"Using Oracle Accelerators to Implement in Small and Medium Size Businesses"

Industry Accelerators

- Aerospace and Defense
- Automotive
- Banking
- Business Services
- Capital Markets
- Chemicals
- Communications
- Consulting Services
- Consumer Products
- Education and Research
- Engineering and Construction
- Engineering and Residential Construction
- Healthcare Payer
- Healthcare Provider
- High Technology Consumer Electronics
- High Technology Distribution

- High Technology Electronic Manufacturing
- High Technology Equipment
- High Technology Manufacturing
- High Technology Semiconductors
- High Technology Software
- Industrial Manufacturing
- Insurance
- Life Sciences Medical Devices
- Life Sciences Pharmaceuticals & Biotechnology
- Logistic Services Provider
- Media and Entertainment
- National and Local Government
- Natural Resources
- Oil and Gas
- Retail
- Wholesale Distribution

Localizations

|			
🇦🇺 Australia	🇧🇭 Bahrain	🇧🇷 Brazil	🇨🇦 Canada
🇨🇳 China	🇪🇬 Egypt	🇮🇳 India	Indonesia
🇯🇵 Japan	🇰🇼 Kuwait	🇲🇽 Mexico	🇴🇲 Oman
🇵🇰 Pakistan	🇵🇭 Philippines	🇵🇷 Puerto Rico	🇶🇦 Qatar
🇸🇦 Saudi Arabia	🇸🇬 Singapore	🇹🇭 Thailand	🇦🇪 UAE
🇬🇧 United Kingdom	🇺🇸 United States		

New for R12: Argentina, Brazil, Colombia, Denmark, Finland, Korea, Malaysia, and Sweden

- Tools providing the foundation to packaged solutions
- Accelerate packages the right flows with the right bundle of applications for any sized business
- Partners may extend Business Accelerators to create industry and region-specific application configuration packages
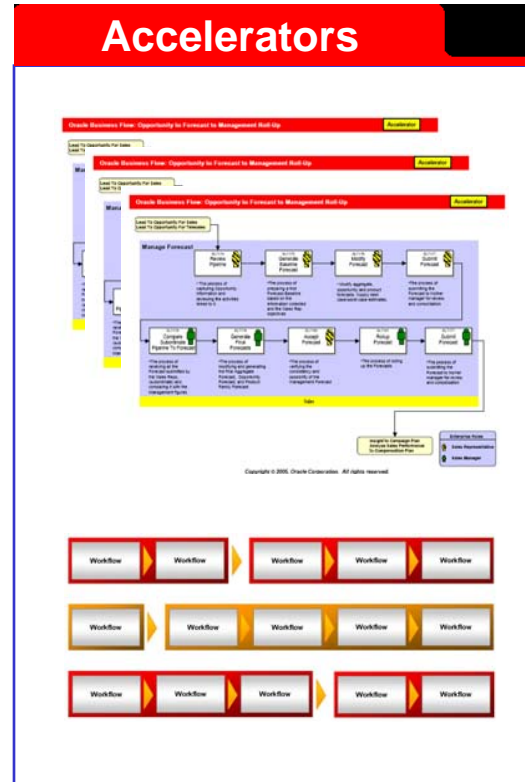
Accelerators

Education Audio

How To Guides

Business Flow Models & Video's

Setup Tools

Test Scripts

Reports & Templates

Over 1,230 Unique Business Flows

Benefits of Accelerator Flow Based Implementation

Accelerated Implementation Startup
- Eliminate the need to design your system from scratch
- Start end-user testing immediately
- Rapid and predictable timeline for completion.

Implement Relevant Business Processes
- Mix and match business flow templates according to their level of relevance to your business and the expected impact to your organization.
- As your requirements evolve you can easily add new business flow templates to further improve your company's efficiencies.
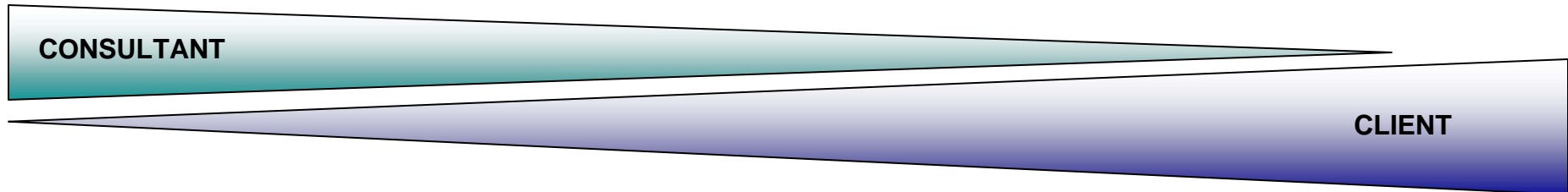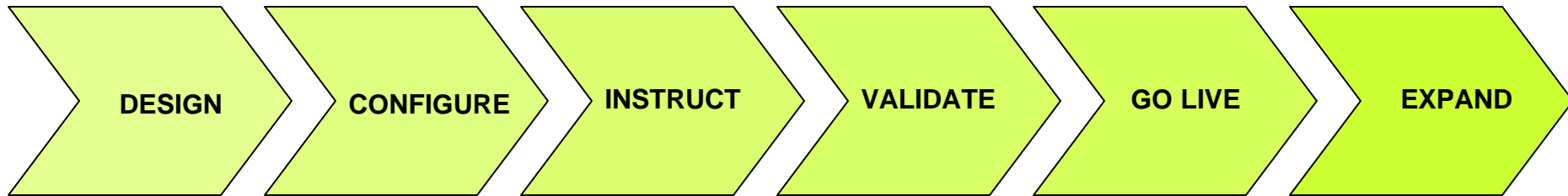
Predictable Implementations Mitigate Business Risk
- Focus on improving your business rather than on worrying about the details of the underlying technology being implemented
- Understand the scope of your implementation up front, ensuring a predictable cost, time and outcome.
- Uses one integrated software package for end to end business processes resulting in one source of information

Cost Effective
- Proven practices and tools with pre-tested business flows help deliver your specific implementation in les time for less cost.
- Scalable for future growth so you can implement only what you need.

Accelerate Phases

DESIGN	CONFIGURE	INSTRUCT	VALIDATE	GO LIVE	EXPAND

CONSULTANT

CLIENT

Kickoff and Overview	Execute Setup Tool	Review Training Videos	Execute Flow Walkthroughs	Execute Transition Plan	Streamline Processes
Project Plan	Perform Post Setup Steps	Tune Process Flow Scripts	Verify Conversions and Extensions	Maintain System Life Cycle	Incorporate Additional Workflows and Automation
Project Team and Roles Definition	Backup Instance	Develop Conversion Requirements	User Acceptance Testing	Perform Production Close	Expedite Reporting
Training Plan	Conduct Business Flow Review Meeting	Develop Extensions (Interfaces)	Super User Readiness Reviews	Audit Process Controls	Extend Applications Functionality
Software Download / Instance Build	Review Reporting Requirements	Conduct Preliminary Gap Analysis	Test Backup and Recovery		Add Additional Business Flows to Footprint
Complete and Review Questionnaire	Define User Access / Security	Organize Support Resources	Optimize Processes		

How does it work?

Getting to that first CRP for Validation:

- Step 1 – Select an Accelerator
- Step 2 - Verify the Key Assumptions and determine if there are any deviations from the featured business practice
- Step 3 – Select the flows within the accelerator that will be needed for go live.
- Step 4 – Answer the questions to tune the implementation to meet your specific needs
- Step 5 – Conduct initial training
- Step 6 – Take a backup and then have a DBA load the configuration into the instance
- Step 7 – Use the flows and videos to start using Oracle Applications.

Hardware Team	Consultant	Client
Procure and Install Hardware	Select an Accelerator	
	Verify Key Assumptions	
	Select the Flows	
Install the Software	Answer the questions	
Backup		Review Training Videos and Guides
Load the Questionnaire		
	Start using Oracle Applications Test	
Restore from Backup		
	Modify the Questions (as needed)	Gather opening balance/data
Load the Questionnaire		
	Tune the Installation	Enter initial balances / data
Go Live		

Key Assumptions

Key Setup Decision	Assumption
General Accounting	
Accounting Basis	Accrual Basis Only
Encumbrance Accounting	Encumbrance Accounting is not used.
Accounting Calendar	A standard monthly 12 + 1 Accounting Calendar is defined by default in the setup tool. You may change the calendar to meet client requirements.
Currency	US Dollar Functional Currency only. Additional Transaction Currencies may be defined as necessary.
Chart of Accounts	A Standard Chart of Accounts is provided with default accounting code combinations defined where applicable. You may choose to replace the Chart of Accounts with a custom chart of accounts.
Accounting Key Flexfield	The default Accounting Key flexfield is composed of 6 segments separated by a dot (.). You may change this structure as required to satisfy client requirements up to 10 segments.
Cross-Validation Rules	Basic cross-validation rules assume P&L accounts are coded with cost center detail (Cost Centers other than zero (000)). Balance Sheet accounts are coded to a zero cost center (000) exclusively.
Organizations	
General Ledger Set of Books	A single GL Set of Books is provided by default. In Basic Mode this may be updated to match client requirements. In Advanced Mode you may define Additional GL Sets of Books.
Balancing Entity	The default Balancing Entity is defined as company 10. All default code combinations reflect company 10 as the default company. You may add additional balancing segment values as necessary.

Select Flows

☑ **Accounting to Financial Reports** - Financial management & reporting

- Expense Report to Invoice
- Supplier Invoice to Payment
- Receipt to Assets
- Assets to Depreciation
- Customer Invoice To Receipt
- Subledger Journals to Post
- Bank Statement to Cash Reconciliation
- Period End Close to Financial Reports

☐ **Procure to Pay** - Procure direct & indirect goods

- Sourcing Requirements to Agreement
- Requisition to Receipt - Indirect (using Purchasing)
- Requisition to Receipt - Direct (using Purchasing)
- Supplier Return to Replacement
- Supplier Return to Debit

☐ **Plan to Inventory Management** - Plan & manage inventory levels

- Plan to Replenishment (Min-Max Planning)
- Wall-to-Wall Accuracy Cycle Count
- Wall-to-Wall Accuracy Physical Count

☐ **Demand to Build - Discrete** - Discrete manufacturing

- Design to Release
- Forecast to Plan
- Plan to Schedule
- Schedule to Build - Discrete
- Product Costing To Inventory Revaluation

☐ **Order to Cash** - Order management & shipping

- Order to Shipment
- Order to Drop Shipment
- Customer Return to Credit
- Customer Return to Replacement

Traditional Questionnaires

General Ledger>Setup>Financials>Books>Define

Process: <Process Name>	Business Area: <Business Area>	Date: 11/13/07
Control Number: 001	Priority (H, M, L): <Priority (H, M, L)>	Process Owner: Client Name

Description: Use this form to define Sets of Books.
<Set of Books>

Name		CLIENT NAME
Short Name		XX
Description		Client Set of Books
Chart of Account		XX Accounting Flexfield
Functional Currency		USD

Accelerator Questionnaires

Non Accelerator Training

User Guides & Procedures

Classroom Training

One on One Training

Web Based Seminars

Accelerator Training

User Guides & Procedures

Interactive Videos

Classroom Training

One on One Training

Web Based Seminars

Accelerator Templates for DBI

DBI Sample : Profit and Loss by Manager

Accelerator Templates - Transactions

Accelerators Applied

- **Founded 1999 – Headquartered in Woodbridge, NJ**
- **Owns/operates assisted living communities in NJ, FL, OH, VA**
- **Leading Assisted Living Community on East Coast:**
  - **Spacious and cost-conscious accommodations**
  - **High quality healthcare**
  - **Safe environments**
- **Services include:**
  - **Nursing & Physician**
  - **Exercise Therapy**
  - **Mental Health**
  - **On-Site Clinical Laboratory Services**

Client Business Challenges

- **Very competitive industry**

- **Continuous expansion – 33% growth**

- **Focus on increasing quality of care**

- **Lack of timely data to help make the right business decisions**

- **Running Quickbooks:**

  - **Unable to quickly add newly acquired communities**

  - **Feeble reporting capabilities**

  - **Not able to enter accounting data and print from different locations**

  - **Inflexible system**

  - **Consolidation - an ongoing challenge**

The Solution

- **Oracle E-Business Suite with Oracle Accelerators:**
  - **Highly scalable**
  - **Seamlessly and quickly add acquired communities**
  - **Streamline business processes across facilities**
  - **Enhanced business intelligence to optimize patient care**
  - **Flexibility to operate facilities separately**
  - **Consolidation of enterprise-wide data to drive better informed business decisions**

Planned Business Flows

	Financials
Flows	Supplier Invoice to Payment Assets to Depreciation Sub-ledger Journals to Post Period End Close to Financial Reporting Enter and Maintain Employee Assignments
Functionality	Accounting and Reports Asset Additions, Retirements and Depreciation Supplier Invoices, Credit Memos and Payments Employee Hierarchy
Products	General Ledger Accounts Payable Fixed Assets Human Resources (Shared)

The Implementation

- Client Project Team
  - One Project Manager (Part Time)
  - One System Administrator
  - One Subject Matter Expert
- Consultant Project Team
  - Two Consultants
  - DBA (Part Time)
- Client Users
  - One super user had prior Oracle Applications experience
  - Twelve end users were learning Oracle from scratch
- Scope Changes
  - One change order for a customized check printing solution
  - One change order for formal classroom style training at an off-site location
  - One change order for intercompany accounting logic

The Timeline

Task Name	Duration	Start	Finish
− Oracle Special Edition Implementation	93.5 days	Tue 5/24/05	Fri 9/30/05
− Planning Phase	93.5 days	Tue 5/24/05	Fri 9/30/05
+ Project Management Tasks	93.5 days	Tue 5/24/05	Fri 9/30/05
+ Hardware & Application Install	4 days	Tue 5/24/05	Mon 5/30/05
− Operational Analysis and Solution Design Phase	1 day	Tue 5/24/05	Wed 5/25/05
− Conduct SE Questionnaire Meetings	1 day	Tue 5/24/05	Wed 5/25/05
Vision Demo of the Process flows in Oracle	1 day	Tue 5/24/05	Wed 5/25/05
− Business Requirements Mapping	0.83 days	Tue 5/24/05	Wed 5/25/05
Financial Management Questionnaire	4 hrs	Tue 5/24/05	Tue 5/24/05
Sign off on Questionnaires	0.5 days	Tue 5/24/05	Tue 5/24/05
Review Responses and Update Final setup c	0.33 days	Wed 5/25/05	Wed 5/25/05
Acceptance Certificate	0.5 days	Tue 5/24/05	Tue 5/24/05
− Build Phase	9.67 days	Mon 5/30/05	Mon 6/13/05
− Implementation - Personalization	9.67 days	Mon 5/30/05	Mon 6/13/05
Enter All Questionnaire data in SPRT	1.67 days	Mon 5/30/05	Wed 6/1/05
Take backup of SPRT	1 day	Wed 6/1/05	Thu 6/2/05
Run Personalization Tool in SPRT	8 hrs	Thu 6/2/05	Fri 6/3/05
Create BR100 Documents for User Access	2 days	Fri 6/3/05	Tue 6/7/05
Clone SPRT to SPRD	1 day	Tue 6/7/05	Wed 6/8/05
Clone SPRT to SPRP	1 day	Fri 6/3/05	Mon 6/6/05
Conduct Business Flows testing (CORE INTERNAL)	3 days	Mon 6/6/05	Thu 6/9/05
Demo of Process flows in SPRT (prototype)	2 days	Thu 6/9/05	Mon 6/13/05
Test SE Printed Documents (Check/Invoice…)	0.33 days	Mon 6/6/05	Mon 6/6/05
+ Training Phase in SPRT	0.5 days	Thu 6/9/05	Thu 6/9/05
+ Testing Phase	14.5 days	Thu 6/9/05	Thu 6/30/05
− Transition Phase	5 days	Thu 6/30/05	Thu 7/7/05
− Transition to Production	5 days	Thu 6/30/05	Thu 7/7/05
Transition Plan	1 day	Thu 6/30/05	Fri 7/1/05
Convert Testscripts to Business Procedure Docume	5 days	Thu 6/30/05	Thu 7/7/05
− Open Transactions in SPRP	5 days	Thu 6/30/05	Thu 7/7/05
GL Balances	4 days	Thu 6/30/05	Wed 7/6/05
Open AP Invoices	5 days	Thu 6/30/05	Thu 7/7/05
Final Conversion Acceptance by Super User	0.2 days	Thu 6/30/05	Thu 6/30/05
− Deploy Phase	22 days	Thu 7/7/05	Mon 8/8/05
− Go Live Phase	22 days	Thu 7/7/05	Mon 8/8/05
Oracle Applications Production System	1 day	Thu 7/7/05	Fri 7/8/05
Go Live	0 hrs	Fri 7/8/05	Fri 7/8/05
Post Production Support	20 days	Fri 7/8/05	Fri 8/5/05
Acceptance Certificate	1 day	Fri 8/5/05	Mon 8/8/05

The Result

- **Core Services with Oracle Accelerators:**
  - **Cost-effective**
  - **Rapid implementation –7 weeks**
  - **Software, Consulting and Hosting**

Customer Response

"Oracle and Core Services allowed us to take advantage of Oracle Accelerators to rapidly achieve our go-live in record time. Spring Hills is now positioned to achieve our return on investment much faster than originally projected."

– Tom Vellis, Chief Financial Officer, Spring Hills Assisted Living

Core Services – Company History

- Founded 1990 – Headquartered in Morristown, NJ
- 18 years as dedicated Oracle Certified Partner
- 85 Employees are 100% focused on <u>Oracle Applications Only</u>
- Oracle Partner of the Year North America - 2004
- Leading Oracle Service Provider in:
  - Oracle License Resale
  - Consulting
  - Hosting Services
- Pilot Partner for Oracle SMB Partner Program including first implementations with Oracle Business Accelerators

For additional questions

- Kirsten Haussermann

  khaussermann@coreservices.com