

# Oracle Fusion Cloud Transportation and Global Trade Management

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**Quarterly Update: Preparation and  
Testing Recommendations Guide**

**Release 26B**



Oracle Fusion Cloud Transportation and Global Trade Management  
Quarterly Update: Preparation and Testing Recommendations Guide

Release 26B

G49072-01

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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

Use help icons to access help in the application.

## 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, 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 [otm-doc\\_us@oracle.com](mailto:otm-doc_us@oracle.com).

Thanks for helping us improve our user assistance!



## 2 About This Document

### Audience

This document is for Oracle Transportation and Global Trade Management Cloud administrators who are responsible for coordinating and participating in the preparation and testing activities for regularly scheduled software updates. The tips and techniques detailed in this document may not be suitable for other Oracle applications.

### Content Subject to Change

The information in this document is correct as of the published date. However, Oracle Transportation and Global Trade Management continues to evolve and software updates are applied frequently; therefore this information is subject to change. Check with your Oracle Representative for updates.

This content is not warranted to be error-free.



# 3 About Quarterly Updates

## What Are Quarterly Updates?

We use quarterly updates to deliver new features and functionality for your Oracle Cloud Applications. Quarterly updates contain a smaller number of new features and functionality than on-premises upgrades did, nearly all of which are invisible to your end users until you choose to make them available. Quarterly updates also include resolutions for issues that occurred since the last update.

## What Happens When I Get a Quarterly Update?

Quarterly updates are applied to your non-production and production environments on a predefined, predictable schedule. They're required and they can't be rescheduled. They're first applied to test cadence environments and then to production cadence environments two weeks later.

The two-week period between an update to your test and production cadence environments gives you time to confirm that your critical business flows are supported as expected after the update. Any unexpected issues that are identified need to be reported and resolved with Oracle Support before the scheduled date for the update to your production environment.

## What Should I Test After a Quarterly Update?

Oracle has thoroughly tested the product for the enhancements and corrections included in the update. Oracle has also run a wide range of regression tests against the product.

Your Oracle Cloud Application has been configured for your unique business requirements, so your test plan will be unique to your business. You should focus on validating your current configuration before you try out any of the new features available in an update. The point of this testing is to validate your CURRENT configuration to make sure that the update didn't cause some unexpected behavior to your unique configuration. This IS NOT the time to start enabling the new features available in the update.

We recommend that you test your key business processes on the new update. These processes should include all steps and navigation and might include various functions and user roles. You should include a test of the "Features Delivered Enabled" in the Feature Summary table of the What's New document, if they apply to you. Also, you should include a test of "Expired Opt In Features" in the What's New Features with Opt In Expiration.

## Areas to Include in Your Test Plan

- Integration tests confirming APIs (such as XML, REST) still work and exercise your agents and back end processes
- Third party external systems (such as rating, distance and service time engines)
- Key business process flows for various roles in your organization

- Critical custom reports
- UI tests that cover users' day-to-day activity and address screens that trigger agent actions
- Custom workflows including saved queries and direct SQL updates
- Automatically available UI
- Performance – test your key flows using production volume
- New enhancements that will apply to you (only after testing of your current configuration)

Oracle strongly encourages you to create automated tests to maximize coverage and streamline the test process.

## What If I Find a Problem?

If you find an issue during testing that didn't exist before the update, file a service request immediately. Indicate that the issue didn't exist before the update and give the date for when the update will be applied to your production environments. Oracle Support will use this information to prioritize your update issues and their resolutions. If you uncover multiple issues, file a separate Service Request for each one. Ensure you have suitable solutions for any minor issues filed during testing that aren't due to be fixed before the production update.

## Keys to Success

- Put your Quarterly Update dates on your calendar – they are predictable! So, plan ahead.
- Follow the recommended timeline for preparation and testing – and the guidance provided for each.
- Review the Feature Summary table and other details in the *OTM* and *GTM* What's New guide to determine if there are automatically delivered features that will apply to you.
- Review the Optional Features in the Update Tasks section of the *OTM* and *GTM* What's New Guides to identify features which were originally delivered as optional but are now enabled by default.
- Review the *Release Notes* to understand the detailed changes in the update.
- Validate your test cadence environment and report unexpected issues to Oracle Support right away, so we can work with you to resolve them before the update to your production environment occurs.

# 4 Preparing for Quarterly Updates

## What Do I Need to Do to Prepare for and Complete a Quarterly Update?

There are a few preparation steps to complete before, and some actions to take right after, a quarterly update is applied to your Oracle Cloud Application environment. But quarterly updates are predictable! So, set up some calendar reminders so you don't forget to do these activities.

Use this basic timeline, and the checklists that follow it, as your guide for your quarterly updates.

### Quarterly Update Timeline

4+ Weeks Before	1-2 Days Before	First Days After	1-2 Days Before	First Day After
1st Friday Test cadence environment delivered			3rd Friday Production cadence environment updated	
<ul style="list-style-type: none"> <li>Review materials</li> <li>Update test plan</li> <li>Check test environment</li> <li>Prepare integration tests</li> <li>Production-to-Test Environment Refresh (optional)</li> </ul>	<ul style="list-style-type: none"> <li>Preserve custom reports</li> </ul>	<ul style="list-style-type: none"> <li>Run through test plan in first few hours</li> <li>Log Service Requests for any issues by the end of the day</li> <li>Perform post-update steps, if needed</li> </ul>	<ul style="list-style-type: none"> <li>Preserve custom reports</li> </ul>	<ul style="list-style-type: none"> <li>Quick check of main business processes</li> <li>Perform post-update steps, if needed</li> </ul>

**Note:** If you're on a Thursday update schedule (Middle East), the update is applied on the Thursday before the first and third Fridays of the month.

## 4+ Weeks Before the Date of Your TEST CADENCE Environment Update(s)

### Release Readiness

Review the Spotlight video to give you a quick overview of the major themes in the update. To access:

1. Go to [Cloud Applications Readiness > Supply Chain & Manufacturing](#).

2. See the **Spotlights** section.

Review the **What's New** for the update. To access:

1. Go to *Oracle Help Center*.
2. Navigate to **Cloud Applications Fusion Applications Suite**, then select *See All*.
3. Select *Logistics*.
4. Select *Oracle Transportation and Global Trade Management*.
5. Select **Review what's new for Transportation Management** or **Review what's new for Global Trade Management**.

There, you will find links to:

- Update Tasks which gives you information to help you plan, deploy and validate your update. This section also links to Optional Features which provides information about expired Opt In features and Opt In features that will expire in an upcoming update.
  - **Current Opt-In Expirations:** This table shows features which were originally delivered as optional but are now enabled by default. These features are very important to test before the production update.
  - **Future Opt-In Expirations:** This table displays optional features and the "Optional Until" version when the feature will no longer be optional. These features retain your ability to toggle the "Opted In" value from "True" to "False." If an optional feature is toggled off for this update, you should thoroughly test in a test cadence environment (by setting "Opted In" to "True") before the feature reaches the "Optional Until" version.
- Feature Summary that gives you a snapshot look at the new features delivered in the update.
- Your primary resource to help with your update planning. The guide is organized by functional areas in the product, and it describes all the new features and enhancements and how to enable them. It links to other resources that you might need. The guide will also alert you to the few features or changes that are delivered automatically, without requiring any action on your part. If they apply to you, features that are delivered automatically are important to test before the production update.

## Release Notes

Review the latest Release Notes for the update. To access:

1. Go to *Oracle Help Center*.
2. Navigate to **Cloud Applications Fusion Applications Suite**, then select *See All*.
3. Select *Logistics*.
4. Select *Oracle Transportation and Global Trade Management*.
5. Select *Read the release notes*.

Release Notes provide more detailed information about:

- Corrections reflecting detail fixes made for the update.
- Parameters and Properties describing new parameters and properties.
- Deprecated Items indicating functionality that will be removed from a future update.
- Known issues.

## Documentation

Review extra product documentation. To access:

1. Access *Oracle Help Center*.

2. Navigate to **Cloud Applications Fusion Applications Suite**, then select **See All**.
3. Select **Logistics**.
4. Select **Oracle Transportation and Global Trade Management**.
5. Select **Implementation Guides and Online Help**.

There you'll find links to:

- The [release notes](#).
- The What's New guides.
- A [Getting Started Guide](#) that provides guidance for getting started with setting up Transportation and Global Trade Management.
- Administration documents such as the [Report Designer's Guide](#).
- Interoperability guides for [integration](#) and [data management](#).
- The [REST API guides](#).
- The [online help](#) for the project.

## Other Review Tasks

- Prepare or update test plans to include steps to run through your main business processes.
- Sign in to your test cadence environment to make sure it's working as expected and is a good representation of your production environment.
- Schedule a Production-to-Test (P2T) Environment Refresh to align test with production to:
  - test performance against a production sized dataset (this is especially valuable if your data characteristics have changed since the last P2T) and / or
  - have been actively developing in your test environment, changing the setup and configuration, and it's no longer similar to your production environment.

You must schedule this at least two weeks in advance of the requested refresh date, which must be at least a week before your test cadence update date. See [KB6749: Oracle Fusion Cloud Transportation and Global Trade Management: Update Policy](#) for more information about the Environment Refresh Policy. Note that a P2T clones the entire database with specific exceptions documented in the Environment Refresh Policy.

- Review integration tests to confirm APIs will still work and to exercise your agents and back end processes.

## 1-2 Days Before the Date of Your TEST CADENCE Environment Update(s)

- Make sure that all your modified reports are in a "safe" folder so that they aren't overwritten during the update. A "safe" folder refers to:
  - The "Custom" folder under "Shared Folders," if you want the report to be available to others.
  - "My Folders," if you are not sharing the report.

Reports in other folders may get lost or overwritten during the update.



# 5 Testing Quarterly Updates

## The First Day after Your TEST CADENCE Environment is Updated

Remember, you have a two week window in which to validate an update and resolve any issues in your test cadence environment, before your production environment is updated. So, we strongly encourage you to create automated tests to maximize coverage and streamline the test process.

- Run through your test plans in the first few hours to make sure that the environment was updated with no unexpected impact to your current business processes.
  - Integration tests confirming APIs (such as XML, REST) still work and exercise your agents and back end processes
  - Third party external systems (such as rating, distance and service time engines)
  - Key business process flows for different roles in your organization
  - Critical custom reports
  - UI tests that cover users day-to-day activity and address screens that trigger agent actions
  - Custom workflows including saved queries and direct SQL updates
  - Automatically available UI
  - Test performance
    - Run your current business processes using production volume. One technique we use is to create a data query to select a volume of records. The data query raises a custom event which then triggers an agent with actions against all the records in the data query.
    - Simulate production activity. For example, run integration at the same time as heavy UI activity.
- If you find anything that worked before the update, but doesn't work after it, log a Service Request so you can engage Oracle Support. Do this by the end of the first business day after the update. If you do find such an issue, make sure that when you log your Service Request, you:
  - Indicate that the issue didn't exist before the update
  - State the date that the update will be applied to production or other environments
  - File a separate Service Request for each issue
- Perform any post-update tasks that are recommended in the Post-Update Tasks section of the What's New guide.
- Remain engaged with Oracle Support as we work to validate and correct any issues that you found. Since Quarterly Updates can't be rescheduled, we need to work together to resolve everything before your production environment update begins.

## 1-2 Days before the Date of Your PRODUCTION Environment Update

Repeat the same preparation tasks that you completed for your test cadence environment, before it was updated.

- Make sure that all your modified reports are in a “safe” folder so that they aren't overwritten during the update. A "safe" folder refers to:
  - The "Custom" folder under "Shared Folders," if you want the report to be available to others.
  - "My Folders", if you are not sharing the report.

Reports in other folders may get lost or overwritten during the update.

## The First Day after Your PRODUCTION Environment Is Updated

- Do a quick check of your main business processes to make sure that the environment was updated with no unexpected impact to your current processes.
- Perform any post-update tasks that are recommended in the Post-Update Tasks section of the What's New guide.