Oracle Accelerate

Oracle E-Business Suite Accelerator Implementation

Implementation Methodology

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ORACLE CERTIFIED PARTNER

Approvals

Approval Name	Date	Signature
David Forrest	19 Sep 07	
Quality Assurance	**Date**	**Signature**
Beryl Mott	19 Sep 07	

The Approval signature denotes that this document accurately describes the requirements.

The Quality Assurance approval signature denotes this document has been reviewed and approved for conformity with the Percipient QMS.

Revision History

Revision No	Date	Author	Description
0.1	19 Sep 2007	David Forrest	First Version

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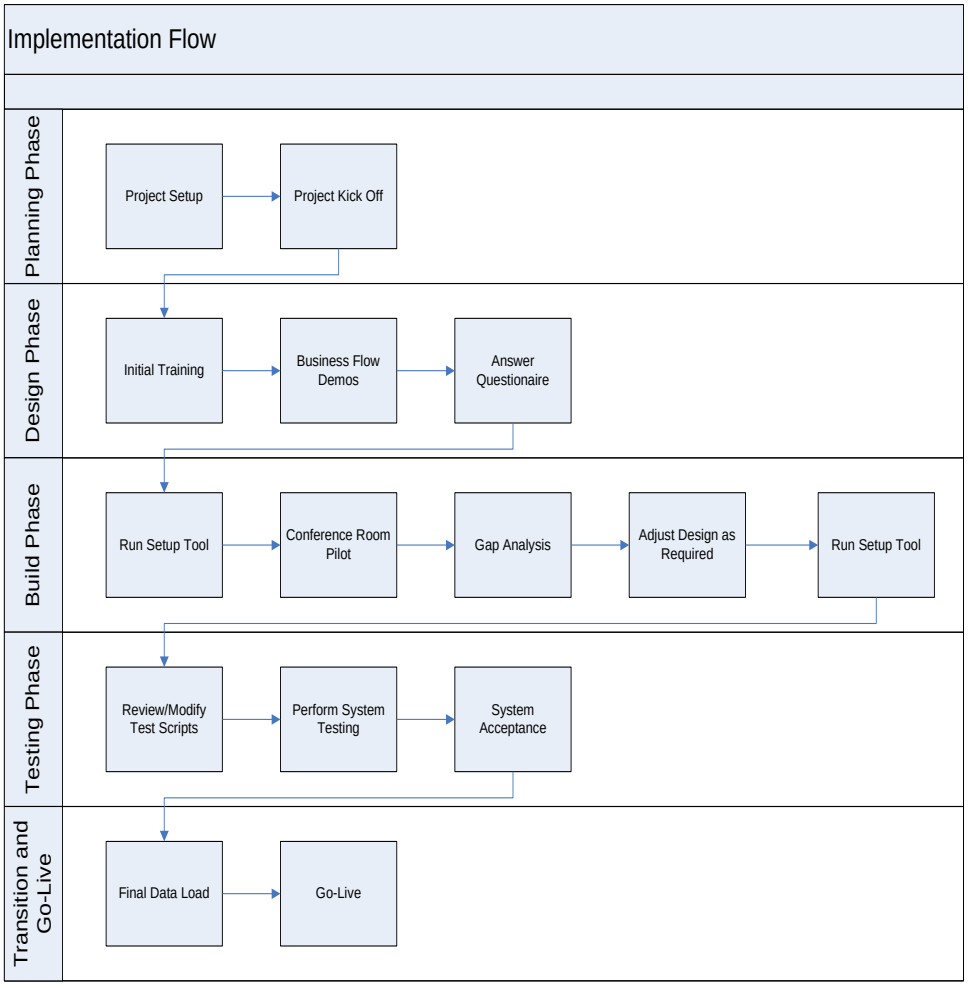
1. Introduction

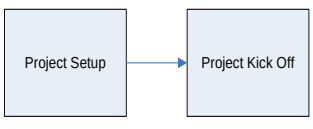
This document outlines the implementation methodology for implementing an R12 Oracle E-Business Suite system using Oracle Accelerators. It is assumed that prior to project start during the sales negotiation that the client's requirements have been analysed and that the correct process flows and software modules are being supplied to meet those requirements. Although it is possible to go through this at a later stage, the project is negotiated as a fixed price contract and changes made may result in additional costs being incurred.

2. Overview



3. Planning Phase

Planning Phase consists of two Activities:



3.1. Project Setup

This step consists of working with the Project board to Plan all future activities, agreeing the scope of project, roles and responsibilities, resources and setting up project controls. As part of this the project team will confirm with the client that the scope should be adequately covered with the flows and software models obtained during the sales process.

3.2. Project Kick Off

A kick off meeting is organised which Introduces the team resources from both client and implementer, setting the scene and briefing all resources on their roles and responsibilities.

4. Design Phase

Design Phase consists of 3 steps:

4.1. Initial Training

This is a high level training of the clients resources of the Accelerator process being followed, ensuring that they all understand the steps involved and their involvement in that process.

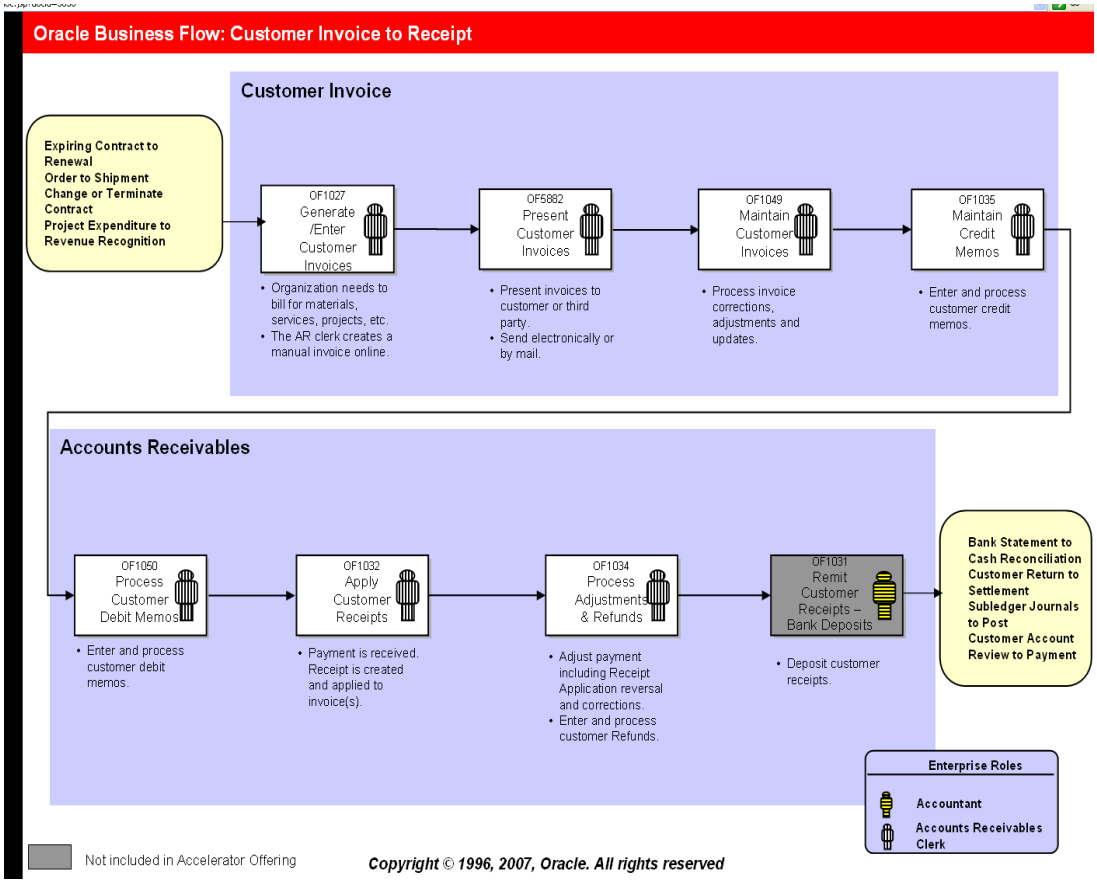
4.2. Business Flow Demos

This involves a walkthrough of the 'Best Practice' Business flows included in the accelerator, using Flow Models and Flow Videos. This is designed to facilitate user understanding of how the processes operate, identify differences to their own processes, so that the consultants can identify configuration settings and changes required to meet the customer needs.

During the walkthrough, the consultant for the business area concerned will go through each of the process steps with the relevant key users from the client and compare the process with the business needs and obtain setup information ready for entering into the setup tool.

4.2.1. Business Flow Model

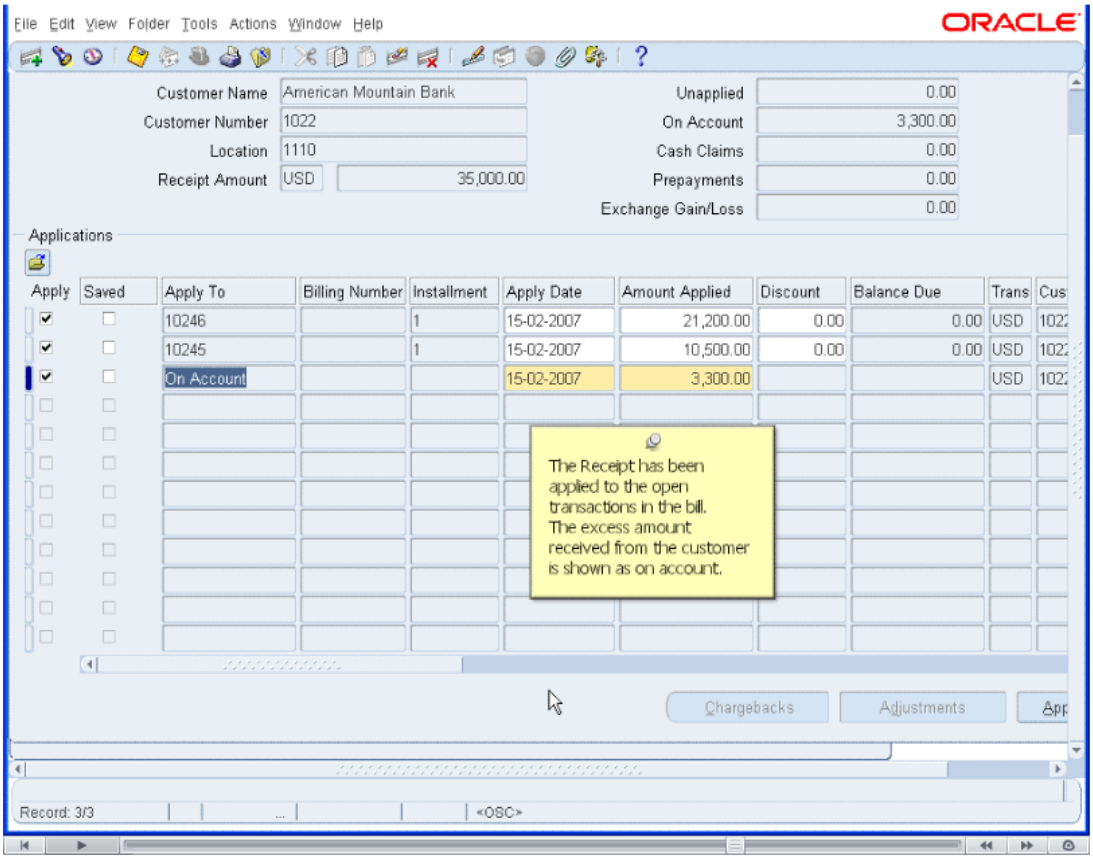
The screen below shows a typical flow model, in this case the process of handling a customer invoice through to receipt of payment.



A Business flow model is a high level representation of the activities required for a business process, as applied in the Oracle E-Business Suite.

The model shows steps that are in the Accelerator Offering, as well as optional steps that are available within the product, but not configured by the accelerator. These can be configured manually as an additional activity later, provided the relevant software is purchased.

4.2.2. Business Flow Videos

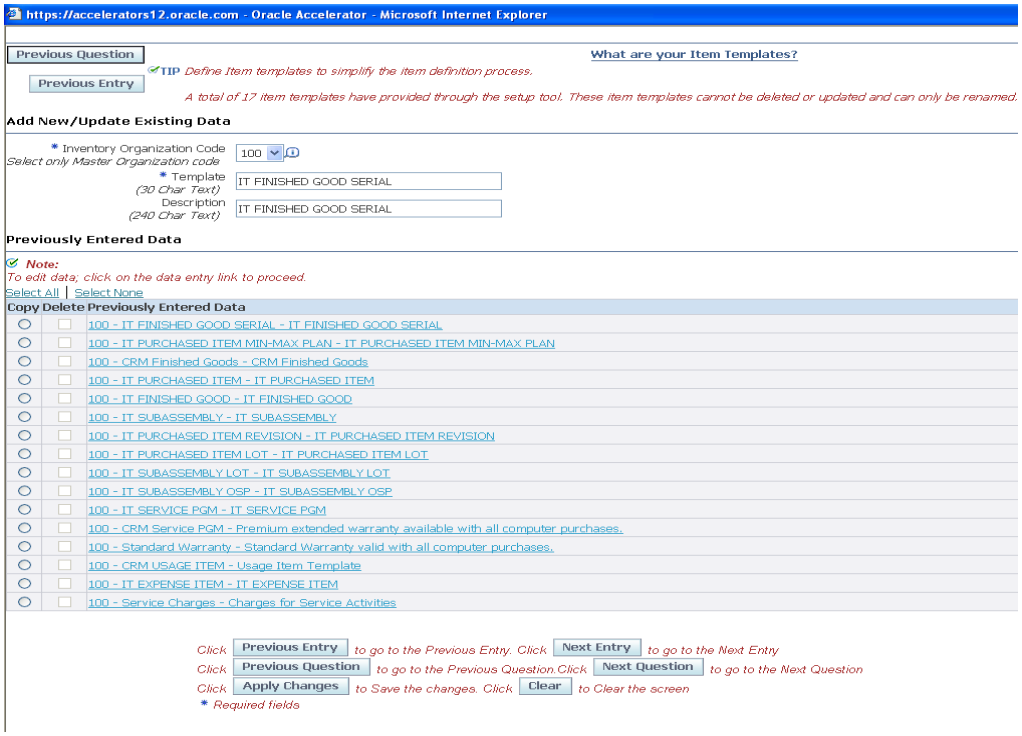


Flow Videos are recorded walkthroughs of each process flow, showing all the steps. Use of these videos ensures that:

- The consultants can walkthrough the process consistently,
- We can Rewind and do the same steps again
- It allows the users to review the processes in their own time

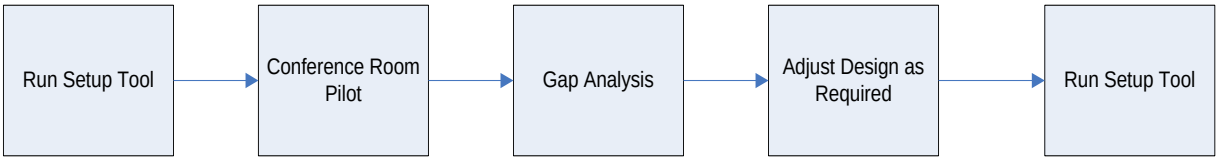
4.3. Answer Questionnaire

The Questionnaire is where the key configuration options are entered into the configuration tool to develop the setup script which is run against the system. The Questionnaire is pre-loaded with industry standard setup information, such as the Organisation Structure, the Chart of Accounts and standard value sets for account codes. However, these can all be modified to generate a specific script to model the required organisation.



5. Build Phase

Build Phase has 5 steps:



5.1. Run Setup Tool

Based on the answers in the questionnaire, a setup script will be created which is run on a test instance.

5.2. Conference Room Pilot

During the Conference Room Pilot, the key users, in a controlled environment and supported by the implementation consultants, run through the agreed processes using their data, allowing them to prove the concept of the design and identify issues and gaps. This is generally done with all relevant resources together in one room, so that the flows can be tested from end to end by the users and people can see the complete process. This leads into the Gap Analysis.

5.3. Gap Analysis

The consultants will review the issues and gaps and determine what course of action is required to overcome the issues.

Although the best practice flows are designed to meet the majority of needs of a business, this is only expected to meet 80-90% of the requirements, further refinement is done during the analysis phase, and by the time of the CRP it is expected to have at least a 90% fit to the business needs,

but experience has shown that many requirements are only identified when the process is walked through in the Conference Room Pilot with real user data, so gaps are expected.

These new requirements are identified as 'Gaps' in the Conference Room Pilot. The consultants will review the issues and gaps and determine what course of action is required to overcome; many of them can be overcome at the time by small configuration changes.

The available courses of action, in increasing order of severity and cost are:

- Adjustment of the design in the questionnaire (changing answers to better fit the requirements
- Post-setup configuration activity (i.e. manual configuration changes)
- Introduce additional process flows or software
- System personalisation – using tools in the system to modify an activity
- Development – A configuration, report creation or as a last resort customisation of the software.

Depending on the nature and severity of the change required these may be handled as change notices to the project scope.

5.4. Adjust design as required

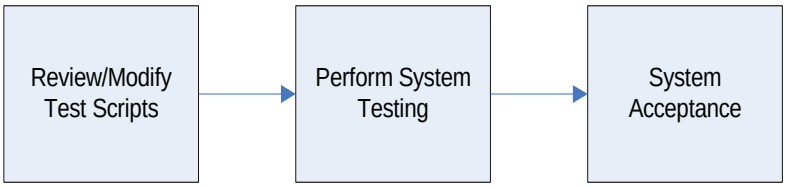
Following the Conference Room Pilot and Gap Analysis, any changes required can be fed back into the Questionnaire prior to it being run on a new clean database ready for system testing. Manual configuration, report development and personalisations are applied to the system following the second run of the setup.

5.5. Run Setup tool on new instance if changes are required to the core design.

If changes to the setup tool are required, then a second run of the tool can be carried out on a clean database. Where no setup changes were required, for instance, where the changes can all be carried out manually, then a clean database will be copied from an earlier backup of the database from before the CRP.

6. Testing Phase

The testing phase has 3 steps



6.1. Review/Modify test scripts

Pre-defined test scripts for the process can be supplied, but it is recommended that the client modify these to meet their business needs. Test scripts should reflect the implemented business processes with user data and should cover all business scenarios to ensure the business needs are met.

6.2. Perform System Testing

System Acceptance Testing is carried out by the Client users, supported by the consultants to ensure that the system functions as designed.

6.3. System Acceptance

Once the system acceptance testing is satisfactorily completed, the system is ready to be implemented.

7. Transition and Go-Live Phase

The transition and go-live are the final steps and include

7.1. Final Data Load

Although most static data will be loaded earlier in the project, any open transactional data must be handled via data loading just prior to go-live. This is so that we can capture the up-to date information. The transition period also needs to be carefully managed to ensure smooth transition between use of legacy systems and use of the new implementation system.

Note: Data loading is considered out of scope of the fixed price implementation cost as this varies with level and complexity of data. Costs can be provided on request.

7.2. Go Live

This is the ramping up of activity within the new system, and involves ensuring that all transactions are working correctly and that all users understand the activities they need to follow.