

## **CherryRoad On-Going Support – Year 1**

In addition to the standard one-month post-production support, CherryRoad is providing an additional 11-month managed service support from phase 1 Go Live. Combining our unparalleled experience in the public sector and Oracle's Cloud offerings with our established processes and procedures for Help Desk support, we have developed a holistic support solution for the City. Support will focus on two distinct areas:

1. Incident-based support.
2. Release Management for Oracle Cloud.

### **1. Incident-Based Support**

Incident-based support will cover the management and resolution of Level (or Tier) 2, 3 and 4 support for Application and Technical issues. Beyond normal break-fix incidents, we recognize the special care that is required for release management for the Cloud solution.

A key component to meeting the City requirements is ensuring issues or incidents are properly recorded, managed, and resolved. Our aim is to restore the City as quickly as possible while finding and addressing the root cause of the problem, as summarized below.

Incident Management	Problem Management	Change Control Management
Restore functionality as quickly as possible	Find the underlying cause	Correct Root Cause / Improve
<ul style="list-style-type: none"><li>▪ Detection and Recording</li><li>▪ Classification and Support</li><li>▪ Investigation and Diagnosis</li><li>▪ Resolution and Recovery</li><li>▪ Incident Closure</li><li>▪ Monitoring</li><li>▪ Oracle SR Tracking</li></ul>	<ul style="list-style-type: none"><li>▪ Problem Control</li><li>▪ Error Control</li><li>▪ Proactive Management</li><li>▪ Major Incident / Problem Review</li></ul>	<ul style="list-style-type: none"><li>▪ Create and Review Request for Change</li><li>▪ Evaluate Change</li><li>▪ Authorize and Schedule Change</li><li>▪ Prepare and Implement</li><li>▪ Review and Close</li></ul>

Knowledge Management – Identify and Standardize Solutions

CherryRoad's Help Desk approach is a tiered approach. The following defines the various tiers/levels of the support services and responsible party throughout this engagement.

### **Tiered Approach to Support**

#### **Level/Tier 1 Support (Supplied by Client)**

From a Client standpoint, your Level 1 Support Staff should consist of a System Administrator that will handle all Application Security related Service Requests. The remaining Level 1 Support Analysts should have the necessary knowledge of the application in order to assist in resolving non-complex issues such as account lock outs, re-setting passwords, issues accessing the system, and questions regarding how to use the application. All service requests are filtered through the Level 1 systems administrator.

**Level/Tier 2 Support (Supplied by CherryRoad)**

Level 2 Support will be provided by the CherryRoad Managed Services, with assistance from the client support team. When a Service Request requires more in-depth analysis, it will be routed to the Level 2 Support Staff either by phone, email, or via ServiceNow. The Level 2 Support Staff, which consists of experienced Cloud Generalists, will complete an initial triage of the request, determine the cause, and begin developing a solution. In the cases where a full code analysis is needed or actual coding changes are required, the Service Request will be routed to Level 3. Activities can include but are not limited to:

- Support end users in their day to day usage of the system
- Best practice recommendations
- Regression testing for new releases for processes, interfaces, and extensions
- Regression testing for patches
- Issue investigation and resolution
- Oracle SR management/tracking
- Updates to System Configurations

If required, the City will need to complete the final testing of all implemented solutions and sign off on deployment to the production environment.

**Level/Tier 3 Support (supplied by CherryRoad)**

Level 3 Support will be provided by CherryRoad Managed Services. If during the analysis by the Level 2 Support Staff, it is determined that further detailed technical analysis is required, the Level 3 Support Staff will take over the Service Request. The Level 3 Support Staff, fully equipped to resolve the most complex of Service Requests, will include both experienced Functional Resources and Technical Expertise covering a wide range of areas. Level 3 will complete any remaining analysis and will find, implement, and unit test the solution. Level 3 resources will work with Oracle as needed to facilitate resolution. Activities can include but are not limited to:

- Technical issues investigation and resolution with the existing interfaces
- Fix defects and retest the functionality with the existing interfaces
- Minor modifications to the existing interfaces (e.g. change in the field mapping)
- Troubleshoot and support data transfer and data transmission issues
- Support existing reports using standard Oracle reporting tools
- Provide ad-hoc SQL queries or data outputs to support issues resolution
- Assist Functional team with issue resolutions
- Provide recommendations for the City desktop configurations

The City will be required to complete the final testing of all implemented solutions and sign off on deployment to the production environment.

**Level/Tier 4 Support (supplied by Oracle)**

If during the analysis it is determined that the issue needs to be escalated to Oracle Support, CherryRoad will log the Service Request with Oracle and manage all communication with Oracle regarding the Service Request. Once Oracle determines a solution, CherryRoad will provide details of the solution to the City and then move forward to implement and test the solution as part of Level 3 Support.

**Help Desk Ticket Lifecycle**

All service requests will flow through one or more of the following steps during its lifecycle.

**Initiation**

Whether the contact is to request documentation or to report a problem, the first stage of the process is to create the SR and capture all the relevant information necessary to either service the request, resolve the problem, or escalate it to the next tier with sufficient information to resolve the problem.

**Assignment**

If the requested service or problem is not resolved on the initial call, the SR is assigned to the appropriate tier/team/resource for the City with the expertise of the effected application or module.

**Resolution**

Since an SR can range from a simple request with a documented resolution to an Oracle bug, the various tasks, the timeframe, and even the tier producing the resolution will vary with each SR. However, in general, this stage involves the analysis, research, and the action taken to fix the root cause of a problem or to identify a suitable workaround until the problem can be resolved.

**Testing**

Depending on the resolution, significant testing and even regression testing may be required before receiving approval to implement the solution. Most typically, it involves a functional analyst testing the solution in a non-production environment, followed by SMEs and/or end-user testing in another non-production environment to ensure the original problem is solved, and no new problems have been introduced.

**Approval**

Approval for the SR can be entered by the City as a comment in ServiceNow SR or via email to the assigned CherryRoad resource and entered into the ServiceNow SR. Approval of an SR indicates the solution has been tested and can now be scheduled for deployment to the production environment, or the SR has been resolved to the originator's satisfaction through explanation or discussion.

**Implementation**

This step represents the actual resolution. Examples would be the documented steps being executed, configurations deployed to production, or the deployment of a vendor patch, code modification, etc.

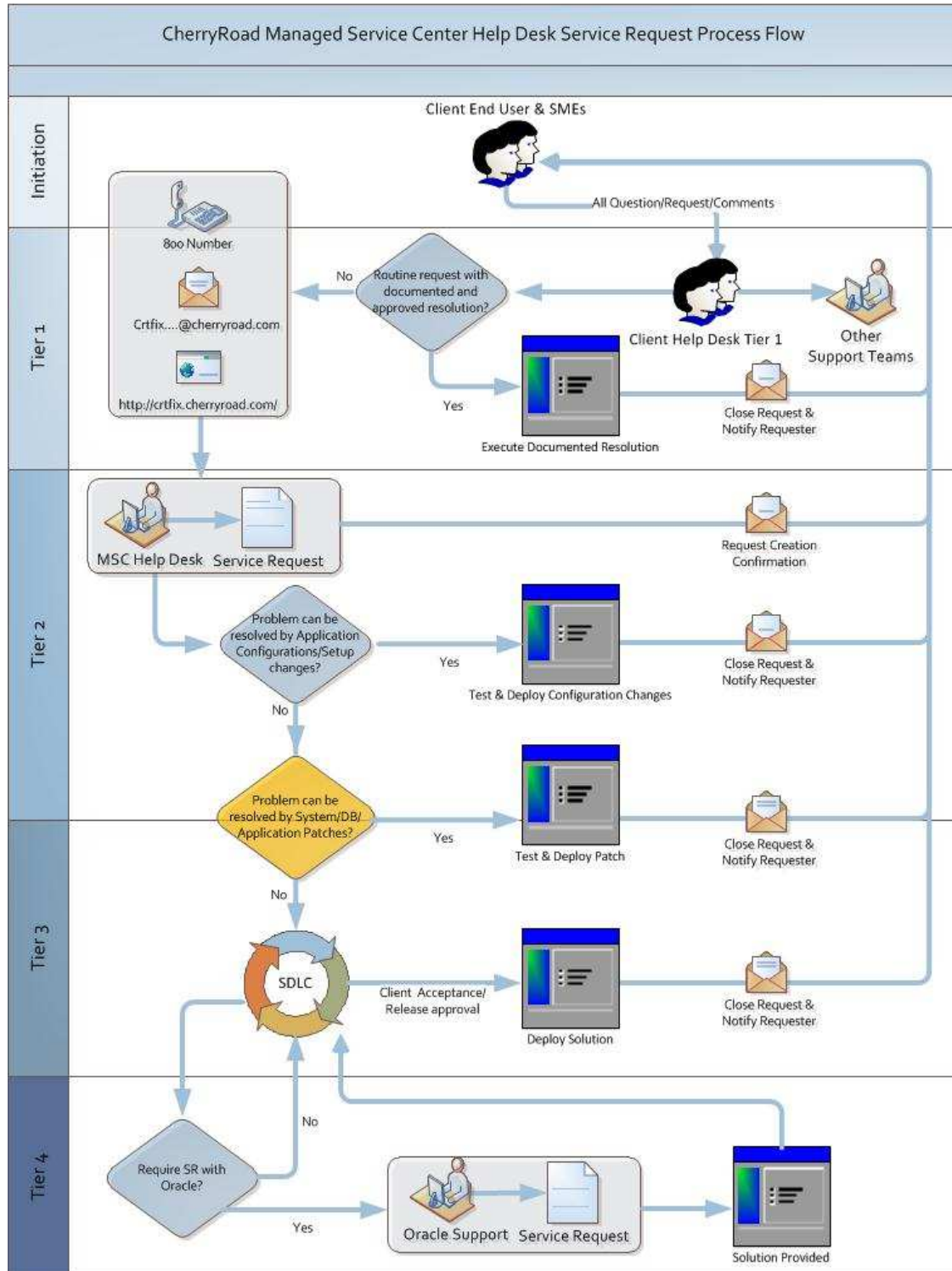
**Closure**

After the resolution has been provided and the City confirms, the SR is closed.

From initiation to closure, each SR within ServiceNow will be updated with relevant notes and status changes. In addition, email messages will be sent upon initiation and at each status change during the process. At any time, the City can log into the system or call CherryRoad Help Desk to get the current status on the SR.

CherryRoad Help Desk Ticket Process Flow below illustrates the stages and support levels involved during the lifecycle of an SR.

## CherryRoad Help Desk Ticket Process Flow Diagram



## **2. Release Management for Cloud**

While Oracle will be responsible for all applying all patches and delivering upgrades as part of the SaaS Cloud agreement, the City needs to be aware of the schedules and be prepared to undertake testing.

The cloud model is different from on-premise, and this is by design. While historically, with an on-premise ERP solution, the user could wait long periods of time to apply releases, in the cloud managing the release schedule is critical. There are a few key concepts our team will be sure to enforce and is uniquely qualified to deliver.

**Release Schedule** – With the Oracle Cloud, a flexible but prescribed release schedule is enforced. Familiarity and a cadence with this schedule is necessary. CherryRoad will provide guidance in reviewing the prospective release and assist in planning the appropriate functional, technical, and testing activities.

**Promoting to Production** – Whereas with on-premise, the City could promote to production whenever it desired, now scheduling needs to occur with Oracle as they are stewards of the cloud.

**Security Patches** – It is vital that the City stays current on security patches with any system, and the Cloud is no exception. If Oracle is recommending a patch, then it should be applied. CherryRoad will provide guidance in reviewing and applying all security patches.

**Oracle Tickets** – It is important to understand the Oracle Cloud ticket process and what levers are available to escalate if needed. Our team brings this knowledge.

In each area above, our team brings unmatched experience working with Oracle's Cloud Solution and Oracle's team to ensure your application is updated while not impacting day-to-day activities.

### **This long term support includes:**

- One seat license to CherryRoad Cloud Success platform for ticket management is included. Release Management services for one release.
- 200 hours of Incident-based Support

Additional Seat licenses, Release Management services or Incident-based Support hours may be added at an additional fee. In addition, CherryRoad is able to provide Level 1 support if desired by the City.

### **CherryRoad On-Going Support – Years 2 and on**

As an added value to the City, for each year the City renews the SaaS application contract through CherryRoad, we will include the following on-going support:

- One seat license to CherryRoad Cloud Success platform for ticket management
- 100 hours of Incident-based Support

The above support would follow the same process as outlined in the Year 1 support above.

Additional Seat licenses, Release Management services or Incident-based Support hours may be added at an additional fee. In addition, CherryRoad is able to provide Level 1 support if desired by the City.