

# Using Oracle<sup>®</sup> Tutor<sup>™</sup> with AIM 3.0 and the Oracle<sup>®</sup> Business Models

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# Using Oracle® Tutor™ with AIM 3.0 and the Oracle® Business Models

Tutor is currently available for the following Oracle Applications bundles:

Oracle Financials  
Oracle Discrete Manufacturing  
Oracle Order Management  
Oracle Purchasing  
Oracle Projects  
Oracle Human Resources

For more information about Tutor, contact your local Education representative. Oracle employees can also access the internal sites <http://products.us.oracle.com> or <http://oracle-edu.us.oracle.com/marketing/index2.html>.

For more information about Oracle Business Models, contact your local consulting representative. Oracle employees can also access the internal web site, <http://obmweb.us.oracle.com> or email [obminfo@us.oracle.com](mailto:obminfo@us.oracle.com).

## INTRODUCTION

Oracle Tutor is a product that enables customers to integrate business process information with applications information for end users. It is also an online reference, available through an Internet browser for organizations to access during business operations. In this way, Tutor is part of the infrastructure that supports dynamically changing business environments, and that impacts organizational performance.

Tutor includes authoring and publishing tools, hundreds of model business procedures, and a repository of Oracle courseware. Customers are immersed in workshops, such as the Procedure Editing Workshop and Publisher training, to learn how to use Tutor and to tailor the model documents to suit their needs. Tutor can be introduced as part of an application implementation, an application upgrade, or along with a stand-alone process and system evaluation.

This paper provides AIM practitioners with information on the key integrating points with Tutor and suggestions for using Tutor with AIM release 3.0 and the Oracle Business Models (OBM).

## Overview

Tutor, AIM, and OBM include content, tools, and techniques that address the need for fast implementations and a unified source of documented practices. Tutor content supplements AIM and the Oracle Business Models. This is because Tutor procedures include policy-, job- and task-level detail not provided in AIM and OBM. Tutor also includes release-specific versions of the Oracle Applications courseware which has been modified for use with Tutor.

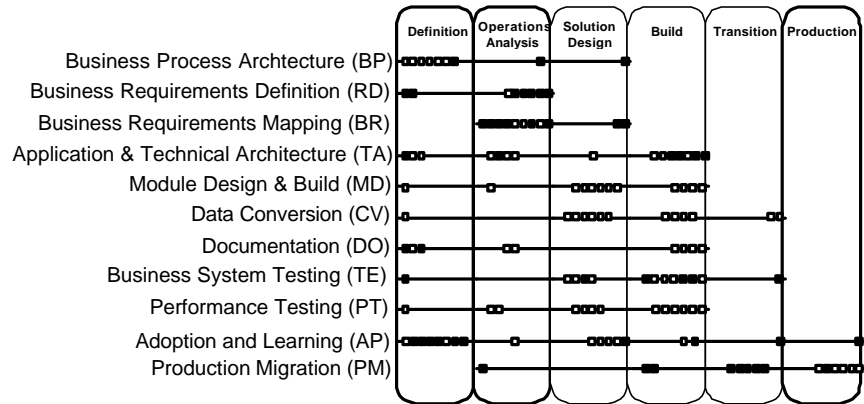
Tutor frees up resources by prepackaging the busywork so customers focus on the more important business benefits of process and application changes. It leverages project team knowledge in a document repository that is accessible to Tutor's Author and Publisher software — This simplifies the creation and maintenance of project deliverables and online reference information for end users.

Ultimately, Tutor’s approach results in tighter integration of business processes with applications. This tight integration illustrates how business needs are met by the applications; it ensures that individuals know their role in the overall process; and it ensures they know when and how to use the application.

The remainder of this paper assumes you have a basic understanding of the AIM and PJM Processes and Tasks. For more information, refer to the AIM and PJM Process and Task References.

### KEY INTEGRATION POINTS

The following diagram depicts the AIM processes, or disciplines, that interact during a typical project life cycle. The shaded boxes indicate core or required tasks.



Tutor impacts or is impacted by many disciplines — especially Business Process Architecture, Business Requirements Definition, Business Requirements Mapping, Documentation, and Adoption and Learning — The details of these impacts are described later in this paper.

### EARLY INTRODUCTION OF TUTOR

You typically determine the overall project approach early in the project life cycle. This drives the approach used in each of the AIM disciplines. You should also decide at this time how you plan to position and use Tutor. This is because Tutor can be used for executing many AIM tasks, but also because Tutor's benefits can be positioned to influence a successful project outcome.

#### Timing is Important

Timing of Tutor is important for several reasons. First, it affects the overall project workplan including the resource plan. For example, you may be able to spread project effort among additional part-time resources, such as departmental experts, by planning to incorporate them in the procedure review cycle.

Second, you will need to direct the efforts of the process modeling teams, the documentation teams, and adoption and learning teams as they begin planning their tasks and deliverables.

Tutor reduces the effort to create business procedures, compared to traditional methods of creating procedures. However, savings are only realized when Tutor is incorporated early into the overall project approach.

Finally, you will need to properly set customer expectations so that customers understand the benefits of Tutor, assign the appropriate resources as process and document owners, and provide the right amount of executive sponsorship to the project.

## **BUSINESS PROCESS ARCHITECTURE, REQUIREMENTS DEFINITION, AND MAPPING**

### **Objective**

The Business Process Architecture (BP) discipline is closely associated with Business Requirements Definition (RD) and Business Requirements Mapping (BR). The overall goal is to provide a framework to assess business process change when accompanied by a change in the application system; to understand and link the business objectives and operational requirements to the application; and to formally dispose any misfits or application gaps. The result is a documented set of policies and procedures, application settings, and possible extensions that reflect the future operating environment.

### **Approach**

Consultants in these disciplines use an analytical technique, called *process modeling*, to collect, understand, and document the objectives and requirements for the application system. This technique has advantages over wish lists and functional requirements. First, it traces requirements to business objectives. Second, it reflects real work of the organization and shows how individual roles or departments use information. So, it is intelligible to people who perform the individual tasks and interact with others in the process.

### **Key Deliverables**

**BP.080 Future Process Models**

**BP.090 Business Procedure Documentation**

**RD.050 Business Requirements Scenarios**

**BR.030 Mapped Business Requirements**

**Future Process Models** include *process flow diagrams* that identify the complete set of business events, organizational work, and applications windows supporting a given business area. These distill into **Business Requirements Scenarios**, textual descriptions of requirements and *how* those requirements are satisfied step-by-step with the application. Scenarios are evaluated by mapping each "step" to an application function. The **Mapped Business Requirements** are the result of an iterative process of designing and evaluating alternatives. Each of these key deliverables provides input to **Business Procedure Documentation**, which includes many types of documents (e.g., procedures, system instructions, references, etc.) The entire approach is also iterative and complete when all requirements have been sufficiently tested, satisfied or resolved, and documented.

## Guiding Other Disciplines

The key deliverables from the business oriented disciplines (i.e., Future Process Models, Business Requirements Scenarios, Mapped Business Requirements, and Business Procedures) are crucial to the remaining disciplines since they are re-used or leveraged to create other deliverables. For example, Business Requirements Scenarios and Mapping Forms are direct inputs to Business System Test Scripts, as are the Business Procedures that are created in parallel. The Future Process Models and Business Procedures can be synthesized and examined to understand their impact to people, work and organizational structure due to the business process change.

## Using Tutor and OBM

Tutor and OBM directly support *process modeling*, since together they provide base *process* content as well as tools for tailoring that content to meet customer requirements. You will probably use OBM as a starting point for creating Future Process Models. Tutor is integrated with OBM at Level 4 (Figure 1). Each process step, or box represents a single Tutor procedure. The diagram itself is a summary of Tutor procedures for a given process area.

Each process step contains a four-digit number that is associated with the Tutor procedure document filename. Tutor procedures are available for many, but not all OBM process steps.

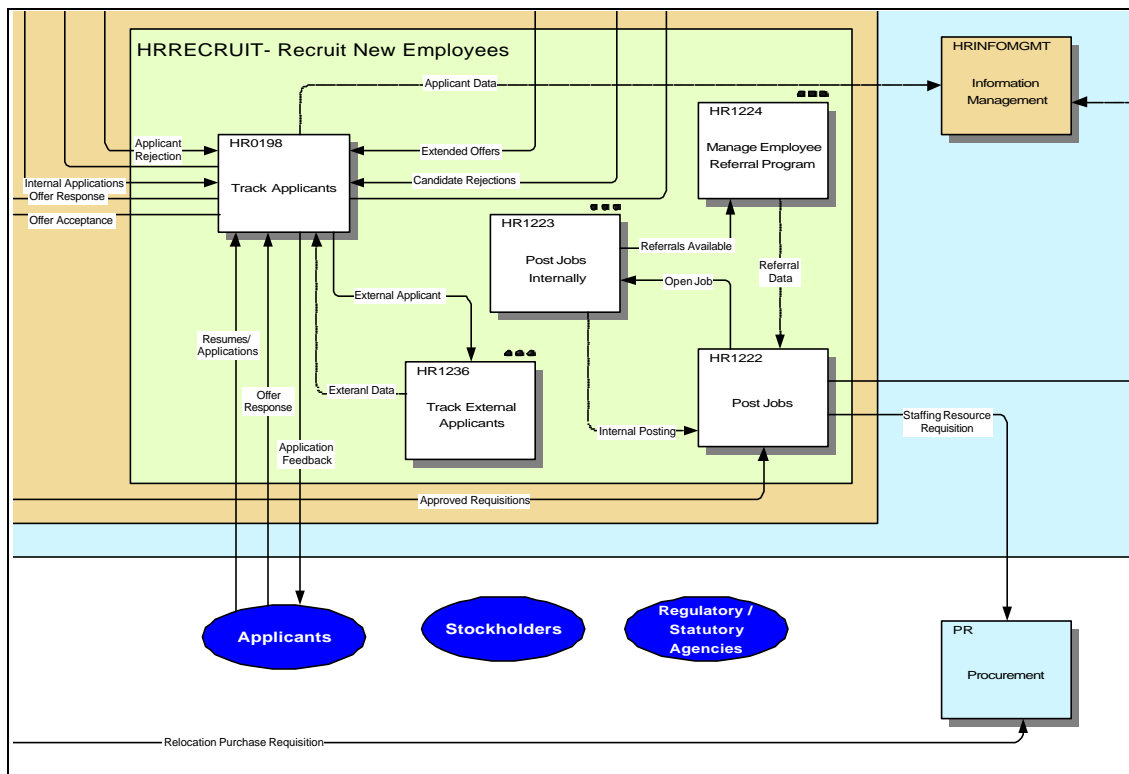


Figure 1 Recruit New Employees, Level 4

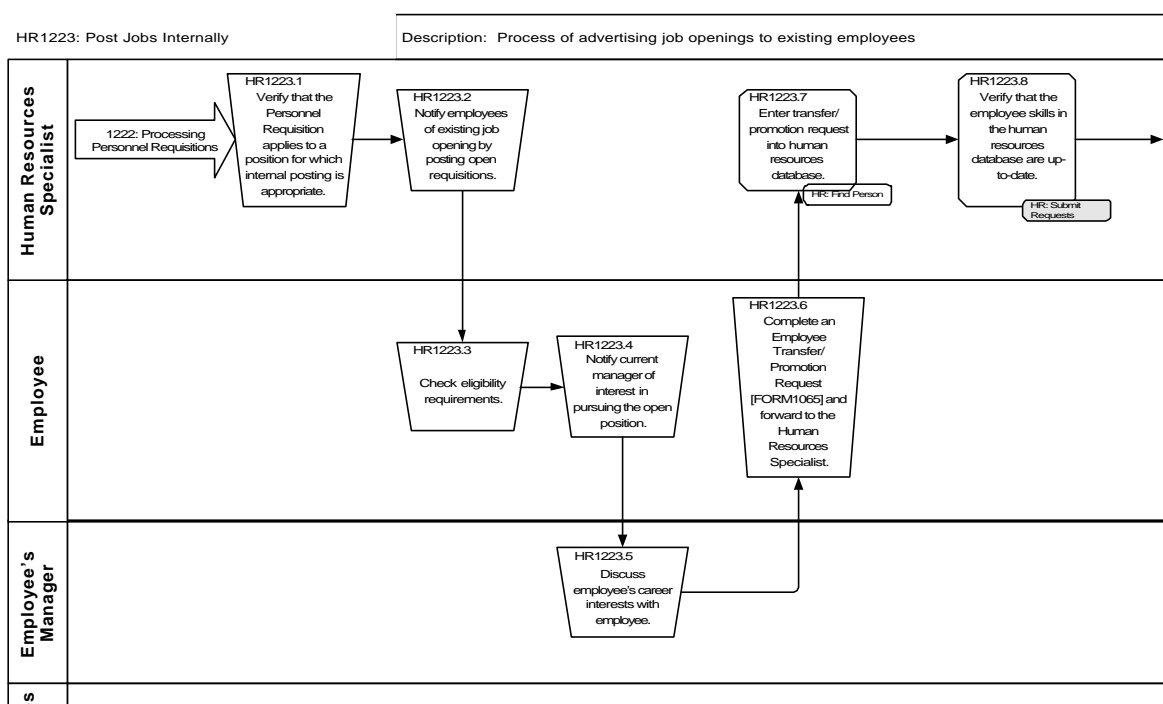
The Recruit New Employees diagram is also referred to as a context diagram in that a context frame borders a group of sub-processes or procedures. In this example, Recruit New Employees is made up of sub-processes (i.e. Tutor procedures) such as Post Jobs, Post Jobs Internally, Track Applicants, Track External Applicants, and Manage Employee Referral Program.

**Comparison of OBM Level 5 and Tutor Procedure Flowchart**

Each process step contains a four-digit number with a one- or two digit extension that is associated with the Tutor procedure task number.

You may decide to use OBM as a starting point for Future Process Models at a detailed, or application level. The OBM Level 5 diagram (Figure 2) contains a listing of tasks and decisions, by role or organization. It is a summary of a given Tutor procedure and was generated directly from the model procedure documents.

A portion of the OBM Level 5 diagram "Post Jobs Internally" is shown below.



**Figure 2 Post Jobs Internally, Level 5 Partial Picture**

This is also referred to as a swimlane diagram. Manual tasks are differentiated from system tasks by the shape of the box and by a reference to the application module and window name. The OBM Level 5 diagrams are application supported via Tutor, in that the system tasks have already been mapped to the Oracle Applications.

Compare the process steps of "Post Jobs Internally" with those of the Tutor procedure flowchart (Figure 3). This flowchart is automatically generated from procedure text by the Author software.

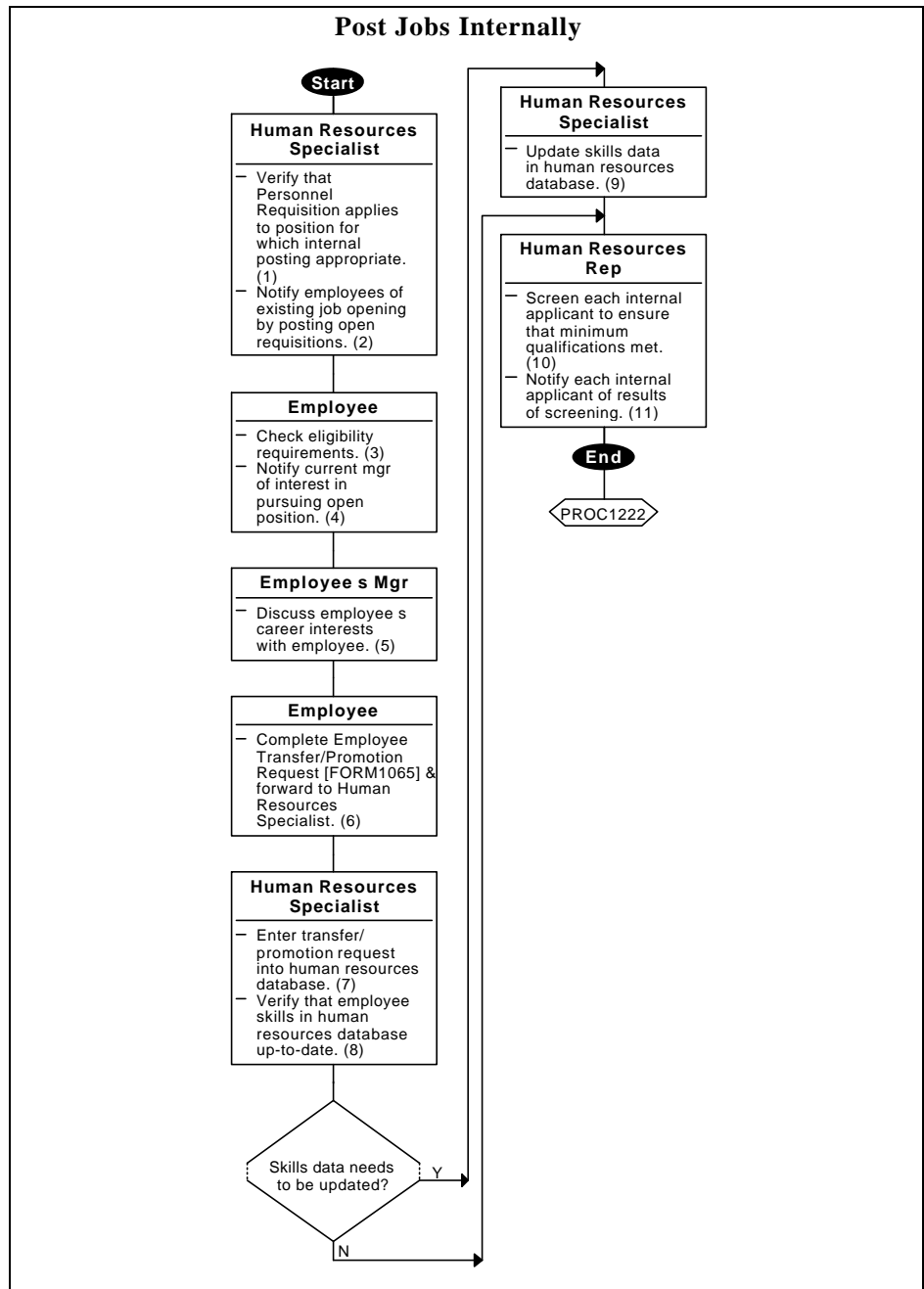


Figure 3 Post Jobs Internally, Tutor Procedure Flowchart

Following are suggestions for using Tutor within the business oriented disciplines Business Process Architecture, Requirements Definition, and Mapping.

1. You can use Tutor to satisfy the AIM requirement for creating business procedures. Tutor procedure ingredients include: scope, system references, policy statements, responsibility statements, distribution, ownership, activity preface, and tasks — all of which are outlined by AIM.
2. Use the OBM Level 4 diagram to create a "master" list of procedures, or to modify the Tutor Document Status Report. This will be a starting point for assessing and prioritizing the net list of procedures to be edited or created, during the Procedure Editing Workshop.
3. Tutor content may currently be unavailable, or may not even be planned for some Oracle Applications. In these cases the Procedure Editing Workshop becomes an authoring workshop where experts assist customers in creating Tutor procedures from scratch or by using available materials, such as the customer-specific OBM Level 5 diagrams and other process information.
  1. Conduct the Procedure Editing Workshop when the Future Process Models have stabilized. This workshop is a focused setting where process owners complete the business procedures in a short period of time.
  2. During procedure editing, you should incorporate all relevant process information into the procedure documents. This includes information from the Business Requirements Scenarios and Business Requirements Mapping Forms.
  3. You will record policy decisions, or placeholders for policy decisions, in the procedure documents. Then, you will be able to use Tutor reports, such as the "Policy to Procedure" report, to summarize policy statements for a given policy subject. This can be helpful later, in reviewing policy decisions with management.
  4. You can use Tutor reports to examine job roles and accelerate the mapping of application-specific tasks to jobs roles. The "Job Title to Responsibility" report summarizes responsibilities across of all job titles. Compare this report to the "Document Master List", which contains a listing of navigation instructions. You could also compare this to the listing of educational objectives for a given job role, derived from the courseware.

**Many customers have successfully used Tutor to create procedures from scratch, both for Oracle and non-Oracle applications.**

**The workshop setting and document review cycle provide an opportunity to involve part-time customer resources in the project. This can facilitate early buy-in of the changed processes and applications.**

**In these cases, use the Tutor procedure flowchart, which is automatically generated, in place of the OBM Level 5 diagram to examine procedural workflow.**

### **Alternatives to Process Modeling**

In some cases, as when process re-design or re-alignment has occurred prior to the project, or in the case of simple application upgrades, you may decide to skip some or all of the AIM process modeling tasks. In these situations, consider using the Procedure Editing Workshop as a mechanism to collect and validate requirements while documenting customer processes.

Even if you choose not to sketch the application level process flows (i.e. OBM Level 5), you can still visualize this information via the Tutor procedure flowchart as you continue to make procedural refinements. This flowchart is generated automatically and contains information similar to the OBM Level 5 diagram — although the two are not identical. Refer to Figure 2 and Figure 3, respectively.

## DOCUMENTATION (DO)

### Objective

The objective of Documentation (DO) is to capture information about current and future business operations for application users, the technical staff, and system managers. This is a key factor in supporting the transition to production, achieving user acceptance, and maintaining ongoing business practices.

### Approach

The documentation approach advocates reducing effort, where possible, to produce deliverables by re-using or leveraging information generated up front. For example, the Business Requirements Scenarios and Mapped Business Requirements are key inputs to the Business Procedures. Business Procedures are then used to prepare key users for business system testing and to prepare end users for the new or changed processes and applications.

Tutor's Publisher software reads the document repository containing procedures, system instructions, references, etc. and automatically creates hyper-linked html documents.

### Key Deliverables

**DO.020 Documentation Standards and Procedures**

**DO.070 User Guides**

**Documentation Standards and Procedures** identify the *look and feel* of the documents themselves and the techniques for creating and maintaining the documents. Document standards may also address writing style and types of content that are important to a particular customer. **User Guides** reflect these standards and contain the total of all types of documentation relevant to users. User Guides provide the detailed day-to-day operating instructions for interacting with other roles and for responding to everyday business events.

### Using Tutor

Tutor directly supports the objective of providing quality, usable procedural documentation while dramatically lowering the total effort traditionally involved. Without Tutor, you would rely on the static Oracle Application manuals as the foundation of documentation, and you would spend precious effort creating standards and custom documentation separate from the static manuals.

Following are suggestions for using Tutor within Documentation.

1. Tutor Desk Manuals satisfy the AIM requirement for User Guides. These online hyper-linked documents, available through an Internet browser, dramatically enhance usability of procedural information. In this way,

Tutor directly supports application users on a real-time, as needed basis.

2. Tutor document templates satisfy the AIM requirements for document standards and templates with no additional project team effort. In fact, it is recommended that you NOT change Tutor's document template formats in order to: a) keep document maintenance simple, and b) support the use of the Tutor Author and Publisher software. Tutor's Author and Publisher software already provide for a common *look and feel*.
3. You can use publishing staff in place of technical writers to achieve savings in time and resources. This is because Tutor automatically leverages all existing project documentation, including procedures, detailed navigation instructions, references, even coding conventions. Tutor's Author and Publisher software reads this document repository and automatically generates Desk Manuals and other materials.
4. You should conduct the Publisher training when Future Process Models and Business Procedures have begun to stabilize. The Publisher software reads all types of Tutor documents, including procedures, and automatically generates hyper-linked Desk Manuals, as well as printed owners manuals and reports. This allows for creating initial versions of manuals that can be used to prepare key users for Business System Testing and to introduce initial groups of users to the new processes and applications.
5. You can use Tutor reports, such as "Actor to Screen" and "Screen to Actor", to summarize the job titles associated with each applications window. These cross-references can be helpful input if your client chooses to customize the applications menus to restrict access privileges.

### **Related Techniques**

Configuration management refers to the identification, tracking, and control of any deliverable that is produced during an implementation, application upgrade, or ongoing operations. All configuration strategies, standards and procedures, including document control procedures, are described in an overall project management plan.

Document control procedures are produced early in the project life cycle. The objective is to ensure that documents are easily accessed, yet are protected from unauthorized changes.

When customers learn how to use Tutor, they also learn about the Tutor document control process (introduced during the Procedure Editing Workshop). You can fold this process into the document control procedures of the project management plan.

**For more information about configuration management and document control, refer to the PJM release 2.5 *Process and Task Reference*.**

## **ADOPTION AND LEARNING (AP)**

### **Objective**

Adoption and Learning addresses the needs of the following organizational groups: executives, project teams, information technology staff, functional managers and end users.

One objective of Adoption and Learning is to examine how organizational structures and job roles will align as a result of application and process changes. Another objective is to provide infrastructure to ensure initial and ongoing support of these changes. Thus, Adoption and Learning centers on the acceptance and use of new or changed processes and applications to enable high organizational performance.

### **Approach**

Early in the project cycle, project teams determine how future processes and corresponding work detail will be supported by the new or changed applications. In some cases, this requires a thorough analysis of the extent of the changes and their impact, especially when accompanied by organizational change.

As the project continues, consultants analyze the work detail of end users to determine their specific learning needs and performance support requirements. They can then develop the content and delivery strategies, and related work management tools that will be used to prepare people for their new or changed roles and to support them during the change.

### **Key Deliverables**

**AP.130 User Learning Needs Analysis**

**AP.140 User Learning Plan**

**AP.150 User Learningware**

The **User Learning Needs Analysis** describes the gaps in knowledge, skills, and aptitudes between the current and future states for all audiences of users, especially end users. This information distills into the **User Learning Plan**, the guidelines for curriculum development including learning objectives for each group of learners. The User Learning Plan should also include criteria for measuring the effectiveness of the learning objectives.

The User Learning Plan provides direct input to the **User Learningware**, which can take shape in the form of many types of media (e.g. instructor led, self paced, etc.) Traditional media include instructor led materials for use in a classroom setting or during mentoring sessions.

## Using Tutor

The primary deliverables that assist end user learning are the Desk Manuals (organized by role) and Student Guides (organized by role or topic).

The Desk Manuals become the reference, available through an Internet browser, for end users to access during business operations

The Student guides are typically used for a specific learning event. They can be recreated from source documents as needed.

Tutor's Publisher software generates two primary deliverables that assist end user learning. These are the Desk Manuals (online or printed) that contain procedures, navigation or system instructions, references and other process related documents; and the Student Guides that contain educational overviews, navigation or system instructions, and exercises. Publisher also provides reports that assist the analysis of learning needs and the development of the user learning plans.

Following are suggestions for using Tutor within Adoption and Learning.

1. You will be able to examine process changes and their impact on a given job role or group of roles with the help of the Oracle Business Models, Tutor procedures, and Tutor reports — all of which provide information about future processes and related work detail.
2. Tutor reports contain valuable information that can help you understand and validate job descriptions and analyze learning needs for a role or group of roles. The Tutor reports “Job Title to Responsibility” and “Job Title to Document” provide information about all job responsibilities across all procedures for all job titles. This information is especially useful when developing User Learning Plans.
3. The Publisher software lets you update procedures, navigation instructions, and educational overviews based on which job titles access navigation or system windows in a given procedure. This ensures that all documents are accessed by the correct job roles; it also generates a table (that associates job titles, educational overviews, navigation or system instructions, and procedures) that is useful in further analyzing learning needs and developing User Learning Plans.
4. You will need to establish some courseware editing guidelines prior to physically editing the courseware. Tutor provides enough flexibility for you to determine the breadth and level of detail desired in the Student Guides.
5. You should create initial versions of the Student Guides for review and use during train-the-trainer and pilot training programs. Edit the courseware after the application solution and general learning needs have stabilized. Depending on your project timeline, you may also be able to use these pilot versions to prepare key users for Business System Testing.
6. You can use the Business System Test Scripts created for system testing to assist creation of customer-specific labs and exercises.
7. In some cases, you may want to use Tutor to quickly tailor Oracle Applications courseware to meet the unique needs of project teams.

These teams sometimes need just a quick view of the applications that are peripheral to their subject matter area.

## **SUMMARY**

Oracle Tutor includes content, tools and techniques that complement AIM and the Oracle Business Models. There are numerous and creative ways to leverage Tutor in the context of application implementation, upgrade, or a stand-alone process and system evaluation.

Tutor procedures are an extension of the Future Process Models, Business Requirements Scenarios, and Mapped Business Requirements. They describe the everyday operating detail (e.g. policy-, job- and task-level detail — including application detail) of people in their new or changed business environment.

Tutor procedures and related documents, such as educational overviews, navigation instructions, references, coding conventions, etc. represent the complete knowledge repository — accessible to the Author and Publisher software. Desk Manuals and Student Guides are automatically created from this repository according to job role or topic. This reduces the total effort to create documentation, compared to traditional techniques.

Finally, Tutor's primary outputs — online Desk Manuals, Student Guides, and reports — help you prepare end users for learning about new or changed processes and applications. The document control techniques and review cycles, established during the Procedure Editing Workshop, outlive the project. And this assures the managers of dynamically changing environments that new information will be captured to support continuing process improvements and will ultimately impact organizational performance.

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Author: Kathy Koenig

Reviewers: Sharon Broadley, David Carr, Joyce Conroy,  
Stuart Dunsmore, Dave Finley, Ed Glenn, Jim Lange,  
Matt Malanga, Tinamarie Rispinto, Shirlene Spillers

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**ORACLE®**

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
650.506.7000  
Fax 650.506.7200

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