Oracle Intelligent Advisor <Project Name>

Project Overview

This document has been provided as a guide to some of the decisions you may need to make when establishing a successful Intelligent Advisor project. You should add and remove detail as relevant to your project and you may need to split the content into several documents, depending on the audience for each.

Background

<Insert any relevant background information>

Vision Statement

The vision for this project is to deliver <insert details>.

Scope and Requirements

The agreed scope and requirements for the project are documented in <list the associated documents>.

Assumptions, Dependencies and Constraints

<List any assumptions that the project is being based upon. Include the factors that you consider to be true/real, and the potential impact of assumptions should they prove to be false.>

<List any dependent tasks that require one or more other tasks to be completed or started before the team can start work on them>

<List any constraints that are expected to affect the project, such as personnel constraints, performance constraints, budget constraints, and regulatory constraints>

People and Communication

Team Profile

The following people will make up the project team:

|  |  |
| --- | --- |
| NAME | ROLES |
|  | Policy Modeler |
|  | Author |
|  | Interview Designer |
|  | Tester |
|  | Project Administrator |
|  | Contract Manager |
|  | Developer |
|  | System Administrator |

|  |  |
| --- | --- |
| **Information with solid fill** | For more information, see [Introduction to Workspaces and Roles](https://docs.oracle.com/en/cloud/saas/intelligent-advisor/securing-intelligent-advisor/Content/Guides/Implement_Intelligent_Advisor/Manage_users_permissions/Introduction_to_workspaces_and_roles.htm). |

Stakeholder Profile

Key Stakeholder

|  |  |
| --- | --- |
| NAME |  |
| Description |  |
| Expectations |  |
| Goals and priorities |  |
| Driving requirements |  |
| Tolerance for risk |  |

Other Stakeholders

|  |  |
| --- | --- |
| STAKEHOLDER | INTEREST IN PROJECT |
|  |  |
|  |  |
|  |  |
|  |  |

Communications Plan

Reports

|  |  |  |
| --- | --- | --- |
| REPORT TYPE | SUBMITTED TO | REGULARITY |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Meetings

|  |  |  |
| --- | --- | --- |
| MEETING TYPE | ATTENDEES | REGULARITY |
| Team meeting |  |  |
| Stakeholder review |  |  |
|  |  |  |
|  |  |  |

Risk Register

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ID | DATE RAISED | DESCRIPTION OF RISK | LIKELIHOOD OF OCCURRING | IMPACT IF OCCURS | SEVERITY | MITIGATING ACTION | OWNER |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |

Responsibilities

|  |  |
| --- | --- |
| RESPONSIBILITY | NAME |
| Managing project risk, budget and timing |  |
| Managing project quality |  |
| Making the final decision on any policy interpretation/scoping/functionality |  |
| Signing off that the project is complete/acceptable |  |
| Collecting baseline data to compare project success against |  |

Development Lifecycle

Hubs

|  |  |  |
| --- | --- | --- |
| HUB URL | HUB TYPE | HUB DESCRIPTION |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |
| --- | --- |
| **Information with solid fill** | For more information, see [Create and manage environments](https://docs.oracle.com/en/cloud/saas/intelligent-advisor/admin-intelligent-advisor/Content/Guides/Implement_Intelligent_Advisor/Create_and_manage_sites.htm). |

Deployment Process

The process by which a deployment will be promoted to production is <insert details>.

Branching and Versioning

<Indicate here whether multiple streams of development are occurring in parallel and, if so, the process by which these streams are branched and merged>

Issue Management

The process for managing issues identified during development and testing is <insert details>.

Deliverables and Success

Baseline Data

The following baseline data has been collected to provide a comparison post-implementation:

* <metric> for period <date range>
* <metric> for period <date range>
* <metric> for period <date range>

|  |  |
| --- | --- |
| **Information with solid fill** | For more information, see [Measure return on investment for a project](https://docs.oracle.com/en/cloud/saas/intelligent-advisor/using-policy-modeling/Content/Guides/Use_Intelligent_Advisor/Use_Policy_Modeling/Get_started/Measure_return_on_investment_for_project.htm). |

Project Success Factors

The success factors for the project are:

* <Success factor 1>: can be measured by <insert measure>
* <Success factor 2>: can be measured by <insert measure>
* <Success factor 3>: can be measured by <insert measure>

Deliverables

This project will deliver the following in version 1.0:

|  |  |
| --- | --- |
| DELIVERABLE | ACCEPTANCE CRITERIA |
| <Deliverable 1> | Verified as being acceptable by <insert acceptance criteria> |
| <Deliverable 2> | Verified as being acceptable by <insert acceptance criteria> |
| <Deliverable 3> | Verified as being acceptable by <insert acceptance criteria> |

Delivery Schedule

The project will deliver version 1.0 on <insert delivery date>.