



Roles and Responsibilities – Multi Tenant CloudSuite Business and CloudSuite Industrial

For Infor staff and partner use and distribution

The following is a general guideline for roles and responsibilities in the implementation, operation, and ongoing Support of Infor CloudSuite Business and Infor CloudSuite Industrial Solutions. This is not a comprehensive list; however is intended to provide an overview of responsibilities in the relationship.

To request changes email CloudSuiteRoles@Infor.com

P = Primary Responsible Party O = Optional Responsible Party	S = Secondary Party F = Facilitator	Customer	MT Cloud Ops	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
		Contracting					
Bid process and SOW to Pre -Sales							P
Pre-Sales contract review							P
Capture business goals; create "Business Objectives and Goals" document							P
Complete contract with customer							P
Communicate contract signing to Order Desk			S	S	O	S	P
Project Initiation							
Engage Customer Success Manager (CSM)						F	P
Hand-off to CloudOps & CSM with documented configuration details, Site diagram, SKU's			S		O	F	P
Provision							
Provision the systems and perform provisioning test			P				
Install Infor application			P				
Set up all required environments			P				
Apply and confirm application licenses			P				
Install Doc-Trak			P				
Enable and set up of Polling			P				
Deployment and management of SSL certificates			P				
Database Installation							
Create and manage databases			P				
Create DB instances (SQL, RDBMS, etc.)			P				
Create databases, sites, etc. for add-ons to CloudSuite Business/Industrial			P				
Create demo and production database			P				
Load training data			P				
Create Admin User			P				
Multi Site creation and linking			P				
Create multi-site databases			P				
Link Sites			P				
Perform server backups/restores; add to SaaS daily schedule			P				
Set up configuring of server, services, and application performance monitoring tools			P				
Provision Validation and Communication							
Test, validate, and confirm environment			P				
Communicate provisioning complete			P				
Email customer and consulting with URL, Admin User ID, Password, instructions for first login			P				
Confirm customer received document and has successfully logged in			P				
Email Infor Rev Rec			P				
Update "Business Objectives and Goals" document						P	S
Implementation							
Project and Solution Management							
Provide project management and implementation assistance per Services Agreement and/or Work Order if executed					P		
Core project team training	P				S		
Participate in regular status meetings					P	S	
Establish regular calls with team and customer to review issues etc.					P	S	
Manage implementation, Integration and extension related tasks	P				O		
Manage application and environment data	P	S					
End-user authorization and management							
Create users (OS/Apps) - if using ADFS	P				O		
Create Users in Infor applications	P				O		
End-user training							
Train the trainer	P				O		
Build roll-out plan for training of all users	P				O		
Perform the training	P				O		



Infor CloudSuite: Roles and Responsibilities – Multi Tenant

CloudSuite Business and CloudSuite Industrial

	P = Primary Responsible Party S = Secondary Party O = Optional Responsible Party F = Facilitator				Customer	MT Cloud Ops	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
Roles										
Define required Roles	P			O						
Create Roles	P			O						
Manage Roles	P			O						
Batch job management										
Set up and management of recurring jobs	P			O						
Schedule Jobs	P			O						
Configuration and setup of Doc-Trak, Polling, MRP, APS				P						
Multi Site enablement										
Request additional Sites to be created	P									
Creation of new Site, new Site Enablement, and linking to other sites		P								
Set up Site Admin Replication and Regen Replication Trigger				P						
Set up replication rules for site admin and basic financial(G/L and Ledger consolidation)	P			O						
Regen Replication triggers, run manual Replication, repopulate all tables	P			O						
Perform functional testing										
All purchased modules	P			O						
Defined processes	P			O						
Incident Management										
Train on use of Xtreme Portal			P	O						
Create and manage users on the Infor Xtreme Portal	P			O						
First level user support of Xtreme ticket	P									
Incident escalation management			P							
Support customer created incidents with Infor Xtreme			P							
Reproduce discrepancies and assist in providing alternative methods to help maintain stability until the discrepancy is corrected		S	P							
Troubleshoot issues through remote diagnoses			P	O						
Coordination of Infor Xtreme Incidents with Cloud Operations team as required		S	P							
Change Management										
Request and approve changes and change controls	P									
Execute customer approved changes following change management process		P								
Life Cycle Management										
			P							
Provide component system updates that include fixes for incidents and minor and major			P							
Request installation of patches and fixes	P		S							
Apply APARs, Service Packs and upgrades		P		S						
Install patches/cyclical/upgrades to OS and application environment		P								
Test APARs, Service Packs and Upgrades and request promotion once tested	P									
Perform patch promotion from test to production environments		P								
Infor Administration Functions										
Maintain file systems and directories, such as purge user reports		P								
Monitor drive/file system space		P								
Monitor system and applications		P								
Monitor and administer operating system functions		P								
Maintain and manage logs within the operating system, environment, and application		P								
Maintain middleware components, such as WebSphere and IIS		P								
Maintain Infrastructure and Network on Infor side of firewall		P								
Database Administration										
Populate codes/parameter via SyteLine Forms	P			O						
Load data (Master, Transactions and Order) via SyteLine Forms	P									
Install patches/cyclical/upgrades to the MS SQL application		P								
Performance tune databases		P								
Perform MS SQL backups/restores		P								
On-going maintenance and administration		P								
Develop daily backup scheme		P								
Provide restores at customers request		P								
"Restoring" production database to Pilot		P								
Establish, size, and resize planning databases		P								
Solution Support and Assistance										
Provide assistance and interpretation of error messages		S	P							
Clarify program functionality and system capabilities		S	P	O						
Assist with interpretation of system documentation		S	P							
Isolate suspected product defect and submit defect ticket		S	P	O						
Escalate incidents		S							P	
Provide "how-to" assistance		S	P	O						
Interactive/Recorded Support Briefings		S	P							
Partner with development on resolution of defects		S	P						F	
Escalate defects on behalf of customer									P	
Implementation Turnover										
Update "Business Objectives and Goals" document									P	
Handover to Support		S	S	P				P		
Go Live report				O						
Go Live announcement				P						
Peer review - document project lessons learned			S	O				P		



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	Customer	MT Cloud Ops	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
Post Go Live						
Solution Management						
Manage application	P					
On-going creation and management of Users	P					
Incident management						
First level user support of Xtreme ticket	P					
Manage incident escalation			P			
Support customer created incidents with Infor Xtreme			P			
Troubleshoot issues through remote diagnoses			P	O		
Coordinate Infor Xtreme Incidents with Cloud Operations team as required		S	P			
Coordinate with Infor Xtreme Support for environment questions, APAR listing, APAR install, executing SQL Script, etc.		S	P			
Debugging process for issues/errors on subscriber system		P	P			
Provide root cause analysis on incidents within Infor Xtreme			P			
Life Cycle Management			P			
Provide updates that include fixes for incidents and minor and major releases			P			
Request installation of patches and fixes	P		S			
Apply APARs, Service Packs and upgrades		P		S		
Install patches/cyclical upgrades to operating system and application environment		P				
Testing of APARs, Service Packs and Upgrades	P					
Request promotion of patch from test to production once tested	P		S			
Perform patch promotion from test to production environments		P				
Change Management		S	S			
Request and approve changes and change controls	P					
Execute customer approved changes following change management process		P				
Infor Administration Functions						
Actively monitor system, applications, file system space		P				
Operating system administration		P				
Proactively notify subscriber of system alerts		P				
Cleanup and maintenance of logs within the operating system, environment and application		P				
Manage SSL certificates		P				
Maintain file systems and directories, such as; purge user reports		P				
Database Administration						
Install patches/cyclical upgrades to the MS SQL application		P				
Performance tune databases		P				
Perform MS SQL backups/restores		P				
Provide ongoing maintenance and administration		P				
Request "Restoring" production database to Pilot	P			S		
Perform and maintain backups of operating system, database and all application components		P				
Data copy and restores at customers request		P				
Multi Site						
Request additional Sites to be created	P					
Scope and costing of additional Site creation		S		S		P
Create new Site, new site enablement, and linking to other sites		P				
Set up Site Admin Replication and Regen Replication Trigger				P		
Fill in information in site/entities, intranets				P		
Set up replication rules for site admin and basic financial(G/L and Ledger consolidation)	P			O		
Regen Replication triggers, run manual Replication, repopulate all tables	P			O		
Solution Support and Assistance						
Provide assistance and interpretation of error messages		S	P			
Clarify program functionality and system capabilities		S	P	O		
Assist with interpretation of system documentation		S	P			
Provide "how-to" assistance		S	P	O		
Interactive/Recorded Support Briefings		S	P			
Knowledge Base (KB) article creation and maintenance			P			
Monthly touchpoint with customer (written or verbal)					P	S
Quarterly progress check against Business Goals					P	S