



# Roles and Responsibilities - Single Tenant CloudSuite Business and CloudSuite Industrial

For Infor staff and Infor 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](mailto:CloudSuiteRoles@Infor.com)

	Customer	Cloud Operations	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
<b>Contracting</b> P = Primary Responsible Party S = Secondary Party O = Optional Responsible Party F = Facilitator						
Bid process and SOW to Pre-Sales		S				P
Pre-Sales contract review		S				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
<b>Project Initiation</b>						
Engage Customer Success Manager (CSM)					F	P
Hand-off to CloudOps & CSM with documented configuration details, Site diagram, SKU's		S		O	F	P
Send Internal notification to Infor Sales and Consulting		P				
Send customer welcome packet		P			P	
Complete Pre-Install questionnaire and requirements documents	P					
Schedule and complete customer requirements gathering / Pre-Install questionnaire call as needed	S	P		O		
<b>Provision</b>						
Review of work order and provisioning plan		P				
Preparation of network architecture and diagram for provisioning		P				
Create the deployment script for the approved customer environment architecture		P				
Request application licenses		P				
Provision the systems and perform provisioning test		P				
Install applications that are pre-requisites for the application. Examples: WebSphere & IHS/ISS, Perl, Java6, etc.)		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				
<b>Database Installation</b>						
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				
<b>System Network and Administration</b>						
Infor LDAP maintenance (Inforbc domain with single tenant environment)		P				
Set up Site-to-Site VPN	S	P				
Perform server backups/restores; add to SaaS daily schedule		P				
Set up configuring of server, services, and application performance monitoring tools		P				
<b>Provision Validation and Communication</b>						
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
<b>Hand-over meeting to ICS (Partner) and support</b>						
Provide test document		P				
Review installed products		P	S	S	F	
<b>Implementation</b>						
<b>Project and Solution Management</b>						
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		S		P	S	
Establish regular calls with team and customer to review issues etc.		S		P	S	
Manage implementation, integration and extension related tasks	P			O		
Manage application and environment data	P	S				



# Roles and Responsibilities – Single Tenant CloudSuite Business and CloudSuite Industrial

	P = Primary Responsible Party	S = Secondary Party	O = Optional Responsible Party	F = Facilitator	Customer	Cloud Operations	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
<b>Implementation</b>										
<b>End-user authorization and management</b>										
Create users (OS/Apps) - if using ADFS	P							O		
Create Users in Infor applications	P							O		
Create users on customer AD	P		O							
Create users on IFS/ADFS	P									
Enable Single Sign On if applicable	S		P							
<b>End-user training</b>										
Train the trainer	P							O		
Build roll-out plan for training of all users	P							O		
Perform the training	P							O		
<b>Roles</b>										
Define required Roles	P							O		
Create Roles	P							O		
Manage Roles	P							O		
<b>Batch job management</b>										
Set up and management of recurring jobs	P							O		
Schedule Jobs	P							O		
Configuration and setup of Doc-Trak, Polling, MRP, APS								P		
<b>Multi Site enablement</b>										
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 (GL and Ledger consolidation)	P							O		
Regen Replication triggers, run manual Replication, repopulate all tables	P							O		
<b>Functional testing</b>										
Perform testin of all purchased modules	P							O		
Perform testing of defined processes	P							O		
<b>Incident Management</b>										
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			
Troubleshoot issues with Infor component systems when subscriber experiences unexpected results							P	O		
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			
<b>Change Management</b>										
Request and approve changes and change controls	P									
Execute customer approved changes following change management process			P							
<b>Life Cycle Management</b>										
Provide component system 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 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							
<b>Infor Administration Functions</b>										
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				
<b>Database Administration</b>										
Populate codes/parameter via SytleLine Forms	P							O		
Load data (Master, Transactions and Order) via SytleLine 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							
Request "Restoring" Production database to Pilot								S		
"Restoring" production database to Pilot			P							
Establish, size, and resize planning databases			P							
<b>Printer Management</b>										
Create and manage printers						P				
Set up and configure printer	P							O		
<b>Solution Support and Assistance</b>										
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				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
<b>Implementation Turnover</b>										
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		S			O		P



# Roles and Responsibilities – Single Tenant CloudSuite Business and CloudSuite Industrial

	Customer	Cloud Operations	Support	Consulting or Alliance Partner	CSM	Account Manager or Channel Reseller
<b>Post Go Live</b>						
<b>Solution Management</b>						
Manage application	P					
On-going creation and management of Users	P					
<b>Incident management</b>						
First level user support of Xtreme ticket	P					
Manage incident escalation			P			
Support customer created incidents with Infor Xtreme			P			
Troubleshoot issues with Infor component systems when subscriber experiences unexpected results			P	O		
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		S	P			
Provide root cause analysis on incidents within Infor Xtreme			P			
<b>Life Cycle Management</b>						
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				
<b>Change Management</b>						
Request and approve changes and change controls	P		S			
Execute customer approved changes following change management process		P				
<b>Infor Administration Functions</b>						
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				
Infor LDAP maintenance (Inforbc domain)		P				
<b>Database Administration</b>						
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				
<b>Multi Site</b>						
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		
<b>Solution Support and Assistance</b>						
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			
Manage system code customizations (coordination)	P					
Monthly touchpoint with customer (written or verbal)					P	S
Quarterly progress check against Business Goals					P	S