

# Cloud Implementation Playbook

Epicor ERP in the Cloud  
Environments, Options,  
Processes, and Resources

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## Introduction

This document is intended to provide guidance on the processes, procedures, and options for internal teams implementing Epicor ERP Public and Government Cloud. Included are definitions of environments, key modules, tools and best practices.

Epicor has partnered with Microsoft to deliver Epicor ERP in the Cloud. Microsoft Azure is an open, flexible, and enterprise grade public cloud computing platform. It serves more than 50 regions globally and leads the industry in security and privacy standards. Microsoft Azure is the leading public cloud platform for enterprises. Epicor leverages this proven foundation to build and deploy enterprise business applications that enable our customer's business to grow.

**Audience:** This is an internal reference document, intended for Professional Services, Consultants, Customer Account Managers, Customer Success Managers, CIRRUS Program Managers, Partners, and Support.

# Implementing a Net-New Public Cloud Customer

When a new customer signs with Epicor, the Epicor ERP Cloud Operations team begins creating and compiling account information to send in the customer's "Welcome Letter." The Welcome Letter is sent to the person at the customer's organization who signed the contract, once the provisioning process is complete. This Welcome Letter contains instructions on registering for user accounts in EpicWeb, EpicCare, Installation Instructions and Account Credentials and guidance on how to opt into system notifications. According to privacy laws, we cannot send this letter to anyone other than the person who signed the Epicor contract. Therefore, the Epicor Professional Services Project Manager or third-party implementation partner would obtain the User ID and Password information from the customer.

Note: The Epicor ERP licenses must never be sent or otherwise delivered directly to a cloud customer.

## Default Public Cloud Environment Types

By default, a customer will receive two standard environments during implementation, Pilot and Production.

- ▶ **Public Cloud Pilot Environment** – Also known as the "test" environment. The Epicor Project Manager or implementation partner will start the design and build process by working with the customer to design the General Ledger (GL), posting rules, GL controls, etc. Changes are applied in Pilot environment and copied to Production via a refresh.
- ▶ **Public Cloud Production Environment** – Also known as the "live" environment. The Production Environment is the environment that the customer will transact in upon go-live. As a guide, Production environments will not be deleted and restored to a previous backup. Do not allow customers to enter transactions in this environment until the go-live.

If a customer happens to be implementing during an upgrade month, implementing customers will not be able to have the data refreshed from Production to Pilot during the upgrade testing month. If customers need data refreshed prior to testing, raise a ticket in EpicCare.

When requesting a refresh in EpicCare select the Asset "ERP Public Cloud" and the Category "Refresh DB". The request will be routed to the Cloud Operations team. The database will be refreshed within three business days.

Additional actions may require the Cloud Operations team's resolution. Functions such as adding User Defined Fields, Regenerating the Data Model and Moving Reports can be requested by raising a case in EpicCare and selecting the corresponding category.

## Additional Environment Types

Additional environment types are available to support more complex implementations as well as facilitate customer's knowledge of Epicor ERP throughout the implementation.

- ▶ **Public Cloud Premium Pilot Environment** – This environment is available for purchase as an enhanced version of the standard pilot environment. Premium Pilot gives customers the ability to test [Public Cloud Premium features](#). This environment replaces Pilot providing access to Epicor Web Access, Enterprise Search, and Epicor Mobile Access for testing.
- ▶ **Embedded Education (training environment)** – Embedded Education, often referred to as "Train", provides a preconfigured environment that customers can use to access the Epicor Embedded Education courses. The customer will need to subscribe to the Embedded Education option (in the SVP Core section).

By default, only 1 company (Epic06) will be provisioned. Additional companies (Epic03, Epic02 etc....) can be added to the configuration. Training materials are available for all modules regardless of if the customer has purchased a subscription or license for the solution.

Note that Embedded Education environments are provisioned through a Multi-Tenant App Server. Therefore, there will be a different login to this environment on a shared Database and App Server. Embedded Education environments cannot be refreshed with a copy of the Production environment; rather Education environments can be refreshed with a copy of the source Education data set. Request a refresh via EpicCare to be fulfilled by the Cloud Operations team. This may be required for completion of certain courses. Refreshes are completed in the window of Sunday – Thursday, overnight.

- ▶ **Additional Environment (implementation and/or development environment)** – Clients may elect to deploy an 'Epicor Public Cloud Additional Environment' for a fee, typically to support implementation or development initiatives. The Additional environment is a great way to safely test transactions of the system design and structures that you are building in Pilot, before moving changes to Production.

Epicor upgrades the Additional environment in cadence with Pilot environments. The ability to refresh data from Production into either Pilot or the Additional environment is requested as needed via the process of submitting a request through the EpicCare portal. As such, it fills up with transactions and scenarios that can obscure a novice user from understanding the core functionality. If this is the case, ensure that Production and Pilot are on the most recent version and request a refresh. Refreshes are scheduled via EpicCare and data from the source environment is copied to the target environment. Note that 72 hours of notice is required (3 business days) and so it is recommended to request it in advance as a regular activity built into your test plan.

### Determining Additional Environment Requirements

Determining how many Additional environments a customer needs is a process that Professional Services should undertake and discuss with Sales as early as possible to accurately price the full subscription fee for customers, set expectations, avoid unexpected surprises, and generally lay the groundwork for a positive customer experience. To determine the cost for Additional environments please refer to the [Epicor Cloud price list](#).

While the Epicor ERP Public Cloud does not allow for server-side code changes or customizations, your customer may still require a complex implementation with several moving parts. In fact, your customer may even require two or three or more Additional environments. The additional subscription fees for these extra environments may be offset by the reduced project management cost and a customer's better utilization of the innovative functionality within Epicor ERP.

If CSG or ITC is being engaged for customizations, BPM development, or forms work where they may require a more stable environment and that the objects they are building / testing not to be overwritten, then include the need for more than one Additional Environment in your Services SOW.

Similarly, if there is a multi-country implementation, with different implementation teams in different countries, having an additional environment available for the implementation will simplify the project management coordination effort. Multi-site / Multi-country implementations generally require one environment per country implementation. However, if the country specific implementations are being staggered and country C being done after country A is live it is recommended to use this same environment; simply request a refresh from Production.

**Companion and Partner Solutions** - For information about provisioning additional companion or partner products, please refer to worksheet titled “FOR PM, PS – How to provision” in the [Epicor ERP Cloud Global Product Matrix](#).

Additional Resources: [Epicor Help, accessible within the Epicor ERP environment](#) | [Epicor ERP in the Public Cloud Buyer Q&A](#) | [Epicor ERP Cloud Global Product Matrix](#) | [ITAR FIPS](#) | [@Cloud PM](#)

## Implementing an Existing Customer Upgrading to the Public Cloud via the CIRRUS program

Implementations through the Upgrade Program, also known as “CIRRUS” follow a different path as the customer has an existing database. CIRRUS is an internal name for a program designed to simplify upgrades. CIRRUS covers E10 and Vantage/Vista customers looking to move to the Epicor Public Cloud. In this process two copies of the customer’s existing database are made available for the implementation.

### CIRRUS Environment Types

- ▶ **Custom** – This environment contains all customer elements that were part of the existing Epicor Database such as BAQ’s, Dashboards, BPM’s, Customizations, Personalization and Custom Menu items.
- ▶ **Vanilla** – This environment is a copy of the customer’s data that has been stripped down removing all custom elements other than user defined tables and fields.

### Tooling

The CIRRUS upgrade program is made possible by a variety of tools and automation utilities that allow customers to get a clear picture of their processes and data. To upgrade customers, constraints must be identified and removed through heavy process reengineering and automation. There may be multiple trial / UAT testing sessions through the process to narrow down the desired functionality to achieve the optimal scope. Below utilities used for CIRRUS upgrades.

- ▶ **DB Packer** - DB packer is used for an upgrade, which is built into the tool. Database Packer allows for the data to be tested without customizations so that a customer can view a “vanilla” version of their data.
- ▶ **ERP Analyzer** – This is a scoping tool that provides transactional analytics against Vantage 8, Epicor 9 and ERP 10. It analyzes assets for upgrade readiness; BAQ’s, Dashboards, Configurations, Report’s etc.
- ▶ **Solution Builder** – This utility is used to package and transfer the desired Unique Business Components and then import them into the next iteration of the upgraded standard database. The Upgrade Program checks that the package is complete and then manages the import. This is part of the initial testing phase and would be required for go-live to help ensure a successful experience.
- ▶ **Cloud View** – Cloud view provides a secure instance of an ERP Public Cloud instance with the customer’s data. This allows for validation of customizations, reports and data.

# Implementing a Customer in the Government Cloud

Companies that must comply with International Traffic in Arms Regulations (ITAR) require strict controls and access to some or all their ERP data. Customers that require compliance with ITAR regulations are hosted in the Epicor's Azure Government Cloud.

For example, access to their ERP system by "non-U.S. Persons" as defined under ITAR is typically not allowed. To help customers comply with these access control measures, Epicor has long offered an ITAR support option, which—among other things—ensures support tickets are only routed to staff who are U.S. Persons or otherwise allowed access to ERP data. The Epicor Government Cloud option also restricts database access to only U.S. Persons, services are hosted only in the United States, and all data is securely stored within the country.

ITAR customers should have a special handling note in EpicCare. If that note is not visible or the customer, please notify support. Support maintains a policy guide on ITAR that can be shared with customers upon request.

## Default Government Cloud Environment Types

As with Public Cloud implementations customers are provisioned, by default, Pilot and Production environments with the options available for a Premium Pilot and Flex Option to Defer Upgrades in the Government Cloud.

- ▶ **Government Cloud Pilot Environment** - The Epicor Project Manager or implementation partner will start the design and build process by working with the customer to design the General Ledger (GL), posting rules, GL controls, etc. Bullets. Changes are applied in Pilot and Copied to Production.
- ▶ **Government Cloud Production Environment** – The Production Environment is the environment that the customer will transact in upon go-live. As a guide, Production environments will not be deleted and restored to a previous backup. Do not allow customers to enter transactions in this environment until the go-live.

Note that there are additional companion or partner products that are not Government Cloud compatible, please refer to worksheet titled "FOR PM, PS – How to provision" in the [Epicor ERP Cloud Global Product Matrix](#).

## Application Version Upgrades

Environments are updated and upgraded regularly as part of the subscription service, the dates for the updates to Pilot and Production are published in the [Epicor Help](#) under the heading "ERP Cloud Update Schedule." All customers are given one month to test releases in the pilot environment. Additionally, a Flex Option is available for an additional cost that allows a customer to defer upgrades for up to 90 days. Visit the [ERP Upgrade Resource Center](#) for additional resources related to upgrades.

## Upgrade Types & Cadence

A typical Epicor ERP system number is defined by the following syntax: 10.2.300.13. In this example, '10' represents the Product, '2' represents the Version, '300' represents the Release, and '13' the Update level.

- ▶ **Updates** - Updates are generally applied on a bi-weekly or monthly basis. Updates are applied to the customer's 'pilot' environment on Tuesday or Wednesday evening, and then promoted to 'production' environments during Saturday night local datacenter time. These are non-disruptive updates to our

system, and do not introduce schema changes. We avoid month-end and calendar year-end for your convenience.

- ▶ **Releases** - Releases are scheduled twice a year with black-out dates to avoid calendar year end. Because they tend to be larger releases and may introduce new functionality release upgrades are installed into a customer's pilot environment no less than one month before their promotion to production, allowing customers to test the new features and updates.
- ▶ **Versions** - Version upgrades occur approximately every 18-24 months. These often include changes to schema, user interface, and business objects. Like release updates, testing is required, so the upgrades are applied to the customer's pilot environment thirty days prior to the scheduled production upgrade.
- ▶ **Products** - Product upgrades are typically more involved; and accordingly, we allow extended time and support to test and prepare before introduction into production.

## Deferred Upgrades – Epicor Public Cloud Flex Option

In the case where the customer experiences fluctuating seasonal demands or other time constraints, Epicor offers a premium "Epicor Public Cloud Flex Option," which allows clients to defer upgrades for up to 90 days, for an additional subscription fee. With the Epicor Public Cloud Flex Option, the customer may select among two or three alternate pre-selected dates for your upgrade.

Regardless the customer opts to stay on cadence or select a later date to upgrade, the standard is a time frame of one month to test releases in the pilot environment. Customers with this option would not have the full 90 days to test upgrades, but rather have the option to test and upgrade up to 90 days later if business needs require. Please note that during this 90-day testing window they will not be able to refresh their Additional Environment using their Pilot or Production environments due to the version change.

The alternative upgrade schedule is published in the in the Epicor Help (accessible within the Epicor ERP environment) under the heading "ERP Cloud Update Schedule" in Epicor Public Cloud. Note this is only a deferral on Release updates which occur approximately twice a year. The Flex option is not available to defer the more frequent monthly updates. To request a delay, raise a ticket in EpicCare with the Asset "ERP Public Cloud" and the Category "Flex Upgrade".

## Testing Best Practices

Prior to Version, Product, and Release upgrades, testing is encouraged by all parties involved in an implementation to identify defects and issues specific to a customer's customizations. In some, cases defects are introduced and can be resolved through updates and hotfixes. A [Change List](#) is published to EpicWeb for each Update which is a list of fixes functional area.

As a best practice, PMs should keep track all data-fixes, hot-fixes and update requests applied to each environment. It is important to understand what is fixed in new releases, what needs to be reapplied with a restore and what data fixes can be run on the original environment and what need to be run after the upgrade.

## Post Implementation Considerations

After an implementation is complete there are key considerations that customers should be made aware of to maintain and optimize their implementation.

- ▶ **Unique Business Component Tracker** - UBC Tracker Cloud customers should be made aware of the Unique Business Component tracker to manage the integrity of customizations as upgrades are introduced. The UBC tracker will organize the items that require attention for customers to test to ensure resolutions are in place before the Production system is upgraded. For more information on the UBC tracker please find the Upgrade guide on [EpicWeb](#).
- ▶ **Issue Resolution Process** - After the implementation, Pilot will be the environment that Support will usually ask customers to test an issue in when a case is raised in EpicCare. If required, support may request a Production to Pilot refresh. Production data is then copied into the Pilot environment to facilitate troubleshooting by recreating the issue in a non-production environment.
- ▶ **Disable Printing in Pilot** – A Pilot environment can provide a useful medium to train training new employees and learning how to use Epicor. It is important to disable the Auto Print / Advanced Print Routing so that forms are not sent.
- ▶ **Communications Opt-In** – The Epicor Cloud Operations team will publish notifications via In-App Messaging prior to upgrades or where downtime may be anticipated, and testing required. This is an opt-in feature where users can elect to receive such notifications. Cloud customers should ensure that designated users are set up to receive such communications to prepare for these events.
- ▶ **Outages** – In the event of a printing or system outage, it is recommended to raise a ticket in EpicCare with the asset of “ERP Public Cloud” and the appropriate category.

## Premium Services

Each environment works from a separate DB (apart from Embedded Education), and separate App Servers, running on common infrastructure in the Public Cloud environment. There is no access provided to the Database, App Server, Cloud Servers, etc. Access is only available through the UI or published REST services.

For Production (or Live) environments, the features illustrated in the chart below are included (no additional charge). However, they must be requested through EpicCare to be installed by the Cloud Development Operations Team. It is important to identify the system number to target the service installation to when creating the EpicCare ticket which is available in the lower right corner of the home screen.

Service	Live	Pilot	Test	Education
Smart Client	Included	Included	Included	Included
REST	Included	Included	Included	Included
EWA	Installed on request	Requires Premium Pilot	Requires Premium Pilot	Installed on request
EMA	Installed on request	Requires Premium Pilot	Requires Premium Pilot	Installed on request
EDD	Installed on request	Requires Premium Pilot	Requires Premium Pilot	Installed on request
Enterprise Search	Installed on request	Requires Premium Pilot	Requires Premium Pilot	Installed on request
Info Worker <sup>1</sup>	Installed on request	Installed on request	Installed on request	Not available
DMT <sup>1</sup>	Uses Smart Client DLL's			
XL Connect <sup>1</sup>	Uses Smart Client DLL's			

<sup>1</sup> Also requires subscription to product.

## Optional Modules

- ▶ **Multi-Company / Multi-Site** - If your design of the customer's solution needs multiple sites within a company and/or multiple companies then the customer must subscribe to the SVP Global Business Management modules called Epicor ERP Multi-Site Management (for legacy customers it's called Multi-Site / Multi-Entity Management).
- ▶ **Data Migration Tool (DMT)** - DMT allows customers to maintain key data sets such as users as environments are refreshed and is included in most subscriptions. As of ERP 10.400 the license for DMT is now included in the database as opposed to being licenses as a separate module.
- ▶ **Web Service Users** - If the required solution is going to incorporate REST based interfaces, it is important to include at least a single Web Service User. REST provides the interface for querying and posting data. Where an interactive user takes a session and holds it for a long duration, REST calls are shorter and then drop the session after, however that doesn't give a zero footprint. If the proposed load is going to be transactionally significant then the WebService users should be accounted for in the user count and design.

## Additional Resources

- ▶ [Epicor Help, accessible within the Epicor ERP environment](#)
- ▶ [Epicor ERP in the Public Cloud Buyer Q&A](#)
- ▶ [Epicor ERP Cloud Global Product Matrix](#)
- ▶ [ERP Upgrade Resource Center](#)
- ▶ [ITAR FIPS](#)
- ▶ Still Have Questions? Contact the Cloud Product Management Team [@Cloud PM](#)