



Oracle Accelerator

# PROJECT IMPLEMENTATION GUIDE

11.5.10 Oracle Accelerators

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# Oracle Accelerator Project Implementation Guide

## Purpose

The Project Implementation Guide explains how to use the Oracle Accelerator as part of your implementation projects. Basic familiarity with traditional Oracle implementation projects is assumed. Topics covered include:

- Leading and participating in Oracle Accelerator (OA) Projects
- Setting up a baseline instance using the Accelerator Setup Tool
- Preparing OA Deliverables
- How to manage beyond Accelerator scope issues
- Use of Accelerator training and support services

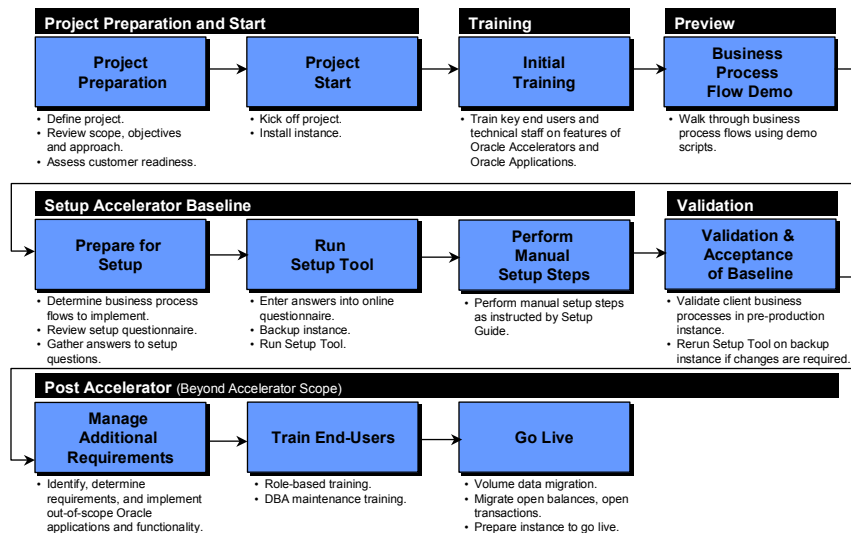
## Overview

The following steps are used in the Accelerator approach:

- Determine scope using flows
- Select business flows
- Answer business questions in setup tool
- Finalize answers and load in hours
- Test, train & educate
- Address additional requirements

The sections of this guide correspond to the suggested Overall Project Approach as shown below. This is a suggested approach for implementing Accelerator baselines and includes the steps in the Accelerator approach mentioned above. You should incorporate these steps into your own specific project plan as appropriate.

## Overall Project Approach



There are references to a variety of project documents throughout this Guide. Some of the documents are provided as part of the Accelerator. The implementation team is responsible for determining the actual set of documentation deliverables that should be developed for their specific project according to the project scope and complexity of the client organization.

## Preparation & Start

Oracle Accelerators rapidly implement a baseline of business transactions for Oracle E-Business Suite. Many traditional early phase activities are automated and condensed to quickly setup the Accelerator baseline. The biggest single difference in an Oracle Accelerator project is the use of the automated Setup Tool to rapidly enter setups into the Oracle Applications. This allows the implementation team to take an iterative approach to baseline implementation, and easily enter changes to setups until the client validates and accepts the baseline.

Remember that there are several critical steps that must be performed by the clients themselves. It is important that implementers:

- Use implementation resources who have solid implementation experience
- Develop a well-scheduled project plan
- Communicate expectations to the client early
- Provide the client with a list of readiness activities that they are responsible for
- Allow sufficient time for readiness activity to be completed

Suggestions for working with Accelerators in the preparation phase are listed below.

## Project Preparation

### Define Project & Review Scope, Objectives, Approach

#### **Recommended Role: Implementer Project Lead**

1. Learn about implementing with Oracle Accelerators
  - Participate in Accelerator implementation training offered by Oracle Partner Network or Oracle University.
  - Download Accelerator, review online documentation provided with Accelerator.
  - Conduct a Project Ramp-Up Call with your Accelerator Support team.
2. Assigning Project Resources
  - Automation does not replace experience. Experienced functional consultants are required to make changes beyond the Accelerator baseline.
3. Developing Your Work Plan
  - Schedule setup of Accelerator baseline before implementation of additional requirements.
  - Remember that the Accelerator baseline is easily developed in an iterative cycle:
    1. Answer Setup Questions
    2. Take backup
    3. Run Setup Tool
    4. Validate Setups, note any changes required

5. Restore backup
6. Make changes to Setup Question answers
7. Cycle back to Step 2 until client validates and accepts Accelerator baseline.

#### **Recommended Roles: Implementer Functional Leads**

4. Review Functional Scope of Project
  - Review Business Flow Family Solution Implementation Guidelines documents to understand the scope of the Accelerator baseline.

#### **Perform Readiness Assessment**

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#### **Recommended Roles: Implementer Project Lead, Client Project Lead**

1. Conduct Pre-Engagement Meeting
  - Setting expectations for change management
    - Ensure client understands approach of using Accelerator baseline
    - Ensure client understands which Applications, features, and functions are outside of the Accelerator baseline
  - Review Setup objectives
    - Review the Accelerator Setup Guide
    - Review the Accelerator Setup Questions
  - Review Validation objectives
    - Explain the iterative approach for setting up the Accelerator baseline
    - Explain initial flow training approach
  - Define Preliminary Validation Approach
    - Review data preparation vs. training data tradeoffs

#### **Recommended Roles: Implementer Project Lead, Client Project Lead**

2. Finalize Validation Approach
  - Determine if client-specific demo scripts with client Setup data will be prepared
  - Based on ability of client to assemble data
3. Finalize Project Schedule
4. Schedule Kickoff Meeting

## **Start**

Key to the successful start of an Oracle Accelerator project is correctly setting expectations with the client project team. Be sure to remind the client of the value of the Accelerator approach stemming from the rapid installation and configuration of leading practice business transactions.

## **Kickoff Project**

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**Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Client DBA, Implementer Functional Leads**

1. Conduct Kick-off meeting.
  - Review:
    - Iterative Accelerator baseline setup approach
  - Set scope expectations: what comes with Accelerator baseline, what is beyond the baseline, what is out of scope.
  - Be prescriptive regarding leading practice business processes and the benefit of moving quickly

## **Install Oracle Accelerator on Server**

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**Recommended Roles: Implementer DBA, Client DBA**

1. Install instance onto Target server.
  - Review Technical Installation Guidelines
  - Plan for a two hour load process
2. Verify Server connected into Client Network.

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# Training

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## Initial Training

### **Train Key End-Users on Application Features**

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This is standard applications training that is similar for any new implementation project. Utilize Oracle University and other typical resources.

### **Train Technical Staff**

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Train client technical staff on Application setup, maintenance as usual.

## Preview & Business Flow Demo

Flow Models, Videos, and Demo Scripts are located in the “Business Flows” section of the Accelerator. The client team should review these flow-based training materials in detail so that they will fully understand the scope and function of the business transactions implemented by the Accelerator baseline. Then, using the Demo Scripts as a guide, implementers and client key users can try executing the business flows within the instance.

### Business Flow Demonstration

#### Train Key End Users

#### **Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

1. Conduct Training Overview meeting.
  - Review Approach and Objectives
  - Discuss use of key business process documents

Business Flow Models depict cycles of business processes that make up each business transaction.

Flow Videos show execution of the flow processes within Oracle Applications.

Demo Scripts contain instructions to walk the end user through the Applications.

#### Preview

#### **Recommended Roles: End Users, Implementer Functional Leads**

2. Execute Flow Walkthroughs – Functional Area 1. (note: Organize Functional Areas as required by the project)
  - For all Walkthrough activity:
    - Review “What are Business Flows” document
    - Review flow models
    - View Videos
    - Introduce clients to system navigation
    - Demonstrate use of Demo Scripts
    - Review Business Flow Testing Sequence Document
    - Take client through initial Demo Script walkthrough
    - Encourage additional client-only walkthroughs
3. Execute Flow Walkthroughs – Functional Area 2.
4. Execute Flow Walkthroughs – Functional Area 3.
5. Execute Flow Walkthroughs – Functional Area 4.
6. Execute Flow Walkthroughs – Functional Area *n*.
7. Review Reporting Overview.

**Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

8. Conduct Demo Review meeting.

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## Setup Accelerator Baseline

A key feature of the Oracle Accelerator is the Setup Tool. The implementer enters client data into the tool, and the data is loaded into the Oracle Applications in an automated fashion. This greatly reduces the time required to configure applications with the client's data. The Applications will then contain a set of client-specific data, which can be used both for additional training and production purposes.

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### Prepare for Setup

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#### Gather Answers to Setup Questions

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**Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

1. Conduct Setup Overview meeting.
  - Review Approach and Objectives
  - Discuss use of Setup data in Validation phase
  - Review Setup Questions
  - Review Setup Tool

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#### Recommended Roles: End Users, Implementer Functional Leads

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2. Answer Setup Questions - Functional Area 1.
  - For all Questionnaire activity:
    - Review Setup Questions
    - Gather Setup Data
    - Access Online Setup Tool
    - Change default values to client specific values
    - Review and revise until complete
3. Answer Setup Questions - Functional Area 2.
4. Answer Setup Questions - Functional Area 3.
5. Answer Setup Questions - Functional Area *n*.

**Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

6. Conduct Setup Review meeting.

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### Run Setup Tool

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#### Recommended Roles: Implementer DBA, Client DBA

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1. Confirm Questionnaire completion.
2. Take Backup1 of Oracle Accelerator instance.
3. Run Setup Tool.

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## Perform Manual Setup Steps

### Recommended Roles: Implementer DBA, Client DBA

1. Perform Final Setup steps.
  - Some manual steps defined in the Final Steps Guide are required to start up the Setup Environment. Review that document and execute those steps.
2. Print, review, and archive reports.
  - Keep a record of the before and after data value set.

## Validation

Once the Oracle Accelerator Setup Tool has been run, the client project team must validate that the Accelerator baseline has been set up to meet their requirements. If the client determines that further changes to setups are required, the implementation team should restore the prior backup and make the changes using the Setup Tool.

## Validation & Acceptance of Baseline

### Validate Client Business Processes

#### **Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

1. Create client-specific Demo Scripts with Client Setup Data if client chooses.
2. Conduct Validation Overview meeting.
  - Review Approach and Objectives
  - Discuss use of key business process documents

Business Flow Diagrams depict the leading practice series of business processes which define the standard cycle of activity to manage the business for that function.

Demo Scripts contain instructions to walk the end user through the Applications.

#### **Recommended Roles: End Users, Implementer Functional Leads**

3. Execute Flow Walkthroughs – Functional Area 1.
  - For all Walkthrough activity:
    - Review business flow diagrams
    - Review Business Flow Testing Sequence Document
    - Take client through initial demo script walkthrough
    - Client conducts walkthrough of demo script for each flow within functional area
    - Incorrect Setup data and required changes are noted by client
4. Execute Flow Walkthroughs – Functional Area 2.
5. Execute Flow Walkthroughs – Functional Area 3.
6. Execute Flow Walkthroughs – Functional Area *n*.

#### **Recommended Roles: Implementer Project Lead, Client Project Lead, End Users, Implementer Functional Leads**

7. Conduct Validation Review meeting.
  - Review feedback from Flow Walkthroughs
  - Client accepts baseline as setup, or specifies changes to Setups that must be made

#### **Recommended Roles: Implementer DBA, Client DBA**

8. If changes to Accelerator Baseline are required, restore Backup1
  - Project returns to Step 2 in “Setup Accelerator Baseline” phase.

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## Post Accelerator

Many projects include Oracle Applications and functionality that are outside the scope of the Accelerator baseline. Once the Accelerator baseline is implemented and accepted by the client, any additional products, features, and functions would be implemented at this point. Finally, end-of-project phases such as end-user training, data migration, bringing a production instance live, and handing off to the client are outside of the Accelerator scope. The implementation team will need to manage additional requirements and end of project phases in their specific project plan.