Enhance your project documentation process with Oracle Applications Implementation Methodology (AIM)

Introduction

Having supported many software implementations including those of ERP systems I have found that project documentation is one area which requires significant improvement. Often just finding the project documentation is difficult enough and once this frustrating process is completed you find that the documentation is inadequate. This makes it very difficult to support such implementations and any new users of such software have to rely on learning from previous users whose availability is often in question. Although poor documentation can be attributed to poor project management, in many instances the documentation is not done simply due to the effort involved and the lack of awareness as to which tools are available to facilitate the process. This article highlights how Oracle AIM advantage simplifies the documentation process and can also be used as a tool to effectively manage Oracle Applications project implementations.

AIM Overview

In my communications with a number of Oracle Applications implementer's I have been surprised to find that there is very little awareness surrounding AIM and it is very rarely used for implementations. However, I have personally found it to be very useful in managing and documenting the Oracle Applications projects I have been involved in. I also believe it compares favorably and in many instances betters project management tools being used for other ERP system implementations.

AIM consists of a project management methodology together with the underlying documentation templates that support the tasks you perform within this methodology. This combination of a methodology together with documentation templates makes AIM a powerful tool for assisting implementation participants in running and managing projects successfully. The methodology can be used for any other software implementations but obviously the true value of AIM will be only be realised when it is used in conjunction with the Oracle specific document templates.

The methodology and structure

The methodology used is similar to traditional software project management methodologies. There are six phases within the project, these are: -

- Definition – establish the business objectives and related requirements. Define the project work plan.
- Operations Analysis – analyze the operations and determine fit between organizational requirements and standard application functionality.
- Design – develop detailed designs for the optimal solutions to meet the future business requirements.
- Build – physical software system build and testing.
- Transition – deploying the finished solution into the organisation.
- Production – go LIVE!

Within these phases are the various processes – see the horizontally listed processes in Figure 1. Each process is made up of a number of tasks. Each task has a deliverable for which there is normally a documentation template. A process such as Application and Technical Architecture may span across more than one phase. In the case of Project management it is obvious that this phase stretches across all of the project phases. The level of work required for each process within each phase can immediately be ascertained by looking at the length of the bars for each process within the phases as displayed in Figure 1.

In order to allow customisation of the methodology according to user requirements core and optional tasks have been defined. The core tasks in AIM define the minimum set of steps necessary to implement Oracle Applications. Depending on your circumstances you may want to include a number of other optional tasks. For example, where there are interfaces to third party systems you can incorporate AIM tasks to help you examine, update and test those interfaces to work with the new system. Once you become more familiar with AIM you can therefore customize your implementation plan based on your knowledge of the tasks needed for a particular project.
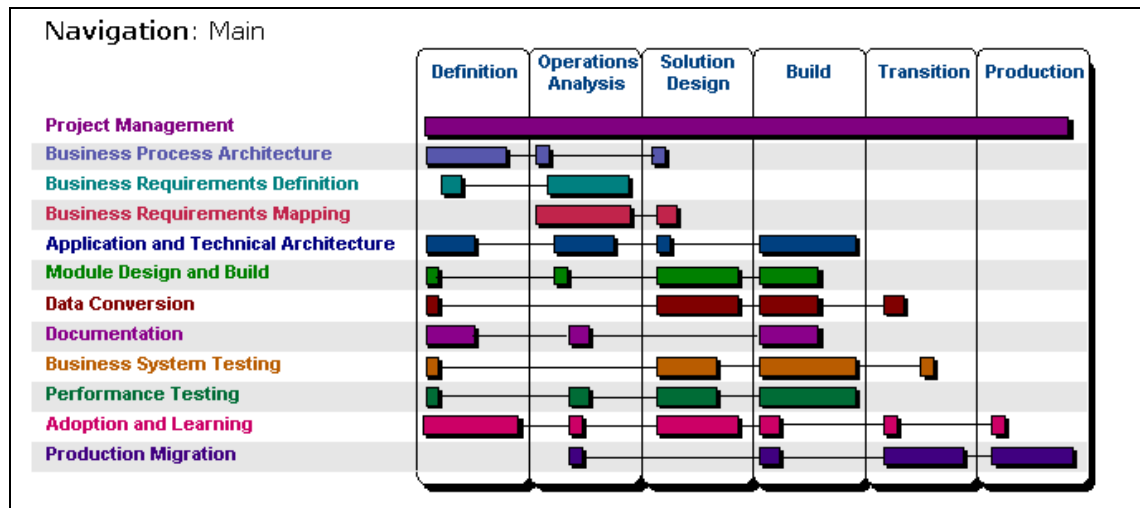

Figure 1: The AIM Main screen displaying Project Phases and Processes

Graphical User Interface (GUI)

An aesthetically pleasing GUI is always a plus for any software. However, one should always assess whether the GUI enhances the functionality of the software or whether it is there to simply dazzle the users without providing the underlying utility. In AIM's instance I believe that the interface has been crafted in such a way that it clearly illustrates the structure of the implementation methodology as well as provides easy access to the relevant deliverables for each particular task.

The GUI allows you to drill down to the necessary deliverables as well as view the implementation plan in multiple different views. The very first view that a user is presented with is shown in Figure 1 – here you are shown the relevant phases and the processes within these phases. By clicking on the word for each project phase you can look at all the tasks within that particular phase which are also split according to process. Clicking on a particular process will show you all the tasks for that particular process divided up according to the relevant project phase.

Documentation Templates

By far the most important feature and indeed "the guts" of AIM are the documentation templates that it provides. There are more than 150 templates which you can make use of and which come in a variety of formats such as MS Word documents, MS Excel Spreadsheets and MS Project Files. Each of the document templates follows a standard coding convention which corresponds to the codes used in the template of the MS Project plan. Information on how to use each template can also be found in the comprehensive help system provided.

The document templates can really be divided up into two types. Firstly there are generic project management documents. Examples of these include the project work plan, change request documents, quality control documents, status monitoring and reporting documents. These templates should be edited and adopted as standard documents for your organisation so that they can be reused for subsequent implementations.

Secondly, there are documentation templates designed specifically for Oracle Applications implementations. This is the feature of AIM I like the most since it makes the documentation of the system setup and configuration relatively easy. Each of the setup documents is designed in accordance with the layout of the fields within the various forms contained in each module. Hence, capturing setup information merely involves transferring the data contained in your forms directly into the word documents provided.

Conclusion

Using Oracle AIM helps you in the early stages of your implementation to establish what kind of solutions your customer wants and how Oracle Applications needs to be configured in response to customer demands. Thereafter it becomes very useful in monitoring and documenting the entire implementation process. It is particularly useful in ensuring that at the end of each phase you have signed off deliverables. As with all project management tools, however, it is only effective to the extent that it is used and understood by those involved in the implementation.

About the Author

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