

Oracle® Applications Implementation Wizard User's Guide

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Oracle Applications Implementation Wizard User's Guide

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Preface

Welcome to Release 11 of the *Oracle Applications Implementation Wizard User's Guide*.



Attention: This manual describes Application Implementation Wizard functionality that we added since the original release of Oracle Applications Release 11. If you do not have this updated functionality (patch number 630709 or later), please install it before using the Implementation Wizard. Contact Worldwide Customer Support Services for more information.

This user's guide includes the information you need to work with the Oracle Applications Implementation Wizard effectively. It contains detailed information about the following:

- Overview and reference information
- Oracle Applications Implementation Wizard implementation suggestions
- Specific tasks you can accomplish using Oracle Applications Implementation Wizard
- How to use Oracle Applications Implementation Wizard windows
- Oracle Applications Implementation Wizard programs, reports, and listings
- Oracle Applications Implementation Wizard functions and features

- Oracle Applications Implementation Wizard system setup

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

About This User's Guide

This guide is the primary source of information about the Oracle Applications Implementation Wizard. It contains overviews as well as task and reference information. This guide includes the following chapters:

- Chapter 1 contains an introduction to the Wizard and explains some basic concepts you need to know before you can use it.
- Chapter 2 describes additional installation steps you should have completed before you use the Wizard.
- Chapter 3 tells you how to use the Wizard to help manage implementation projects.
- Chapter 4 describes the hierarchy of the common processes.
- Appendix A lists the Oracle Applications products that you can implement using the Wizard.
- Appendix B contains troubleshooting suggestions.
- Appendix C summarizes the navigation paths you use to open Wizard windows.

This user's guide is available online

All Oracle Applications user's guides are available online, in both HTML and Adobe Acrobat format. (Most other Oracle Applications documentation is available in Adobe Acrobat format.)

The paper and online versions of this manual have identical content; use whichever format is most convenient.

The HTML version of this book is optimized for on-screen reading, and lets you follow hypertext links for easy access to books across our entire library; you can also search for words and phrases if your national language is supported by Oracle's Information Navigator. The HTML documentation is available from the Oracle Applications toolbar, or from a URL provided by your system administrator.

You can order an Oracle Applications Documentation Library CD containing Adobe Acrobat versions of each manual in the Oracle

Applications documentation set. Using this CD, you can search for information, read it on–screen, and print individual pages, sections, or entire books. When you print from Adobe Acrobat, the resulting printouts look just like pages from an Oracle Applications hardcopy manual.

Note: There may be additional material that was not available when this user’s guide was printed. To learn if there is a documentation update for this product, choose the Documentation Updates link on the main menu on this product’s HTML help.

Assumptions

This guide assumes you are familiar with the Oracle Applications implementation process and products. If you have never used Oracle Applications Implementation Wizard, we suggest you attend one or more of the Oracle Applications Implementation Wizard training classes available through Oracle Education. (See Other Information Sources for more information about Oracle Applications Implementation Wizard and Oracle training.)

This guide also assumes that you are familiar with the Oracle Applications graphical user interface. To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User’s Guide*.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle provides powerful tools you can use to create, store, change, retrieve and maintain information in an Oracle database. But if you use Oracle tools like SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Consequently, we STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our manuals.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of the Oracle Applications Implementation Wizard.

Most Oracle Applications documentation is available in Adobe Acrobat format on the *Oracle Applications Documentation Library* CD. We supply this CD with every software shipment.

If this manual refers you to other Oracle Applications documentation, use only the Release 11 versions of those manuals unless we specify otherwise.

Oracle Applications User's Guide

This guide explains how to navigate, enter data, query, run reports, and introduces other basic features of the graphical user interface (GUI) available with this release of Oracle Applications Implementation Wizard (and any other Oracle Applications product). This guide also includes information on setting user profiles, as well as running and reviewing reports, and concurrent requests.

You can also access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Related User's Guides

For more information about implementing a particular Oracle Applications product, please see that product's User's Guide.

Installation and System Administration

Oracle Applications Installation Manual

This manual and the accompanying release notes provide information you need to successfully install Oracle Applications in your specific hardware and operating system software environment.

Oracle Applications Upgrade Manual

This manual explains how to prepare your Oracle Applications products for an upgrade. It also contains information on finishing the upgrade procedure for each product. Refer to this manual and the *Oracle Applications Installation Manual* when you plan to upgrade your products.

Oracle Applications System Administrator's Guide

This manual provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Applications Product Update Notes

This book contains a summary of each new feature we added since Release 10.7, as well as information about database changes and seed data changes that may affect your operations or any custom reports you have written. If you are upgrading from Release 10.6 or earlier, you also need to read Oracle Applications Product Update Notes Release 10.7.

Other Information

Training

Oracle Education offers a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of

information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Applications Implementation Wizard working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources, and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 140 countries around the world.

Thank You

Thank you for using the Oracle Applications Implementation Wizard and this user's guide.

We value your comments and feedback. At the end of this manual is a Reader's Comment Form you can use to explain what you like or dislike about the Oracle Applications Implementation Wizard or this user's guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

CHAPTER

1

Overview

This chapter gives an overview of the Oracle Applications Implementation Wizard.

About the Oracle Applications Implementation Wizard

The Oracle Applications Implementation Wizard (or "Wizard" for short) is an innovative tool that facilitates the Oracle Applications implementation process. Using the Wizard allows companies to deploy Oracle Applications faster and improve communications among project teams, and allows project teams to communicate more effectively with senior management.

The Wizard assists you in the setup and implementation of the Oracle Applications. It walks you through the setup tasks and forms you need to complete to implement Oracle Applications. To make your implementation job easier, the Wizard groups related setup tasks logically.

During an implementation, your implementation team can use the Wizard to set up one or several Oracle Applications products. The setup of each product is accomplished by completing the implementation processes. An implementation process is a sequence of steps, which are related to Oracle Applications setup forms. You can run through a process multiple times to complete an implementation task.

The Wizard automatically detects the products installed on your implementation site and displays all the processes you need to run in the correct order. You can locate specific processes and corresponding task assignments using a variety of flexible selection criteria. Once you are in a task, you are automatically routed from step to step throughout the process.

The processes guide you through the specific implementation steps required for your installation. The sequence of steps are contingent on which application modules you install. This structure reduces complexities created when having to implement multiple application modules that have same setup steps.

As you proceed through the implementation processes, you are able to document the completion of setup steps and append notes for later recall. Additionally, the Wizard provides guidance, such as instructions, options, warnings, and alerts to help with key decision making.

After you complete the common processes, your implementation team can work completely in parallel on the modular processes without having to worry about dependencies.

The Wizard does not replace a product's User's Guide. However, since it knows which products you are planning to implement, it helps you

sort through cross-application interdependencies you face when implementing multiple applications modules. After the Wizard determines the subset of setup steps you need to perform, it helps you find the corresponding documentation for those steps.

Benefits of Using the Wizard

The Wizard provides the following benefits:

- **Increased productivity:** the Wizard offers you step-by-step guidance from the first to the last setup step, and helps you manage members of an implementation team to allow them to work in parallel.
- **Reduced effort and time:** by reorganizing setup into several process segments, you can eliminate redundant steps that occur from multiple applications being implemented together.
- **Lowered implementation risk:** the Wizard guides you through the complexities of interdependent tasks and activities performed during the setup of any combination of Oracle Applications products.
- **Effective management of your implementation:** by using the Wizard to assign tasks to different members on your implementation team, set objectives, and monitor team members' status and progress.

The Wizard is built to automate the setup of Oracle Applications and complements the Oracle Application Implementation Method (AIM), which helps you manage the entire implementation process and budget and analyze business aspects of the implementation.

Major Features

Effective Organization of Setup Steps

By effectively grouping and sequencing implementation processes together, redundant setup steps across products are eliminated whenever possible. This also enables a higher degree of collaboration among implementation teams for parallel setup. After completing the common processes, your implementation team can work completely in parallel on the product-specific processes. Because the implementation

processes are fully automated, you never need to worry about sequencing and the complexities of cross-product interdependencies.

Process Monitor

The Wizard is equipped with the Process Monitor, located on the Step Details window, which provides situational awareness throughout the implementation. You can always see graphically the steps you have completed and the steps still to be completed. By clicking on the graphic icon of a step in the Process Monitor, you can review or preview any of the setup step information in a process.

Status Display

On the Process Overview window, processes are identified by different graphic icons that indicate whether a process is active or complete. At any time, you can go to the Process Overview window and see a graphic representation of which processes have been completed and which processes are still open or active. For each process, you can see who is performing the task, how long it has lasted, and the current step being worked on. Based on your judgment, you can also close a task.

Team Collaboration

To effectively manage and delegate implementation tasks, the Wizard allows you to assign processes to different members on your implementation team. Additionally, if you need help about how to set up a particular step, you can reassign a task, with your comments, to the specialist on your team.

Self-Documentation

The self-documentation feature provides an audit trail for you to track the status and issues of your implementation. You can append comments or note issues at the process level and step level.

- At the process level, you can enter information to provide guidelines and set objectives for your implementation team.
- For each step in your task, you can record any conflict, issue, reason, or open question specific to that step.

You have the option to skip steps in an iteration or branch within an iteration. All the comments and user options are automatically recorded by the Wizard for your later recall.

Setup Guidance

The Wizard provides setup guidance throughout your implementation, in the form of instructions, options, warnings, and alerts for key decision making during your implementation. These instructions provide information such as whether the step is mandatory or optional, and what you are supposed to do to complete the step. If you need more detailed help information about how and what to enter in a particular setup form, you can view the online documentation by selecting the View Documentation button on the Step Details window.

Flexible Identification of Key Processes

A large implementation involves many processes and iterations. The Wizard provides flexible selection criteria for you to identify the critical processes and iterations you need. You can find processes or iterations according to their status, assignment, and duration. You can also view the result sorted by process hierarchy or process name. These features allow you to quickly locate critical paths and bottlenecks to effectively manage your implementation tasks and project.

Phased Implementation

The Wizard provides setup support to allow you the option of phasing Oracle Applications into production. You can phase your implementation based on your implementation rollout plan for Oracle Applications products. For example, you may want to implement General Ledger and Payables in the first phase and Sales and Marketing in the second phase. The Wizard automatically shows you the corresponding processes you need to run based on the products you specified for that phase.

Data Segregation and Security

The Wizard ensures data segregation and security by preventing you from entering setup information into the wrong business entity.

Some processes (for example, Security and Audit Trail) do not belong to any business entity and are only performed once per implementation. Most processes in the Wizard need to be performed multiple times if you have multiple business entities, which are categorized by Oracle Applications into the following types:

- **Business Group:** Used to separate employee information in HRMS products for different organizations or countries.

- **Set of Books:** Used to separate information about financial reporting entities with different charts of accounts, functional currencies, and accounting calendars.
- **Operating Unit:** Any organization such as a sales office, a division, or a department that uses Order Entry, Payables, Purchasing, or Receivables.
- **Inventory Organization:** An organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products.

These features allow you to implement the various multiple business entities in parallel.

The business entity type of your process must match the security and profile of your current responsibility. This prevents accidental modifications. For example, if you have two operating units, the Wizard ensures that you set up the appropriate data for the operating unit for which it was originally intended.

Automatic Detection of Installed Products

The Wizard can automatically detect the products that are installed on your site. It shows you only the processes and steps relevant to your specific implementation.

Implementation Classification and Grouping

The application's setup processes, known as "Implementation Processes" for the Oracle Applications have been grouped under the following categories:

- Common Applications
- Common Product Family Processes
- Product-Specific Processes

We created these categories to ensure that you complete common steps—steps that many products depend upon—early in the process. That is, the Common Applications category of setup steps contain steps which are common to more than one product line within Oracle Financials, Oracle Manufacturing, and other Oracle product families. Generally, these steps need to be completed before you can proceed to the Common Product Family processes.

Similarly, the Common Financials group contains setup steps which are common to more than one module across the Financials products. The final processes contain product-specific tasks that can be completed in parallel with each other, without cross-process interdependencies; you can assign a different team member to each final process and let them proceed without waiting for one another to complete any steps.

By the time you reach the final implementation processes, you can have a very large team working on many independent implementation processes in parallel.

Common Applications

Common processes address all the shared setup steps across Oracle Applications product families, including HRMS, Financials, Manufacturing, and Front Office.

Common Product Family Processes

These processes include shared setup steps across products, but within a specific product family, for example, Financials. The common product family processes include:

- Common Financials
- Common Distribution
- Common Manufacturing
- Common HRMS
- Common Front Office

Product-Specific Processes

The product-specific processes include the additional processes necessary to implement individual products, such as General Ledger, Payables, Inventory, Human Resources, or Sales Compensation.

See: Supported Products: page A – 2 for a listing of all Oracle Applications products supported by the Wizard.

Function Security for Data Protection

Note that the ability to view a task does not guarantee you the privileges to open the corresponding setup window and make changes to setup data. The usual function security requirements for your current responsibility still apply.

See: *Oracle Applications System Administrator's Guide*

CHAPTER

2

Installation

This chapter explains how to install and configure the Implementation Wizard.

Prerequisites for Using the Wizard

Before you can begin using the Wizard to complete your product setup, you need to install Oracle Applications and complete a few setup steps.

Generally, each Wizard user needs access to the same environment that any other Oracle Applications user needs.

- ▶ **To complete the prerequisite steps before using the Oracle Applications Implementation Wizard:**
 1. Install the current version of Oracle Applications. See: Oracle Applications Installation Manual
 2. Set up Oracle Web Server. See: Oracle Workflow User's Guide:
 3. Define the Help System Base URL profile option: 2 – 2
 4. Define implementation users and roles (optional): page 2 – 2.

Defining and Configuring

Beyond the basic Oracle Applications setup, you should perform the following additional steps before you begin using the Wizard.

Define Help System Base URL Profile Option

Confirm that the Help System Base URL profile option is set to the topmost directory of the HTML help system. (When you choose "View Documentation" from the Step Details window, the Wizard uses this profile option/system variable to locate the "reference" documentation for each setup step.) Ordinarily, this option/variable is set automatically during installation.

Define implementation users and roles (optional)

When you install the Wizard, you get one pre-seeded user, named WIZARD, with password WIZARD. To take advantage of the ability to assign different tasks to different users, you should define a new user for each person who will work on your implementation team, and to whom you will assign tasks.

You also need to assign each user to one or more responsibilities. If you want a user to have access to all the setup windows for a particular

product family, as well as access to the Implementation Wizard forms,, you can use one of the pre-seeded responsibilities, as follows:

- Implementation Financials
- Implementation Human Resources
- Implementation Manufacturing
- Implementation Sales and Service
- Implementation System Administration

Each of these responsibilities is registered to the Oracle Applications Implementation Wizard.

If you use other responsibilities besides these Implementation responsibilities, ensure that those responsibilities allow access to the appropriate setup forms. The ability to view a setup task does not necessarily confer any additional privileges to use a particular setup window corresponding to a step in the task.

You need to create separate responsibilities for each organizational context so you can associate a different responsibility with each context. Note that using the menus associated with the pre-seeded Implementation responsibilities is an easy way to create new implementation responsibilities that have access to all the setup windows.

Setting Up Oracle Web Server

To run the Implementation Wizard, you must first properly set up Oracle Web Server.

See: Oracle Workflow User's Guide

See Also

Updating Process Definitions during Implementation: page 2 – 3

Updating Process Definitions During Implementation

When you install the Implementation Wizard, you get a set of processes describing the implementation steps that are appropriate for your version of Oracle Applications.

If you begin using the Wizard on an implementation project but decide to upgrade to a newer version of Oracle Applications before you finish with your implementation, you need to reload an updated set of processes containing implementation steps appropriate for your new version.

► **To update the Wizard during an implementation:**

1. Install and upgrade to the new version of Oracle Applications.
2. Upgrade the Wizard using the patch provided by Oracle.
3. Select the Implementation Wizard from the Navigator.
4. Proceed through the processes. At each step, consult the documentation and visit the setup window to review your implementation information to date. If you still agree with the current setup information, mark the step done.

See Also

Prerequisites for Using the Wizard: page 2 – 2

CHAPTER

3

Using the Wizard

This chapter explains how to use the Implementation Wizard.

Implementing with the Wizard

The following are the high level steps you need to complete when using the Oracle Applications Implementation Wizard for an implementation project:

1. Ensure that you have completed the prerequisites described in Chapter 2.
2. Define phases for the products that will be implemented.
3. Complete the Common Applications processes, in the order they are listed in the Process Overview window.
4. Complete the common product family processes, such as Common Distribution and Common Financials, as appropriate. The common product family processes can be completed in any order. These family processes are independent of each other and can be completed in parallel.
5. Complete the final product-specific processes in any order. The product-specific modules have setup tasks that are independent of each other, and can therefore be completed in parallel.

See Also

Defining Phases: page 3 – 3

Define Phase Window Reference: page 3 – 3

Managing Task Assignments: page 3 – 4

Planning and Reviewing your Work: page 3 – 5

Monitoring Progress: page 3 – 5

Recording and Resolving Issues: page 3 – 6

Viewing Your Tasks: page 3 – 6

Completing Steps in a Task: page 3 – 6

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Using the Wizard to Complete Setup Steps: page 3 – 7

Completing Context-Dependent Process Steps: page 3 – 8

Context Values for Processes: page 3 – 9

Select Process Group Window Reference: page 3 – 9

Process Overview Window Reference: page 3 – 12

Defining Phases

The Wizard allows you to roll out the implementation of your Oracle Applications in phases. Phasing your implementation allows you to implement first the products that are most critical for your business needs. Or, if you do not have the resources on hand to implement all products at once, phasing your implementation may simplify the process. For example, if you are implementing Financial, Manufacturing, and HRMS products, you may want to implement Financials in phase 1, Manufacturing in phase 2, and HRMS in phase 3.

Based on the phases you define, the Wizard automatically selects the processes you need to complete to implement the installed Applications.

You must assign a numerical value to each phase. By default, each installed product is assigned to phase 1. This means that if you do not assign phases, all products will be implemented at the same time.

► **To define phases:**

1. Navigate to the Define Phase window.

All of the installed Applications that are supported by the Application Implementation Wizard initially appear with a value of 1 in the Phase field.

2. Change the value in the Phase field to the appropriate value. For example, if you are implementing General Ledger, Payables, and Receivables, and you decide you want to implement General Ledger first, you can implement in two phases. You keep General Ledger as phase 1 and change Payables and Receivables to phase 2.

Define Phase Window Reference

If you decide you need to implement Oracle Applications in phases, you use the Define Phase window to define which products will be implemented in each phase.

Product Region

All of the installed products appear in this region.

Phase Region

In the phase region, you assign a numerical value to each product to indicate in which phase the product will be implemented. For example, you are implementing Financial and HRMS products, and you decide to implement Financial Applications as phase 1 and HRMS Applications as phase 2. By default, all products are in phase 1, so you would leave all Financial Applications products (General Ledger, Payables, etc.) as phase 1, and change the HRMS products (Human Resources, Payroll, etc.) to phase 2.

Managing Task Assignments

- ▶ **To start and assign a task:**
 1. Navigate to the Process Overview window.
 2. Choose the Start New Task button to invoke the Task Assignment window.
 3. Assign the task to a user by selecting the User ID of the user to whom you want to assign the task in the poplist.

Reassigning a Task to a Different User

You can reassign tasks to another user on the implementation team. To reassign a task, enter the User ID of the user to whom the task is being reassigned. If you reassign a task to another user, all subsequent steps in that task are assigned to the new user.

Closing a Task

You can close a task that is in progress by choosing the Close Task button on the Process Overview window. Reasons you might want close a task are:

- You started a task by mistake
- You planned to work on a task, then decided not to work on it at this time

Planning and Reviewing Your Work

The Wizard allows you to plan ahead for your implementation. You can look at the upcoming steps within a process by clicking on the appropriate step icon in the Step Details window, and you can look at the corresponding step guidance. You can also look at the steps you have already completed to review the data you entered, or to refer back to some of the comments you might have recorded.

Monitoring Progress

The Wizard allows you to monitor the progress of your implementation at various levels.

Process Group Level

As processes are completed, implementation team members can mark them complete by checking the Process Complete check box on the Process Overview window. When all processes in a process group are complete, the Wizard automatically inserts a check mark next to the process group name on the Select Process Group window. You can look at the Select Process Group window for a snapshot of which process groups have been completed.

Process Level

You can check the processes that are marked complete (those that have the Process Complete check box checked). You can also monitor the progress of each task for a particular team member on the Step Details window.

Identifying Bottlenecks

You can look at the tasks that are taking the most time to complete by navigating to the Find window and specifying a number of days in the Days Task Lasted field. For example, you may want to look at all tasks that have taken longer than a week to complete, so you can enter > 7 in the Days Task Lasted field.

Recording and Resolving Issues

The Wizard allows team members to record issues during the implementation that can be viewed by other members of the team. You can record comments for an entire process in the Process Comments field on the Process Overview window, or for a step in the Step Comments field on the Step Details window. You can view the comments later, and if you assign the task to another team member for resolution, that team member has access to the comments.

Viewing Your Tasks

You can quickly view the tasks assigned to you by clicking on the Show My Tasks button on the Select Process Group window. This will show you all the active tasks assigned to you for the current phase.

Completing Steps in a Task

Once you are at a particular step, you can work on the step using the guidance provided at that step. If you want more information, you can look at the online documentation for that step. You can enter data for the step by choosing the Open Form button on the Step Details window. For example, if you are currently at the Define Set of Books step, when you choose the Open Form button, the Set of Books window appears. Once you have completed the step, choose the Next Step button on the Step Details window. The window that appears gives you the option to mark the step done or skip the step.

Marking Processes Complete

As you proceed through your implementation, you can mark the processes complete after your team has completed the task and setup data for the steps associated with the process. You can remove these processes from the process list, based on the Find criteria you specify for the process.

Using the Wizard to Complete Setup Steps

When you have completed the prerequisites in Chapter 2 and set up phases, you are ready to use the Wizard to walk through and complete your setup steps.

Although the initial implementation processes need to be completed just once for an entire enterprise, later processes need to be completed once per set of books, inventory organization, or other "context." See: Completing Context-Dependent Process Steps: page 3 – 8.

► **To implement Oracle Applications using the Implementation Wizard:**

1. Sign onto Oracle Applications using a user ID that has access to Implementation Wizard responsibilities. (You can use the predefined user Wizard, with password Wizard.)
2. Choose any of the Implementation responsibilities.
3. Select the Implementation Wizard from the Navigator Menu to open the Select Process Group window.
4. From the Select Process Group window, choose the Common Applications radio button and choose Next.

The Process Overview window displays the list of setup processes you need to complete for Common Applications.

or

If you want to view only the tasks you are currently responsible for completing, choose Show My Tasks to view all tasks assigned to you (this view does not include tasks that were assigned to you that you have already completed).

5. Select a process and choose the Start New Task button.
6. Select a task to complete by highlighting the task and choosing Next.

The Step Details window shows a process diagram, which illustrates what you need to do to complete the task.

7. Complete the steps associated with the task to complete the task. For example, if you are defining units of measure, you need to define units of measure classes, units of measure, and units of measure conversions.
8. Continue working until you have completed all Common Applications processes.

9. Repeat all steps for the common family processes.
10. Repeat all steps for the product-specific processes.

See Also

Implementing with the Wizard: page 3 – 2

Completing Context-Dependent Process Steps: page 3 – 8

Context Values for Processes: page 3 – 9

Select Process Group Window Reference: page 3 – 9

Process Overview Window Reference: page 3 – 12

Find Window Reference: page 3 – 16

Step Details Window Reference: page 3 – 18

Completing Context-Dependent Process Steps

During an Applications implementation, some setup information must be specified once per set of books, inventory organization, operating unit, or business group. That is, you need to enter setup data once per organization, since the data may vary by organization.

To help you manage this dependency, the Wizard indicates which setup processes depend upon an organization context and allows you to begin those context-dependent processes only after you have defined the contexts using the appropriate Applications setup windows.

After you indicate the various organizations you will use (by completing some Common Applications processes) and create responsibilities specific to those organizations, you can proceed to the common family implementation processes.

Generally, you need to complete a context-dependent process once for each element of that organization context. For example, if you have three sets of books, you need to complete processes for each set of books.

See Also

Implementing with the Wizard: page 3 – 2

Context Values for Processes: page 3 – 9

Context Values for Processes

For the processes that are based on context, the context names are always displayed with the processes. The processes are organized at various context levels as shown below :

- **None:** You can run these processes before defining any organizations, and can run from any responsibility
- **BG:** Business Group
- **IO:** Inventory Organization
- **OU:** Operating Unit
- **SOB:** Set of Books

► **To continue completing context–dependent processes:**

1. Choose one of the responsibilities you created during the Common Applications setup steps; this responsibility will be associated with a particular context, such as a set of books or organizational unit.
2. Select the Implementation Wizard from the Navigator.
3. Choose a Common Financials, Common Manufacturing, or other common product family process from the list of values. Note the "Context" value associated with that process.

See Also

Implementing with the Wizard: page 3 – 2

Using the Wizard to Complete Setup Steps: page 3 – 7

Completing Context–Dependent Process Steps: page 3 – 8

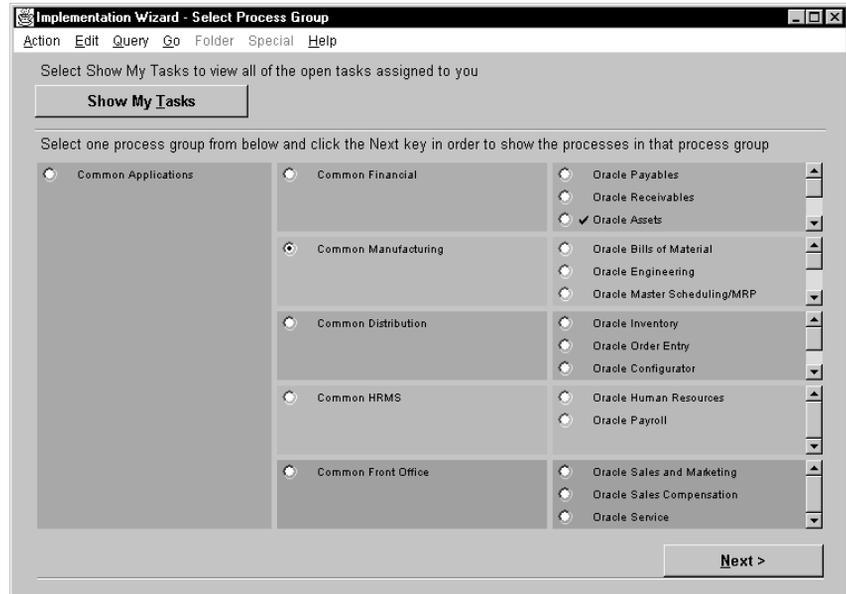
Select Process Group Window Reference: page 3 – 9

Select Process Group Window Reference

You use the Select Process Group window to do one of the following:

- View the tasks assigned to you that are yet to be completed

- Select a specific group of implementation processes



Show My Tasks

To view the uncompleted tasks assigned to you, choose the Show My Tasks button. This takes you to the Process Overview window and displays the list of tasks assigned to you

If you want to redefine the selection criteria, you must do so on the Find window.

If there are no tasks assigned to you, or if you have already completed your assigned tasks, the Wizard displays the message: "There are no open tasks assigned to you. Please select a process group."

See: Find Window Reference: page 3 – 16.

Select Process Group

The window displays a three-level dependency listing of all of the process groups necessary to implement the Oracle Applications you have installed. A process group is either a group of implementation processes, or an installed Oracle Applications product, such as Oracle General Ledger, Oracle Inventory, Oracle Bill of Materials, and so forth.

The third level of the process group dependency changes, depending on the products you have installed. Uninstalled product names are grayed out. If there are no installed products for a particular product family, the common family process group is also grayed out. For example, if none of the Financial products are installed, the Common Financials process group is grayed out. The dependency chart indicates that you should complete the common setup steps before completing product-specific steps. Although the Wizard will not prevent you from selecting product-specific steps first on the Select Process Group window, you may receive an error and be unable to complete a product-specific task, if you have not completed necessary common setup steps.

Note: You can select only one process group at a time.

Viewing Common Applications Steps

The first level of the dependency chart shows steps common across more than one product line of Oracle Applications. When you choose Common Applications, you see a list of setup processes that you must complete across all applications. For example, if you have installed Financials, Manufacturing, and HRMS, the processes listed will apply to all of these product lines.

Viewing Common Product Family Steps

The second level of the dependency chart shows steps common to an Applications family, for example, Financials. You should complete these steps after completing all Common Applications processes.

The possible selections at this level of the dependency chart are:

- Common Financial
- Common Manufacturing
- Common Distribution
- Common HRMS
- Common Front Office

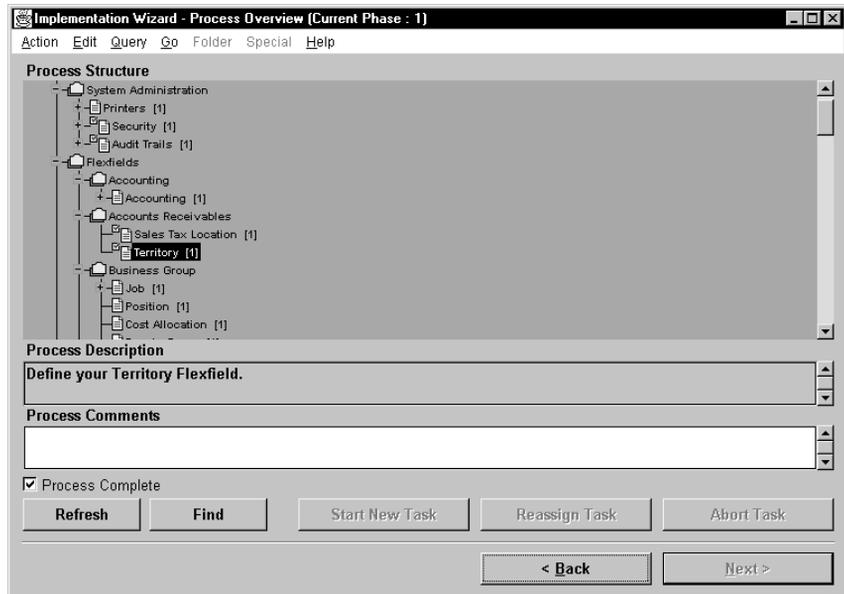
Viewing Product-Specific Steps

The third level of the dependency chart shows the remaining product-specific processes for the Oracle Applications products you have installed. You should complete these processes after completing

all Common Applications processes, and all processes common to the family to which the product belongs.

Process Overview Window Reference

You use the Process Overview window to start new tasks and to select tasks on which you will be working.



Process Structure

The Process structure region lists all of the processes that need to be completed for the selected process group, along with the associated task information.

The information displayed in the Process Structure region varies according to what you chose on the Select Process Group window.

- If you selected a specific process group on the Select Process Group window, the Process Structure region displays the structure of that process group and the associated task information, sorted by process hierarchy.

- If you chose Show My Tasks on the Select Process Group window, the Process Structure region displays all tasks assigned to you, sorted by process hierarchy.

When the Wizard shows you a list of eligible processes, it does not include processes that depend upon a set of books setup (SOB); the system does not consider your set of books context to be valid until you have defined a set of books and specified its calendar, chart of accounts, and currency.

Similarly, the Wizard does not show you setup processes that depend upon a Business Group (BG), Inventory Organization (IO), or Operating Unit (OU) until you have defined at least one of that kind of organization.

Icons

In the Process Structure, process groups, processes, and tasks are all represented by different icons. When processes and tasks are completed, the icons representing them contain a checkmark.



Process Group



Process



Completed Process



Task



Completed Task

Uncompleted and Completed Tasks

If a task has not yet been completed, the following information appears next to the icon associated with the task:

- Current step name

- User ID to whom the task is assigned
- Number of days elapsed since task has been started
- Number of steps done
- Number of steps skipped

When a task has been completed, the following information appears next to the icon associated with the task:

- User ID of the person who completed the task
- Number of days it took to complete the task
- Number of steps done
- Number of steps skipped

Process Description

The Process Description field displays a description of the process corresponding to the process or task that is currently highlighted.

Process Comments

The Process Comments field displays user-entered comments for the process or associated task that is currently highlighted. You can modify the text in this box. The Wizard saves the modified text when you choose any of the buttons at the bottom of the window, or when you select another process/task. If you update the Process Comments field and try to close the Process Overview window, the Wizard displays the message: "Do you want to save the changes you have made?" Select OK to save your changes.

Process Complete

Once you have completed and reviewed all the setup data for a process, you can mark the process complete by checking the Process Complete check box. When the Process Complete check box is checked, a check mark appears on the icon in front of the process name. If the process is marked complete and you are not satisfied with the work on the process, you can uncheck the Process Complete check box.

Refresh

The Refresh button updates the process structure diagram. This enables you to see the changes made by other members of your team during your Wizard session.

Find

The Find button invokes the Find window, which contains the selection criteria currently used to list processes and tasks.

See: Find Window Reference: page 3 – 16.

Start New Task

You choose the Start New Task button to go to the Task Assignment window and assign the task to a user. To choose Start New Task, you must first highlight a process. The Task Assignment window displays the current user by default. Once the new task is started, the Wizard updates the Process Overview window with the new task.

Reassign Task

You choose the Reassign Task button to reassign your tasks to another member of the implementation team. When you choose the Reassign Task button, the Task Assignment window appears, and you can assign the task to a different user.

Close Task

You choose the Close Task button to close any task assigned to you that is currently in progress. A confirmation window appears asking you to confirm or cancel the Close Task command.

Back

You choose the Back button to return to the Select Process Group window.

Next

After selecting a new or incomplete task on the Process Overview window, you Choose the Next button to take you to the Step Details window.

Find Window Reference

You invoke the Find window by choosing the Find button on the Process Overview window. If the Process Overview window does not show the processes and tasks you want to see, you can use the Find window to change the selection criteria. For example, if the Process Overview window is showing only your tasks, but you want to see the tasks for all users, you can change the selection criteria on the Find window to indicate that you want to see tasks for all users.

If you invoked the Process Overview window by choosing Show My Tasks, the default selection criteria settings are as follows:

Process Status	Not Completed
Process Phase	Current
Processes with Started Tasks	Enabled
Task Assignment	Current User
Task Status	Not Completed
Days Task Lasted	> = 0 (all tasks)
Sort by	Process Hierarchy

If you invoked the Process Overview window by choosing a process group, the default selection criteria settings are as follows:

Process Status	Not Completed
Process Phase	Current
Processes with Started Tasks	Not enabled
Task Assignment	Current User
Task Status	Not Completed
Days Task Lasted	> = 0 (all tasks)
Sort by	Process Hierarchy

Process Status

You can set the Process Status field to any of the following:

- Not Completed (default)
- Completed
- All (will search for both completed and incomplete tasks)

Process Phase

You can set the Process Phase field to any of the phases that have been defined. The Process Overview window displays only the list of processes you need to complete for the selected phase. If Process Phase is blank (the default), processes for all phases are displayed on the Process Overview window.

Task Assignment

You can set the Task Assignment field to any of the users on the implementation team. The Process Overview window will show only tasks assigned to the user indicated in this field. The Task Assignment can be any of the following:

- Current user (default)
- Any other user on the implementation team
- Blank (will list tasks for all users)

Task Status

You can set the Task Status field to any of the following:

- Not Completed (default)
- Completed
- All (will search for all tasks)

Processes with Started Tasks

If you check this check box, the Process Overview window shows only those tasks with started tasks. If you do not check this check box, the Process Overview window shows both started tasks and tasks that have not yet been started.

Days Task Lasted

You can list tasks that lasted a certain number of days (or greater than or less than a certain number of days). For example, you may want to list only those tasks that have lasted for over two weeks.

Sort by

You can set the Sort by field to show processes on the Process Overview window sorted by any of the following criteria:

- Process Hierarchy

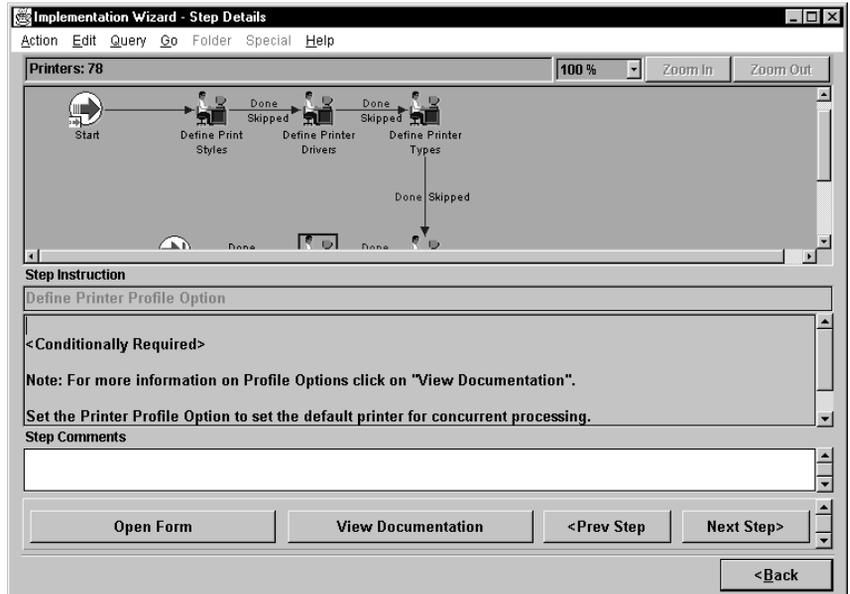
If you select Sort by Process Hierarchy, processes will be shown on the Process Overview window according to the hierarchy shown on the Select Process Group window. That is, Common Applications processes appear first, followed by common family process groups, followed by product-specific process groups.

- Process Name

If you select Sort by Process Name, processes will be shown on the Process Overview window alphabetically, so that you can easily find a specific process.

Step Details Window Reference

The Step Details window shows details about each process.



Process Monitor

The Step Details window shows a process diagram illustrating all of the steps that need to be completed for the process. The current step is highlighted in the diagram. You can resize the diagram in the process monitor by selecting a resize percentage (50% or 25%), or by selecting Fit to fit the diagram to the window.

If you selected a completed process in the Process Overview window, the Process Monitor displays the process diagram, with the first step as the current step. Every other step and connection path are in a different color, to indicate the step has already been completed.

If the task is assigned to another user, you will not be able to choose the Prev Step and Next Step buttons. You can, however, navigate in the Process Monitor, read accompanying notifications and documentation, and open setup forms to view the previously set data.

Zoom In and Zoom Out Buttons

If the process contains a sub-process, you can view the steps in the sub-process by choosing the Zoom In button. To go back to the main process, choose the Zoom Out button. If there are no sub-processes, these buttons are grayed out.

Step Instruction

The Step Instruction region contains the step name and step description. The text in this region is display only.

Step Comments

You can enter comments in the Step Comments box that correspond to a step in a particular task. If you are viewing a task assigned to another user, you can read comments that are already entered, but cannot modify or add any comments. The Wizard saves changes in the Step Comments box when you select one of the buttons at the bottom of the window. If you update the Step Comments and exit the window immediately, you see the message: "Do you want to save the changes you have made?" Select OK to save your changes.

Open Form

Select the Open Form button to open a form associated with a particular setup step.

View Documentation

Select the View Documentation button to open online documentation associated with a particular setup step.

Prev Step

Select the Prev Step button to return to the previous step in a task. The Wizard updates the Process Monitor so that the previous node becomes the current node. The Wizard also updates the Step Instruction and Step Comments. When you return to a previous step, you see the comments entered at that step, if any. However, when you complete a step and move to the next step, the text in the Step Comments field is deleted. When you are viewing the first step in a task, the Prev Step button is grayed out.

Next Step

Select the Next Step button to go to the next step in a task. The Wizard displays a list of responses. Depending upon circumstances, the choices include Done, Skip, or a selection of implementation steps, when a branching decision is asked. After you make your choice, the

Wizard updates the Process Monitor, documentation, and form names. On the last step of a task, the Next Step button is grayed out.

Back

Select the Back button to return to the Process Overview window. To display the process structure diagram, the Wizard uses the most recently-used selection criteria. The process structure diagram reflects any progress on a specific task.

See Also

Implementing with the Wizard: page 3 – 2

Using the Wizard to Complete Setup Steps: page 3 – 7

Completing Context-Dependent Process Steps: page 3 – 8

Context Values for Processes: page 3 – 9

CHAPTER

4

Process Hierarchies

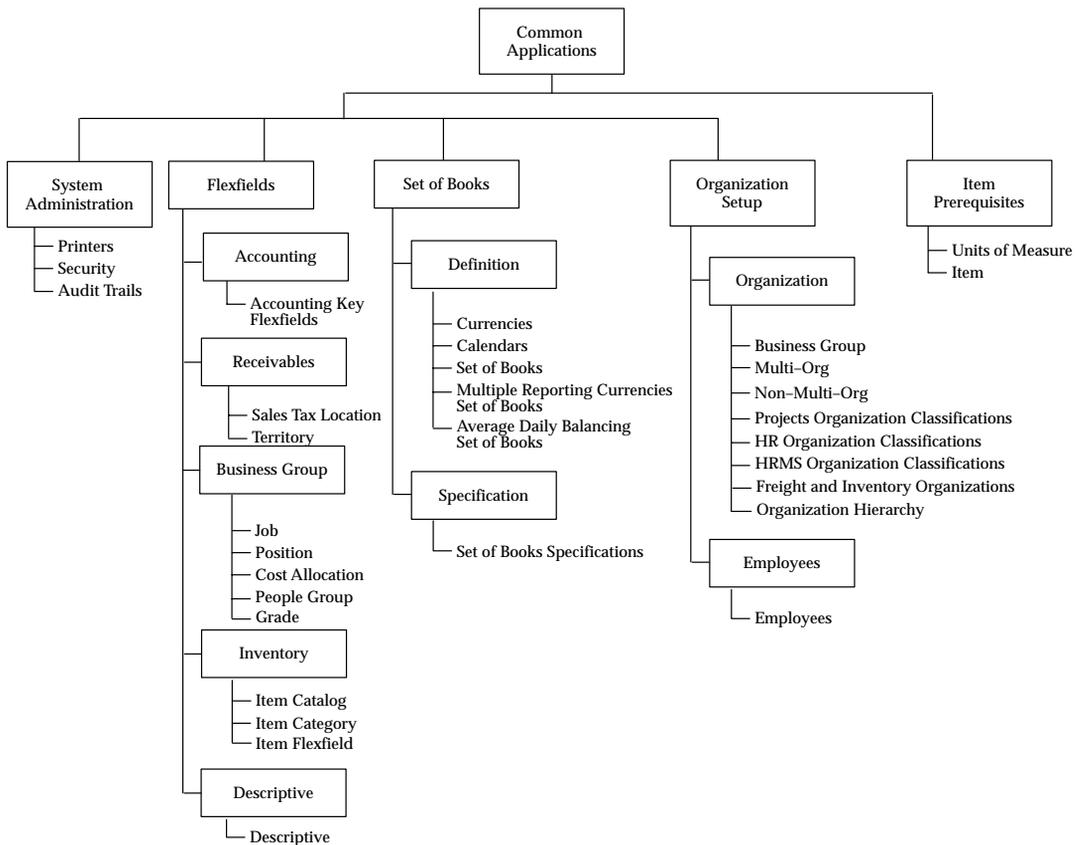
This chapter provides an overview of the common processes within the Wizard.

About Process Hierarchies

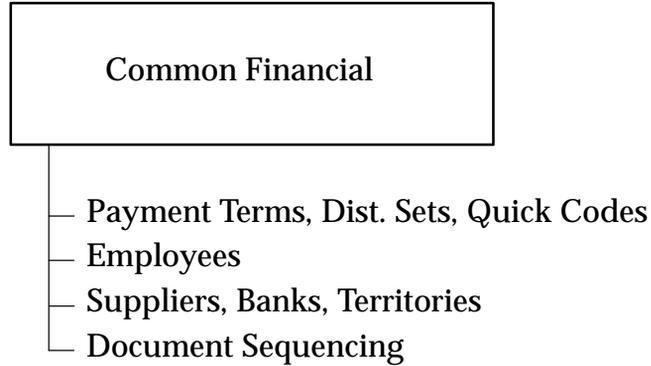
The following diagrams illustrate the detailed structure of the common processes within the Application Implementation Wizard.

Note: There are no common processes for Front Office products. Consequently, there is no Front Office process hierarchy diagram provided in this chapter.

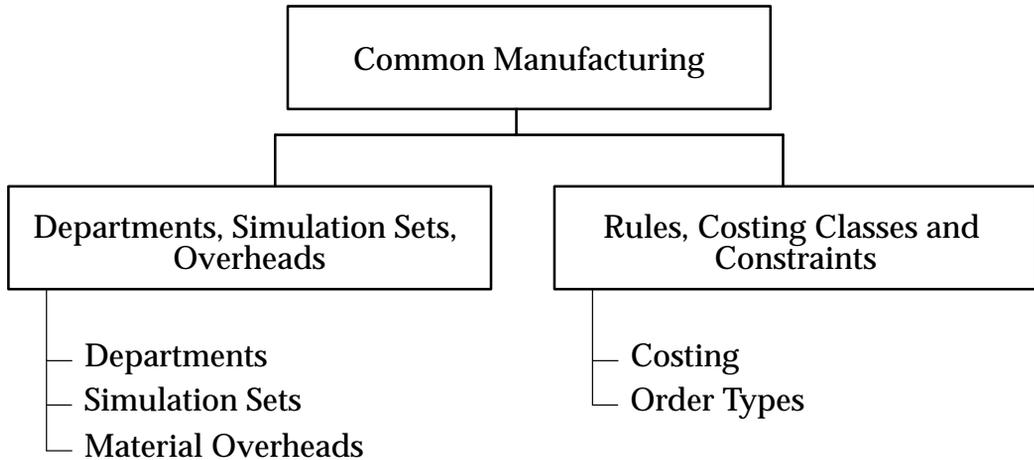
Common Applications Process Hierarchy



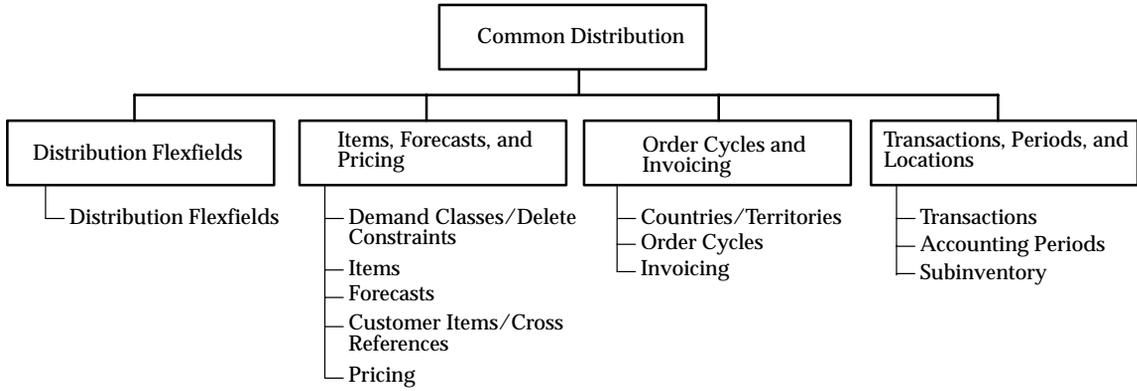
Common Financial Process Hierarchy



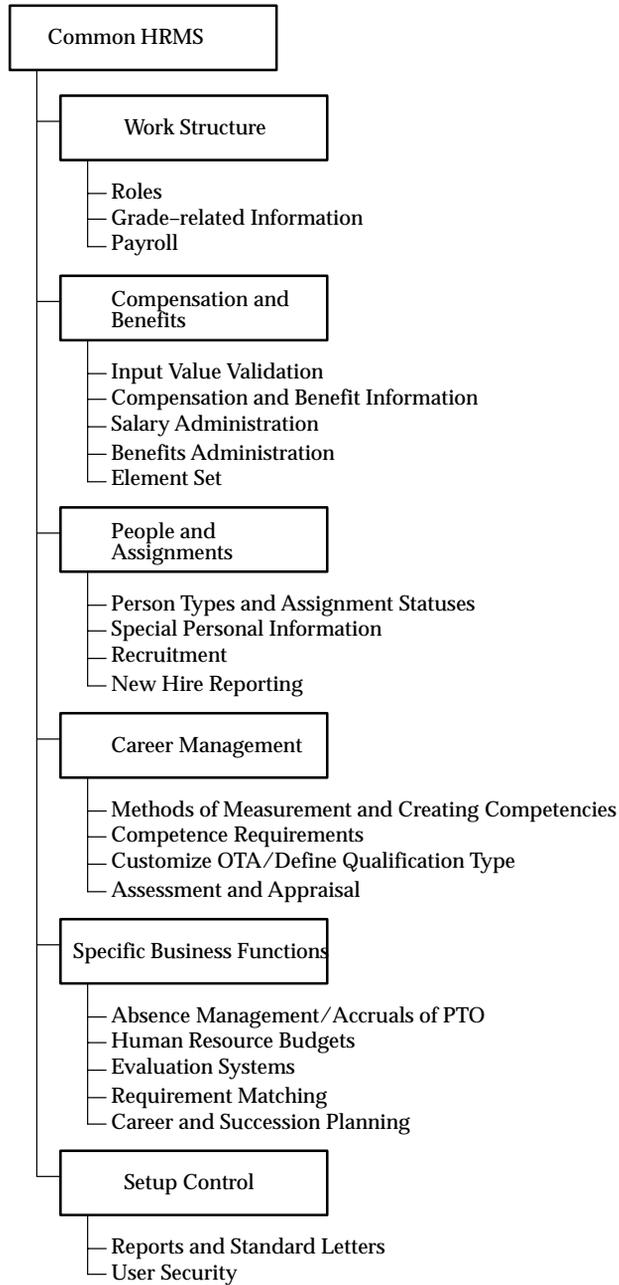
Common Manufacturing Process Hierarchy



Common Distribution Process Hierarchy



Common HRMS Process Hierarchy



APPENDIX

A

Supported Products

This appendix describes the products you can implement with the Oracle Applications Implementation Wizard.

Supported Products

This version of the Oracle Applications Implementation Wizard contains a database of setup steps for most Oracle Applications products, including System Administration. You can get full guidance for the following products:

Oracle Financials products:

- Oracle General Ledger
- Oracle Payables
- Oracle Receivables
- Oracle Cash Management
- Oracle Assets
- Oracle Projects

Oracle Manufacturing and Distribution products:

- Oracle Bills of Material
- Oracle Engineering
- Oracle Forecasting
- Oracle Inventory
- Oracle MRP
- Oracle Order Entry
- Oracle Purchasing
- Oracle Product Configurator
- Oracle Supply Chain Planning
- Oracle Work in Process
- Oracle Supplier Scheduling
- Oracle Quality
- Oracle Cost Management

Oracle HRMS products:

- Oracle Human Resources
- Oracle Payroll (UK)
- Oracle Payroll (US)

Oracle Front Office:

- Oracle Sales and Marketing
- Oracle Sales Compensation
- Oracle Service

Other Supported Functionality:

- Multiple Reporting Currencies
- Euro currency setup
- Receivables tax setup

If you are implementing a product not included on this list, complete the implementation for the other products you are planning to use, as directed by the Wizard. Then, consult the User's Guide for the excluded product and follow the setup steps outlined for that product.

APPENDIX

B

Wizard Navigation Paths

This appendix lists the standard navigation paths you use to open Oracle Applications Implementation Wizard windows.

Wizard Navigation Paths

This section lists each Wizard window and corresponding navigation path.

Window Name	Navigator Path
Select Process Group	Implementation Wizard
Process Overview	Implementation Wizard. Select a process group, choose Next OR Implementation Wizard. Show My Tasks
Step Details	Implementation Wizard. Select a process group, choose Next, select a task, choose Next. OR Implementation Wizard. Show My Tasks, select a task, choose Next.
	Implementation Wizard. Select a process group, choose Next, Find. OR Implementation Wizard, Show My Tasks, Find.
Define Phase	Implementation Phase

See Also

Glossary

Context A particular set of books, operating unit, inventory organization, or business group.

Dependency A prerequisite for completing a particular setup step, whereby it cannot be completed unless some other setup information has already been defined.

Function Security An Oracle Applications feature that lets you control user access to certain functions and windows. See: *Oracle Applications System Administrator's Guide*

Implementation Process A set of related setup steps you complete using the Wizard, including Common Setup and product-specific processes. Also known as **process**.

Process See: *Implementation Process*

Process Group A group of implementation processes that need to be implemented across products, for example, Common Applications, Common Financials, etc. A process group can also be the implementation process for a particular product, such as General Ledger, or Bill of Materials.

Response An acknowledgement that a particular step of an implementation process has been completed, deferred, skipped, or otherwise marked; in many cases, a response tells the Implementation Wizard to proceed to the next step of an implementation process.

Setup The activity of configuring applications to reflect your business rules and requirements; also, a collective name for the data you entered during the setup activity. You must set up before end users can begin day-to-day processing. Not to be confused with installation.

Step Steps are building blocks of processes. A step in the Wizard corresponds to a setup step in Oracle Applications.

Task A process that is assigned to a user.

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Reader's Comment Form

Oracle Applications Implementation Wizard User's Guide, A58481-01

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- Do you need more information? If so, where?
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