇒ Need for coordination
- ***** Software Configuration Management
 - manages evolving software systems
 - controls the costs involved in making changes to a system

What is Software Configuration Management

- * Definition:
 - A set of management disciplines within the software engineering process to develop a baseline.
 - Forward Definition!

- ***** Description:
 - Software Configuration Management encompasses the disciplines and techniques of initiating, evaluating and controlling change to software products during and after the software engineering process.
- * Standards (approved by ANSI)
 - IEEE 828: Software Configuration Management Plans
 - IEEE 1042: Guide to Software Configuration Management

SCM Activities

- ***** Software Configuration Management (SCM) Activities:
 - Configuration identification (labeling and identification)
 - Baseline management
 - Change control (mechanism needed to coordinate parallel activities)
 - Reviews (status accounting, audits)
 - Release management
- * No fixed rules:
 - SCM functions are usually performed in different ways (formally, informally) depending on the project type and lifecycle phase (research, development, maintenance).

Terminology and Methodology

- * What are
 - Configuration Items
 - Baselines
 - SCM Directories
 - Versions, Revisions and Releases

The usage of the terminology presented here is not strict but varies for different configuration management systems. We will see for example that the configuration management system used for this class uses different names than those mentioned in the IEEE standards.

Terminology: Configuration Item

"An aggregation of hardware, software, or both, that is designated for configuration management and treated as a single entity in the configuration management process."

- Software configuration items are not only program code segments but all type of documents according to development, e.g
 - ⇒ all type of code files
 - drivers for tests
 - ⇒ analysis or design documents
 - user or developer manuals
 - system configurations (e.g. version of compiler used)
- In some systems, not only software but also hardware configuration items (CPUs, bus speed frequencies) exist!

Finding Configuration Items (CIs)

- * Large projects typically produce thousands of entities (files, documents, ...) which must be uniquely identified.
- But not every entity needs to be configured all the time. Issues:
 - What: Selection of CIs (What should be managed?)
 - When: When do you start to place an entity under configuration control?

Starting too early introduces too much bureaucracy
 Starting too late introduces chaos

Finding Configuration Items (continued)

- Some of these entities must be maintained for the lifetime of the software. This includes also the phase, when the software is no longer developed but still in use; perhaps by industrial customers who are expecting proper support for lots of years.
- * An entity naming scheme should be defined so that related documents have related names.
- * Selecting the right configuration items is a skill that takes practice
 - Very similar to object modeling
 - Use techniques similar to object modeling for finding CIs

Configuration Identification is similar to Object Identification PAID CI **PAID CI** promote() release() Models Subsystems **Documents Object Model** Dynamic Model RAD ODD Database Learning **Unit Test** Code Data Carenter Tembner PAID 15-413 Software Engineering Fall 1998 10

Tasks for the Configuration Managers in PAID

Define configuration items

Terminology: Baseline



"A specification or product that has been formally reviewed and agreed to by responsible management, that thereafter serves as the basis for further development, and can be changed only through formal change control procedures."

Examples:

- Baseline A: The API of a program is completely defined; the bodies of the methods are empty.
- Baseline B: All data access methods are implemented and tested; programming of the GUI can start.

Baseline C: GUI is implemented, test-phase can start.

More on Baselines

- * As systems are developed, a series of baselines is developed, usually after a review (analysis review, design review, code review, system testing, client acceptance, ...)
 - Developmental baseline (RAD, SDD, Integration Test, ...)
 - Goal: Coordinate engineering activities.
 - Functional baseline (first prototype, alpha release, beta release)
 - Goal: Get first customer experiences with functional system.
 - Product baseline (product)
 - Goal: Coordinate sales and customer support.
- * Many naming scheme for baselines exist (1.0, 6.01a, ...)
- * 3 digit scheme:



Baselines in SCM



SCM Directories

- * Programmer's Directory (IEEE: Dynamic Library)
 - Library for holding newly created or modified software entities. The programmer's workspace is controlled by the programmer only.
- * Master Directory (IEEE: Controlled Library)
 - Manages the current baseline(s) and for controlling changes made to them. Entry is controlled, usually after verification. Changes must be authorized.
- ***** Software Repository (IEEE: Static Library)
 - Archive for the various baselines released for general use. Copies of these baselines may be made available to requesting organizations.

Standard SCM Directories



Controlling Changes

- ***** Two types of controlling change:
 - Promotion: The internal development state of a software is changed.
 - *Release:* A set of promotions is distributed outside the development organization.



- * Approaches for controlling change to libraries (Change Policy)
 - Informal (good for research type environments)
 - Formal approach (good for externally developed CIs and for releases)

Change Policies

- * Whenever a promotion or a release is performed, one or more policies apply. The purpose of change policies is to guarantee that each version, revision or release (see next slide) conforms to commonly accepted criteria.
- ***** Examples for change policies:

No developer is allowed to promote source code which cannot be compiled without errors and warnings.

No baseline can be released without having been beta-tested by at least 500 external persons.

Tasks for the Configuration Managers in PAID

Define configuration items

Define promote / release policies

Version vs. Revision vs. Release

- * <u>Version</u>:
 - An initial release or re-release of a configuration item associated with a complete compilation or recompilation of the item. Different versions have different functionality.
- * <u>Revision</u>:
 - Change to a version that corrects only errors in the design/code, but does not affect the documented functionality.
 Quiz: Is Windows98 a new

* <u>Release:</u>

• The formal distribution of an approved version.

version or a new revision compared to Windows95?

SCM planning

- * Software configuration management planning starts during the early phases of a project.
- The outcome of the SCM planning phase is the Software Configuration Management Plan (SCMP)
 which might be extended or revised during the rest of the project.
- * The SCMP can either follow a public standard like the IEEE 828, or an internal (e.g. company specific) standard.

The Software Configuration Management Plan

- * Defines the types of documents to be managed and a document naming scheme.
- * Defines who takes responsibility for the CM procedures and creation of baselines.
- * Defines policies for change control and version management.
- * Describes the *tools* which should be used to assist the CM process and any limitations on their use.
- * **Defines the** *configuration management database* **used to record configuration information**.

Outline of a Software Configuration Management Plan (SCMP, IEEE 828-1990)

- * 1. Introduction
 - Describes purpose, scope of application, key terms and references
- * 2. Management (WHO?)
 - Identifies the responsibilities and authorities for accomplishing the planned configuration management activities
- * 3. Activities (WHAT?)
 - Identifies the activities to be performed in applying to the project.

- ✤ 4. Schedule (WHEN?)
 - Establishes the sequence and coordination of the SCM activities with project mile stones.
- * 5. Resources (HOW?)
 - Identifies tools and techniques required for the implementation of the SCMP
- * 6. Maintenance
 - Identifies activities and responsibilities on how the SCMP will be kept current during the life-cycle of the project.

Tasks for the Configuration Managers in PAID

Define configuration items

Define promote / release policies

Define responsibilities

Tailoring the SCMP

- * The IEEE standard allows quite a bit flexibility for preparing an SCMP.
- ***** To conform to the rest of the project, the SCMP may be
 - tailored upward:
 - to add information
 - to use a specific format
 - tailored downward
 - Some SCMP components might not apply to a particular project.
 - Instead of omitting the associated section, mention its applicability.
 - Information that has not been decided on at the time the SCMP is approved should be marked as "to be determined".

Conformance to the IEEE Standard 828-1990

- * Presentation format & Minimum information
 - A separate document or a section embedded in another document titled "Software Configuration Management Plan".
 - 6 Sections: Introduction, Management, Activities, Schedules, Resources and Plan Maintenance
- * Consistency Criteria:
 - All activities defined in the SCMP are assigned to an organizational unit or person and they are associated with resources to accomplish the activities.
 - All identified Configuration items have defined processes for baseline establishment and change control.
- * If the above criteria are met, the SCMP can include the following sentence:

"This SCMP conforms with the requirements of IEEE Std 828-1990."

Tools for Software Configuration Management

- * Software configuration management is normally supported by tools with different functionality.
- ***** Examples:
 - RCS
 - very old but still in use; only version control system
 - CVS
 - based on RCS, allows concurrent working without locking
 - Perforce
 - Repository server; keeps track of developer's activities
 - ClearCase
 - Multiple servers, process modeling, policy check mechanisms

Tasks for the Configuration Managers in PAID



Summary

- * Software Configuration Management is an elementary part of the project management plan to manage evolving software systems and coordinate changes to them.
- * SCM is performed by following a SCM plan. This plan can either follow a public standard (e.g. IEEE 828) or an internal standard.
- * It is necessary to tailor a standard to a particular project:
 - Large projects need detailed plans to be successful
 - Small projects can't afford the bureaucracy of such plans
- * SCM is supported by tools. Their functionality varies from simple version storage tools to very sophisticated systems with automated procedures for policy checks and support for the creation of SCM documents.

CVS

Concurrent Version System

CVS at a glance

- * We will use CVS (Concurrent Version System) as version management system for this project during development. CVS is a shell-based, freely available configuration management system with a very short learning time for standard users.
- * For easy access, we provide also a web-interface to the repository which allows no changes to the repository.
- * The Configuration Manager of the project is Kent Ma. He will install and operate the system and provide basic help for the other students.

How CVS works ...

- * Configuration Manager
 - Creates one central repository for all developers.
 - Structures the repository by defining *modules* which represent directory trees.
- * Developer
 - Has his/her own working directory.
 - Selects the part of the repository (modules) he wants to work with.
 - Receives copies of all these modules. He can then work on his local copies.
 - Adds new files to the repository.
 - Modifies existing ones.
 - Resolves conflicts when two developers have edited the same part of the same file simultaneously.

CVS Tutorial Operations

Setting up a master directory (CVS: Repository)

- Creating the programmers directory
- * Adding a new file to the repository
- * Getting a file from the repository
- * Updating a file in your local directory
- * Editing a file and resolving a conflict
- ***** Promoting your changes to a file
- * Getting information about a file
- ***** Deleting a file from the repository

Creating the programmers directory

- * Before you can use CVS, you have to set the following two environment variables:
 - Variable: **CVSROOT**
 - Value: <Directory has to be defined>
 - Variable: **EDITOR**
 - Value: <Your preferred editor>
- * Set this variables in your login-scripts so that you can be sure, that they definitely exist when you are working in the computer lab.
- * Create a directory for the PAID, enter it and type cvs checkout <module name>

Creating the programmers directory (continued)

- * What is this "module name"?
 - CVS doesn't work on ordinary directory trees; you need to work within a directory that CVS created for you. Just as you check out a book from a library before taking it home to read it, you use the cvs checkout command to get a directory tree from CVS before working on it. The module name specifies, which tree you get from the repository as there can be more than one.
- * Only the configuration manager can create modules for you. If you want to establish a new module (e.g. for bringing also the HTML documentation under version control), you have to contact Kent Ma.

Creating the programmers directory



Getting files from the repository

- Situation: You want to get a copy of a file you have currently not in your local directory. If the file belongs to a different module, you have to checkout the module.
- * Command: cvs checkout module
- * If you deleted a file by accident and want it back, simply request the most recent version from the repository. Remember that this will not bring back the changes you made locally before!
- * Command: cvs update filename

Getting files from the repository



Working with your files



Adding a file to the repository

- * Situation: A file which is currently not under version control has to be added to the repository.
- * Command: cvs add filename
- * You still have to do a cvs commit after this command to make the addition(s) actually take affect.
- * You may make any number of new files in your programmers directory, but they will not be committed to the central repository unless you do a cvs add.

Adding a file (example)



Updating a local file

- Situation: You have a local, possibly outdated copy of a file which you have edited. You now want to get the most recent version with all changes done by other developers (merged with your changes).
- * Command: cvs update filename
- * CVS will inform you, if the file
 - has not changed in the meantime
 - has been updated (new code only from other developers)
 - has been merged (new code also from you)
 - couldn't be completely merged, because a conflict was found

Updating a local file



Resolving a conflict

- * Situation: You asked for an update of one or more files. During this process, you got at least one message looking like the following: rcsmerge: warning: conflicts during merge cvs update: conflicts found in <filename>
- * To resolve the conflict, start your favorite editor and search the file for the following construct:

```
<<<<<< filename

if (! error) {

    exit (1);

}

=======

if (! error) {

    exit (0);

}

>>>>> 1.9
```

Resolving a conflict (continued)

- * The text from your working file appears at the top, after the `<<<' characters; below it is the conflicting text from the other developer. The revision number `1.9' indicates that the conflicting change was introduced in version 1.9 of the file, making it easier for you to check the logs, or examine the entire change with cvs diff.
- * Once you've decided how the conflict should be resolved, remove the markers from the code, and put it in its proper state.
- * Repeat this process for all files with an error message and all occurrences within them.

Resolving a conflict



Resolving a conflict (continued)



Committing your changes

- Situation: You have brought your sources up-to-date with the rest of the group and tested them, so you are ready to commit your changes to the repository and make them visible to the rest of the group.
- * Command: cvs commit filename
- * At this point, CVS will start up your favorite editor and prompt you for a log message describing the change. When you exit the editor, CVS will commit your change, it is now visible to the rest of the group. When another developer runs cvs update, CVS will merge your changes to 'filename' into their working directory.

Committing your changes



Committing your changes (continued)



Getting some information about a file

- * Situation: You might well be curious what changes the other developers made to a file.
- * Command: cvs log filename
- * You will see the log for this particular file. You get a list of all revisions including the name of the developer, the message describing the changes he/she did, the date and time of the commit and the differences between the revisions.
- * You can find a description of the diff-format in the CVS documentation on the homepage of this course!

Getting some information about a file

CommNet - [donut]	
Eile Edit Vjew Communications Transfers Script Setup Tools Window Help	_ 뭔 쓰
description: revision 1.4 date: 1998/09/28 18:49:21; author: teubner; state: Exp; Created "GoodbyeWorld" Corrected "HelloWorld"	lines: +1
revision 1.3 date: 1998/09/28 18:41:15; author: teubner; state: Exp; We should say "Hello" to everybody!	lines: +1
revision 1.2 date: 1998/09/28 18:33:43; One "Hello world" is not en h!	lines: +1
revision 1.1 date: 1998/09/28 17:54:04; a.thor: teubner; state: Exp;	
branches: Initial r Initial r revision date: 199 This is t Committed a particular revision and the comment he specified.	lines: +0
TELNET VT100 cd 🔳 rd	📕 sd 📕

Deleting a file from the repository

- * Situation: One or more files are not longer being used and have to be removed from the repository.
- * Command: cvs remove filename
- * You still have to do a cvs commit after this command to make the remove(s) actually take affect.
- Note: cvs remove does not actually remove the files from the repository. It only moves them from the "current list" to the CVS Attic. When another person checks out the module in the future they will not get the files that were removed. But if you ask for older versions, the file will be checked out of the Attic.

Deleting a file (example)



CVS Basic Commands (Summary)

- * Adding a file to the repository
 - cvs add filename
- * Getting a module (file tree)
 - cvs checkout filename
- * Updating a local file
 - cvs update filename
- * Promote all changes done to a file
 - cvs commit filename
- * Deleting a file from the repository
 - cvs delete filename
- * See version history for a file
 - cvs log filename

Security aspects of CVS

- * Direct access (through the file system) to the repository is restricted by using the access control mechanisms of the Linux file system.
- * Web access is restricted by
 - using a password protected website
 - allowing only read-access to the repository through the web
- Important: Every developer has to protect his private working directory by establishing appropriate access rights (e.g. read and write access only for him/her.

Where to find help on CVS?

- * The direct way
 - cvs -H
- * The unix way
 - man cvs
- * The comprehensive way
 - Read the documentation for CVS. You'll find a copy on the webpage of the project.
- * Where to start in the web?
 - http://www.cyclic.com