



HMS Guide

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Version 9

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Introduction

Upgrades of Oracle RightNow CX Cloud Service are managed using the Hosting Management System (HMS). Accessed through a simple web interface, HMS tracks most critical aspects of your upgrade, such as scheduling, notifications, and checklists of tasks that must be performed prior to and following your upgrade to a new release.

This guide contains an overview and procedure for upgrading Oracle RightNow CX through HMS. Also included is a procedure for rescheduling an upgrade as well as information about tasks to complete during the upgrade process. You will also find procedures for creating sites that can be used to review new features and migrate customizations to your production site.

This guide is intended for CX administrators or any staff member responsible for configuring, administering, and upgrading your site.

In this document

- **Upgrading Oracle RightNow CX**—Contains an overview of the upgrade process, procedures for upgrading your site through HMS, and the creation of test sites. Refer to page 5.
 - **Upgrade Checklist**—Contains an overview of UMS (Upgrade Management System) and procedures for managing tasks, including creating custom tasks. Refer to page 23.
-

Note This guide is updated periodically. The title page lists the date it was released. If you have questions regarding any of the procedures described in this guide, submit an assistance request through the [Ask an Upgrade Question](#) page on our support site.

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Upgrading Oracle RightNow CX

Upgrading to the latest version of Oracle RightNow CX Cloud Service through HMS is straightforward and efficient when you follow the procedures listed in this chapter. Before you begin, you will want to review the HMS upgrade process.

In this chapter

- **Preparing for your upgrade**—Contains information about preparing for your upgrade to Oracle RightNow CX. Refer to page 6.
 - **Upgrade process summary**—Contains a description of the overall HMS upgrade process along with procedures for upgrading Oracle RightNow CX. Refer to page 6.
 - **Requesting an upgrade**—Contains procedures for requesting an upgrade through HMS. Refer to page 9.
 - **Rescheduling an upgrade**—Contains the procedure for rescheduling an upgrade. Refer to page 16.
 - **Creating a test site**—Contains procedures for scheduling the creation of a test site. Refer to page 19.
-

Preparing for your upgrade

In addition to reviewing this HMS guide, you also need to review the other documentation you will need before, during, and after the upgrade. The documentation you need to prepare for your upgrade is available for download from [Answer 5168](#) on our support site (<http://cx.rightnow.com>) and is summarized as follows.

- **Workstation Specifications**—Contains a description of the hardware and software recommendations and requirements for user workstations.
- **Release Notes**—Contains a brief description of the new and expanded features in each version of Oracle RightNow CX. Release notes are included as part of the online documentation.
- **Upgrade Guide**—Contains procedures for upgrading to the latest version, including procedures for configuring features that have been added to the new release.
- **Deployment Guide**—Contains procedures for deploying the Oracle RightNow CX client on agent workstations.

Note Information about changes carried forward from the upgrade site and production site during the upgrade process is available from [Answer ID 1925](#) on our support site.

Upgrade process summary

Before you begin upgrading Oracle RightNow CX through HMS, be sure to review the descriptions and procedures included in this chapter. The following outline summarizes the process and procedures that you and your staff will follow to complete your upgrade. While the entire process may take several weeks, you can use this summary to quickly orient yourself and track your progress.

Note If you have any questions regarding the upgrade, submit an assistance request through the [Ask an Upgrade Question](#) page on our support site.

Phase 1: Review upgrade resources and request an upgrade

- 1 Use our secure HMS website to review required documentation and resources and request an upgrade of your production site (refer to [Requesting an upgrade](#)). When you request an upgrade, an incident is created on our support site (<http://cx.rightnow.com>) and an email acknowledging your request is sent to all contacts in your organization who have opted in to receive hosting and upgrade communications.
- 2 A technical migration manager will contact you shortly after your upgrade request is received to coordinate the processing of your upgrade site.
- 3 Once we have confirmed the version you want to upgrade to and completed all development work (if applicable), an upgrade site will be made from a clone of your production site. HMS will notify you by email when the upgrade site is available.

Note The email includes a link to the upgrade site, an estimate of how long the production upgrade will take to complete, and a list of all previously modified PHP files containing changes that cannot be carried over automatically.

- 4 Once the upgrades team has fully processed your upgrade request, another email will follow with information verifying the date and time of your upgrade. When you receive this verification email, you should consult with your colleagues and staff to ensure that the schedule is feasible. If you need to reschedule the upgrade for another date and time, you can easily do so by logging back in to HMS and referring to [Rescheduling an upgrade](#).

Note A minimum two-week upgrade site evaluation period is generally required prior to the upgrade date. For this reason, most upgrades are scheduled no sooner than two weeks from the request date. If customizations were previously applied to the site (usually consisting of modifications you have requested through Professional Services), the upgrades team will work with you to adjust the schedule accordingly.

Phase 2: Evaluate your upgrade site and complete all mandatory pre-upgrade tasks

- 1 Access your Oracle RightNow CX upgrade site to verify that all the data has been converted correctly and that the site is functioning as expected. If you have more than one interface, be sure to evaluate each interface.
- 2 Review and perform the standard operations listed for your upgrade path in the [Oracle RightNow CX Upgrade Guide](#).

- 3 Review the [release notes](#) for the new version to ensure a smooth transition to the new version. View and test the new and enhanced features and customize your upgrade site before it becomes your production site.

Important When your site is upgraded, the data from your previous version production site is merged with configuration files from your upgrade site. Therefore, changes made to either site can affect your upgrade. For a description of which items are carried forward from your upgrade site and which are carried forward from your production site, refer to [Answer ID 1925](#) on our support site.

If you have any questions regarding the upgrade site, update your upgrade site incident through the [My Account](#) page on our support site.

- 4 Review and complete all mandatory tasks included in the upgrade checklist using the Upgrade Management System (UMS). Refer to [Upgrade Checklist](#). The tasks in the upgrade checklist will help you test the core functionality of your upgraded site before you go live.
- 5 You will receive three additional email notifications before the upgrade: one 96 hours before the upgrade, another 48 hours before the upgrade, and the final notice 24 hours before the upgrade. These notifications will let you know if there are still any mandatory tasks which remain open and are reminders that your upgrade is imminent.

Important Your production site will automatically be upgraded at the scheduled time unless you have not completed all mandatory tasks listed in the UMS Checklist.

Phase 3: Evaluate the upgraded production site

- 1 At the scheduled time, your production site and database will be upgraded and your upgrade site interfaces will become your production site interfaces. An email notification will be sent to confirm the start of the upgrade.
 - 2 HMS will send another email confirming that your production upgrade has been successfully completed.
-

- 3 Once you receive the upgrade confirmation email, you should immediately verify that all data in your production site has been converted correctly and that all customizations are in place and working properly. The evaluation process for the production site is the same as it was for the upgrade site. If you have more than one interface, you should evaluate each interface.

Important After your site has been upgraded, there is a 96-hour waiting period before you can request another upgrade for the same site. This mandatory waiting period applies to all sites to ensure that adequate time is available to evaluate your upgrade and address any issues that may have occurred during the process. It is important to verify that all data has been converted correctly and that all customizations are in place and fully functional on the upgraded production site.

During this four-day period, the old version of your site still exists (though disabled) as a precautionary measure, and you **cannot** create an upgrade site. The options to do so will be inactive in HMS until the waiting period has ended.

If you have any questions following the upgrade, please submit your question to our [support site](#).

Requesting an upgrade

Once you have become familiar with the HMS upgrade process described in the previous section, you can request an upgrade. The HMS website will walk you through a series of simple steps that allow you to select the site you want to upgrade and how long you want to delay the resumption of utilities upon cutover.

Once you request an upgrade, a technical migration manager will contact you to create an upgrade site. The site is created by cloning your production site and upgrading the cloned site to be your upgrade site. This takes place after any required engineering work is completed. Working with an upgrade site ensures a fast and smooth transition when your actual production site is upgraded. You will complete many aspects of the conversion and gain familiarity with new features before the upgrade site becomes your live production site. While you work, you can reschedule your upgrade to allow for more time as needed. (Refer to [Rescheduling an upgrade](#) for details.)

Important Once an upgrade site is created, the production site must be upgraded to that specific version of Oracle RightNow CX, even if the upgrade request is later canceled.

To request an upgrade for your production site

- 1 Launch your web browser and type `https://hms.custhelp.com` in the address bar. The HMS Login page opens.

Tip You can also access the HMS upgrade system by logging in to the [My Site Tools](#) section of our support site and clicking Upgrade RightNow.

Thank you for choosing to upgrade to a new version of Oracle RightNow[®] software. Please login using your Oracle RightNow login/password. Your login and password are case-sensitive.

If you have forgotten your login/password, please go to <http://rightnow.custhelp.com> to obtain that information from the login page of the Oracle support site.

Customer Login:

Password:

Login

English ▾

- 2 Type your customer login (user ID) and password for your Oracle support account. This is the same user name and password you use to log in to our support site.

Note A password is required to log in to the HMS website. If your Oracle support login is not configured with a password, you must first add a password through the My Account > Change Password page on our support site.

- 3 Select the language you want the HMS website displayed in (English or Japanese) from the drop-down menu.
- 4 Click the Login button. The HMS Welcome page displays an overview of documentation and resources you will need to complete the upgrade.

Welcome to the RightNow Technologies Hosting Management System (HMS)

Through HMS, you will be able to request an upgrade. An Upgrade Technical Migration Manager will assist you in setting your upgrade date and time. Once established, you will then be able to reschedule your upgrade at any time.

When you upgrade your RightNow Software, you must review and understand the accompanying upgrade documentation. For quick and easy reference, please [download](#) these now.

- SmartConversion Guide
- Release Notes

We have also created an Upgrade Checklist to help you manage your tasks as you test your upgrade site. You may get to the Upgrade Checklist through the HMS tool or through MyStuff > Support Services on your RightNow Support Site. For more information on how to use the Upgrade Checklist, please visit our [support site](#).

There are mandatory tasks within your Upgrade Checklist that must be marked as "complete" before your production upgrade cutover will commence.

- Read the upgrade documentation, including the Smart Conversion Guide and Release Notes
- Verify all functionality on the upgrade test site has been validated and is performing as expected
- Train all staff members on the upgrade test site and the new version functionality

Important The HMS Welcome page provides links to upgrade documentation that you are required to read before requesting your upgrade. You can either download and read the documents while you are still logged in to HMS, or you can download the documents, log off, and return after you have read the documentation.

- 5 Follow the instructions on the Welcome page and click the Continue button. The Choose Site page opens.

Choose Site

1. Specify the site you intend to upgrade by selecting the radio button corresponding to that site. Options applicable to the selected site will highlight.
2. Select the appropriate action:
 - o **Request Upgrade** - Select the upgrade version and engage with Technical Migration Manager to schedule date and time of upgrade.
 - o **Reschedule Upgrade** - Change the upgrade date and/or time of an existing upgrade site.

Site	Current Version	Test Site (When Available)	Scheduled Upgrade Date	Upgrade Status
<input checked="" type="radio"/> doc_hms_ums <ul style="list-style-type: none"> • doc_hms [admin] 	RightNow CX February 12			ready to schedule

- Select the radio button next to the site you want to upgrade and click the Schedule Upgrade button. Each Oracle RightNow CX site and its interfaces are listed in the Site column.

Note Only one site can be selected at a time. Once you request an upgrade for one site, you can return to this page to request upgrades for your other sites as well. If the site you select has more than one interface, a test interface will be created for each interface listed for that site.

For information about the options to reschedule an upgrade, refer to [Rescheduling an upgrade](#).

The screenshot displays the 'Upgrade Details' page for site 'doc_hms_ums'. It indicates the current version is 'RightNow CX February 12' and offers an upgrade to 'RightNow CX November 12'. The page includes a 'Choose Version' section with a message: 'Your current production version of doc_hms_ums is RightNow CX February 12. You may upgrade to the latest release, RightNow CX November 12.' Below this, there are two radio buttons: 'You are now running: RightNow CX February 12' and 'Version to upgrade to: RightNow CX November 12'. The 'Version to upgrade to' option is selected. At the bottom, there are 'Continue' and 'Reset' buttons, and a 'Manage Test Sites' button with the text 'I just need to work with a test site clone:' next to it.

- Select the radio button next to the version you want to upgrade to and click the Continue button. The upgrade choices offered on this page are the available options based on the version and language you are currently using.

Note The upgrade process is restricted to latest version upgrades only—you cannot create an upgrade site that is the same version as your production site.

Release notes for each version of Oracle RightNow CX are available from [Answer 5168](#) on our support site (<http://cx.rightnow.com>).

If HMS does not provide upgrade choices on this page, your site will probably require a special upgrade procedure. For assistance, submit an assistance request through the [Ask an Upgrade Question](#) page on our support site.

Upgrade
Details

site name: doc_hms_ums
 upgrading from RightNow CX February 12 to RightNow CX November 12
 cutting over on ? at ?
 with a utility delay of ? hours

Set Utility Delay

The upgrade process may render some of your business rules inoperative.

Utilities that could trigger these rules will remain disabled until one hour after the upgrade to enable you to review and update your business rules. You may change the utility reactivation delay using the drop down box below.

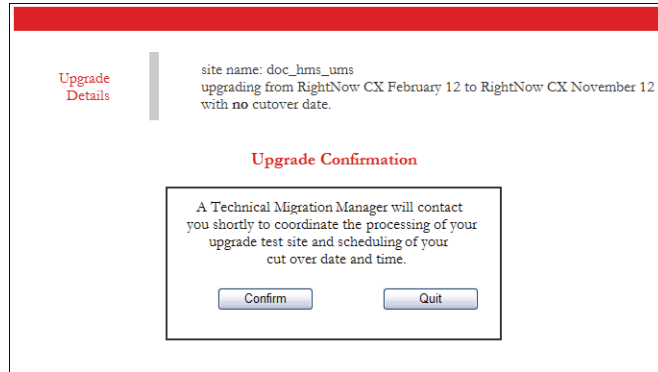
Please reactivate utilities for my site hours after the upgrade.

If you want to enable utilities immediately, enter zero.

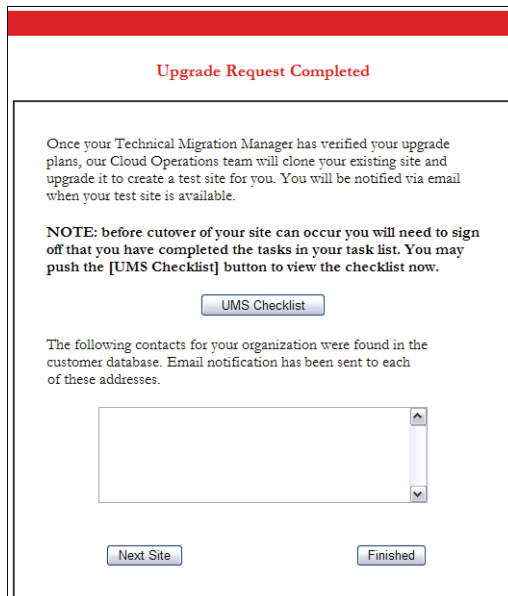
- 8 Click the drop-down menu to select the number of hours you want to delay the automatic enabling of utilities following the upgrade, and then click the Continue button. This will give you time after the upgrade to review business rules for accuracy and make any necessary updates before the utilities run. If you do not allow enough time and utilities are enabled before you update your rules, utility processes, such as incident routing and escalation, may be performed incorrectly. The default delay is one hour.

During the delay, the following occurs.

- Techmail does not retrieve email from mailboxes. No new incidents will be created from email messages and incidents will not be updated from email messages. All email messages will remain in the mailboxes until Techmail resumes. Incidents will still be created through Ask a Question.
- Dbstatus does not escalate incidents, answers, opportunities, or tasks. Scheduled reports and answer notification messages are not sent by Dbstatus. When utilities resume, all objects that were scheduled to be escalated or sent while utilities were disabled will be escalated or sent.
- Agedatabase does not set incidents to the Solved status or cache report results. If utilities are disabled during Agedatabase's scheduled execution time, some standard reports will not include data from the previous day and incidents will remain set to Waiting until the next time Agedatabase runs.



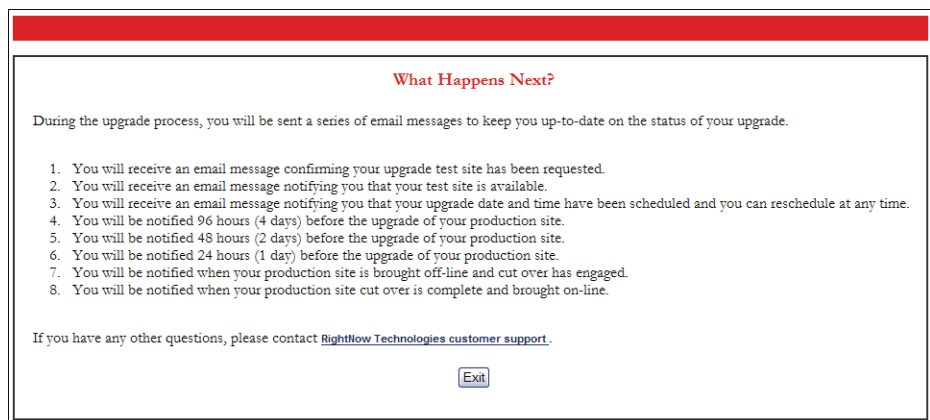
- 9 Click the Confirm button to submit your upgrade request. The Upgrade Request Completed page opens.
- Or
- Click the Quit button to cancel the request.



- 10 To review tasks to be completed before and after your upgrade, click the UMS Checklist button and click View Checklist next to the site name. Refer to [Checklist overview](#).

- 11 To request an upgrade for another site, click the Next Site button. Your first upgrade request will be processed and an email will be sent to the email addresses listed. You will return to the Choose Site page in step 6 on page 12.
- 12 To complete your upgrade request and send email notifications to all the email addresses listed in the display area, click the Finished button. This list of contact email addresses is generated from the active contacts for your organization listed in our support database. These email notifications confirm that an upgrade has been requested.

Note If you want to add, remove, or update the email addresses displayed on the Scheduling Completed page, you, or a member of your organization who has contact management permissions, can add, remove, or update contacts on our support site. Refer to [Answer ID 2023](#) on our support site.



The What Happens Next page describes the follow-up email notifications that you and your staff members will receive during the upgrade process.

- 13 Click the Exit button to end your session and return to the HMS Login page. Refer to [Upgrade process summary](#) to review the additional steps for completing your upgrade.

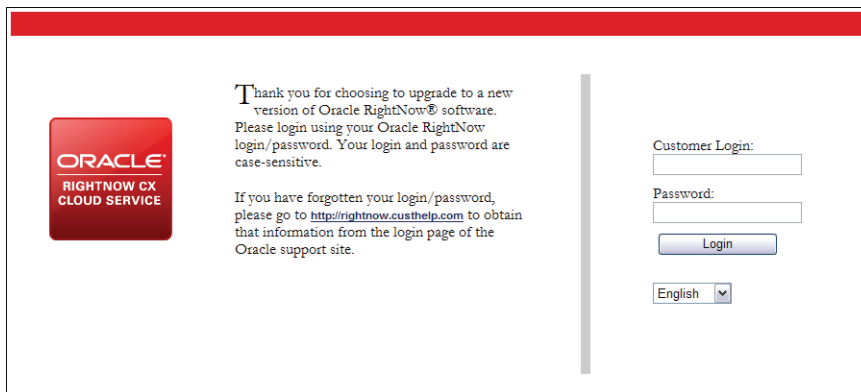
Rescheduling an upgrade

Once a technical migration manager has scheduled an upgrade for your site, you can easily reschedule your upgrade if you need more time to familiarize your staff with the new features of the latest release.

To reschedule the date or time of an upgrade

- 1 Launch your web browser and type `https://hms.custhelp.com` in the address bar. The HMS Login page opens.

Tip You can also access the upgrade schedule by logging in to the [My Site Tools](#) section of our support site and clicking Schedule An Upgrade.



- 2 Type your customer login (user ID) and password for your Oracle support account and click the Login button. This is the same user name and password you use to log in to our support site.

Note A password is required to log in to the HMS website. If your Oracle login is not configured with a password, you must create a password through the My Account > Change Password page on our support site.

- 3 Select the language you want the HMS website displayed in (English or Japanese) from the drop-down menu.

- 4 Click the Login button. The HMS Welcome page opens.
- 5 Click the Continue button. The Choose Site page displays your site with information about the currently scheduled upgrade.

Choose Site

1. Specify the site you intend to upgrade by selecting the radio button corresponding to that site. Options applicable to the selected site will highlight.

2. Select the appropriate action:

- o **Request Upgrade** - Select the upgrade version and engage with Technical Migration Manager to schedule date and time of upgrade.
- o **Reschedule Upgrade** - Change the upgrade date and/or time of an existing upgrade site.

Site	Current Version	Test Site (When Available)	Scheduled Upgrade Date	Upgrade Status
<input checked="" type="radio"/> doc_hms_ums_colin <input type="radio"/> doc_hms [admin]	RightNow CX February 12	<input type="radio"/> doc_hms--upgrade [admin] <input type="radio"/> RightNow CX November 12	2012-12-20 07:00:00 PST	scheduled: ready to upgrade site

- 6 Select the radio button next to the site you want to reschedule the upgrade for and click the Reschedule Upgrade button. The Choose Upgrade Date page opens.

Choose Upgrade Date - major upgrade

Upgrade
Details

site name: doc_hms_ums
 upgrading from RightNow CX February 12 to RightNow CX November 12
 cutting over on ? at ?
 with a utility delay of ? hours

IMPORTANT - PLEASE READ: If your site contains customizations that require assistance from RightNow, the target upgrade date will be subject to change depending on resource availability and scope of customization. A RightNow Project Manager will contact you post the scheduling of your upgrade to discuss and finalize an appropriate cut over date.

December 2012

January 2013

February 2013

March 2013

April 2013

May 2013

Note The initial upgrade date scheduled by Oracle is based on several factors, including the size of your site and the extent of any customizations that must be migrated. For this reason, when rescheduling an upgrade, you will not be able to select a date earlier than the date initially scheduled by Oracle.

If you want to request an upgrade date earlier than the one provided by Oracle, please submit your request through the [Ask an Upgrade Question](#) page on our support site.

- 7 Click the date you want your site to be upgraded on. The Choose Upgrade Time page opens.

Upgrade Details

site name: doc_hms_ums
upgrading from RightNow CX February 12 to RightNow CX November 12
cutting over on 2013/5/31 at 2:00 PM
with a utility delay of 2 hours

Choose Upgrade Time

Choose a time to schedule your upgrade:

Times are in US/Pacific

*Place cursor over a listed time to see tooltip with US/Eastern & GMT

<input type="radio"/> 12 AM	<input type="radio"/> 12 PM
<input type="radio"/> 1 AM	<input type="radio"/> 1 PM
<input type="radio"/> 2 AM	<input type="radio"/> 2 PM
<input type="radio"/> 3 AM	<input type="radio"/> 3 PM
<input type="radio"/> 4 AM	<input type="radio"/> 4 PM
<input type="radio"/> 5 AM	<input type="radio"/> 5 PM
<input type="radio"/> 6 AM	<input type="radio"/> 6 PM
<input type="radio"/> 7 AM	<input type="radio"/> 7 PM
<input type="radio"/> 8 AM	<input type="radio"/> 8 PM
<input type="radio"/> 9 AM	<input type="radio"/> 9 PM
<input type="radio"/> 10 AM	<input type="radio"/> 10 PM
<input type="radio"/> 11 AM	<input type="radio"/> 11 PM

- 8 Select the radio button next to the time you want to begin the upgrade and click the Continue button. Times that are blocked out are already scheduled.
- 9 Follow the procedure for requesting an upgrade, beginning with step 8 on page 13.

Creating a test site

As a standard part of the process of upgrading Oracle RightNow CX, you are automatically provided with a clone of your production site running the version you are upgrading to. This site, referred to as the upgrade site, allows you to evaluate the impact of the upgrade upon your data and take preliminary steps to configure and prepare your site for the upgrade. Upon the cutover date, customization and configuration elements from the upgrade site are applied to your upgraded production database to complete the transition of your site to the new release. Refer to [Upgrade process summary](#).

However, it is also sometimes useful to create a test site that exists independently from the upgrade path. With a test site, you can evaluate features and customizations with no impact on your production site. You can create a test site that is the same version as your production site or one that is updated to the latest version. This site can exist indefinitely and you can define the extension appended to its site name (such as “__tst1”).

Important Testing features and customizations thoroughly before taking them live can help minimize the disruptive impact of enabling them on your production site. However, your test site cannot be used to cut over changes to your production site—such migrations must be made manually. The cutover process is restricted to latest version upgrades following the standard upgrade path. However, because a test site is independent of the upgrade process, it does not prevent you from creating an upgrade site or cutting over your production site.

To create a test site

- 1 Launch your web browser and type the following URL in the address bar to load the test site management page.

`https://hms.custhelp.com/cgi-bin/tsm-login.py`

Thank you for choosing to upgrade to a new version of Oracle RightNow® software. Please login using your Oracle RightNow login/password. Your login and password are case-sensitive.

If you have forgotten your login/password, please go to <http://rightnow.custhelp.com> to obtain that information from the login page of the Oracle support site.

Customer Login:

Password:

Login

English ▾

- 2 Type your customer login (user ID) and password for your Oracle support account and click the Login button. This is the same user name and password you use to log in to our support site.

Note A password is required to log in to the HMS website. If your Oracle support login is not configured with a password, you must create a password through the My Account > Change Password page on our support site.

- 3 Select the language you want the HMS website displayed in (English or Japanese) from the drop-down menu.
- 4 Click the Login button. The Manage Test Sites page opens.

Manage Test Sites

Requestable Test Sites

doc_hms_ums__tst1 (upgradable to Nov 12)

Site	Status
No test sites currently exist	

Destroy and re-create on current version

Destroy and re-create on latest version

- 5 Select the site you want to clone and type an extension for the test site name. By default, test site names end with “__tst1.”
- 6 To create a test clone of the same version, click the Create button.
- 7 To create a test clone of the latest version (indicated in parentheses), click the Create and Upgrade button. The status of the test site is displayed as Cloning.

Site	Status
<input type="radio"/> doc_hms_ums_colin__tst1 (upgradable to Nov 12)	cloning
<input type="radio"/> Destroy and re-create on current version	
<input type="radio"/> Destroy and re-create on latest version	

- 8 To check the status of the test site creation process, click the Refresh Page button. The clone process may take several hours, depending on the option you selected. Once the test site is complete, its status will be displayed as Ready.

Site	Status
<input type="radio"/> doc_hms_ums_colin__tst1 (upgradable to Nov 12)	ready
<hr/>	
<input type="radio"/> Destroy and re-create on current version	
<input type="radio"/> Destroy and re-create on latest version	
<input type="button" value="Submit"/>	
<hr/>	
<input type="button" value="Return to Upgrade Page"/>	<input type="button" value="Refresh Page"/>

Note Once your test site has been created, you can easily delete and rebuild it when needed. Test sites cannot be upgraded to another version, but they can be destroyed and re-created on either its current version or the latest version using the following options.

- 9 To remove and re-create the test site on the current production version, select the Destroy and Re-create on Current Version radio button and click the Submit button.
- 10 To remove and re-create the test site on the latest version, select the Destroy and Re-create on Latest Version radio button and click the Submit button.
- 11 To return to the upgrade request form, click the Return to Upgrade Page button.

3

Upgrade Checklist

The Upgrade Management System (UMS) is a dynamic checklist tool designed to assist you when your organization is upgrading Oracle RightNow CX Cloud Service. The upgrade checklist guides you through a series of tasks designed to test the core functionality of your upgraded site. You can add custom tasks, edit tasks, or remove tasks. UMS can be accessed by any staff member with a support account login.

In this chapter

- **Accessing UMS**—Contains the procedure for accessing UMS. Refer to page 24.
 - **Checklist overview**—Contains an overview of UMS checklists. Also contains descriptions of the pre-upgrade, next upgrade, and post-upgrade checklists. Refer to page 25.
 - **Managing tasks**—Contains the procedures for adding, editing, ignoring, and organizing tasks. Also contains a description of task statuses. Refer to page 29.
-

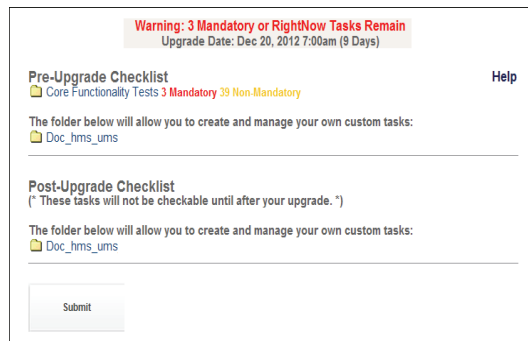
Accessing UMS

UMS contains the lists of tasks you will complete before upgrading Oracle RightNow CX.

Note Once you have entered UMS, you can return to HMS only by closing UMS and logging back in to HMS.

To access UMS

- 1 Launch your web browser and log in to the Oracle support site (<http://cx.rightnow.com>).
- 2 Click My Site Tools.
- 3 If prompted, enter your support user name and password and click the Login button.
- 4 Click Upgrade Checklist.
- 5 Click the View Checklist button for the site you are upgrading. The UMS checklist displays.



The screenshot shows a web interface for the UMS Pre-Upgrade Checklist. At the top, a warning banner reads: "Warning: 3 Mandatory or RightNow Tasks Remain" with a sub-note "Upgrade Date: Dec 20, 2012 7:00am (9 Days)". Below this, the "Pre-Upgrade Checklist" section includes a folder icon, "Core Functionality Tests 3 Mandatory 39 Non-Mandatory", and a "Help" link. A message states: "The folder below will allow you to create and manage your own custom tasks:" followed by a folder icon and "Doc_hms_ums". A horizontal line separates this from the "Post-Upgrade Checklist" section, which has a note: "(* These tasks will not be checkable until after your upgrade.)". It also includes a message: "The folder below will allow you to create and manage your own custom tasks:" followed by a folder icon and "Doc_hms_ums". At the bottom, there is a "Submit" button.

- 6 To view a checklist, click the folder or interface name for the checklist you want to view. Refer to page 25.
-

Checklist overview

UMS provides you with checklists to keep track of tasks to complete before upgrading Oracle RightNow CX. These checklists consist of Oracle-created tasks as well as custom tasks added by your organization. Some of these tasks are mandatory and must be completed before your site is upgraded or your upgrade will be delayed. Refer to [Managing tasks](#).

Important The Oracle-created tasks in the checklist will vary according to the products you have enabled at the time you request your upgrade.

There are three types of checklists you will work with when completing tasks before, during, and after an upgrade. The checklists are described in the following sections.

- **Pre-upgrade**—The pre-upgrade checklist becomes active when you request an upgrade. It consists of the tasks that should be completed before the time of the upgrade. Refer to page 25.
- **Next upgrade**—The next upgrade checklist is a copy of the pre-upgrade checklist and is active until you request your next upgrade. It includes all Oracle-created tasks and the custom tasks you define in the pre-upgrade checklist. Refer to page 27.
- **Post-upgrade**—The post-upgrade checklist becomes active after your upgrade. It consists of custom tasks created by your organization. Refer to page 28.

Note When a checklist is active, you can mark tasks complete. If disabled, you can edit task details, but you cannot mark tasks as completed.

Pre-upgrade checklist

The pre-upgrade checklist becomes active when you request an upgrade. It includes a list of Oracle-created tasks and custom tasks that should be completed before your upgrade. All tasks from the pre-upgrade checklist will be included in the next upgrade checklist once your upgrade has taken place.

The following figure shows a pre-upgrade checklist.

Pre-Upgrade Checklist			
Core Functionality Tests			
● Verify staff can log in	Unassigned	[details]	<input type="checkbox"/>
● Test and confirm upgrade site functionality	Unassigned	[details]	<input type="checkbox"/>
● Review upgrade documentation	Unassigned	[details]	<input type="checkbox"/>
RightNow Service			
● 1 -- Navigation Sets	Unassigned	[details]	<input type="checkbox"/>
● 2 -- Workspaces	Unassigned	[details]	<input type="checkbox"/>
● 3 -- Test Email Functionality	Unassigned	[details]	<input type="checkbox"/>
● 4 -- Verify Format of Receipt Email Message	Unassigned	[details]	<input type="checkbox"/>
● 5 -- Test Reply Between the Lines Email Update	Unassigned	[details]	<input type="checkbox"/>
● 6 -- Test Reply Outside the Lines	Unassigned	[details]	<input type="checkbox"/>
● 7 -- Test Ask a Question	Unassigned	[details]	<input type="checkbox"/>
● 8 -- Review Ask a Question Receipt Email	Unassigned	[details]	<input type="checkbox"/>
● 9 -- Test Update Link	Unassigned	[details]	<input type="checkbox"/>
● 10 -- Test My Stuff Question Update	Unassigned	[details]	<input type="checkbox"/>
● 11 -- Test Agent Response	Unassigned	[details]	<input type="checkbox"/>
● 12 -- Verify Workflow Routing	Unassigned	[details]	<input type="checkbox"/>
● 13 -- Verify Response Email Format	Unassigned	[details]	<input type="checkbox"/>
● 14 -- Verify Incident Count and Content	Unassigned	[details]	<input type="checkbox"/>

Important If any mandatory tasks remain, a warning will appear at the top of the pre-upgrade checklist page.

Table 1 contains a description of the main folders in the pre-upgrade checklist.

Table 1: Pre-Upgrade Checklist Description

Task	Description
Core Functionality Tests	This folder contains subfolders and Oracle-created tasks to test core functionality in your test site before completing your upgrade. The tasks will vary according to the products you have enabled at the time you request your upgrade.
RightNow Service	This folder contains core functionality tasks specific to Oracle RightNow CX Cloud Service (Service). Note: This folder will be available only if you have Service enabled.
RightNow Marketing	This folder contains core functionality tasks specific to Oracle RightNow Outreach Cloud Service (Outreach). Note: This folder will be available only if you have Outreach enabled.

Table 1: Pre-Upgrade Checklist Description (Continued)

Task	Description
RightNow Sales	This folder contains core functionality tasks specific to Oracle RightNow Opportunity Tracking Cloud Service (Opportunity Tracking). Note: This folder will be available only if you have Opportunity Tracking enabled.
(your interface)	Use this folder to create and manage your own custom tasks to complete before your next upgrade. For information about creating tasks, refer to Adding tasks . Note: If you have more than one interface on your site, a folder will be created for each interface. For information about multiple interfaces, refer to the documentation available on our support site .

Next upgrade checklist

Once your upgrade has taken place, the tasks from the pre-upgrade checklist are copied to the next upgrade checklist. The next upgrade checklist keeps track of all recurring tasks for each product enabled in your Oracle RightNow CX application. You can add additional tasks to this checklist and manage existing tasks to assist with a smooth transition the next time your organization upgrades. Once your next upgrade is scheduled, the tasks in the next upgrade checklist are copied to the pre-upgrade checklist and become active. Refer to page 25.

The following figure shows a next upgrade checklist for a site with all products enabled.

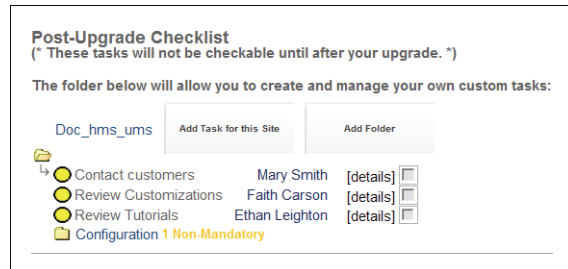
Next Upgrade Checklist			
(* These tasks will become checkable until after you have scheduled an upgrade. *)			
📁 Core Functionality Tests			
🔴 Verify staff can log in	Unassigned	[details]	<input type="checkbox"/>
🔴 Test and confirm upgrade site functionality	Unassigned	[details]	<input type="checkbox"/>
🔴 Review upgrade documentation	Unassigned	[details]	<input type="checkbox"/>
📁 RightNow Service			
🟡 1 -- Navigation Sets	Unassigned	[details]	<input type="checkbox"/>
🟡 2 -- Workspaces	Unassigned	[details]	<input type="checkbox"/>
🟡 3 -- Test Email Functionality	Unassigned	[details]	<input type="checkbox"/>
🟡 4 -- Verify Format of Receipt Email Message	Unassigned	[details]	<input type="checkbox"/>
🟡 5 -- Test Reply Between the Lines Email Update	Unassigned	[details]	<input type="checkbox"/>
🟡 6 -- Test Reply Outside the Lines	Unassigned	[details]	<input type="checkbox"/>
🟡 7 -- Test Ask a Question	Unassigned	[details]	<input type="checkbox"/>
🟡 8 -- Review Ask a Question Receipt Email	Unassigned	[details]	<input type="checkbox"/>
🟡 9 -- Test Update Link	Unassigned	[details]	<input type="checkbox"/>
🟡 10 -- Test My Stuff Question Update	Unassigned	[details]	<input type="checkbox"/>
🟡 11 -- Test Agent Response	Unassigned	[details]	<input type="checkbox"/>
🟡 12 -- Verify Workflow Routing	Unassigned	[details]	<input type="checkbox"/>
🟡 13 -- Verify Response Email Format	Unassigned	[details]	<input type="checkbox"/>
🟡 14 -- Verify Incident Count and Content	Unassigned	[details]	<input type="checkbox"/>
🟡 15 -- Create an Incident	Unassigned	[details]	<input type="checkbox"/>

For a description of the main folders in the next upgrade checklist, refer to Table 1 on page 26.

Post-upgrade checklist

The post-upgrade checklist consists of custom tasks you and your staff members create. When you begin the upgrade process, the post-upgrade checklist will contain a folder with no tasks. You will need to define tasks specific to your organization and add them to the post-upgrade checklist. For example, if your organization integrates accounting software with your Oracle RightNow CX application, you can create a custom task to verify the accounting software integration. The tasks on the post-upgrade checklist are disabled until your upgrade is complete. For information about adding custom tasks, refer to [Adding tasks](#).

The following figure shows a post-upgrade checklist.



Note Since the post-upgrade checklist contains only tasks created by your organization, there are no standard tasks or folders for this checklist.

Managing tasks

With UMS, you can easily manage tasks. You can add custom tasks, edit existing tasks, assign tasks to staff members, and create folders to organize tasks. In addition, you can edit certain fields in Oracle-created tasks. You can add and edit tasks at any time.

Each task is associated with a circular indicator signifying its status. The indicator color quickly tells you whether a task is mandatory or non-mandatory, if it must be completed by your staff or Oracle staff, or if it is complete or to be ignored. Once a task is modified, the indicator color changes to reflect its current status. For example, a mandatory task that is set to Completed will change from a red indicator to a green indicator.

The following table describes the status for each indicator color.

Table 2: Task Status Description

Indicator	Status	Description
Green	Completed	This task has been marked as completed.
Red	Mandatory	This task must be completed before the scheduled upgrade date. If not completed, your upgrade date and time will be delayed by one week and your cutover will not occur as scheduled.

Table 2: Task Status Description (Continued)

Indicator	Status	Description
Blue	Oracle-created	This task must be completed by Oracle staff before the scheduled upgrade date. If not completed, your upgrade date and time will be delayed by one week and your cutover will not occur as scheduled. If you have questions about this task, please submit an incident to our support site .
Yellow	Non-Mandatory	This task is not required. Failure to complete non-mandatory tasks will <i>not</i> prevent an upgrade cutover.
Gray	Ignored	This task has been ignored. These tasks are not required and will not prevent an upgrade cutover.

Tip To review the definitions of task status indicators from within UMS, click Help from the UMS Checklist page.

Adding tasks

Tasks provide you with test points to evaluate your test site upgrade, ensuring the upgrade is successful before your site goes live. Several tasks are defined by Oracle. You can add custom tasks to track other important steps for your upgrade, and optionally assign tasks to other staff members.

Important If you have a mandatory task in the pre-upgrade checklist and it is not marked as being completed before your scheduled upgrade date and time, your upgrade will automatically be delayed by one week. If this occurs, you can go back to the UMS Checklist and check all remaining mandatory tasks after testing, and then return to HMS and reschedule your upgrade for your new date and time.

To add a task

- 1 From the UMS checklist, click the interface name to expand the contents of the folder. In this example, the interface is Doc_hms_ums.

Pre-Upgrade Checklist
 Core Functionality Tests 3 Mandatory 39 Non-Mandatory

The folder below will allow you to create and manage your own custom tasks:

Doc_hms_ums

↳ Contact customers Mary Smith [details]

Review Customizations Faith Carson [details]

Review Tutorials Ethan Leighton [details]

Configuration 1 Non-Mandatory

Note If you have more than one interface on your site, a folder will be created for each interface.

2 Click the Add Task For This Site button.

Add Task
 Folder: /Doc_hms_ums

Recurring Task Use only for this upgrade

Title

Description:

Assign to (optional):
 Name Email

Responsibility :
 Mandatory Non-mandatory
 (WARNING: Uncompleted Mandatory tasks will cause your upgrade to be delayed!)

3 Enter field information described in Table 3.

Table 3: Adding a Task Description

Field	Description
Folder	Displays the name of the folder the task will be saved in. This is a display-only field.
Recurring Task	Select this radio button to save the task for all future upgrades.
Use Only For This Upgrade	Select this radio button to save the task only for the current upgrade. Once the current upgrade has taken place, the task will no longer be available.
Title	Type the title of the task in this text field.
Description	Type a description of the task in this text field.
Assign to (optional)	The following fields enable you to specify a member of your organization to complete this task.
Name	Type the name of the person you are assigning to this task. Note: You must type a valid email address for the assignee before the assignee information will update.
Email	Type the email address of the person you are assigning to this task. Note: You must type a valid email address for the assignee before the assignee information will update. Assignees will receive a task assignment alert in their email inbox. The alert will be sent from an Oracle support email address. If the assignee replies to the alert, the reply email will be sent to the person who assigned the task.
Mandatory	Select this radio button to specify that the task must be completed before your site is upgraded. Note: If a mandatory task is not completed by the cutover date, the upgrade will be delayed.
Non-mandatory	Select this radio button to specify that the task is not mandatory.

- 4 Click the Add Task button to save the task and return to the UMS Checklist.

Or

Click the Back button to return to the UMS Checklist.

Caution When you click the Back button, any edits made to the page will be lost.

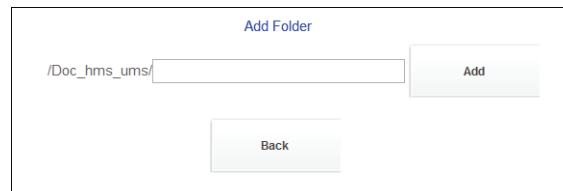
Adding folders

When adding tasks with UMS, you can also add folders to organize those tasks, making it easier for staff members to locate specific tasks. For example, you could add a folder for each Oracle RightNow CX product, or add folders for each staff group in your organization (such as managers, sales representatives, agents, and administrators).

Important You can create an unlimited number of folders and subfolders. However, you can add subfolders only to those folders with your interface name(s). You cannot add subfolders to Core Functionality Tests folders.

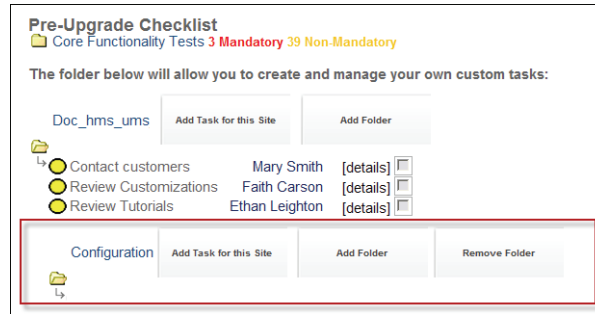
To add a folder

- 1 Click the Add Folder button next to the checklist you want to add the folder to.



The screenshot shows a dialog box titled "Add Folder". It contains a text input field with the prefix "/Doc_hms_ums/" and a blank space for the folder name. To the right of the input field is an "Add" button. Below the input field and "Add" button is a "Back" button.

- 2 Type the name of the folder in the text field and click the Add button. The folder is added to the UMS Checklist.
- 3 Click the folder to expand it.



- 4 To add a task to the folder, click the Add Task For This Site button. Refer to page 30.
- 5 To add a subfolder to the folder, click the Add Folder button.
- 6 To remove the folder from the UMS Checklist, click the Remove Folder button.

Important Folders that do not contain tasks will be removed once you exit the UMS Checklist.

Editing tasks

When necessary, you can easily edit custom tasks and specific fields in Oracle-created tasks. When editing a custom task, you can edit all of its attributes, including title and description text, recurrence, and assignment. In addition, you can ignore a task or activate a task that is in an ignored state. With Oracle-created tasks, you can assign a task to a staff member, ignore a non-mandatory task, and activate a task that is in an ignored state.

Important If you have a mandatory task in the pre-upgrade checklist and it is not marked completed before your scheduled upgrade date and time, your upgrade will be delayed by one week. If this occurs, you can go back to the UMS Checklist and check all remaining mandatory tasks after testing, and then return to HMS and reschedule your upgrade for your new date and time.

To edit a custom task

- 1 To mark the task completed, select the check box next to the name of the task.
- 2 Click Details next to the task to edit task details.

This task is Assigned to: Ethan Leighton ethan.leighton@example.com

Name: Email:

Task Lifetime: Recurring Responsibility: Non-Mandatory Task
Task type: User Defined Post Upgrade Task

- 3 To update assignee information, type the staff member's information in the appropriate fields and then click the Update Assignee button. Refer to Table 3 on page 32.
- 4 To view the history of the task, click the History button. The Task History page opens.

Task History: Review Tutorials			
DATE	USER	ACTION	DETAILS
12/11/12	Ethan Leighton	Contact updated	
12/11/12	Ethan Leighton	Task was created	
12/11/12	Ethan Leighton	Contact updated	

[\[Back\]](#)

Note The Task History page displays the date, your name or the staff member's name who made edits to the task, actions taken, and details for the task, along with information about dates your site was scheduled to be upgraded.

- 5 Click Back to return to the UMS Checklist.
- 6 To edit the task details, click the Edit button.

Add Task
Folder: /Doc_hms_ums

Recurring Task Use only for this upgrade

Title

Description:

Assign to (optional):
Name Email

- 7 Enter field information described in Table 3 on page 32.
- 8 Click the Update Task button to save your changes and return to the UMS Checklist.

Important To return to the UMS Checklist without saving changes to the custom task, be sure to click the Back button instead of your browser's back button.

To edit an Oracle-created task

- 1 To mark the task as completed, select the check box next to the name of the task.
- 2 Click Details next to the task to open the task details. The following figure shows an example of the details for the Test Email Functionality task.

3 -- Test Email Functionality

Send an email with an attachment into each RightNow CRM mailbox. Verify that the email is processed and an incident is created. This tests that incidents are created correctly via email and the techmail utility.

Note: In order to test mailboxes in an upgrade test site, you must first check the "enabled" checkbox in the mailbox configuration. You must also remove the "invalid" email extension from the select address(es) you wish to test with. This extension was added to all addresses in the test site to make this site safe from mailing to production email addresses.

This task is Assigned to: Nobody

Name Email

Task Lifetime: Recurring Responsibility: Non-Mandatory Task
Task type: Pre Upgrade Task

Tip Notice that the display and availability of fields change when you access an Oracle-created task.

- 3 To update assignee information, type the staff member's information in the Name and Email fields and then click the Update Assignee button. Refer to Table 3 on page 32.
- 4 To ignore a non-mandatory Oracle-created task, click the Ignore button and refer to [Ignoring tasks](#).
- 5 To view the history of the task, click the History button. The Task History page opens.

Task History: Review Tutorials			
DATE	USER	ACTION	DETAILS
12/11/12	Ethan Leighton	Contact updated	
12/11/12	Ethan Leighton	Task was created	
12/11/12	Ethan Leighton	Contact updated	

[\[Back\]](#)

Note The Task History page displays the date, your name or the staff member's name who made edits to the task, actions taken, and details for the task.

- Click Back to return to the UMS Checklist.

Important To return to the UMS Checklist without saving changes to the Oracle-created task, be sure to click the Back button instead of your browser's back button.

Ignoring tasks

If you find that a non-mandatory task is not applicable to your site, you can choose to ignore it in the task list. When you set a task to an Ignored state, its indicator turns gray and it is hidden from view under a collapsible subheading. You can also reactivate an ignored task as needed.

Tip Mandatory tasks must be acknowledged and cannot be ignored. If a mandatory task is not marked complete by the cutover date, the upgrade will be delayed.

To ignore a task

- From the UMS Checklist, click Details next to the task you want to ignore.

3 -- Test Email Functionality

Send an email with an attachment into each RightNow CRM mailbox. Verify that the email is processed and an incident is created. This tests that incidents are created correctly via email and the techmail utility.

Note: In order to test mailboxes in an upgrade test site, you must first check the "enabled" checkbox in the mailbox configuration. You must also remove the ".invalid" email extension from the select address(es) you wish to test with. This extension was added to all addresses in the test site to make this site safe from mailing to production email addresses.

This task is Assigned to: Nobody

Name Email

Task Lifetime: Recurring **Responsibility:** Non-Mandatory Task
Task type: Pre Upgrade Task

- Click the Ignore button to set the task to Ignore. The Upgrade Checklist page displays a collapsible subheading with a gray indicator containing any ignored tasks.

Pre-Upgrade Checklist

- 📁 Core Functionality Tests
 - 🔴 Verify staff can log in Unassigned [details]
 - 🔴 Test and confirm upgrade site functionality Unassigned [details]
 - 🔴 Review upgrade documentation Unassigned [details]
- 📁 RightNow Service
 - 🟡 1 -- Navigation Sets Unassigned [details]
 - 🟡 2 -- Workspaces Unassigned [details]
 - 🟡 3 -- Test Email Functionality Unassigned [details]
 - 🟡 4 -- Verify Format of Receipt Email Message Unassigned [details]
 - 🟡 5 -- Test Reply Between the Lines Email Update Unassigned [details]
 - 🟡 6 -- Test Reply Outside the Lines Unassigned [details]
 - 🟡 7 -- Test Ask a Question Unassigned [details]
 - 🟡 8 -- Review Ask a Question Receipt Email Unassigned [details]
 - 🟡 9 -- Test Update Link Unassigned [details]
 - 🟡 10 -- Test My Stuff Question Update Unassigned [details]
 - 🟡 11 -- Test Agent Response Unassigned [details]
 - 🟡 12 -- Verify Workflow Routing Unassigned [details]
 - 🟡 13 -- Verify Response Email Format Unassigned [details]
 - 🟡 14 -- Verify Incident Count and Content Unassigned [details]
 - 🟡 15 -- Create an Incident Unassigned [details]
 - 🟡 16 -- Verify Contact Count Unassigned [details]
 - 🟡 17 -- Test Contact Updates Unassigned [details]
 - 🟡 18 -- Verify End User Pages Unassigned [details]
 - 🟡 19 -- Test Answer Creation Unassigned [details]
 - 🟡 20 -- Test Analytics Unassigned [details]
 - 🟡 22 -- Customization Unassigned [details]
- 🔍 Show 1 Ignored Tasks
- 📁 RightNow Marketing 7 Non-Mandatory
- 📁 RightNow Sales 9 Non-Mandatory

- 3 To view an ignored task, click Show Ignored Tasks.
 - a Click Details next to the task.

21 -- Test Live Chat

Have one staff member log in as an agent, and another log in as an end user. Engage in a Chat session using the functionality common to your operations. Verify all messages are transferred between an agent and the enduser. Verify that an incident was created with the proper text and routed correctly.

This task is Assigned to: Nobody

Name Email

Task Lifetime: Recurring **Responsibility:** Ignored Task

Task type: Pre Upgrade Task

- b** To activate an ignored task, click the Activate button. The task will appear active in the UMS Checklist with its indicator reverted to yellow.

Tip You can view the history of a task by clicking the History button to open the Task History page. The Task History page displays the date, your name or the staff member's name who made edits to the task, actions taken, and details for the task.
