

SCM Patterns for “Agile” Architectures

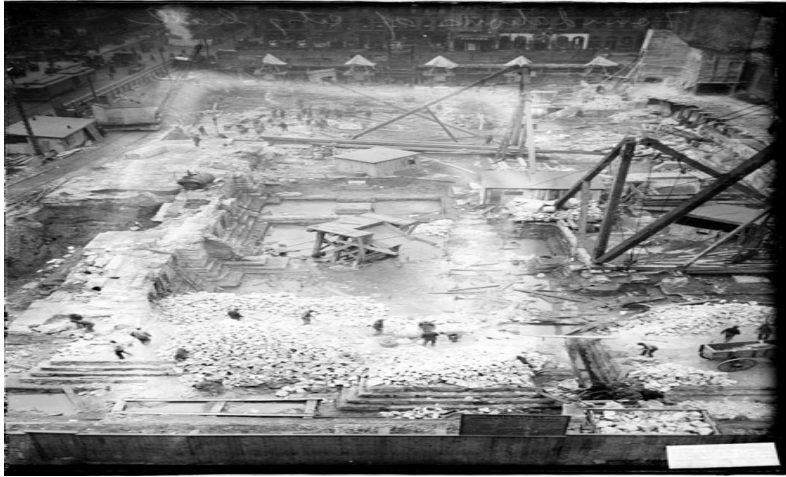
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Agenda

- [Part I: Background](#)
 - [What is Architecture? Architectural Views](#)
 - [What is Agility? Lean & TOC](#)
 - [What is Agile Architecture?](#)
 - [What is SCM? SCM & Architecture](#)
 - [Core SCM Pattern Concepts](#)
- [Part II: The Patterns](#)
 - [Codeline Patterns](#)
 - [Build/Integration Patterns](#)
 - [Promotion “Leveling” Patterns](#)
 - [Variability Management](#)
 - [Wrap-Up](#)

Part I: Background/Foundation



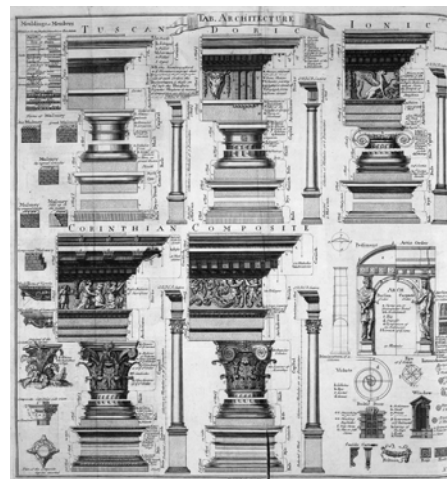
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What is “Software Architecture”?

The fundamental organization of a system:

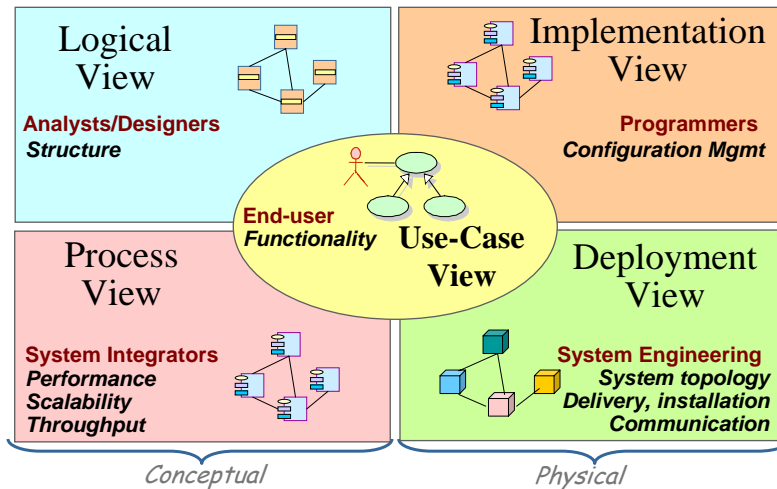
- embodied in its components,
- their relationships to each other and the environment,
- and the principles governing its design and evolution

-- IEEE 1471-2000



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4+1 Views model of Software Architecture (Kruchten & UML/RUP)



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What is Agility?

"The ability to both **create and respond to change** in order to profit in a turbulent business environment."

-- James Highsmith, *Agile Software Development Ecosystems*

Rapid Response with **Efficiency** in Motion, **Economy** of Effort, **Energy** in Execution, and **Efficacy** of Impact!



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Agile Development Characteristics

- Adaptive** – responsive to change in needs & requirements via continuous feedback and reflective retrospection
- Goal-driven** – focus on producing executable-results (working functionality) in order of highest business value.
- Iterative** – short development cycles, frequent releases, regular feedback
- Lean** – simple design, streamlined processes, elimination of redundant information, minimal intermediate artifacts
- Emergent behavior** – highly collaborative self-organizing teams in close interaction with stakeholders

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Principles of Lean Development

- **Eliminate Waste** (*Minimize Artifacts & Add Nothing but Value*)
- **Build Quality In** (*Satisfy All Stakeholders & Deploy Comprehensive Testing*)
- **Amplify Learning** (*Learn by Experimentation*)
- **Defer Commitment** (*Decide as Late as Possible*)
- **Deliver Fast** (*Deliver as Fast as Possible*)
- **Respect People** (*Decide as Low as Possible*)
- **Optimize the “Whole”** (*Measure Business Impact & Optimize Across Organizations*)

Source: Mary & Tom Poppendieck, <http://www.poppendieck.com/>

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Theory of Constraints – 5 Focusing Steps

1. IDENTIFY the Constraint
2. EXPLOIT the Constraint
3. SUBORDINATE to the Constraint
4. ELEVATE the Constraint
5. Repeat – PREVENT INERTIA from becoming the Constraint

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What is an “Agile Architecture”?

- *Gracefully evolves & adapts* to meet changing needs & constraints
- *Resilient & responsive to change*



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What is SCM? (Traditional view)

- Configuration Identification
- Configuration Control
- Status Accounting
- Audit & Review
- Build & Release Management
- Process Management, etc

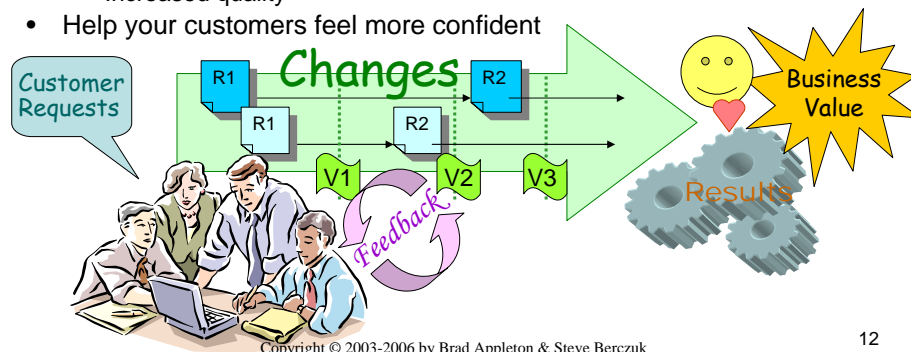


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What is SCM? (Agile view)

SCM is a set of structures & practices that:

- Facilitate frequent feedback on build quality & product suitability
- Enable changing & building systems in repeatable, agile fashion with:
 - Increased productivity
 - Enhanced responsiveness to customers
 - Increased quality
- Help your customers feel more confident



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What is SCM? (Architectural view)

Software Configuration Management is the **architecture of the evolution of architecture!**

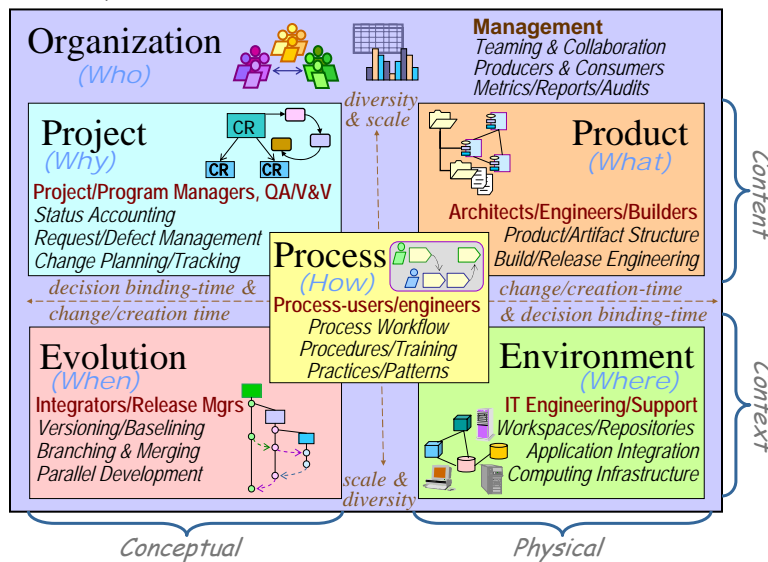
4+2 views of SCM "Architecture"

- 1) The **Project** structures
- 2) The flow of **Evolution**
- 3) **Product** Objects/Artifacts
- 4) Your **Environment**
- +1) Your **Processes**
- +2) Your **Organization**



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4+2 Views of SCM Architecture



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Core SCM Patterns Concepts

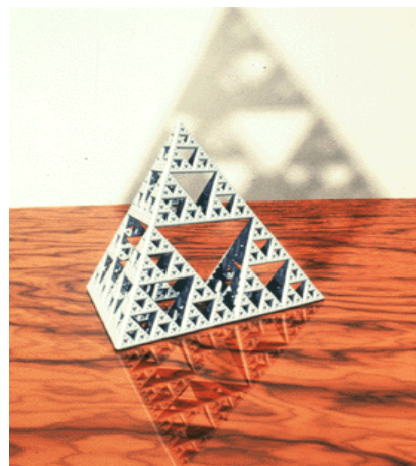
- [What are Patterns?](#)
- [Codeline/Branch](#)
- [Configuration](#)
 - Version
 - Revision
 - Label
- [Workspace](#)



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What are Patterns and Pattern Languages?

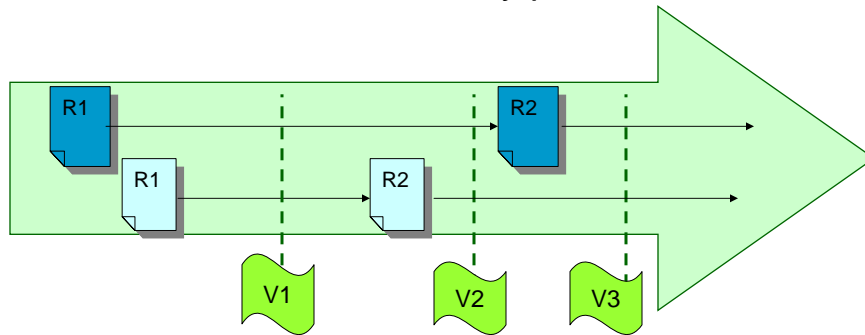
- A pattern is a solution to a problem in a context.
- Patterns capture common knowledge.
- Pattern languages guide you in the process of building something using patterns. Each pattern is applied in the correct way at the correct time.



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Codeline

- A **codeline** contains every version of every artifact over one evolutionary path.

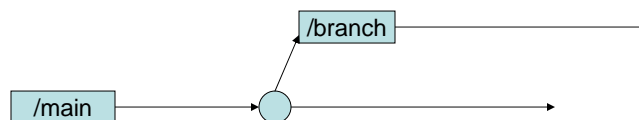


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Branching

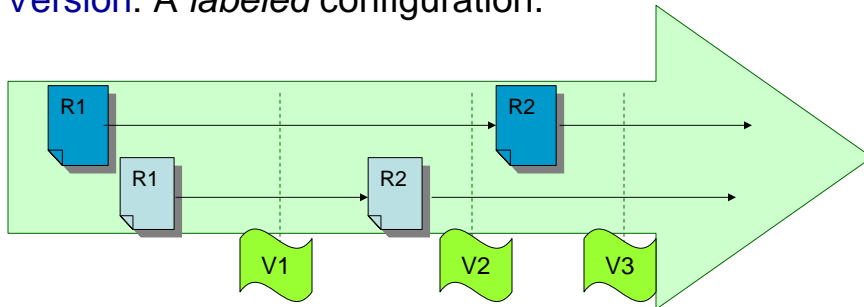
- **Branch**: A codeline that contains work that derives (and diverges) from another codeline.
- **Branch** of a file: A revision of a file that uses the trunk revision as a starting point.



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Versions, Revisions and Labels

- **Revision:** An element at a point in time.
- **Configuration:** A snapshot of the codeline at a point in time.
- **Version:** A *labeled* configuration.

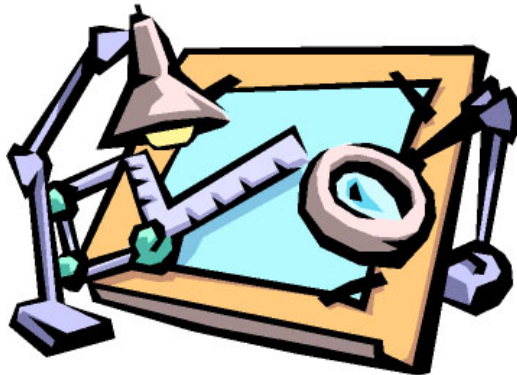


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Workspace

- Everything you need to build the Product
 - Code, Scripts, Database resources, etc.



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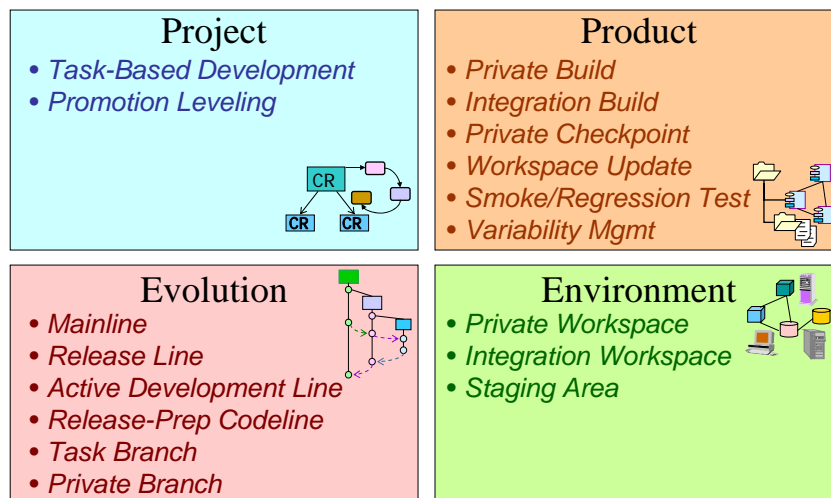
Part II: The Patterns

- [Codeline Patterns](#)
- [Build/Integration Patterns](#)
- [Promotion "Leveling" Patterns](#)
- [Variability Management](#)
- [Wrap-Up](#)



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SCM Patterns across the 4 Views



Codeline Patterns

- [Mainline](#)
- [Active Development Line](#)
- [Codeline Policy](#)
- [Release Line](#)
- [Release-Prep Codeline](#)
- [Task Branch](#)
- [Private Branch](#)



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Codeline Structures for Agility

- How many codelines should you be working from?
- What should the rules be for check-ins?
- Codelines are the integration point for everyone's work.
- Codeline structure determines the pulse of the project.

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Mainline

- You want to simplify your codeline structure.
- **How do you keep the number of codelines manageable (and minimize merging)?**



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Mainline (Forces & Tradeoffs)

- A Branch is a useful tool for isolating yourself from change.
- Branching can require merging, which can be difficult.
- Separate codelines seem like a logical way to organize work.
- You will need to integrate all of the work together.
- You want to maximize concurrency while minimizing problems caused by deferred integration.

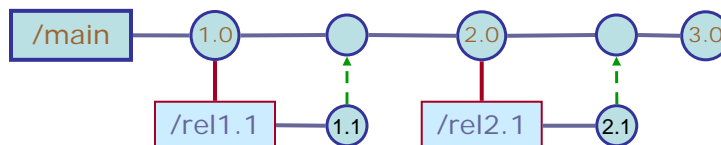
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Mainline (Solution)

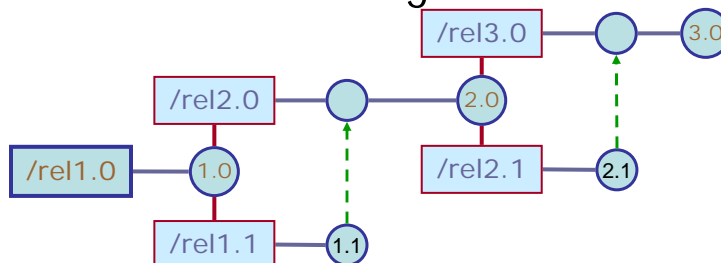
- Keep *Latest* release/project efforts on Mainline
- Branch *Late/Lazy* to support & maintain previous releases [use nested synchronization]
 - ☹ **DON'T cascade new branches** for follow-on projects/releases [avoid staircase branching]
 - ☺ **DO sync-merge to Mainline** (“mainlining”) to reduce breadth of branch tree

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Mainline



vs. Cascading Staircase



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Active Development Line

- You are developing on a [Mainline](#).
- How do you keep a rapidly evolving codeline stable enough to be useful (but not impede progress)?



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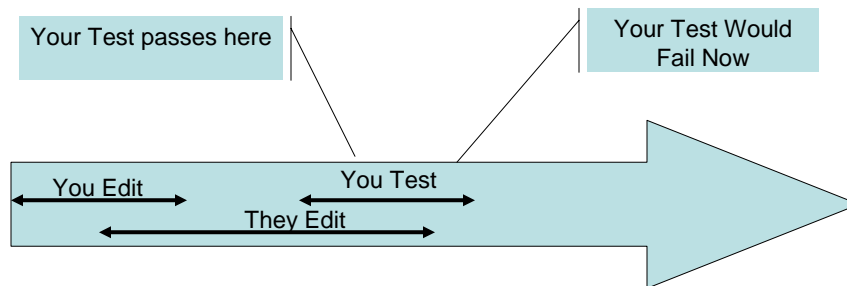
Active Line (Forces & Tradeoffs)

- A [Mainline](#) is a synchronization point.
- More frequent check-ins are good.
- A bad check-in affects everyone.
- If testing takes too long: Fewer check-ins:
 - Human Nature
 - Time
- Fewer check-ins slow project's pulse.

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Phase Shift

- Long running tests increase the likelihood of phase shift.



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Active Development Line (Solution)

- Use an *Active Development Line*.
- Have check-in policies suitable for a “good enough” codeline.
- Unresolved:
 - Doing development: [Private Workspace](#)
 - Keeping the codeline stable: [Smoke Test](#)
 - Managing maintenance versions: [Release Line](#)
 - Dealing with potentially tricky changes: [Task Branch](#)
 - Avoiding code freeze: [Release Prep Codeline](#)

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Codeline Policy

- Active Development Line and Release Line (etc.) need to have different rules.
- **How do developers know how and when to use each codeline?**



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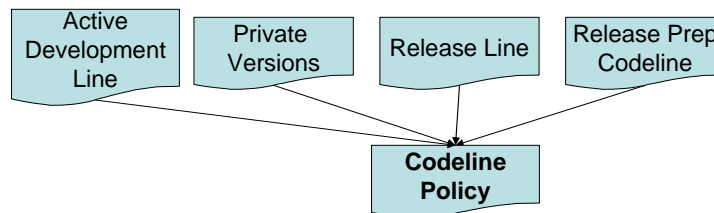
Codeline Policy (Forces & Tradeoffs)

- Different codelines have different needs, and different rules.
- You need documentation. (But how much?)
- How do you explain a policy?

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Codeline Policy (Solution)

- Define the rules for each codeline as a *Codeline Policy*. The policy should be concise and auditable.
- Consider tools to enforce the policy.



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Release Line

- You want to maintain an Active Development Line.
- How do you do maintenance on a released version without interfering with current work?



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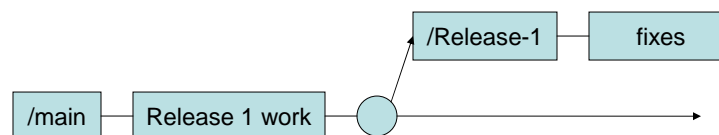
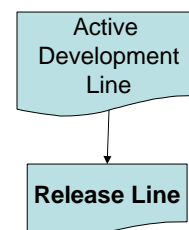
Release Line (Forces & Tradeoffs)

- A codeline for a released version needs a Codeline Policy that enforces stability.
- Day-to-day development will move too slowly if you are trying to always be ready to ship.

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Release Line (Solution)

- Split maintenance/release activity from the Active Development Line and into a *Release Line*.
- Allow the line to progress on its own for fixes.



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Release Prep Codeline

- You want to maintain an Active Development Line.
- How do you stabilize a codeline for an imminent release while allowing new work to continue on an active codeline?



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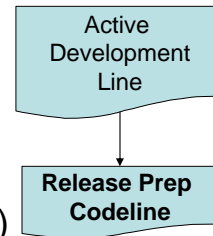
Release-Prep Codeline (Forces & Tradeoffs)

- You want to stabilize a codeline so you can ship it.
- A code freeze slows things down too much.
- Branches have overhead.

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Release Prep Codeline (Solution)

- Branch instead of freeze. Create a *Release Prep Codeline* (a branch) when code is approaching release quality.
- Leave the Mainline for active development.
- The *Release Prep Codeline* becomes the Release Line (with a stricter policy)
- Note: If only a few people are doing work on the next release, consider a Task Branch instead.



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Task Branch

- Created exclusively for the duration of a single development task
- Good for risky or experimental efforts



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Private Branch

Created exclusively for a single developer (or two) for the duration of a project

- Encompasses multiple (sequential) change-tasks
- Good for implementing Private Checkpoints



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Build/Integration Patterns

- [Private Checkpoint](#)
- [Workspace Update](#)
- [Task-Level Commit](#)
- [Private Build](#)
- [Integration Build](#)
- [The Three Builds](#)
- [Smoke Test](#)
- [Regression Test](#)



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Private Checkpoint

- An Active Development Line will break if people check in half-finished tasks.
- **How can you experiment with complex changes and still get the benefits of version management?**



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Private Checkpoint (Forces & Tradeoffs)

- Sometimes you may want to checkpoint an intermediate step of a long, complex change.
- Your version management system provides the facilities for checkpointing.
- You don't want to publish intermediate steps.

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Private Checkpoint (Solution)

- Provide developers with a mechanism for checkpointing changes using a simple interface.
- Can Implement as any of the following:
 - Private Archive/Repository
 - [Private Branch](#)
 - [Task Branch](#)
 - Private Label/Tag

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Workspace Update

- **Synchronize your workspace with the codeline**, without breaking the codeline
- Reconcile recent changes together sooner & keep developers aware of others activities



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Task Level Commit (Forces & Tradeoffs)

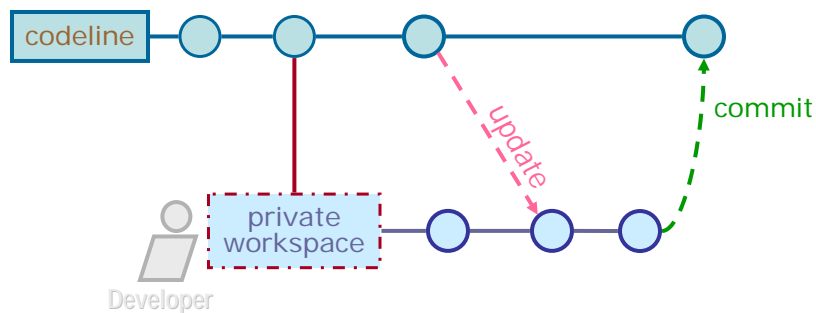
- The smaller the task, the easier it is to roll back.
- A check-in requires some work.
- It is tempting to make many small changes per check-in.
- You may have an issue system that identifies units of work.

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Task Level Commit (Solution)

Do one commit per small-grained task.

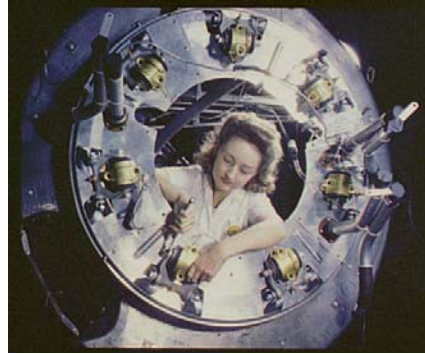
- [Compare with [Task Branch](#) for long lived efforts]



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Private Development Build

- You need to build to test what is in your [Private Workspace](#).
- How do you verify that your changes do not break the system before you commit them to the *Repository*?



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Private Development Build (Forces & Tradeoffs)

- Developer Workspaces have different needs than the system build.
- The system build can be complicated.
- Checking-in changes that break the [Integration Build](#) is bad.

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Private Build (Solution)

- Build the system using the same mechanisms as the central integration build, a *Private Development Build*.
- This mechanism should match the integration build.
- Do this before checking in changes!
- Update to the codeline head before a build.

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Integration Build

- What is done in a [Private Workspace](#) must be shared with the world.
- **How do you make sure that the code base always builds reliably?**



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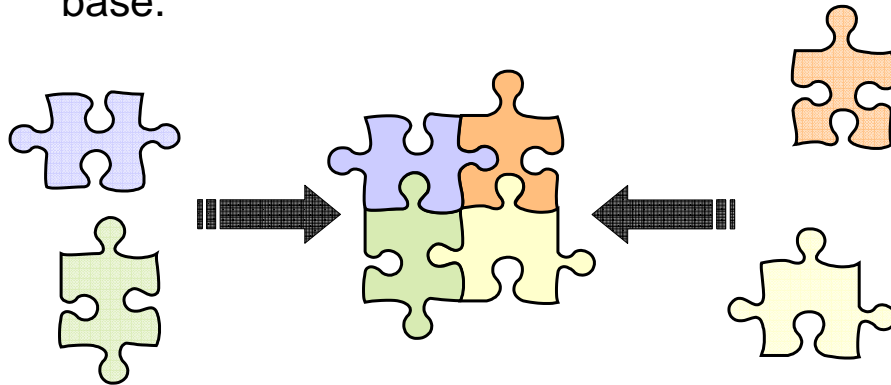
Integration Build (Forces & Tradeoffs)

- People do work independently.
- Private Development Builds are a way to check the build.
- Building everything may take a long time.
- You want to ensure that what is checked-in works.

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Integration Build (Solution)

- Do a centralized build for the entire code base.



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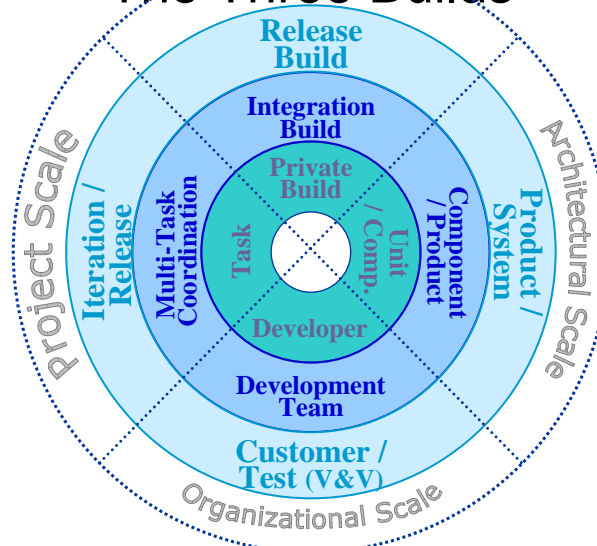
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The Three Builds

- **Private Development Build**
 - Provides a consistent way for the developer to build the software in the confines of their private workspace
- **Team Integration Build**
 - Synchronize team, feedback on code quality/integrity
- **Formal Release Build**
 - Creates the deployable package
- Why?:
 - Productivity, predictability, documented, ability to delegate build activity without compromising CM or quality.

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The Three Builds



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Smoke Test

- You need to verify an Integration Build or a Private Build so that you can maintain an Active Development Line?
- How do you verify that the system still works after a change?



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Smoke Test (Forces & Tradeoffs)

- Exhaustive testing is best for ensuring quality.
- The longer the test, the longer the check-in, encouraging less frequent check-ins.

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Smoke Test (Solution)

- Subject each build to a *Smoke Test* that verifies that the application has not broken in an obvious way.
- Unresolved: A *Smoke Test* is not comprehensive. You will need to find:
 - Problems you think are fixed: [Regression Test](#)
 - Low level accuracy of interfaces: *Unit Test*

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Regression Test

- A [Smoke Test](#) is good but not comprehensive.
- **How do you ensure that existing code does not get worse after you make changes?**



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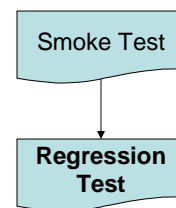
Regression Test (Forces & Tradeoffs)

- Comprehensive testing takes time.
- It is good practice to add a test whenever you find a problem.
- When an old problem recurs, you want to be able to identify when this happened.

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Regression Test (Solution)

- Develop *Regression Tests* based on test cases that the system has failed in the past.
- Run *Regression Tests* whenever you want to validate the system.



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Promotion “Leveling” Patterns

- [What is “Promotion”?](#)
- [Version Promotion](#)
- [Promotion Workspaces](#)
- [Branch Promotion](#)
- [Promotion Branches](#)
- [Label Promotion](#)



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What is a Promotion Lifecycle?

- A series of stages/levels that our end-result must pass through before we are willing to “release” it to others
- A sequence of significant milestone events, each of which represents either:
 - an increase in confidence, *or* ...
 - a transfer of responsibilityin assuring the release-quality of a deliverable

Example Promotion Lifecycles:

- {Developed, Reviewed, Tested, Audited, Released}
- {Development, Staged, Tested, Validated, Production}
- {Private, Team, QA, Customer, Failed}

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Common Promotion Mechanisms

- *Version Promotion* (Promoted Versions)
- *Promotion Workspaces*
- *Branch Promotion* (Promoted Branch)
- *Promotion Branches* (Promotion Branching)
- *Label Promotion* (Promoted Label)
- *Promotion Labels* (Promotion Labeling)
 - Equivalent to Version Promotion using Labels as the “attribute values” for the promotion-level

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Version Promotion

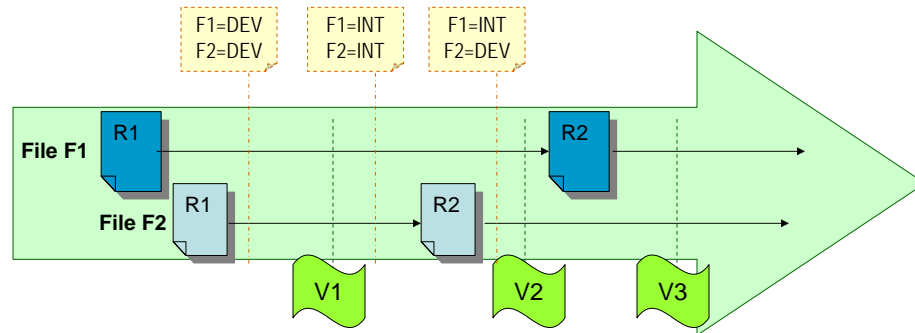
- The most recent version of each file on the codeline is associated with a promotion level
- File versions are “promoted” to the next level by “advancing” their promotion-level attribute
- Whenever a file is “updated”, it starts over again at the initial promotion level.

PRO: Can easily discern if all files on the tip of the codeline are at the correct promotion level, and which files aren't

CON: Can be very cumbersome to implement if you have to do it yourself

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Version Promotion



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Promotion Workspaces

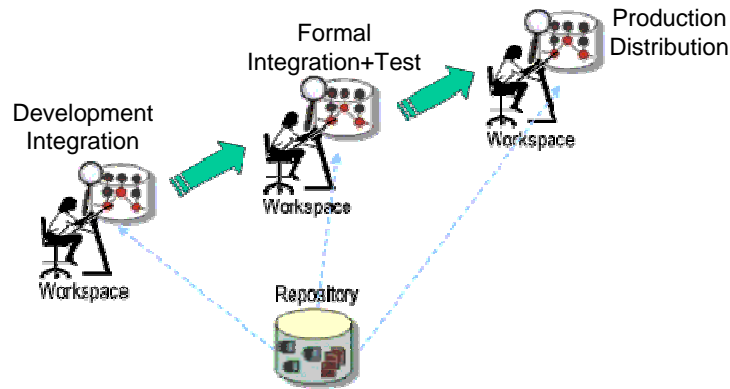
- Uses a separate workspace or “staging area” for housing built deliverables
- When a build progresses from one level to the next, the built results are “pushed” to the next-level workspace
- Common example uses three “vaults” (staging areas):
 1. Development Integration “Vault”
 2. Formal Integration+Test “Vault”
 3. Production Distribution “Vault” (Release-Area)

PRO: No confusion over which versions in the workspace are at which “level”

CON: Can be time-consuming to copy/link file versions across workspaces or staging areas

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Promotion Workspaces



Promotion Workspaces

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Branch Promotion

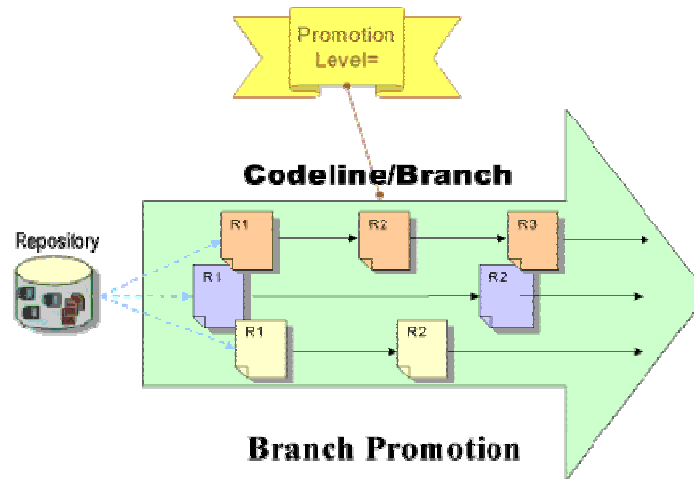
- Associate promotion-level attribute with an entire codeline
- When tip of the codeline progresses from one level to the next, advance the branch's promotion-level

PRO: Very quick & easy to “promote” – no files need to be copied/linked

CON: Okay for handing off an entire branch but not as useful when using the same codeline for frequent handoffs (can't tell status of previous handoff anymore)

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Branch Promotion



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Promotion Branches

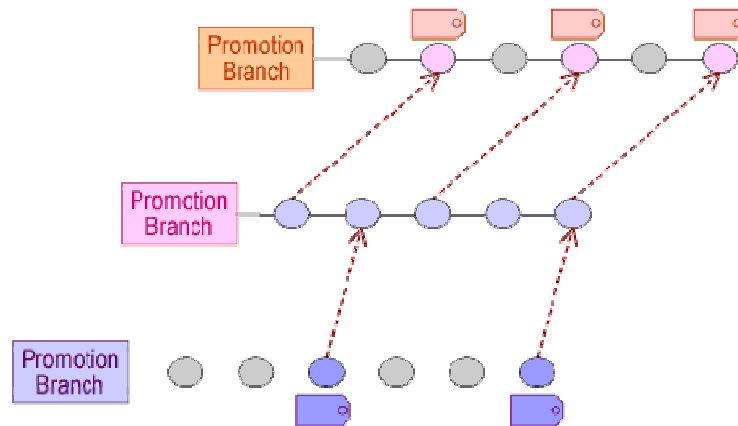
- Uses separate branch/codeline for each promotion level
- When a build progresses from one level to the next, the versions are “pushed” (copymerged)
- Very similar to promotion workspaces, but with codelines instead (or in addition)

PRO: Codelines make for nice “integration territories” when transferring responsibility – avoids “turf wars” and “policy disputes” from competing groups by giving each their own codeline and codeline policy

CON: Creates a new version when promoting to the next level (even if no changes were needed)

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Promotion Branching



Promotion Branching

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Label Promotion

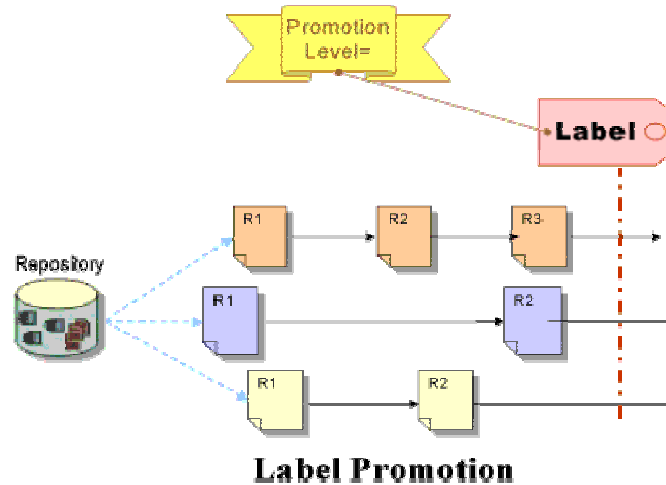
- Associate promotion-level attribute with each label/build
- When build progresses from one level to the next, advance the label's promotion-level

PRO: Very quick & easy to “promote” – no files need to be copied/linked and no versions to merge; allows for multiple builds on the same codeline to each go thru their own promotion levels independently

CON: Can be somewhat unwieldy to implement if your tool doesn't readily support “attributes” on a label/tag

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Label Promotion



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Variability Management

- [What is Product Variability?](#)
- [Why Product Variability?](#)
- [Branching-time or Binding-time?](#)
- [Binding Times](#)
- [Build/Package Options](#)
- [Feature Configuration](#)
- [Business Rules](#)
- [Composition, Inheritance & Aspects](#)



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What is Product Variability?

Product-Lines & Product-Families:

- Variability of a single codebase across multiple products:

Multi-Variant Product:

- Variability of a single codebase across the same product:

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Multiple Products & Multiple Variants

Product-Lines & Product-Families:

- An entire line/family of different products with some “core” (shared) components & functionality
- Each product has some unique combination of additional functionality and/or functional “variation”

Multi-Variant Product:

- Many (functional) variations of the same (product) theme
- Variations are often customer/market-specific
- Different from supporting legacy releases (multi-project):
 - because the functional differences aren’t separated by time, but by market/customer and/or technology/platform.

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Why Product Variability?

A Company may offer product variability because they may believe ...

- "One size does *not* fit all!"
- It will improve competitive advantage
- It will increase their market size/share
- It will uniquely differentiation them in the market (branding)
- Etc.,

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Branching-time or Binding-time?

- Many attempt product-variability with Branching by using a codeline per variant;
Don't do this!
 - Branching is for isolation/synchronization of code across people & places during the same time-period:
 - Concurrent/parallel & remote/distributed development
 - Maintaining legacy/historical versions of an install-base

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Branching-time or Binding-time?

Address Variability using late-binding

(instead of branching) **whenever possible!**

– *Branching for Variability is like Cut-n-Paste Reuse!*

- Creates multiple instances of the same code that all need to be repaired for the same “bugfix” or enhancement
- Creates more merging & integration for something that is fundamentally not an issue of isolation+synchronization

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Binding-Times

Example decision *binding times* for a point of functional variation (*variation point*):

- **Source reuse time** - when reusing a configurable source artifact
- **Development time**
- **Static code instantiation time** - during generation/assembly of code for build
- **Build time** - during compilation or related processing

Source: www.softwareproductlines.com

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More Binding-Times

- **Package time** - when assembling binary & executable collections
- **Customer customizations**. Decisions bound during custom coding at customer site
- **Install/Upgrade time**. Decisions bound during the installation of the software product
- **Startup time**. Decisions bound during system startup
- **Runtime**. Decisions bound when the system is executing

Source: www.softwareproductlines.com

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Build/Package Options

Manage platform differences with well known design & architecture patterns that “bind” at build-time or package-time:

- ***Wrapper-Façade*** [POSA2]
- Numerous patterns from the Gang-of-Four design patterns book (***Factory***, ***Factory Method***, ***Bridge***, etc.)
- Combine with Make/ANT options & variables and judicious use of conditional compilation

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Post-Release Feature Configuration

Manage variation in features/feature-sets with selection & deselection patterns:

- Enables/disable features and services at post-release binding-times (install/upgrade-time & run-time)
- **Component Configurator, Interceptor, Extension Interface** [POSA2]
- Variations of **Register/Unregister** and **Publish-Subscribe** in a feature/service “registry”

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Business Rules

Differences in policy/mechanism may be handled using a business-rules approach

- Maintains a single codebase + codeline to deliver a single product with multiple possible configurations of rules and rule-settings
- **Strategy, Template Method, Adapter, Decorator** [“Gang of Four”]
- **Adaptive Object-Model** [Yoder & Johnson]
- **Application “resource settings”**

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Composition, Inheritance & Aspects

- Composition & Delegation are usually best
- Inheritance may be useful in some cases
 - if the type of configuration needed really does fit a single hierarchical model of increasing specialization
- In other cases, an aspect-oriented approach might be better
 - if the “seams” of configurability cut-across multiple components/services

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Wrap Up

- [Lean Branching](#)
- [CM Constraints](#)
- [Promotion Notions](#)
- [SCM Patterns Book](#)
- [Managing Multiple Variants/Products](#)
- [Other “Agile SCM” Resources](#)



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Principles of “Lean” Branching

- Deliver as fast as possible
 - Integrate fine-grained change-tasks as early as possible
- Decide as late as possible
 - Branch as late as possible
- Decide as low as possible
 - Developers reconcile merges and commit their own changes
- Optimize across the “Whole”
 - Use a Mainline to maintain a manageable branching structure

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Eliminate CM Constraints

Remove Integration/Build/Test “Bottlenecks”

- One of the single biggest “drags” on development feedback cycle-time is the “friction” that comes from prohibitive build-times, or long testing-cycles
- These force development to either freeze or branch the code-base for significant periods of time while waiting for integration/build/test activities to complete
- Integration+Build tools/scripts, code structure, and network resources must be leveraged appropriately to minimize build times

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Applicability of Promotion Mechanisms

- Can mix & match mechanisms as appropriate
 - *Branch Promotion*: useful when the branch is the unit of handoff or when handoffs are infrequent on that branch
 - *Promotion Branching*: useful for separate levels of integration (so merging would be performed anyway) or separate owners/policies
 - *Label Promotion*: well suited for a promotion levels at the same level (scope) of integration.
- Be wary of Branching/Labeling for promotion purposes if wouldn't otherwise make sense to branch/label or merge
- Don't "force-fit"! Some of these things emerge "naturally"
 - Private/Task Branch ⇒ Active Line ⇒ Release Line
 - Private Build ⇒ Integration Build ⇒ QA/Release Build

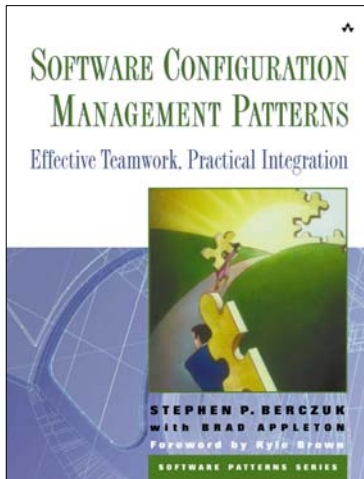
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Managing Product Variability

- Use Late-Binding instead of Branching:
 - Build/Package Options
 - Feature Configuration/Selection
 - Business Rules
- Think about which of the following needs to "vary" and what needs to stay the same:
 - Interface vs. Implementation vs. Integration
 - Container vs. Content vs. Context
- Commonality & variability analysis helps identify the core dimensions of variation for your project
- Use a combination of strategies based on the different types of needed variation and the "dimension" in which each one operates

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Our Book



- Pub Nov 2002 By Addison-Wesley Professional

www.scmpatterns.com

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Other Agile SCM Resources

- <http://www.scmpatterns.com/>
 - *SCM Patterns* book has most of the codeline, workspace & build patterns presented here; and this site has a reference card and synopses for the patterns
- <http://www.cmwiki.com/AgileSCMArticles>
 - Numerous links to specific “Agile SCM” papers on the subject of patterns for continuous integration, promotion, staging, branching & merging, and more
- <http://blog.bradapp.net/> and <http://acme.bradapp.net/>
- <http://www.berczuk.com/>
- <http://www.cmcrossroads.com/>

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Thank You!

شكراً

Gracias

Juspajaraña

Tesekkürler

Salamat

Yum botic

Xie xie

Bedankt

Khawn khun

Obrigado!

Arigato

Diky

ขอบคุณ

Mahalo

谢谢

Merci

Helten Dank

Danke

Grazie

Spacibo

Köszönettel

תודה