Oracle Fusion Cloud HCM

How do I adopt Redwood for HCM?

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Contents

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⑦ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

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0 How do I get started adopting Redwood for HCM?

These are the steps to adopt Redwood:

1. Inventory your custom assets, learn about the HCM Redwood Personalization Helper tool, and prepare an adoption plan.

   To plan Redwood adoption work, review the changes to your deployment that will need to be addressed:

   - Page changes
   - Personalizations
   - Custom job roles
   - Auto complete rules
   - Feature changes

2. Prepare a test environment for Redwood testing.
3. Make the required changes in the test environment and test thoroughly.
4. Deploy Redwood to production.

   For a complete list of delivered Redwood features, see *Which Oracle Fusion App features are built using the Redwood user experience?*

Plan your adoption sequence

Schedule your adoption work around HCM events, such as benefits enrollment, performance reviews, or year-end payroll.

For the latest Redwood adoption timeline, see *Oracle HCM Redwood Timeline Update*. To get notified with timeline changes, click the Bookmark icon to bookmark the page. Go to *Bookmarks-Cloud Customer Connect* for details about bookmark notifications on Customer Connect.

Assess your adoption work

The adoption work varies depending on your business requirements and configuration.

> **Note:** You'll need to run the Personalization Helper tool in Report Only mode to create a personalization report.

Use this table to assess your Redwood page changes.

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Changes to consider	What to do
Is there new functionality delivered with this Redwood page?	Review Oracle What's New for more information.
Does this Redwood page come with security privilege changes that I'll need to apply to my custom job roles?	Review Oracle What's New to see if there are security privilege changes for the page.
Does the Responsive version of this page include Experience Design Studio or Page Composer personalizations?	Check the Personalization Helper tool report to see if personalizations exist.
Does this page require manual Visual Builder Studio Express personalization?	Check the Personalization Helper tool report to see if the tool can convert and migrate the page. Otherwise, you can manually personalize the page using Visual Builder Studio express.
Does this page have any autocomplete rules applied to it?	For validation rules with errors at the page or region level (Object Validation rule type): • Existing validation rules with errors from Autocomplete Rules will continue to work on Redwood pages. If your existing rules are supported in Visual Builder Studio Business Rules (Express mode) and don't validate data from back end sources such as HCM Data Loader, we recommend migrating them to Business Rules. For these other rule types, create them in Visual Builder Studio Business Rules Express mode. • Defaulting rules (Object Defaulting rule type) • Field-level error rules (Field Validation rule type) • Warning rules (Field Modification rule type) **Note:** When you create equivalent rules in Business Rules that already exist in autocomplete rules, you must disable the autocomplete rules for all other pages built on the same underlying business object before the Redwood page is enabled. Disabling autocomplete rules on a business object affects both Redwood and Responsive pages that use the object.
Does the page change require altering your organization's procedures, policies, or Oracle Guided Learning?	Evaluate the effect on your employees.

Enable your HCM Redwood pages

You must establish a dedicated test environment with a Visual Builder Studio instance associated with it.

You need to set profile options, run search index processes, and update custom job roles. Before you adopt each set of Redwood pages, run a Production-to-Test refresh to the test environment.

ORACLE

Enable Oracle Search for Redwood

Redwood flows require Oracle Search. If you've enabled Oracle Search features before, some of these steps might already be completed in your environment.

1. In Setup and Maintenance, search for and click the **Manage Administrator Profile Values** task.
2. For each profile option listed in this table, search for and set each profile's level and value.

Profile Option Code	Profile Display Name	Application	Module	Profile Level	Profile Value
ORA_FND_SEARCH_ EXT_ENABLED	Enable/Disable Search Ext Framework	Oracle Middleware Extensions for Applications	Oracle Middleware Extensions for Applications	Site	Yes
HRC_ELASTIC_ SEARCH_ENABLED	HRC: Enable Elastic Search	HCM Common Architecture	Search Framework	Site	Y
PER_SEARCH_LOGIN_ EVENT_PUB	PER: User Login Event Publication for Search	Global Human Resources	Security	Site	ATOM
AFLOG_ENABLED	FND: Log Enabled	Oracle Middleware Extensions for Applications	Application Logging	Site or User for the user running ACL processes	Yes
AFLOG_LEVEL	FND: Log Level	HCM Common Architecture	Application Logging	Site or User for the user running ACL processes	Severe
AFLOG_MODULE	FND: Log Module Filter	Global Human Resources	Application Logging	Site or User for the user running ACL processes	%
ORA_PER_ ORACLE_SEARCH_ WORKERSLOV_ ENABLED	Enable Oracle Search Workers LOV	Global Human Resources	Personal Information	Site	Yes

3. If your implementation includes a module that's listed in this table, set the profile value to Y or Yes for the Site profile level:

Profile Option Code	Profile Display Name	Application	Module
ORA_HWM_ELASTIC_SEARCH_ ENABLED	HWM Enable Oracle Search	Workforce Management	Workforce Management
HRT_PROFILE_ORACLE_SEARCH_ ENABLED	HRT_PROFILE_ORACLE_SEARCH_ ENABLED	Profile Management	Profile Management
ORA_PER_CHK_ORACLE_ SEARCH_INDEX_ENABLED	Oracle Search Index for Journeys Enabled	Global Human Resources	Allocated Checklists
ORA_PER_CHK_ORACLE_ SEARCH_DIRECT_INGEST_ ENABLED	Direct Uptake of Data for Oracle Search in Journeys Enabled	Global Human Resources	Allocated Checklists

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Run Initial Data Ingestion for the Required HCM Indexes

1. Go to **Tools** > **Scheduled Processes** and click **Schedule New Process**.
2. Select **ESS job to create index definition and perform initial ingest to OSCS** from the menu and click **OK**.
3. Enter the index you want to ingest in the **Index Name to Reingest** field. For example:
   - Enter fa-hcm-person for the person index.
   - If you're setting up multiple indexes for HCM products, then you must submit the process in a sequence with each index name as input parameter in serial. We recommended you submit indexes one by one to keep from loading up the Oracle Search Cloud Service (OSCS).
4. Launch the process for each HCM product deployed in your environment.

HCM Product	Index names
General search infrastructure	○ fa-hcm-savedsearch
Global Human Resources	○ fa-hcm-person ○ fa-hcm-job ○ fa-hcm-position ○ fa-hcm-location ○ fa-hcm-organization
Learning	○ fa-hcm-learningitem ○ fa-hcm-learn-acl ○ fa-hcm-learningrecord ○ fa-hcm-learningbooking ○ fa-hcm-wlf-recommendationprofile ○ fa-hcm-wlf-recommendation ○ fa-hcm-wlf-learningassignmentprofile
Time and Labor	○ fa-hcm-timecard
Recruiting	○ fa-hcm-requisition ○ fa-hcm-irc-hiring-events ○ fa-hcm-irc-messages
Career and Profile Management	○ fa-hcm-modelprofile ○ fa-hcm-personprofile
Journeys	○ fa-hcm-workerjourney ○ fa-hcm-workerjourneytask
Connections	○ fa-hcm-profile-tag

Run HCM ACL Initial Ingestion

1. Go to **Tools** > **Scheduled Processes** and click **Schedule New Process**.
2. Select **ESS job to create index definition and perform initial ingest to OSCS** from the menu and click **OK**.
   You won't need to run this process again after your quarterly updates.

Schedule ACL processes for Oracle Search data security

Schedule these processes to run:
   a. Compute Users ACL by Event—Schedule for every 15-60 minutes.
   b. Compute Users ACL—For User Population as Logged in users. Schedule for every 30-120 minutes.
   c. Compute Users with Large ACL—For User Population as All Users and Compute action. Schedule to run once every day.

Oracle Search data security maintenance

Run the **Compute Users ACL** process with **User Population = All Users** after P2T (production-to-test) process.

Add new security to custom job roles

Each Redwood page comes with new or changed security privileges that you need to add to the appropriate custom job role to access the Redwood page.

> **Tip:** If the Redwood page you're testing doesn't open, try to access the page using a delivered job role.

Use these resources to understand security privileges required for your Redwood pages and how to use them.

- See the Access Requirements in *What's New* to view or change security privileges for each Redwood page.
- *Overview of Security Reference*
- *Edit Job Role and Abstract Role*

Contextual journey privileges

If you use the security roles delivered with our Oracle Cloud products, contextual journeys are ready to use.

If you use custom job roles, you must add these privileges to each custom Contingent Worker, Employee, and Pending Worker roles:

- Duty Privilege: ORA_PER_ACCESS_JOURNEY_BY_WORKER
- Aggregate Privilege: ORA_PER_REST_SERVICE_ACCESS_WORKER_JOURNEYS
- Function Privilege: PER_REST_SERVICE_ACCESS_WORKER_JOURNEYS

Related Topics
- Edit Job Role and Abstract Role
- Overview of Security Reference

ORACLE

Manager and Learning Administrator Privileges for Oracle Learning

If you use the delivered Manager and Learning Specialist roles, you don't need to do anything. If you use custom roles, you need to add certain security privileges and duty roles.

Additions for custom manager roles

Privileges

- Use REST Service - Learning Record Searches by Manager
- Use REST Service - Public Workers Read Only
- Use REST Service - Manager Connections Read Only
- Manage Recommendation Profiles by Manager
- View and Respond to Recommendations by Manager

Additions for custom learning specialist roles

Privileges:

- Use REST Service - eLearning Content Read Only
- Use REST Service - Questionnaire Lists of Values
- Recommend by Manager Hierarchy
- Recommend by HR Job
- Recommend by Position
- Manage Catalog Administration Profile
- Select Learning Audience by Analysis
- Select Learning Audience by Filtered List

Data policy

- If using a global RunAs user, ensure that the person has the View Catalog Learning Items by Administrator policy with condition set to All Values.

Roles:

- Learning Specialist REST Services
- Manage Recommendation Profiles by Administrator
- View and Respond to Recommendations by Administrator
- Learning Catalog All Items Management Duty
- Learning Catalog Management Duty

Set profile options for Redwood pages

Set the global and page-specific profile options.

Before you start

ORACLE

You must enable Oracle Search. See *Enable Oracle Search for Redwood*.

Here's what to do

1. In Setup and Maintenance, search for and click the **Manage Administrator Profile Values** task.
2. Search for and select **ORA_HCM_VBCS_PWA_ENABLED** and set the profile value to Y.

   > **Note:** This global profile option enables Redwood across HCM applications.

3. Enable page-specific profile options. See *HCM Redwood Pages with Profile Options* (MOS Document 2922407.1).

   > **Note:** Before enabling the worker and manager Redwood experience profile options for Oracle Learning, you need to *enable activity sequencing*.

Prepare Apps for Redwood

Prepare Oracle Learning for Redwood

You need to enable activity sequencing and self-paced learning. You also need to migrate learning recommendations.

    1. You need to complete these steps before enabling the Redwood learning experience.

1. Prepare to enable activity sequencing by completing these steps:
   a. Set the ORA_WLF_SEQUENCING_VERSION profile option, site-level value to **Y**. Use the **Setup and Maintenance** > **Tasks panel Search** > **Manage Administrator Profile Values** task.
   b. Cancel all schedules for these background processes using the **Tools** > **Scheduled Processes** task because you'll replace these process with new processes after the migration completes. At that point, these processes won't function.
      - Evaluate Person IDs for Assignment Rule
      - Reconcile Dynamic Assignments
      - Reconcile Access Groups
2. Enable activity sequencing by completing these steps:
   a. Migrate the learning catalog and learning enrollments in your current learning by submitting the **Tools** > **Scheduled Processes** > **Learn Migration** process with **Migrate catalog and active assignments for sequencing** as the data correction.

      Verify that the process completed successfully before continuing.

   b. Migrate people's learning history by submitting the **Learning Migration** process again with **Migrate completed assignments to support sequencing** as the data correction.

      Verify that the process completed successfully before continuing.

3. Configure and schedule the new background processes that reconcile learning initiatives and access groups:

New Process	Comments
Process Learning Records	Replaces Reconcile Dynamic Assignments
Process User Access	Replaces Reconcile Access Groups

ORACLE

New Process	Comments
Process Learning Recommendations	New

You don't need to separately schedule the Evaluate Person IDs for Assignment Rule background process anymore because these three new processes will handle its function automatically.

   2. You need to enable the Redwood learner and manager experiences before completing these steps. See *HCM Redwood Pages with Profile Options* (MOS Document 2922407.1).

4. Prepare to enable self-paced learning by completing these steps, if they haven't already been completed:

   a. Delete all active learning assignments and recommendations for learning journeys. Use the **My Client Groups** > **Learning and Development** > **Learning Assignments** task and the mass action.

   b. Delete self-service videos and learning journeys that are private and have named viewers. Or update them to have open visibility.

      Also search for and delete all self-service videos and learning journeys with any of these statuses: Draft, Rejected, or Pending active.

      Use the **My Client Groups** > **Learning and Development** > **eLearning** task.

For information about a migration validator tool that helps you identify the affected learning items, see *Learning Catalog Management: Redwood Experience (document ID 3052904.1)*.

5. Enable self-paced learning by completing these steps:

   a. Update the site-level value to Y for the ORA_WLF_ENABLE_DL_API profile option. Use the **Setup and Maintenance** > **Tasks panel Search** > **Manage Administrator Profile Values** task.

   b. Run the digital learning enablement script and migration of self-service videos and learning journeys.

      i. Submit the **Tools** > **Scheduled Processes** > **Learn Migration** process after selecting **Digital Learning Migration** as the data correction.

      ii. Verify that the process ended successfully. If it doesn't, verify the log file for issues found and review the prerequisite steps, as needed.

6. Migrate learning recommendations created by self-service users, administrators, and recommendation initiatives so that the recommendations are compatible with the Redwood recommendation experience.

   a. If you extended the ORA_WLF_RECOMND_CATEGORY lookup with custom values, you need to add them to the new ORA_WLF_RECOM_CATEGORY lookup. Use the **Setup and Maintenance** > **Tasks panel Search** > **Manage Common Lookups** task. You can do this before or after the migration.

   b. Submit the **Tools** > **Scheduled Processes** > **Learn Recommendations Migration** process after selecting **Recommendations Migration** as the data correction.

   c. Re-ingest the fa-hcm-wlf-recommendation and fa-hcm-wlf-recommendationprofile search indexes. Submit the **Tools** > **Scheduled Processes** > **ESS job to create index definition and perform initial ingest to OSCS** process once for each index using each index name as the input parameter.

   d. Schedule the **Process Recommendation Profiles** background process daily to process the audience criteria and refresh recommendations for profiles.

If you're currently using learning recommendations, the generated recommendations, and learning recommendations initiatives, won't be accessible in Grow and Learning self-service pages after you enable the ORA_WLF_ENABLE_GROW_RECOMMENDATIONS profile option. Also, the learningRecommendations alerts resource won't work anymore. Recommendation notifications are done using HCM Communicate instead.

Prepare Recruiting for Redwood

Schedule and submit each of these processes only once, in the order listed:

1. Go to **Tools** > **Scheduled Processes** > **Schedule New Process**.
2. Search for and select each of the following processes sequentially, submitting the next one after the previous one is complete.
   - Load and Index Master Geography Hierarchy
   - Load and Index Job Requisitions
   - Load and Index Candidates

Inventory your Redwood page personalizations

Assess the effort and convert your existing Page Composer and HCM Experience Design Studio personalizations to new Redwood pages and flows. Go to *Oracle Cloud CoE Central* to download the HCM Redwood Personalization Helper tool corresponding to your release and platform and move it to the working directory you created.

The tool lets you:

- Run the tool in Report Only mode to see which personalizations can be converted and migrated.
- See a list of personalized pages created in Page Composer and Transaction Design Studio in a PDF report or XLS spreadsheet.
- See which page personalizations the tool can convert to Visual Builder (VB) Studio Express mode.
- Convert the personalizations into a VB Studio workspace when you run the tool in Migrate and Report mode.

You can run the tool in Report Only mode for all HCM products. For a list of HCM products you can convert page personalizations for, see the List of Modules (Table 6.1) in the *HCM Redwood Personalization Helper Tool* (MOS Document 2999756.1).

Export your personalizations to the HCM Redwood Personalization Helper tool

1. Sign into the test environment associated with your Visual Builder Studio instance.
2. Go to the Navigator menu and select **Configuration** > **Migration**.
3. Click **Create Migration Set** in the Outgoing tile.
4. Click **Move All Changes**.
5. Name the configuration set and deselect all options.
6. Save your changes to send the request to export.
7. After the process completes, download the archive and extract it.
8. Open the extracted folder and navigate to the ADF folder.
9. Copy the CS_ADF_*.jar file to the working directory with the HCM Redwood Personalization Helper tool .exe file.

Run the HCM Redwood Personalization Helper tool report

To run the tool, you must have exported your personalizations from your test environment to your working directory.

1. Launch the HCM Redwood Personalization Helper tool that you downloaded and installed.
2. Select your working directory.
3. Select **Report Only Mode**.
4. Select the ADF Personalization File that you exported.
5. Select the modules you want to evaluate. They're grouped by VB Studio extensions.
6. If flexfields are used in your personalized pages, select **Connect to HCM Env** and enter the environment URL and user credentials.

   The tool uses a REST API to retrieve flexfield metadata.

Personalization Helper tool report

You'll find an output folder in the working directory with these files:

- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer.

- XSLX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

The report provides details on any personalizations that weren't migrated and what to do next.

ORACLE

1 How do I convert my page personalizations?

Use the HCM Redwood Personalization Tool in Migrate and Report mode to convert your personalizations.

> **Note:** If your personalization list isn't current, export it to the tool's working directory. See *Export your personalizations to the HCM Redwood Personalization Helper tool*. Otherwise, use the CS_ADF_*.jar file that was created when you exported your personalizations.

After your Redwood pages are available in your test environment, you can use the personalization helper tool to convert your personalizations to a Visual Builder Studio workspace. Then, you import them to the Visual Builder instance in your test environment.

Export your Visual Builder Studio workspace to use with the HCM Redwood Personalization Helper tool

Complete these steps in the test environment associated with your Visual Builder Studio instance if you've created personalizations in your test environment. If you haven't created new personalizations, you can ignore this step.

> **Note:** If you've created Visual Builder Studio Express personalizations in your test environment, you must export the workspace before running the Personalization Helper tool. If you don't export the workspace and include it while running the tool, when you import the converted personalizations into the workspace, any existing personalizations in the environment will be overwritten.

1. Open a Redwood page in your test environment.
2. Select **Settings and Actions** > **Edit Page in Visual Builder Studio**, then select the Visual Builder Studio project with the personalizations you want to keep.
3. Select **Advanced** to move into Visual Builder Studio Advanced mode.

   HCM supports Visual Builder Studio Express mode to personalize Redwood pages. Use Advanced mode only when importing or exporting a workspace.
4. Select **Export** from the menu.
5. Copy the downloaded **.zip** file to the same location where the HCM Redwood Personalization Helper .jar file is.

Run the HCM Redwood Personalization Helper tool

1. Launch the Personalization Helper tool.
2. Select your working directory.
3. Select the **Migrate and Report** mode.
4. Select the ADF Personalization File that you exported.

ORACLE

5. Select the Visual Builder Studio Workspace if you exported one to your working directory.

6. Select the modules to convert.

7. If flexfields are used in your personalized pages, select **Connect to HCM Env** and enter the environment URL and user credentials.

   The tool uses a REST API to retrieve flexfield metadata.

8. Submit the process.

Personalization Helper tool in migrate and report mode results

You'll find an output folder in the working directory with these files:

- Visual Builder Studio workspace: Includes converted personalizations to import into Visual Builder Studio Express. If you exported an existing workspace, the file will be called <original name of the VBS workspace>-updated.zip. If you didn't export a workspace, the tool creates and names a workspace for you.

- HTML output file: Lists the modules selected for processing, along with the related personalizations from Transaction Design Studio and Page Composer.

- XSLX output file: Lists all the modules (including personalization details) in the first two tabs. For each module, the tool creates a tab for Transaction Design Studio (TDS) and for Page Composer personalizations.

The report provides details on any personalizations that weren't migrated and what to do next. For any page personalizations that the HCM Redwood Personalization Helper tool can't convert, you'll need to manually recreate them. See the *Learning Path for Visual Builder Studio* for an overview of Visual Builder Studio Express.

Import converted personalizations to Visual Builder Studio

1. In your test environment, go to Visual Builder Studio and open the workspace you exported earlier to run the tool.

2. Select **Advanced** mode.

3. Select **Import** from the menu.

4. Import the workspace <original name of the VBS workspace>-updated.zip updated by the tool.

5. Select **Express** mode to view the imported personalizations in the Redwood pages.

ORACLE

Oracle Fusion Cloud HCM
How do I adopt Redwood for HCM?

Chapter 2
How do I recreate personalizations in the Redwood user
experience?

2 How do I recreate personalizations in the Redwood user experience?

You'll use Visual Builder Studio Express to recreate page personalizations in the Redwood user experience. It's the next generation extension tool for HCM Redwood pages, replacing Page Composer, Transaction Design Studio, and autocomplete rules.

As part of your Oracle Cloud Applications subscription, we provision an instance of VB Studio for each of your nonproduction environments. You can use the same platform that our developers use to create pages, applications, and extend delivered pages. HCM supports extending delivered Redwood pages in VB Studio Express mode only, using business rules and constants.

What's the process to recreate personalizations in Visual Builder Studio Express?

First, you'll need to *Inventory your Redwood page personalizations*. The inventory list shows which of your enabled pages have personalizations and which ones the Redwood Personalization Helper tool can convert. Then, you'll follow these steps:

1. *Set up Visual Builder* to extend Oracle Cloud Applications in a test environment.
2. *Create a simple extension* for HCM.
3. Recreate your personalizations. See the Examples of HCM Visual Builder extensions section.
4. *Preview* your changes in Visual Builder Studio Express to view page behavior with an extension.
5. *Share* your extensions so others can test your work.
6. *Publish* your extension so that it's available in the main Git repository.
7. *Deploy* your extensions to your production environment.

Examples of HCM Visual Builder extensions

- Business rules
    - *Hide or show a field*
    - *Hide or show a region*
    - *Make a field read only*

- Page properties
    - *Reorder tabs on a Journeys page*

- *Defaulting rules*

Related Topics
- Learning Path for Visual Builder Express and Business Rules

ORACLE

Oracle Fusion Cloud HCM
How do I adopt Redwood for HCM?

Chapter 2
How do I recreate personalizations in the Redwood user
experience?

Oracle Fusion Cloud HCM
How do I adopt Redwood for HCM?

Chapter 3
How do I deploy Redwood to my production environment?

3 How do I deploy Redwood to my production environment?

Once you validate the Redwood pages and flows in your test environment, you're ready to deploy to your production environment. You'll need to go through several, but not all the same steps you went through to prepare your test environment.

Prepare your production environment for Redwood

To update your production environment, you'll follow these same steps you completed in your test environment but now in your production environment.

- *Enable Oracle Search for Redwood*
- *Run Initial Data Ingestion for the Required HCM Indexes*
- *Run scheduled processes for Oracle Search data security*
- *Set profile options for Redwood pages*
- *Add new security to custom job roles*
- *Contextual journey privileges*
- *Prepare Recruiting for Redwood*

Move your tested personalizations to your production environment

The converted and validated personalizations in your test environment can be deployed to your production environment from Visual Builder Studio.

See *Set Up the Project to Deploy for Production* to set up a continuous integration and continuous delivery (CI/CD) pipeline. You can then use this pipeline to deploy your personalizations to production.

Note: You only need to set up this pipeline up once.

ORACLE

Oracle Fusion Cloud HCM
How do I adopt Redwood for HCM?

Chapter 3
How do I deploy Redwood to my production environment?