Oracle Cloud Applications Post Go Live Activities

Post Go Live Leading Practices

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PURPOSE STATEMENT

This document provides an overview of post implementation leading practices that details activities that are the responsibility of the Cloud ERP customers after going live.

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INTRODUCTION

The objective of this white paper is to provide post implementation leading practices to customer success managers, implementation success managers and system integrators that details the activities and best practices that are the responsibility of Cloud ERP customers after going live. Implementation is just the first step in realizing the business value that Oracle ERP Cloud service provides.

Constant change and innovation. Implementation success managers should stress to customers that with Cloud ERP there is constant change and innovation.   This is different for customers coming from legacy applications where their go live is a huge change event and often stops until the next upgrade. Customers must staff their organizations appropriately to handle the change. These resources are responsible for preparing for each quarterly release for the organization, for testing the new release during the testing window and for transferring the knowledge to the rest of the organization.

Cloud ERP is 'upgrade safe.' Customers will no longer be behind the curve or exposed to potential security flaws because they have not upgraded their applications. Customers will automatically be on the latest version of the applications with all of the latest security, functional and some legislative updates included.

As part of your Go-Live activities the following are post implementation leading practices that will create a lasting positive experience.

Throughout this document there are references to Customer Success Managers (CSM), Implementation Success Managers (ISM) and System Integrators or Implementation Partners. Any of these resources can follow the guidance included here.

COMMONLY USED TERMS

A **Super user** plays a key role in the business application support infrastructure. In addition to being on the front line with users, they serve as liaisons between the business and IT organizations, enabling IT to focus on the more technical aspects of system support.

IMPLEMENTATION PARTNER TRANSITION

Before the partner resources, who fully understand the cloud applications and the customer's solution, depart they need to transition knowledge to the proper customer resources or future (external) support resources. The partner resources should consider documenting key tasks that are part of normal functional maintenance (suppliers, bank accounts, customers, tax rates, etc.) In addition to the documentation, the following are key reviews that should take place:

Functional Solution Review

Configuration and business process review with Super Users that should also focus on the logical processes that would be considered "normal functional maintenance" (i.e. adding a business unit, normal changes to the HCM organization structure, defining a new list of value entry).

Technical Solution Review

Non SaaS functions (i.e. interfaces, scheduling tools, etc) review with IT Support Staff to ensure that all documentation is complete and accessible and that a general support understanding is present to provide guidance during the planning of an update or triaging of a problem. It is also recommended that test plans be shared for each non SaaS function and these be executed after each update.

Integration Operational Review

Solution, scheduling, troubleshooting review with IT Support Staff so that routine health checks on the state of execution can be done and issues can be triaged should a problem occur.

Security Operational Review

Detailed process and solution review with IT Support Staff in order to ensure that they understand the current security model including any custom roles that were created, the basics of how Fusion application security works and review the administration process to create a new user, maintain role assignments and also setup of new printers. This should also include a review of how the customer's SSO integrates with the Oracle Cloud SSO functionality.

Oracle Cloud Operations Review (SR, Cloud Portals, Outages)

A review of all of the standard Oracle Service portals, a review of SR best practices, a review of the various cloud operations recurring maintenance activities and a review of the available cloud service request types.

The following document describes all the services that customers can request for the cloud environments:

> **Learn More: Oracle Applications Cloud Service Entitlements Doc ID 2004494.1**

Conversion Methodology and Tool Review

Approach and tool review to prepare for potential re-use in case of customer executing a new business acquisition.
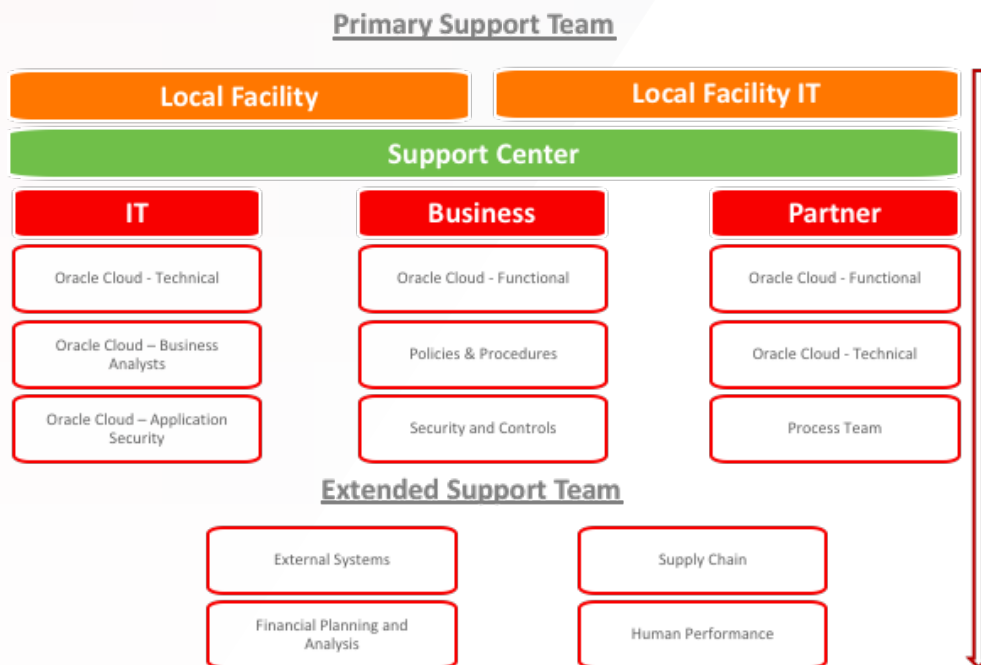
Training Material Review

Content and delivery method review to prepare to use in the future for all end users. There is likely training created for multiple groups of users. The most common training is done for:

- Professional users or users that are using several applications on an ongoing basis to perform their day to day jobs. An example is a member of the finance department.
- Self Service user are those users that use the application less frequently and create transactions like expense reports or purchase requisitions.

IMPLEMENT A SHARED SUPPORT MODEL

The goal is to ensure that a fully qualified issue gets quickly documented, routed efficiently to the right resource for triage, forwarded to an expert, if required, to provide a solution, the information and status provided back to the user and the issue formally closed. The support structure typically involves a front-line support team of super users and subject matter experts that work directly with the end-users. They are then supported by solution functional and technical experts from either the customer and/or partner teams. If these two layers of support cannot resolve the issue, then that 2nd level team should turn to Oracle Support for assistance via the standard Service Request (SR) process via the My Oracle Support portal (support.oracle.com).

An example shared support model follows:

Primary Support Team

Local Facility	Local Facility IT
Support Center	

IT	Business	Partner
Oracle Cloud - Technical	Oracle Cloud - Functional	Oracle Cloud - Functional
Oracle Cloud – Business Analysts	Policies & Procedures	Oracle Cloud - Technical
Oracle Cloud – Application Security	Security and Controls	Process Team

Extended Support Team

External Systems	Supply Chain
Financial Planning and Analysis	Human Performance

DOCUMENTATION

Formal Instance Management Plan

A formal Instance Management Plan should be authored and maintained in order to keep various activities documented to avoid conflicts. This plan should be created during the deployment and continue to be maintained after Go-Live as a living document. The activities included within this document are:

- key project testing events

- configuration completion milestones

- external integration environments that are linked to each pod

- P2T (Production to Test copy) or T2T (Test to Test) refresh events

- scheduled update bundle maintenance dates

- scheduled update maintenance dates

- pod names

- application versions, languages installed, pod URLs

- associated PaaS environments

Validate documentation on configuration decisions, reporting, interfaces, ESS jobs and extensions (customer self-sufficiency).

Keep a pristine copy of your production functional configurations in the FSM configuration templates.

Additional information on creating an Instance Management Plan can be found in this note on MyOracle Support:

> **Learn More: Oracle ERP Cloud Instance Management Plan (Doc ID 2351681.1)**

PERFORMANCE MONITORING

Establish Performance Baseline Metric (manual) in Production & Test (provides a point of reference to analyze if performance degrades)

Proactively review all IT infrastructure, Firewall, IT browser and IT carrier changes to determine potential impact to connecting with Oracle ERP Cloud service.

If a performance issue is identified, here are some MOS Notes to review:

- Performance Issue SR Template (Doc ID 2031093.1)

- Best Practices for Browser Settings and Performance on Fusion Applications (Doc ID 1385107.1)

- How to Capture a Fiddler Trace to Troubleshoot Issues and View HTTP(s) Requests (Doc ID 1547259.1)

- SRDC : Fusion Financials BI Report Performance Data Collection (Doc ID 2035327.1)

CONTINUOUS TRAINING

Customer Connect

Register key IT and business users on Customer Connect. There is a variety of information on Customer Connect. From Forums to the Idea Lab to Events to Resources. Dedicate one user to establish watches on content update and forward as needed to other stakeholders.

- Forums: Pose questions, explore ideas, and discuss Oracle Applications

- Idea Lab: Share your ideas on product enhancements, vote and comment on your favorite ideas.

- Events: Learn about upcoming events that showcase new release functionality and more.

- Resources: Release Readiness and learn more on Oracle University

- Members: Build your Network and Connect with Other Community Members

- Search: Posts, Comments, Forums and People

Learn more using this link:

Learn More: Customer Connect

Oracle University

Provides many valuable application training opportunities courses for project team members.

Learn More: Oracle University - Learning Subscriptions

CLOUD NOTIFICATIONS

A leading practice that has worked for many customers is to establish a distribution list created by the customers' email administrator. The customer's ERP/HCM staff and system integrators are subscribed to that distribution list. The Service Administrator can then add that distribution list as a notification user of the Oracle Cloud Service. The people receiving the system availability notifications need not be service administrators. It is critical that the user(s) that receives cloud notifications from Oracle do in fact read these and have the ability to act upon them. In addition, customers should have a process in place to update this email if and when a contact is no longer at the customer. This distribution list should be reviewed during the go-live period to ensure it has the appropriate contacts post go-live. For additional information on Service Notifications, review Doc ID 2129641.1.

Learn More: Cloud Notifications (My Services)

USER EXPERIENCE / SECURITY

Complete a sample check on user's browser settings to ensure optimal performance. You can find best practices for browser settings and performance on Fusion Applications here (Doc ID 1385107.1)

User Security Operations – As you continue to run your business on the Oracle Cloud, employees will be hired, fired and promoted, all of these actions may require changes to the Oracle Cloud Applications (create user and assign roles, end-date user or grant/revoke roles). This maintenance must be executed by the customer's application security administrator with their application pod.

INTEGRATION MONITORING & TROUBLESHOOTING

Your solution may include integrations with other applications or entities that are not part of Oracle-delivered seeded cloud applications. If this is the case, then a resource from the customer must be tasked to monitor the execution status of those integrations (both inbound and outbound) to ensure that things are running smoothly.

This resource would also be responsible for conducting analysis into any execution issues and collaborate with external application owners to restore the integration to a steady state.

This person would also open and support any integration-related SRs with Oracle Support if initial analysis points to an Oracle Cloud Applications issue.

The following table shares links to notes in MyOracleSupport that are key troubleshooting resources:

Item	Link
Execute Enterprise Structures Setup Report	MOS Note
Diagnostic Tests for Fusion Procurement	MOS Note
Diagnostic Tests for Fusion Financials	MOS Note
Diagnostic Tests for Fusion Project Portfolio Management	MOS Note
Troubleshooting Guides: Financials	Information Center (MOS)
Troubleshooting Notes - Recently published Troubleshooting notes to help you diagnose and resolve your issues	Information Center (MOS)
Debug & Tracing - Use these documents to capture debug logs and trace files	Information Center (MOS)
Guided Resolutions-Guided help resolving issues using diagnostic scripts	Information Center (MOS)
Diagnostics- Diagnostic tools, scripts, and notes to pinpoint product issues	Information Center (MOS)

UPDATE PLANNING & TESTING

Updates are not upgrades. They are smaller, simplified and less disruptive. Many of the new features are delivered as 'opt-in' items, which means you choose if and when to enable them. The What's New document provides update specific guidance about any changes or new features delivered with the update.

Updates are predictable. This means you can plan the time you need to test the update from the first day.

On a quarterly basis, Oracle will deliver new functionality and service updates via a pre-scheduled maintenance update. This update is applied to your non-production environment(s) on the first weekend of the quarter and then applied to your production environment on the third weekend of the quarter. Customers receive updates on one of the following cadences:

- Jan-Apr-Jul-Oct

- Feb-May-Aug-Nov

- Mar-Jun-Sep-Dec

In between these two maintenance windows (2-week period), the customer has the opportunity to execute appropriate testing to ensure that the update to their production environment will not adversely affect their business continuity and create any issues with their unique process.

Customers located in the Middle East will receive their updates on Thursdays instead of the standard of Fridays.

Monthly vs Quarterly

It is not uncommon that customers receive Monthly updates during implementation. These customers will need to log a service request to switch to quarterly updates upon go live. As customers are considering this change, it is important that they choose a cohort (update cadence) carefully; making sure to avoid critical business periods, for example year end.

Optional Concurrent Maintenance

The Enterprise concurrent maintenance option allows you to keep your non-production and production environments at the same code level, by ensuring that application updates are applied to both of your environments at the same time. There are two types of concurrent maintenance:

1. Concurrent Maintenance as Non-Production: This option applies ONLY if you are not yet live in production, and will ensure that the production environment is maintained at the same level as the Non-Production environment(s).
2. Concurrent Maintenance as Production: This option applies ONLY if you are live in production and have more than one Non-Production environment. It ensures that the additional Non-Production environment is always maintained at the same level as the production environment.

For additional information on optional concurrent maintenance:

Learn More: **Oracle Fusion Applications Cloud Concurrent Maintenance Option**
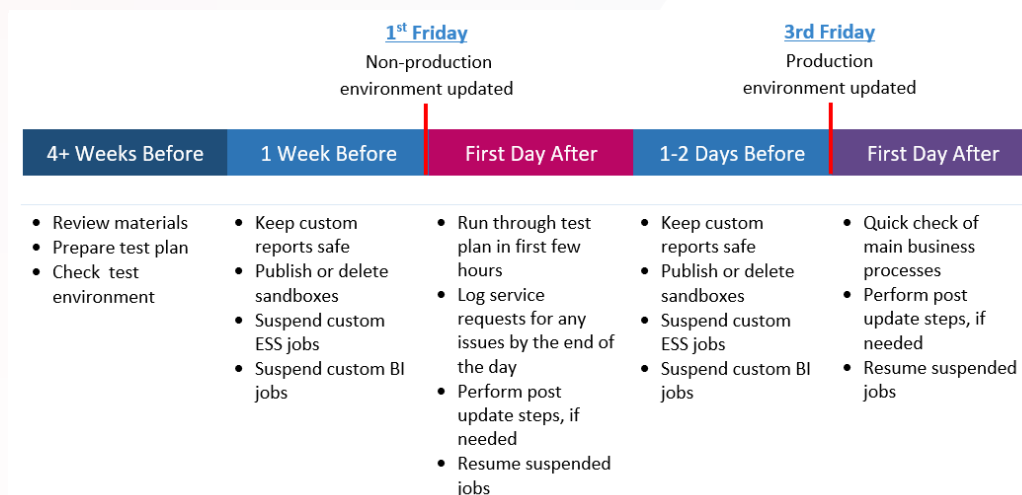
Testing

Please note that Oracle conducts comprehensive functional testing in a standard ERP Cloud services environment that contains a standard model of configuration and transaction data. Oracle does not have access to customer specific configurations and transactions for testing purposes. Therefore, to minimize the risk of an unplanned disruption of services, Oracle recommends that our customers perform appropriate functional testing as part of the update maintenance cycle.

If needed, the customer will manage and execute this required testing in their test pod and report any issues found via a priority service request (SR) with Oracle Support to work the issue to resolution before the scheduled production maintenance.

There are many ways to perform your functional testing:

- Use automated functional regression testing tools such as Selenium, OATS (Oracle Application Testing Suite), or build your own test cases and scripts
- Testing as a service – several Oracle Partners offer this service and they have a full library of test cases and scripts for vanilla functionality

Below is a sample timeline recommended for testing quarterly updates:

1st Friday Non-production environment updated			**3rd Friday** Production environment updated	
4+ Weeks Before	**1 Week Before**	**First Day After**	**1-2 Days Before**	**First Day After**
• Review materials • Prepare test plan • Check test environment	• Keep custom reports safe • Publish or delete sandboxes • Suspend custom ESS jobs • Suspend custom BI jobs	• Run through test plan in first few hours • Log service requests for any issues by the end of the day • Perform post update steps, if needed • Resume suspended jobs	• Keep custom reports safe • Publish or delete sandboxes • Suspend custom ESS jobs • Suspend custom BI jobs	• Quick check of main business processes • Perform post update steps, if needed • Resume suspended jobs

Versions

Oracle has changed the way it identifies a version. It is now the last two digits of the year + letter for the quarter:

Example: 19A = 1st quarterly delivery for 2019

New customers implementing will receive this in January. Then the 'groups of customers' (also referred to as cohorts) will begin – first group to be updated in February, second in March and third in April. Each of the quarterly updates will follow this method.

Each customer will receive their non-production update on the 1st calendar weekend and production will be updated on the 3rd or 4th calendar weekend of the month.

Documentation

Supporting documentation published in advance on the Oracle Cloud Release Readiness (Documentation) Portal

- Spotlights are overview videos.
- New Feature Summary contains high level descriptions.
- What's New guide gives the details and is the primary resource for update planning.
- Readiness Training videos give an in-depth look at the new features, including demos and best practices.

For additional information:

See Cloud Operations Practices (Doc ID 1541346.2)

See Oracle Applications Cloud Known Issues and Update Documents (Doc ID 1603154.1)

CONCLUSION

Customers choose Oracle ERP Cloud Service with an expectation of achieving faster time to value through shorter implementation timelines. Implementation is just the first step in realizing the business value that Oracle ERP Cloud service provides. Before customers are getting ready to cutover to production, it would be useful to communicate and review some of the key points referenced within this document.

Support structure and processes - Defining and Implementing a Post Go-Live Support Structure and Help Processes before the solution is live is very critical as your users will need to know how to get assistance for questions or issues they may have when they are using the system. The target is to ensure that a fully qualified issue gets quickly documented, routed efficiently to the right resource for triage, forwarded to an expert, if required, to provide a solution, the information and status provided back to the user and the issue formally closed.

Post-Production Transition Plan – we have reviewed how the partner resources, who fully understand the cloud applications and the customer's solution on top of it, will transition this knowledge to the identified customer resources to ensure that the customer is properly prepared to support themselves going forward once the implementation partner has departed.

In summary, reviewing post implementation leading practices is a critical step in the process that will create a lasting positive experience.

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Integrated Cloud Applications & Platform Services

White Paper **Oracle Cloud Applications Post Go Live Activities**White PaperOracle Cloud Applications Post Go Live Activities Oracle Cloud Applications Post Go Live Activities
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