

Advanced Implementation Methodology (AIM) Blueprint

A Comprehensive Method for Implementing Packaged Applications

EXECUTIVE SUMMARY

Implementing mission-critical applications is a complex and highly challenging task. As a leading supplier and partner to leading e-business application providers, eBS Incorporated has years of implementation experience with Oracle Applications and a variety of their 3rd party software vendors. At eBS we understand that successful application implementations require that organizations embrace a proven, structured methods to guide the project, manage risk, and avoid costly budget overruns. In addition, this structured framework is flexible enough for the implementation effort to be tailored to the specific and unique needs of your organization. eBS Inc.'s Advanced Implementation Method (AIM) Blueprint is a proven, flexible and scalable process used by our teams to successfully implement any large scale ERP, CRM, Business Reporting, Portal, Manufacturing and/or Supply Chain “packaged” application solutions.

The AIM Blueprint provides a proven approach to execute and control your implementation. It is a proven methodology that is the accumulation of years of experience executing rapid and cost-effective application implementation projects. From redesigning business processes to production, AIM encompasses all essential project steps for minimizing risk and facilitating a fast, high-quality implementation. AIM provides direct, product-specific support for any application product family including: Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), Financial Accounting, and Supply Chain Management (SCM) as well as integration to other offerings that support your company like data warehousing, business intelligence, reporting tools, and e-commerce.

BENEFITS OF AIM

When facing the challenge of implementing new business applications, the goal is to achieve a balance between time, quality and cost. The AIM Blueprint supports this effort by providing an approach that is:

- Rapid Deployment
- High Quality Delivery
- Cost Effective

The eBS implementation methodology offers a proven structure that can be duplicated “over and over” regardless of the software package. It meets the demand for quicker, more efficient business system implementations by eliminating any unnecessary tasks from the project plan and reducing the implementation timeframe. The AIM blueprint includes a set of deliverable templates, project workplans and detailed tasks so there is no need to reinvent the wheel. All of these features combine to support a rapid deployment. The methodology has strong quality control checkpoints built into all phases of the project. Periodic management reviews and acceptance points ensure that implementation efforts stay aligned with the project plan and the organization’s business objectives.

The AIM Blueprint incorporates business process design and modeling to align the organization's business processes with strategic business objectives and builds these industry-leading practices into the application implementation. The AIM Blueprint provides pre-defined, leading business practice models to streamline the process design effort.

The AIM Blueprint also includes organizational change management processes and controls to facilitate communication, learning and process adoption throughout the organization. The key benefit to the organization is a solution that encompasses the people, business processes and technology requirements. The blueprint eliminates common errors because all team members, regardless of the level of expertise, have a roadmap for performing their particular tasks. The methodology also provides each team member with clear to understand tasks and deadlines as well as their role to the success of the project. The result is that time and budget are not wasted on unnecessary activities.

KEY FEATURES

The AIM Blueprint was developed with special focus on the following key features:

- Flexibility
- Scalability
- Structured Framework
- Leading-Edge Technology
- Integration with Other Legacy/Packaged Applications

Flexibility

The AIM Blueprint is flexible because it allows the organization to either use a pre-packaged approach or develop a tailored approach based upon the size, number and complexity of the applications implemented and the organization's unique requirements. The methodology provides specific guidelines to assist in determining which approach is appropriate. The pre-packaged approach is a set of predefined activities using the blueprint's tasks and deliverables. The pre-packaged approach can be installed and deployed rapidly or take more of a "traditional" timeline. A tailored/phased approach allows an organization to have maximum flexibility and extensibility in implementing custom developed or collection of different packaged applications.

Scalability

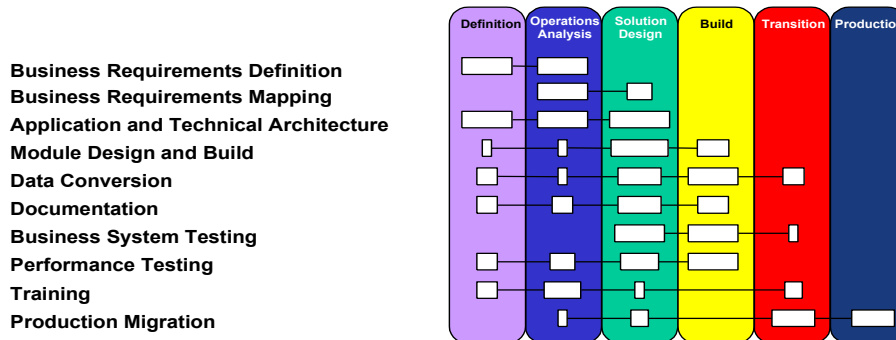
The methodology was designed with scalability in mind. From the largest, multi-currency, multi-location, multi-company projects, through to the smallest, limited size, constrained scope projects—the AIM Blueprint provides the scalability required by each unique project. The methodology defines all implementation tasks and/or steps as either core or optional. A foundation of core tasks defines the minimum set of steps necessary to implement the defined applications. The task guidelines assist in determining which optional activities to include in the project plan. This greatly reduces the complexity for the project management team in planning the work effort required for the implementation.

Structured Framework

The AIM Blueprint uses project phasing to include quality and control checkpoints and allow coordination of project activities throughout the implementation. During a project phase, the project team will execute tasks in several processes.

Figure 1—AIM Blueprint Phase and Process Overview

Advanced Implementation Methodology (AIM) Phases



Proprietary and Confidential

The following is a brief description of AIM Blueprint Phases and Processes.

Project Phases for Control

Definition

During Definition phase, the project management team plans the implementation project. The goals are to identify business and system requirements, propose the future business model, and propose the application and information technology architecture. The project team is organized and oriented. The team develops a plan to ensure team members receive the training and support necessary to perform their roles on the project.

Operations Analysis

During the Operations Analysis phase, the project team collects management, technical, and end-user business process information and requirements. The project team develops business requirements scenarios used to assess the level of fit between the detailed business requirements and standard application functionality. The project team also creates a model for the application structure and suggests an overall technical architecture. Prototyping of business processes may begin in this phase to aid in analysis and demonstrate feasibility of design options.

Solution Design

The goal of the Solution Design phase is to create the optimal business process solution to meet your current and future business requirements. During Solution Design, project team members design application configuration options and detailed business procedure documentation. Detailed design of any custom extensions, interfaces and data conversions occur during this phase. The team also identifies process and organizational changes required for implementation.

Build

During the Build phase, the development team codes and tests all custom extensions including application enhancements, conversions, and interfaces. The team creates and executes performance, integration and business system tests. This phase of the project focuses most heavily on quality control, testing and documentation of the solution. Whether the code is an extension of the packaged application or custom development – quality is paramount to the success of this phase of the project.

Transition

During the Transition phase, the project team deploys the finished application into the organization. The transition phase's success depends on the Build phase for the fully tested "quality" business system. The project team fully executes data conversion and uses the developed documentation to train end users and support staff. The project team conducts a production readiness check with the business user and technical community. There should also be multiple "trail runs" before the final version is released to the user community.

If the implementation includes a phased deployment, Transition will occur multiple times with subsets of the applications deployed to various geographical sites and/or business units at different times.

Production

The Production phase starts immediately with the production cutover. Production marks the last phase of the implementation and the beginning of the system support cycle. Included in this final phase is a series of refinement and measurement activities. The Information Systems (IS) personnel work quickly to fine-tune the system and begin regular maintenance. The group will also provide ongoing support to the organization for the remaining life of the application solution. If multiple deployments or a "phased roll-out" exist, Production occurs at different times for the various geographical sites and/or business units.

Project Processes for Continuity

All of the AIM tasks are organized into processes that group related deliverables together. Project team members are assigned to these groupings according to their specialization and background.

Business Process Flows

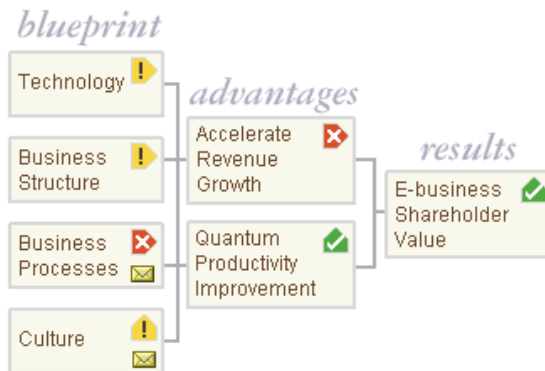
Business Process architecture addresses the need to understand organizational business processes and alignment of these business requirements and the "best practices" embedded in the packaged applications. The team analyzes the current business processes to determine the degree of change required to bring these practices into alignment with the new software or the new organization objectives, and designs new or improved existing business processes. The result is a set of optimized technical business process designs that balance application configuration and organization change.

Business Requirements Definition

The Business Requirements Definition process defines the business needs that must be met for the successful implementation of the application and technical suite. The project team documents business processes by identifying business events and describing the steps the organization takes to respond to those events. The team then organizes these processes into business scenarios that capture the existing or new organization's business requirements. This component of the process will be utilized to build the "test" used by the business partners to test to compliance of the new software to the existing business requirements.

Business Requirements Mapping

The Business Requirements Mapping process produces and documents an acceptable, practical solution to business requirements. As gaps between business requirements and functionality of the packaged applications emerge, these “gaps” are documented for future resolution. The functional team resolves the gaps by review the processes within the applications, documenting alternative solutions, designing application extensions, or changing the underlying business process.



Technical Review

During the Technical Architecture review process, the project team review the company’s technical computing architecture (Servers, Desktop, Operating Systems, Development Environment, Web Capabilities, etc.), telecommunication infrastructure, and network configurations, along with the packaged and customized application environment. All of these factors are evaluated for both compatibility and conflicts. The resulting plan is designed for the most effective utilization of the environment to support an information technology architecture that supports the organization’s business vision.

Modification Design and Build

The Modification Design and Build process produces custom application extensions to fill the gaps in functionality identified during Business Requirements Definition and Mapping phases. These customization can range from designing customer screens and reports to technical activities like extending the database or creating custom triggers. Thus, specialized programs must be designed, built, and tested before the data can be incorporated into the new system. Module Design and Build addresses the design and development of the custom modules and/or integration; the Business System Testing process supports testing of these customized pieces of code.

Data Conversion

The Data Conversion process defines the tasks and deliverables required to convert packaged application or legacy data to the new applications. Integrating the new application(s) to the existing legacy and other packaged applications also requires a great deal of effort. Using the Application Program Interfaces (APIs) substantial reduces the time to deliver. All major application provides provide integration programs to provide supportable integration between applications.

Many smaller vendors and/or legacy systems typically do not provide this type of integration tools. In addition, legacy systems require that there are explicit data definitions and that the data business objects identified for conversion along with the legacy source systems. There is extra care taken during this part of the project because of the fragile nature of many of the existing legacy systems. In addition, most of these systems lack documentation of the system design and integration points. Therefore, there is extensive system testing, training, and acceptance testing requirements and with “converted data” from these legacy systems.

Documentation

The Documentation process begins with documentation standards materials created early in the project to build quality operation support reference materials. Documentation requirements and implementation complexity are closely correlated, and the amount and level of detail of documentation varies by project.

Business System Testing

The Business System Testing process is a formal, integrated approach to testing the quality of all application system elements. It focuses on preparing for testing early in the project life cycle; linking testing requirements back to business requirements, and securing project-testing resources. Business system testing and the quality standard associated with this process has a significant impact on the success of the project and can substantially reduce the cost to support the applications in the both the near term and the future lifecycle of the applications.

Performance Testing

The Performance Testing process helps the project team define, build, and execute a performance test on specific system configurations. This process provides a powerful and direct means of assessing the performance quality of your system. This assessment enables you to determine whether performance is acceptable, and to propose changes and perform tuning to correct any initial performance shortfall.

Adoption and Learning

The Adoption and Learning process accelerates the implementation team's ability to work together through team building and organization-specific application learning. This process also helps determine the number and the skills of the company's human resources to support requirements and the technical environment. There may also be changes needed so that the organization's technical and support structure and job roles align to meet new expectations resulting from the technology change. Learning needs of all personnel impacted by the implementation are considered, and appropriate training materials and learning events are developed and conducted.

Production Migration

The objective of the Production Migration process is to migrate the organization, systems, and people to the new enterprise system. Following production "cut-over", additional objectives include monitoring and refining the production system and planning for the future. The Production Migration process encompasses transition to production readiness, production cutover, and post-production support.

Continuous Process Improvement (CPI)

The objective of our continuous process improvement is to provide the organization with a methodology that enable it to deploy the ongoing functional improvement delivered in the Oracle Application releases. This approach encompasses patching strategy, enablement of new modules or suite functionality, and internal business process improvement. It is our intent to ensure that the customer is both self-sufficient and fully utilizing the ongoing improvements in the Oracle Applications and Technology platform.

In summary, the AIM Blueprint provides a proven approach to execute and control any complex software implementation. It is a proven methodology that is the accumulation of years of experience executing rapid and cost-effective application implementation projects.