

CHAPTER 3

Getting the Most from
Your Oracle CRM
On Demand Service



In the last two chapters, we described the key features of CRM On Demand and how the underlying SaaS infrastructure simplifies deployment and speeds your ability to deliver business value to your organization. In this chapter, we turn to the knowledge and skills you will need to become really effective in your implementation and ongoing management of CRM On Demand. The good news is that Oracle has developed a variety of resources specifically for CRM On Demand that will help you acquire the knowledge and awareness you'll need to configure, deploy, upgrade, and maintain your company instance over the term of your subscription. The key is to know what resources are provided, why a resource would be useful, and where to access what you need.

This chapter will acquaint you with the resources and tools that you should draw on during the implementation process and after launch as issues arise. In each section, we will highlight

- The resources available and where to find them
- When and how to use a specific resource or tool

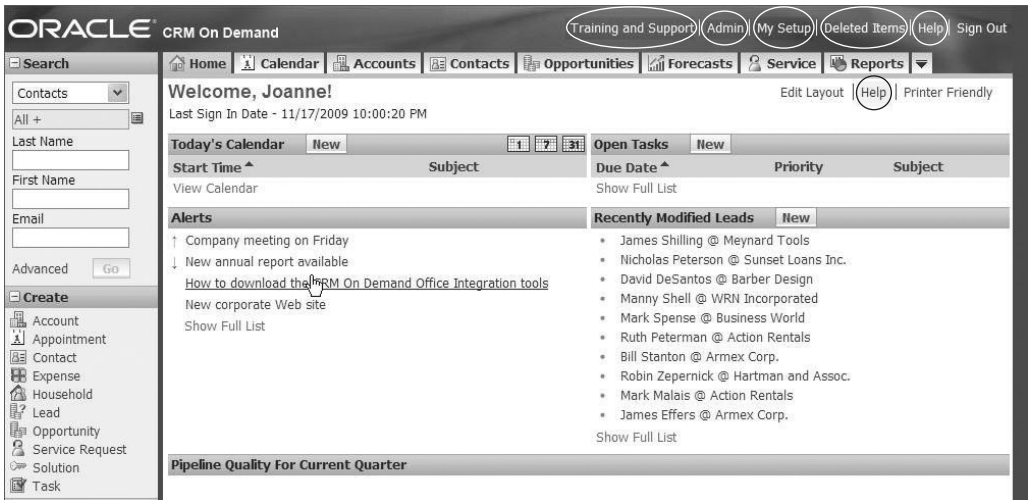
Self-Service Through a Single Point-of-Access

By design, all the supporting information and tools are organized and made available to you through the CRM On Demand application. You have self-service access to training courses, technical documentation, implementation tools, system notifications, and the ability to submit service requests. The objective is to have a single point-of-access and common source of information that you can “pull” from when logged into the service.

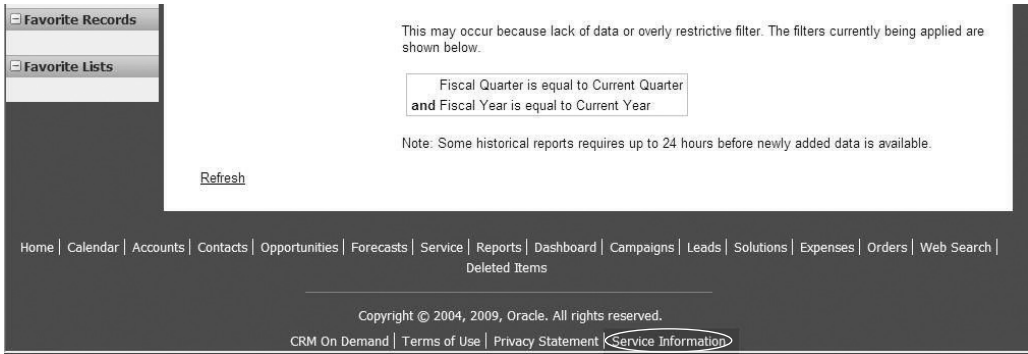
Navigating to Support Resources

Let's begin with a high-level view of the specific links on the CRM On Demand user interface that provide access to resources you will be using in the implementation process and beyond. Note that these links will bring you to the resources referenced later in this chapter.

After you log in to the CRM On Demand service, you'll find a series of links at the top and bottom of the home page layout; we refer to these as *global* links because they are found on every page regardless of where you navigate in the application. See Figure 3-1a and b.



(a)



(b)

FIGURE 3-1. CRM On Demand Key Support Links

The first link at the top, *Training and Support*, will take you to the CRM On Demand Training and Support Center. The Training and Support Center provides a central point-of-access for most of your support needs, including training courses, implementation tools, technical documentation, user forums, system notifications, and maintenance calendars.

Moving left to right, the next link is *Admin*. This link will take you to the Administration homepage with detailed information, tools, and templates that the project team will need to set up the system according to your requirements.

Next to Admin is the *My Setup* link to your Personal homepage. The Personal homepage has preference settings for individual users who want to personalize their experience within your unique company instance.

Next is the *Deleted Items* link. Any deleted records will be found here and may be restored up to 30 days after they have been deleted. This administrative tool is useful to highlight for *all* users. There are additional details governing this function that you will want to understand in greater detail, however.

You'll note that the user interface has two links to online help. The *Help* link at the top next to Deleted Items is a global link to all the content areas included in the general help library. You'll note an index and search function are available. A Help link can also be found on the upper-right corner of every page layout; this Help link is context-sensitive, meaning it will navigate to the information in the knowledge base most relevant to the user's current location and problems in the application.

Finally, note the *Service Information* link at the very bottom of the user interface. This link will provide useful operational information specifically related to your company's instance in Oracle's hosting environment. You'll find the software version numbers for your company instance, information about service availability, and scheduled maintenance events for your stage and production environments.

Now that you understand where to find these resources, let's discuss the capabilities that are most critical to your initial implementation.

CRM On Demand Training

Among all the factors that influence program success, the competence of your implementation team is among the most critical. Before you begin the implementation project, your implementation team must have adequate knowledge of CRM On Demand functionality, understand how to configure the application, and be able to complete the variety of tasks necessary to set up the system. Implementation teams who jump right into the configuration process without first educating themselves about the application's features and functions will likely experience delay and frustration before the project is finished. A common root cause of usability and system performance problems is poor design. Poor application design is a common result when the implementation team does not develop adequate product knowledge nor follow "best practices" for configuring core functions. Effective training alone will not assure the success of an inexperienced team. We strongly encourage implementation teams who are new to CRM On Demand to enlist experts with prior experience with the nuances of CRM On Demand configuration and what it takes to tailor a CRM application to meet the needs of front-office end-users.

To help your team build the necessary technical competence, Oracle has developed a broad library of training courses specifically for CRM On Demand that will help prepare your implementation team to be effective in their assigned roles. By completing the live and recorded courses, your team will deepen their functional knowledge of the application, as well as learn how to configure the environment to your business requirements. The training curriculum offered for CRM On Demand is accessed through two delivery channels:

- Technical courses delivered live online by instructors through Oracle University (for a fee)
- Prerecorded, task-based webinars available through the Training and Support Center (for free)

You will find brief descriptions of the course offerings and where to source them in the sections that follow. We will start by providing recommendations on the most useful courses to complete in the timeline of a typical project.

Recommended Training Courses

Since no single course can provide you with everything you need to know, and trying to take all the available courses before starting your project would be counterproductive, we recommend a series of courses in Table 3-1 for implementation teams with limited CRM On Demand experience. The courses in the *Core* track will develop a comprehensive understanding of the end-to-end system setup activities and are appropriate for any person who will support multiple stages of your implementation project, or post-launch administration. *Administration Essentials* is the most important of these courses. In terms of timing, it is important to complete the courses in the Core track before beginning your project. The courses in the *Data Import* and *Report Development* tracks can be taken after the project commences, but ideally will be completed before the project requirements and schedule have been fixed. Doing this ensures that you and your team have the knowledge necessary to complete the initial implementation project in an efficient way. In Chapter 4, we will describe the recommended project team roles when you have a multiperson implementation team and can assign people to concentrate on specific project tasks. In the event you can delegate the work effort among a team by assigning functional concentrations, you will note specific learning tracks for Data Import and Report Development.

In each row of Table 3-1, you will find the track designation, course title, brief objective, delivery format, and course duration. The courses are listed in the sequence we recommend they be completed.

Track	Course Title	Objective	Format	Duration
Core	Using Oracle CRM On Demand	System Overview	Recorded webinar	< 30 minutes
Core	Administration Essentials	Teaches about all aspects of system setup and administration	Live, online ILT	24 hours 4+ days
Core	What's New in Release 15	Overview of new features	Recorded webinar	< 30 minutes
Core	What's New in Release 16	Overview of new features	Recorded webinar	< 30 minutes
Core	Understanding Data Access & Visibility Control	Overview of how data is structured and exposed based on configuration rules	Recorded webinar	< 30 minutes
Core	Flexible Data Sharing Using Books-of-Business	Teaches how to configure Books-of-Business to company requirements	Recorded webinar	< 30 minutes
Core	Managing Groups	Teaches how to use groups to control data access and the visibility of company requirements	Recorded webinar	< 30 minutes
Data Import	Data Import Workshop	Teaches each step of the data import process	Live, online ILT	2 days
Data Import	Importing Your Data (Parts 1 & 2)	Teaches specific details on the import and validation process	Recorded webinar	Part 1: < 30 minutes Part 2: < 30 minutes
Report Development	Advanced Analytics Workshop	Teaches foundation skills necessary for using analytics and report development tools	Live, online ILT	2 days
Report Development	Build Your Own Reports: 1	Teaches how to control visibility to report data	Recorded webinar	< 30 minutes
Report Development	Build Your Own Reports: 2	Teaches how to create List Reports	Recorded webinar	< 30 minutes
Report Development	Build Your Own Reports: 3	Teaches how to format Custom Reports	Recorded webinar	< 30 minutes

TABLE 3-1. *Recommended Courses*

Track	Course Title	Objective	Format	Duration
Report Development	Build Your Own Reports: 4	Teaches how to create charts for reports	Recorded webinar	< 30 minutes
Report Development	Build Your Own Reports: 5	Teaches how to create pivot tables for reports	Recorded webinar	< 30 minutes
Report Development	Build Your Own Reports: 6	Teaches how to control access to reports	Recorded webinar	< 30 minutes

TABLE 3-1. *Recommended Courses (continued)*

Live Courses

Three CRM On Demand courses are offered online through Oracle University:

- **Administration Essentials** A comprehensive workshop that teaches the fundamental concepts and tasks for configuring and maintaining the application. Under a facilitator’s guidance, participants complete hands-on exercises that reflect the primary setup activities in a typical implementation project.
- **Data Import Workshop** A deep-dive workshop to guide the collection and cleansing of a source data, the steps in the import process, troubleshooting, and best practices to avoid common errors.
- **Advanced Analytics Workshop** A deep-dive workshop on the business intelligence functionality that teaches the end-to-end steps for building analytics dashboards and reports. Participants learn best practices for building complex reports that are easy to use and perform effectively.

Experienced instructors teach each of these courses in a live virtual format. The courses include participant guides, and all exercises are completed in a dedicated CRM On Demand production environment. They range from two to four days in length, and there is a tuition fee. You can enroll in these classes through Oracle University or by following the links to Live Training via the Training and Support Center. As indicated in the training recommendations in Table 3-1, these courses provide the foundation knowledge necessary to prepare you for your CRM On Demand implementation.

Recorded “Task-Based” Webinars

There is a library of more than 40 pre-recorded, task-based courses available online through the Training and Support Center. The course titles address a range of topics that provide practical guidance on the execution of a specific task in the configuration, administration, or use of the application. Some of the titles were developed to assist administrators with more complex, multistep processes associated with a specific functional capability in the application. Others teach end-users how to execute end-to-end business processes. And there are a few that explain specific application features. These courses are available to any users at any time through the Training and Support Center, and most are under 30 minutes in length, making it simple and easy to develop your knowledge on a selected topic when a question arises or you need to execute a given task. You can access the titles by topic area or job role, so you can find the appropriate topic quickly.

In addition to the web courses recommended for implementation teams who are preparing to launch CRM On Demand for the first time, there are additional courses we recommend you consider taking to promote a deeper understanding of the service.

The first set is appropriate once you have initial experience working with the application:

- Consulting Best Practices for Application Configuration
- Consulting Best Practices for Data Import
- Consulting Best Practices for Setting Access & Visibility

As the titles imply, these webinars highlight the tactical lessons learned from Oracle consultants based on their implementation experiences, and they provide practical guidance to help you avoid common pitfalls that result in poor usability and performance. If your project has challenging requirements, the information offered in these courses will be helpful to you.

The second category of recommended courses is produced in support of every major release of CRM On Demand. There is a general overview called, “What’s New in Release (current #)” that will highlight the new functionality associated with the release. The “What’s New” course will acquaint you with the benefits and general purpose of all the new features in a given release. To understand the new features in greater technical detail, a series of Transfer-of-Information (TOI) courses are developed for each major release cycle. These courses will describe and demonstrate the typical use case for a given feature and, when necessary, how it should be configured. If you are planning to deploy a new feature, the TOIs will provide just-in-time guidance to help you integrate the new capability in your production system.

Using the Knowledge Base

Even after completing the appropriate training, you will still have questions in the day-to-day administration and use of CRM On Demand. Oracle has developed an extensive knowledge base with practical information organized to respond to the needs of different stakeholders during the program lifecycle. This knowledge base should be your “go-to” resource anytime a question or obstacle arises. The content available takes many forms, including white papers, guides, samples, tools, and templates. They explain how to use different features, outline best practices, support system setup and administration tasks, and explain technical reference material. But consistent with the self-service design, you need to know where to go to find what you need.

In this section, we will highlight the three locations in CRM On Demand where you can access information and documentation in support of the implementation process:

- Implementation Templates and Tools in the CRM On Demand Knowledge Center on My Oracle Support
- Web Services Resource Library in the Training and Support Center
- Administering CRM On Demand section of online Help

We suggest you, and the other implementation team members, become familiar with the range of resources available in these locations so you can quickly access the right information when a need arises.

Implementation Templates and Tools

The resources found in the Implementation Templates and Tools section contain documents that will be especially useful to your implementation team during the initial system setup. You can download these documents via the Training and Support Center by following the Knowledge and Training links, which take you to the Oracle CRM On Demand Knowledge Center in My Oracle Support. The documentation found here includes proven tools that have been developed by CRM On Demand experts for use on their implementations. The documentation is organized in six sections corresponding to the consulting phases in a typical implementation project schedule (see Table 3-2). The Administrators Rollout Guide found in the Project Organization section provides an overview of the steps in a standard implementation and explains when and how to use the other documents included in this knowledge base. Using these templates and supporting information will help you to organize

Topic	Document Name
Project Organization	Administrator Rollout Guide
Access Management	About Analytics Visibility User, Group and Role Set-up Template
Application Layout & Customization	Field Set-up Template Page and Related Information Layout Template Homepage Layout Template Search Layout Template Sales Methodology Template Assessment Set-up Template
Assignment Rules	Record Assignment Template
Data Import	Before You Import Your Data Data Preparation and Clean-up Guide Address Mapping Template Import Errors and Warning Messages
Validation	Validation Checklist

TABLE 3-2. *Implementation Project Documentation*

planning, discovery, design, configuration, and validation tasks. The materials point out best practices and potential risk areas. We recommend that your project manager review this library of tools when planning your implementation, and incorporate them into the appropriate project stage.

Web Services Resource Library

If the scope of your requirements includes customization, the Web Service Resource Library contains practical guidance for building custom integrations to CRM On Demand using web services. The link is located on the Navigation Bar on the left side of the Training and Support Center homepage. You'll find development guides, reference documentation, and sample code to help your developers with the baseline information needed to begin the development process. We recommend you start with the *Web Services Guidelines and Best Practices* presentation found in the *Documentation* section. This presentation will explain the general guidelines and best practices for building custom integrations to CRM On Demand using web services.

Online Help

Online Help, which is accessed through the CRM On Demand interface, should be the first place to check for answers when you have a question about how to execute a task or when you are seeking information about an individual feature or function in the application. You'll note that in addition to the Help link at the top of the user interface, there is a context-sensitive Help link on every page in the user interface. This link takes you to Help content related to your page location in the system.

During the course of the implementation project, when there is time pressure to complete every task, the Help documentation can be a very effective source of real-time support for the detailed questions that arise. When you launch Help from the Admin Homepage, the Help documentation will open to an extensive section titled, *Administering Oracle CRM On Demand*. This documentation provides a great deal of information to support the execution of each administrative task, including step-instructions, examples, and reference to any hard limits. By invoking the context-sensitive Help link from any Administration subsection, you will find instructions and reference material to support the specific Administrative task that you are executing. For example, from Import and Export Tools under Data Management you'll note record limits by object for each data import cycle and a series of steps for preparing data for import.

Customer Support

During the course of your subscription, there will be times when you want to contact Oracle about a problem with the service, a question that you cannot resolve on your own, or to request a product improvement. To provide assistance at those times, the Oracle Support team provides 24x7 access to every licensed subscriber, bundled within the CRM On Demand service. In this section, we will give you a brief orientation to the mission of the Oracle Support team, the approach they take toward issue resolution, and the expectations you should have in your interactions with them.

Mission and Model

The Oracle Support team follows a traditional "break/fix" support model, reacting to formal requests submitted online or by phone from users. They triage each inbound request, gathering additional details from the "owner," to understand the issues involved and the impact on the company's business operations. Once created, a Service Request (SR) is then categorized by type and assigned a severity level for follow-up action. (Note the information you should supply when submitting a request and how requests are prioritized in the sections that follow.) Oracle Support will solve

issues immediately whenever possible. When additional expertise is necessary to resolve a problem, the Support Specialist will work with the appropriate engineering, operations, and product management teams who “work” behind the scenes to investigate, identify solutions, and develop an appropriate response. Throughout the cycle, Oracle Support is your single point-of-contact for communicating updates and resolving your request. If you are unsure who to direct questions to regarding CRM On Demand, a call to Oracle Support is the best and quickest way to point you in the right direction, but recognize that they will not be able to respond to every type of request.

Activating Additional Capabilities

While the base application code is common to all customers, new accounts are provisioned with certain attributes based on the your specialized requirements (i.e., industry versions). At your request, the Oracle Support team will modify certain attributes and some other variables for your account to expand the capabilities of the service. The following list reflects the requests you can make:

- Expose one or more of the vertical objects associated with Industry editions.
- Activate work flow functionality.
- Activate advanced field management.
- Expose up to 15 dynamic custom objects.
- Activate web services APIs.
- Change company profile parameters (i.e., default timeout, single sign-on).

Critical Information When Submitting a Service Request

The preferred method to submit a Service Request is online via the Service Request link on the Training and Support Center homepage. You may also contact Oracle Support by phone when the request is urgent or has a level of complexity that is difficult to convey in writing. However you submit a service request, to expedite follow-up action, you should provide the following information:

- State the problem clearly, with all known supporting facts.
- List steps to reproduce the problem and describe expected application behavior.

- Describe the business impact of the problem to establish priority.
- If applicable, include a screenshot.

Prioritizing Response by Request Type

Although you are free to submit any type of question or problem, the primary mission of Oracle Support is to resolve technical problems that inhibit the performance of the system in production. Their highest priority is to respond to reported application problems that have a negative impact on your business operations. You should promptly report any perceived feature/function defects, degraded system performance, and system outages as soon as they occur so the support team can begin to investigate the problem.

In the course of configuring your instance during the setup process, you may encounter unexpected behavior from the application and believe that you have encountered a functional defect or bug. You may also discover you are unable to configure the application to meet a particular requirement and want to get help from Oracle to understand how a feature works or a recommended “workaround.” Be advised that in any situation where you are trying to understand how a functional characteristic of the application performs, the ability of Oracle Support to provide assistance will be more limited—they do not have on-staff consulting expertise. When you submit a Service Request, particularly when you believe there is a product defect, Oracle Support will only be able to confirm that the functional behavior of the application is normal. They may also suggest training or documentation in the knowledge base so you can better understand how the feature/function in question works. In the event you require a capability not yet available, they can provide guidance to help you submit an Enhancement Request to product marketing that will formally document the desired feature for consideration in future releases.

Finally, there are two general areas that fall outside the boundaries of the assistance Oracle Support will be able to provide. The first is any request that relates to setup, design, or configuration of the application. Oracle Support does not provide consulting advice, and you will likely be referred to Oracle Consulting Services for billable assistance. The second is any request that involves integration with CRM On Demand. Oracle Support is not able to diagnose problems with or review custom Web Services integrations, and they will deflect any request in that area. In the next section, we will highlight the User Forums for CRM On Demand. These are terrific sources of expertise for implementation and customization questions that you should consider.

Forums: Leveraging the Experts

When you can't find technical "how-to" information from one of the self-service sources in the knowledge base, another option is to tap into the global community of CRM On Demand experts. Oracle established a group of forums to promote information sharing among the global community of professionals working with CRM On Demand. The CRM On Demand Forums are interactive message boards where you can post questions, share information, learn tips, and join in discussions with other CRM On Demand administrators, implementation consultants, and product experts. There are three forums hosted by the Oracle Technology Network (OTN) that are organized around a specific functional theme:

- Oracle CRM On Demand Administration Forum for issues related to setting up and configuring the base application
- Oracle CRM On Demand Analytics and Reports Forum for issues related to developing and using the business intelligence capabilities in the product
- Oracle CRM On Demand Integration Development Forum for issues related to the extension of core capabilities through integrations developed via web services

Posting a specific "how-to" question on the appropriate forum is an easy way to gather information and recommendations quickly from a diverse base of experienced CRM On Demand experts. You can also search the discussion threads from previous postings by keyword to research the topic of interest. A review of the discussion threads is a terrific way to discover the lessons learned from actual customer implementations on a range of topics, and they can often help you solve a problem or answer a question quickly.

While the site is moderated by Oracle, the information found in the discussion threads is not officially endorsed by Oracle, even when provided by an Oracle employee. However, the forums are the only source of consulting expertise or advice that you can tap for free. The Integration Forum is especially useful since CRM On Demand does not provide formal support or documentation for developing web service extensions to the service.

You need to register to participate in the forums, but the process is quick and easy. The discussion threads are accessible in a read-only format to all subscribers. We suggest that you explore each of the forums to get a sense of the value they can provide. You will find a link labeled Access Forums on the homepage of the Training and Support Center.

Oracle Notifications and Communication

One of the big advantages of CRM On Demand is the peace of mind it brings in knowing that Oracle is responsible for availability of the system 24x7. An extensive team of people is working continuously to ensure the service is available, reliable, and performs well. They are also conscious of their responsibility to communicate with you about major events and make operational status available via the self-service channels to help you manage your CRM On Demand programs effectively.

Planned and Unplanned Events

In the course of fulfilling their operational responsibilities, the CRM On Demand operations team monitors service performance, responding to reported outages or performance issues and conducting maintenance. As with any IT system, resources are allocated to support the maintenance schedule as well as respond to any unforeseen issues that impact the availability or performance of the service.

Planned Events

Common planned events include upgrades, patches, stage refreshes, and other maintenance necessary for the health of the hosting environment and overall application performance. These events could include issues related to required security and operating system patches, network maintenance, and hardware replacement. It is useful to remember that the planned maintenance, although inconvenient at times, will improve your overall satisfaction and reduce unplanned outages. You should factor the maintenance schedule for your instance into the management of your program. Oracle posts notice of scheduled maintenance events; just click the Service Information link found on the CRM On Demand homepage. You can also find a maintenance schedule posted under System Notifications on the Training and Support Center homepage.

Unplanned Events

Whenever your ability to use the service is interrupted due to degradation in the application performance, or a system outage occurs outside scheduled maintenance period, CRM On Demand posts the current system status for all impacted customers under System Notifications on the Training and Support Center homepage. The notifications will describe the problem, which hosting environment is impacted, the actions underway to restore the service, and an estimated time to restore the service to production.

E-mail Communication

There are two types of e-mail messages CRM On Demand subscribers can receive:

- **CRM On Demand Announcements** Provide information about major new releases or significant performance issues impacting a large number of customers. These e-mails are distributed to all primary contacts and users with Always Send Critical Alerts selected in the User Detail screen.
- **CRM On Demand Support Alerts** Provide timely notification of system status to all affected accounts related to maintenance events, system outages, or degraded functional performance. You can subscribe to e-mail pushes of this information by contacting Oracle Support and asking to be added the distribution list for system alerts.

Registration to Receive E-mail Notification

When a new CRM On Demand instance is provisioned, a primary contact for the company account will be designated based on the information provided in the order documents. Oracle distributes critical communications to the primary contact and to any other users who have been designated to receive communications. Changing the primary contact, or adding other users to the distribution list for your account, is a self-service task performed by your current primary contact. It is critical that the primary contact designation is updated (as necessary) while your account is active to ensure you continue to receive important information from Oracle. You should follow the instructions here to update the primary contact or add additional users to the distribution list for important communications.

- To update the primary contact, click Admin | Company Administration | Company Profile | Edit | Update Primary Contact in Company Key Information.
- To update user contact preferences, click Admin | User Management & Access Controls | User Management. Then drill down to User Detail | Edit, and check or uncheck Always Send Critical Alerts in Contact Preferences.

Testing: What Are the Options?

One of the benefits of CRM On Demand is that Oracle completes rigorous quality assurance and testing so the base environment is “production ready” when you log in for the first time. Before any patch or upgrade of the software is released to customers, Oracle tests and debugs the software and tunes the infrastructure. You can be confident, therefore, as you begin the setup process that you have a stable

environment that has met Oracle’s testing standards required to meet the service-level obligations in the license agreement. We recognize that testing methodologies and standards for “in-house” IT systems vary from company to company and believe it is important for you to consider how your typical protocols should apply in the SaaS model, where many of the obligations are assumed by Oracle.

We do recommend you take steps to verify that usability and performance expectations have been met after your configuration work is complete and before deploying your configured instance to end-users. Conventional User Acceptance Testing protocols are typically sufficient. In this section, we will explain the options you have for conducting testing activities and the advantages and limitations of one environment over another.

Typical Testing Objectives

Before considering which environment or combination of environments you may want to use for testing purposes, consider your objectives. Implementation teams typically require environments for

- Validating that the configuration meets business requirements, object layouts are correct, automated workflows function, and a typical user can execute basic processes
- Verifying that imported data is exposed correctly in the configured object model, custom reports and dashboards expose data accurately, and system performance is acceptable with anticipated data loads
- Conducting web services testing for any integrations or application extensions to your configuration
- Conducting acceptance tests or end-user training
- Enabling ongoing development and testing after the initial production launch

Choosing the Best Environments for Testing

As we discussed in Chapter 2, when your “company instance” is provisioned, you will have access to two environments: Production and Staging. There is a third environment, called the Customer Test Environment (CTE), which is available on request from Oracle Support. Each of the environments has different characteristics that influence their utility for testing purposes. Remember that all of the environments are subject to the policies and restrictions detailed in your user agreement. In the next section, we’ll discuss the general benefits and limitations associated with each environment.

Production Environment

The Production environment is appropriate for testing purposes if your requirements are relatively simple, and you don't expect extensive ongoing changes after deploying the application to your users. If you are conducting "one-time" tests before the initial launch, you can easily validate the configuration and data loads in the Production environment, as each phase of your configuration is completed. You can also set up a fictional company test instance on your Production environment, with an identical configuration and dummy data, in order to conduct testing cycles in parallel with your development work or for training purposes. Note that any user license set up in this test instance counts against your subscription. Another advantage is that a configuration tested in the Production environment, with a representative data load, will reflect the actual performance your users will experience.

Staging Environment

As a mirror image of your Production environment, the Staging environment is very effective for testing your configuration and integration work in an environment that contains a (quarterly) snapshot of your production data. The biggest downside to using Staging for testing purposes is the lack of control that you have over the environment. Oracle uses the Staging environment for periodic maintenance, for testing patches and upgrades before they are promoted to your Production environment, and, intermittently, for troubleshooting when a performance problem is encountered. As a result, you should never use your Staging environment for ongoing training or business demonstrations. Your time window for testing activities should be relatively brief and your schedule flexible.

Note that any configuration work done in the Staging Environment will be erased with every quarterly refresh of the Production Environment data. The environment is refreshed as part of a maintenance activity. It is important that any configuration work done in the Staging Environment be well documented and that the work migrated to Production well in advance of the refresh.

Customer Test Environment

The Customer Test Environment is a stand-alone environment that is under your control to use for development, testing, and training purposes. The Customer Test Environment instance is provisioned on a standard, Multi-Tenant production environment that reflects the current release of the application, and it is provided at no extra cost to the you. In addition to standard testing activities, it provides a terrific "sandbox" for ongoing configuration and testing of new functionality, as well as for conducting user training. The environment is not refreshed so you have complete control over the configuration, data, and any integration, without intrusion by Oracle.

The limitation of the CTE from a testing perspective is that you are responsible for configuring your instance and managing data consistent with your production build. You should also compare the scheduled maintenance windows between your test and production environments, as they will likely be different, and your team will need to take this into account when planning their work. Finally, only a limited number of user licenses are available, so you need to plan ahead if you are using the Customer Test Environment for activities that require many users to log in to the service, such as acceptance testing or training.

Summary

This chapter provides an effective orientation to the range of resources included in your CRM On Demand subscription. Now that you know how the self-service model works, you should be prepared to take advantage of these resources as different needs arise throughout your subscription life cycle. As the functionality grows with each new release, Oracle expands the supporting resources to improve your customer experience and the value you receive from the offering. We recommend you take time to educate yourself about the different capabilities referenced in this chapter and integrate them in your CRM On Demand planning.