

ORACLE

 Ebook

How to Cloud:

# A Five-Step Guide for Successful Oracle Cloud ERP Projects

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Introduction

# Cloud Momentum

Start leveraging tomorrow's  
ERP, today.

## Cloud Momentum

More and more organizations are moving their on-premises enterprise applications to cloud solutions. Why? They want to change the cost structure of their applications portfolios and reduce their risk for technological obsolescence while delivering growth, innovation, operational agility, resiliency, and efficiency.

**86%** of digital finance leaders say their organization has a **digital-first** and **cloud-first** mindset.

Source: [Agile Finance Unleashed: The Key Traits of Digital Finance Leaders \(AICPA and Oracle research, 2019\)](#)



There are different paths to move to the cloud. For example, you can take a single process such as budgeting to the cloud or you can move all of your financial applications and processes to the cloud. In most cases, the most beneficial path is a full move from on-premises to SaaS applications, which are designed and built for the cloud and provide innovations to support a modern digital business. (See [The First Project Decision—Which Cloud Model?](#) in the Additional Resources section of this document.)

Oracle has assembled this ebook as a high-level guide for your on-premises-to-cloud journey. It provides a sequential summary of recommended steps based on actual cloud projects, and advice from leading partners on how to successfully execute this journey.

This document is not intended to be a substitute for an engagement with Oracle or one of our partners. Oracle recommends implementing solutions with input from experienced project and technical professionals.

Be sure to check the Resources section at the end for additional information to help you on your journey to the cloud.

[Go to the Resources Section](#)

Step 1

# Plan

Define and establish project categories covering scope, design, teams, and messages.

## Plan

Managing a cloud migration project may seem like running any other business and technology project. But the advantages and differences are immediately visible when project plans and resources are mapped. The benefits of a cloud project, when compared to typical on-premises projects, appear early on in the process.

As the business case for a cloud project gains approval, cost and schedule advantages stand out. (See [Make the Business Case for Cloud](#) in the Additional Resources section of this document.) This is also where tasks for cloud projects diverge from on-premises projects. Smaller cloud projects—especially hybrid efforts—receive approval even faster and with less justification, because they cost less and don't require capital expense.

The components of a cloud project fall into five categories: **project definition**, **teams**, **design**, **rollout**, and **communications**. To deliver success, a project must collect the information across each category before kickoff.



## 1. Project definition

This task establishes the foundation for a cloud project. Failure to provide clarity and detail will create problems downstream. Start with the project's intent by writing a mission statement with a charter that incorporates objectives and goals. The next step is to build a project foundation that unambiguously defines goals, scope, risk, a detailed budget, and staffing requirements (both internal and external), all mapped to a general timeline and task schedule.

These tasks are similar across on-premises and cloud efforts. Yet this step moves along quickly with cloud, since there are fewer tasks. Gone are tasks for hardware, software installation, custom code testing, and other on-premises components.

### Partner with IT for a successful transformation

**73%** of finance leaders surveyed said that closer CIO/CFO alignment has become critical to achieving finance transformation.

Source: [Transforming the Finance Function](#)

## 2. Project team

With a cloud project, building a team is easier. No need for hardware architects, custom application coders, report builders, or software installers. With cloud projects, skills focus on business process consultants and data analysts, who configure and apply best practices, user roles and responsibilities, and built-in reporting and analytics.

It's important to clearly define each project role and its associated responsibilities. A few membership requirements to consider: Always include a dedicated project manager and select business partners as needed. If you're currently an Oracle on-premises customer, consider Oracle Soar to accelerate your cloud journey ([see sidebar 1](#)).

You should also have a steering or executive committee. Find an executive sponsor who will advocate for success, remove roadblocks, and engage other senior executives when needed.

## 3. Project design

Think of this as your blueprint for success. Primary outputs included in the design document are the applications to be deployed, any third-party applications, and related systems that require integration. The design must also include detailed data definitions, user requirements, and all required business processes. Some of these components, such as the design of the chart of accounts, will require significant consideration.

Having the design in place at the outset is critical. With the design work done up front, you can hit the ground running with configuration tasks. And with modern cloud applications, these tasks have been simplified.



## 4. Project rollout

Determine which business units and geographies will be covered and in what order. Also, identify the key requirements to take the new system live and into production. Establishing these go/no-go milestones early serves as a logical check for the project schedule. Some capabilities may be earmarked for future deployment after the initial go-live. This is also where you should define goals and key metrics to monitor and assess after going live.

As in previous steps, there are cloud and on-premises similarities. But since the cloud delivers more simplicity, you get the added benefits of a shorter schedule and better scope control.

## 5. Project communications

Internal communication is vital for project success. Consider branding the project with a project name and logo to build internal recognition and awareness. Communicating on a regular basis the project schedule and how the organization will benefit from the project builds awareness and positive anticipation. Change can be hard. Investing in communication throughout the life of the project can help internal teams adjust and get on board quickly.

With the cloud, the best part is the excitement and proven track record of cloud projects. With users already plugged-in to their smartphones and other cloud-enabled applications and platforms, changing from last-century on-premises systems to modern cloud applications is natural, intuitive, and exciting.

Sidebar 1



**ORACLE**  
Soar

### Soar to the Cloud

**Moving to the cloud just got a lot easier—and faster.**

Oracle Soar—the world's first automated cloud application upgrade offering—integrates our time-proven cloud methodology and automated upgrade utilities with new innovations and technologies such as AI and machine learning.

Oracle Soar helps on-premises customers migrate to the cloud with up to 30% reduced time and cost. It's a whole new cloud journey with faster time to value, reduced risk, and increased transparency.

Learn more about Oracle Soar at [oracle.com/soar](https://oracle.com/soar).



# Caesars—11 tips for a smooth migration to the cloud

## The house wins

Caesars Entertainment is going all in with the cloud. It moved Caesars' financial operations off a 30-year-old on-premises system to Oracle Cloud ERP and Oracle Cloud EPM. Caesars' Vice President of Transformation Michael Mann offers these **11 tips for a successful migration:**

- 1 Don't underestimate the data conversion process.
- 2 Give testing your undivided attention.
- 3 Involve your partners and suppliers in that testing.
- 4 Test the application under extreme conditions.
- 5 Line up senior management support.

- 6 Tackle change management head on.
- 7 Dedicate full-time people to specific project roles.
- 8 Avoid integrations whenever possible.
- 9 Document everything to pass audits.
- 10 Enlist people from your cloud vendor for your implementation team.
- 11 Engage the network team.

[Read the complete WSJ article](#)



## Step 2

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# Implement

Configure and integrate.  
Assess data and reports.  
Evaluate extensions.

## Implement

With preparatory work complete, it's time to implement the project design. This is the bulk of the workload in terms of budget, time, and tasks.

Implementing the cloud project requires far fewer tasks than a traditional on-premises solution. Jettisoned tasks include hardware activities, custom coding, software loading and patching, and most (but not all) testing and training. Implementing a cloud project typically covers four, and sometimes five, core activities, collectively called **CIDER**.



### 1. Configure

Cloud applications are focused on configuration rather than customization. It's important early in a project to configure data structures and hierarchies, organizations, and user roles and responsibilities. Coupled with the delivered standard business processes and their workflows, core business activities can be set up quickly.



## 2. Integrate

Few solutions, especially at large enterprises, embrace all business functions. Integrating third-party solutions or legacy systems into cloud applications preserves prior investments and unique capabilities. Expect some integration work. This is an area where you should partner with your IT colleagues on the project team, as they may have existing integration frameworks. Take advantage of [Oracle Integration Cloud](#) to support your integration requirements. You can also find prepackaged connectors in [Oracle Cloud Marketplace](#).



## 3. Data

Moving from on-premises systems involves moving data into the cloud. Once the quantity of data and its definition are defined, this implementation task requires extraction, transformation, and load (ETL) skills covering data quality and normalization tasks. With complex data scenarios, instead of spending time and budget preparing everything in advance, consider using [Oracle Enterprise Data Management Cloud](#), which simplifies data environments.



## 4. Extensions

One of the fundamental advantages of cloud applications is that they are designed to be configured rather than customized. However, when necessary, applications can be extended or complementary capabilities can be developed using [Oracle Platform as a Service](#). Preintegration with Oracle SaaS applications removes the complexity for the most common types of integration, and extensions are preserved when the application is updated.



## 5. Reports

Oracle Cloud Applications come with many reporting capabilities and predefined reports. At implementation time, sort reporting requirements into two buckets: **1)** Identify which reports can be replaced with real-time, onscreen information and the embedded analytics included in the new cloud application; and **2)** Determine the reports that need to be generated and distributed. As a starting point, consider the inventory of nearly [600 cloud financial reports](#) from Oracle.

## Break the custom code habit

It can be hard to let go of your on-premises customizations; in fact, this is often the largest psychological impediment to a migration project. That's understandable, especially when the effort and investment for custom code has typically been large. Having large amounts of custom code has held organizations back from getting the latest capabilities, and has contributed significantly to running costs.

In the cloud, small tweaks to current business processes will often eliminate the need for custom code, especially when following [Oracle Modern Best Practice](#). Use a cloud project to start fresh and harvest benefits for years.



## Step 3

# Verify

Check configurations and related implementation items against project definitions.

## Verify

Once implementation tasks are complete, it's important to check the accuracy and completeness of the work against project requirements. Like on-premises system testing, it's critical to confirm:

- 1. Data quality:** Data is the fuel of all enterprise systems. Verify the following four items related to the migrated data: cleanliness (including spelling); conformity to the data dictionary; and concurrence with the predetermined period pull; and, most important, be certain the data is correct.
- 2. Data archive:** Preserve old system data. Legacy systems usually have a lot of old data. With a new cloud system, you only move the required years of data forward, and you don't discard the past. Instead, archive data that's not migrated and preserve data integrity with read-only access.
- 3. Workflows:** Connect and drive business processes. Business processes connect with workflows, which drive end-to-end enterprise activities. Verify the primary and branch paths, including the decision logic variations of each workflow.

**4. Security: Assurance, confidence, and integrity.** Thoroughly test CRUD: copy (download), read (view), update (alter and change), and delete (erase) access to system logins, sensitive data, user configurations, account management, and report modifications. Determine and verify security protocols with Oracle.

**5. Roles: Positions and titles.** Check that all applicable job roles, positions, and titles are properly identified and implemented.

**6. Responsibilities: Defined work activities and tasks.** Responsibilities are different than roles. The correct mapping of responsibilities to roles is critical for security and workflows.

Unlike with on-premises systems, the cloud deployment will be easier to verify. Since the project is deploying cloud applications, the physical infrastructure, security, code currency, applications, and functionality don't need the complex testing approaches used with on-premises systems. It's all ready to go.

With cloud projects, verification is focused on CIDER: **configurations, integrations, data, extensions, and reports**. With good design documentation and effective data migration, this is essentially a checklist exercise.

Once the project team is satisfied that the implemented solution matches all aspects of the defined project, it's time for user acceptance. When the project was defined, key stakeholders across business units and executives were identified. They also were key to preparing the project's definitions. Return to these individuals and get their signoff confirming that the implemented project matches their requirements.

It's also important to engage business process owners at this stage. They can be the champions of best practices and keep the organization from straying from modern standards.

Business process owners (BPOs) are also the vanguard against customization efforts and can advocate for promoting and communicating best practices across the organization. If you don't have BPOs at this point, this is the perfect time to establish this critical role.

Sometimes there is misalignment. This is the opportunity to revisit requirements and correct the problem. After the fix, be sure to re-engage the appropriate stakeholders.

Sidebar 3

## Accelerate Oracle ERP adoption with Oracle Guided Learning

Oracle Guided Learning helps SaaS customers improve cloud adoption by driving seamless education, change management, and communication in real-time, at the moment of need.

Oracle Guided Learning delivers knowledge directly through your Oracle Fusion Cloud Applications, making it easy to educate and engage your employees. By providing them with step-by-step guidance, tailored learning content, perfectly timed delivery, and updates delivered at the speed of the cloud with every Oracle Fusion update, employees can quickly work through virtually any change or process - thanks to Oracle Guided Learning at their side.

Learn more about Oracle Guided Learning at [oracle.com/oglforerp](https://oracle.com/oglforerp)

## Upskill your ERP skills with Oracle Learning Explorer

[Oracle Learning Explorer](#) offers free entry-level training to help businesses and their employees cultivate IT skills across Oracle's entire portfolio.

Oracle Learning Explorer helps employees build a foundation of knowledge by providing on-demand, video-based training for multiple role-based learning paths, including skills validation quizzes and badges to highlight their achievements.

Learn more about Oracle Learning Explorer at [oracle.com/oleforerp](https://oracle.com/oleforerp)



Step 4

# Prepare

Get ready for production.

## Prepare

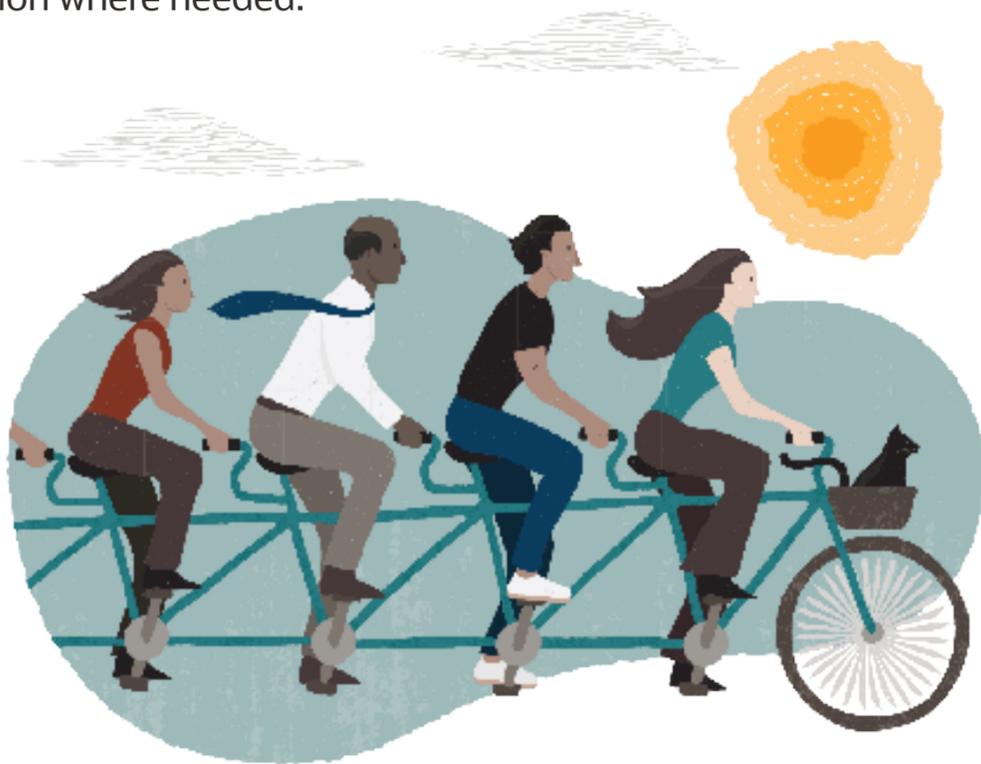
With business approvals in place, the countdown to a production cloud system begins. Work these three tasks in parallel:

- 1 System readiness**  
Complete the list of final items to be addressed or corrected (known as the punch list) and set initial values in the system. For example, determine the first purchase order number to be issued in the cloud.
- 2 User readiness**  
Provision users with their user names, passwords, and related information. Let them know how they can get assistance when the solution goes live.
- 3 Organizational readiness**  
Focus on completing change management and core training as required. If the project faithfully embraced change management in the initial preparation tasks, users will be ready to go and well informed about their new system.



In the preparation phase, cloud projects have advantages, once again, over on-premises projects. There is less to do, which shortens schedules and reduces budgets. It also makes it easier to move forward when project team members are evaluating the decision to go into production. When confidence is high regarding the collective readiness for production, there is one final step prior to going live.

In step 1, recall the project established “go/no-go” criteria. Review these criteria with the steering committee and executive sponsor. Select an appropriate date and insist on a unanimous decision to confirm go-live. If there are any doubts, investigate them and correct any issues. It’s important to a successful go-live to have everyone on board and communicate the decision broadly, using supporting information where needed.



Sidebar 4

## Your destination for success—Oracle SaaS Platinum-level Support Services

Our goal is to provide everything you need across IT and business to have seamless adoption of our SaaS products and reach business value faster.

Our complimentary Platinum-level services are the new standard. With features like named support engineers during implementation, 2,000-plus free education topics, proactive monitoring and outreach, and access to business and technical expertise, your route to success has never been so supported.

Oracle SaaS Support Services help you bridge the gap between the promise of success and the realities of execution—we’re your bridge to success.

Learn more about Oracle SaaS Support Services at [oracle.com/support/saas-services](https://oracle.com/support/saas-services).

## Step 5

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# Deliver

Go-live and beyond.  
Production, promotion,  
celebration.

## Deliver

For projects that have followed the previous steps, go-live should run smoothly. A few isolated problems may occur, but these should be handled by the user assistance team identified in the readiness chapter. The project team, with associated IT infrastructure and network staff, should diligently monitor system performance. At the same time, check with users on their tasks and overall experience.

The biggest difference between a cloud and on-premises go-live will quickly be obvious. There are far fewer issues. With a successful go-live, the end is really the beginning of a new cloud workstyle. This transformation from a last-century applications approach is a great reason to celebrate the project's success.

Start by throwing a party. Invite the steering committee, business partners, key business stakeholders, and others who were instrumental in orchestrating the project's success. Besides having fun, a party is a great vehicle for discussing the ups and downs of the project as a reference point for future endeavors.



And once the party is over, consider these seven additional activities:

**1. Monitor and measure:** Review the metrics identified during the initial preparedness step. Regularly measure and report on their performance while considering their value and potential use in other efforts. (See our project metrics and KPIs guide in the [Resources section](#).)

**2. Review the project:** Take time with the core project team, including partners, to document lessons learned and identify what worked well and areas to improve in a future project. Pay attention to company cultural aspects, user acceptance, and change management approaches. Consider presenting a comprehensive project debrief to the steering committee and executive sponsor.

**3. Stay engaged with Oracle SaaS Support Services:** Be proactive and stay connected with the Oracle SaaS Support Services team. They're a great resource, dedicated to your success, and are included for free with your cloud services ([see sidebar 4](#)).

**4. Establish ongoing training:** Ongoing training is important to maximize system productivity and applications knowledge. Establish training programs for new hires, refresher sessions, and deep-dive learning by utilizing Oracle LaunchPad, Oracle's free, interactive cloud education platform, where you'll find thousands of online courses ([see sidebar 3](#)).

**5. Join the conversation:** Join the [Oracle Cloud Community](#) to add your voice to the global conversation around Oracle Cloud Applications and learn from other users across products, industries, and locations. It's the simplest and best way to get involved and be heard.

**6. Be a reference:** Remember when the cloud applications selection process was underway, and talking to your peers who had made the cloud journey with Oracle was an important step? Consider speaking to others who are considering the migration to the cloud. [Being a reference](#) is also a great vehicle for networking and visibility.

**7. Plan the next cloud project:** After a successful cloud project, there will be major interest in new efforts, especially for retiring other on-premises systems and expanding the cloud footprint further. Build from your experience and plan your next cloud project.

Sidebar 5

## Customer success

### Reach your goals faster with Oracle Customer Success Managers (CSMs).

Oracle CSMs assist new customers with implementation, go-live, consumption, and end-user adoption of their new Oracle Cloud Applications.

Every day, these experienced managers guide new customers through their journey toward value realization of their Oracle Cloud business goals. With deep product and business process backgrounds, CSMs help you achieve your desired business transformation goals as you move to and grow with Oracle Cloud.

Discover how our CSMs can be a vital part of your team, helping you achieve your cloud adoption goals faster.

Learn more about **Oracle Customer Success Managers** at [oracle.com/cloud/customer-success-managers.html](https://oracle.com/cloud/customer-success-managers.html).



Conclusion

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# It's Your Move

Get in touch. Start today.

## It's Your Move

**Don't wait any longer to start your journey to Oracle's SaaS Cloud.**

You now know the steps to ensure a successful cloud project. The cloud is within your reach and Oracle is ready to help you at every step of your journey.

Contact us [here](#) or speak to your Oracle account representative to find out how you can begin your journey today.



# Additional resources to help you on your journey to the cloud

## Learn cloud fundamentals

- ▶ [The First Project Decision—Which Cloud Model? \(PDF\)](#)
- ▶ [7 Tips for Assessing a Modern ERP Deployment](#)
- ▶ [Oracle Cloud Learning—Oracle LaunchPad](#)

## Cloud project and change management

- ▶ [5 Steps to Moving from On-Premise to Cloud ERP](#)
- ▶ [How to Make the Move to ERP in the Cloud \(Without Getting Burned\)](#)
- ▶ [Cloud Projects Phase and Task Structure \(PDF\)](#)
- ▶ [Change Management \(PDF\)](#)
- ▶ [10 Laws of On-Premises to Cloud \(PDF\)](#)
- ▶ [Project KPS and Metrics and Business KPIs \(PDF\)](#)

## Select a cloud implementation partner

- ▶ [Oracle Soar from Oracle Consulting](#)
- ▶ [Oracle Cloud Excellence Partners](#)

## Make the business case for cloud

- ▶ [Request an Oracle Cloud ERP demo](#)
- ▶ [Take an Oracle Cloud ERP Quick Tour](#)
- ▶ [Oracle Cloud ERP benefits calculator](#)
- ▶ [SAP on-premises ERP to Oracle Cloud ERP benefits calculator](#)
- ▶ [Infor on-premises ERP to Oracle Cloud ERP benefits calculator](#)
- ▶ [Oracle Modern Best Practice](#)
- ▶ [Nucleus Research—Cloud Delivers 3.2x More ROI](#)
- ▶ [5 Compelling Reasons to Move from On-Premises ERP to Oracle Cloud ERP](#)
- ▶ [10 Signs It's Time to Move Your ERP to the Cloud](#)
- ▶ [5 Overlooked Advantages of Moving to the Cloud](#)
- ▶ [Oracle Customer 2 Cloud Program for on-premises customers](#)



# Additional resources to help you on your journey to the cloud (cont.)

## Learn from customers and their experiences

- ▶ Western Digital's Story: JDE to Oracle Cloud (video 1:34)
- ▶ Blackmores' Story: JDE to Oracle (video 0:43)
- ▶ The Fedcap Group's Story: EBS to Oracle Cloud (video 1:45)
- ▶ Orange S.A.'s Story: EBS to Oracle Cloud video (video 1:09)
- ▶ Scottish Water's Story: PeopleSoft to Oracle Cloud (video 1:00)
- ▶ Baylor University's Story: PeopleSoft to Oracle (video 1:42)
- ▶ Providence St. Joseph Health switches to Oracle (video 1:54)
- ▶ Precision switches to Oracle

## Learn from leaders and their experiences

- ▶ 6 Lessons Oracle Learned When Moving Its Finance Organization To The Cloud
- ▶ How to Build the Finance Function of the Future
- ▶ How to Modernize Your Enterprise Resource Planning
- ▶ How To Move To The Cloud: The 4 Biggest Back-Office Concerns
- ▶ How You Can Reimagine the Future of Finance
- ▶ Oracle Cloud Customer Connect Community
- ▶ Oracle Customer Success Organization
- ▶ Oracle Cloud Customer Successes

[Learn more about Oracle Cloud ERP](#)



The Oracle logo is centered in the image. It consists of the word "ORACLE" in a white, bold, sans-serif font. The background is a dark teal color with abstract, layered shapes in various shades of teal and blue. There are also faint, light-colored binary code patterns scattered across the background.

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