

Executive Summary:

The following plan outlines a strategy to use Oracle Tutor process documentation to document risks. Warning - This is a generic project plan that outlines high level strategy only. An actual project plan would delve into greater detail.

The entire duration of the transition/training will be divided into several different phases. Each phase will have distinct and measurable goals and objectives.

**Phase I – Learning Oracle Tutor**

Duration – 5 Days

Objectives:

- Build an understanding of the Tutor methodology
- Learn how to install and use the 3 Tutor components
  - Author
  - Publisher
  - Model Documents
- Patching Tutor
- Build a plan on how XXX will use Tutor
- Identify Tutor track leaders who will “own the processes”
- Examine existing materials to be tutored
- Identify opportunities for immediate development

Measurability

The success of this phase will be measured in the following terms:

- XXX resource is comfortable using Tutor and can modify and create Procedures
- A plan documenting how Tutor will be used at XXX will be created and submitted for approval
- Process work can begins documents that have been created by XXX and NOW I CAN DO IT resources

Pre-Requisites:

- Identification of XXX resources
  - Good/Excellent MS Word skills
  - Good/Excellent PowerPoint skills
  - Knowledge of XXX business and Oracle project
- Desktop/notebook computer
  - 128 megabytes (MB) of RAM minimum
  - 4 free hard disk space
  - CD-ROM
  - VGA or higher-resolution video adapter (Super VGA, 256-color recommended).
  - MS Word (Version can be discussed)
  - MS PowerPoint (Version can be discussed)
  - Adobe Acrobat (Full version, not Acrobat Reader)
  - Internet Explorer v. 5 or higher

**Phase II – Collection and Identification of Tutor process for XXX**

Duration – 10 -20 days

Objectives:

- Meet with Track leaders to explain Procedure development effort
- Gather Procedure requirements (including policy information)
- Review Tutor development started in Phase I
- Select existing procedures from Model documents if applicable
- Identify new, XXX procedures to be developed
- Prioritize development (based upon project needs)

Measurability

The success of this phase will be measured in the following terms

- Track leads will understand the plan and commit to supporting the effort
- XXX specific procedures will be identified
- Development timeline will be drafted reflecting project priorities
- Procedure Development will begin

Pre-Requisites:

- Identification of XXX Process owners for the Tutor project
  - Need not be Track leads, can be delegates with draft approval authority
  - May involve XXX resources at sites other than XXX
  - May involve meeting face to face with XXX leads to gather requirements
    - Especially policies

### **Phase III – Review draft procedures with Tracks**

Duration – TBD

*Note: Depending on the volume of procedures required this may become an on-going effort with less formal meeting scheduled between the tracks. In essence, as new draft procedures are completed, they will be forwarded to the Track lead. Establishment of a Service Level Agreement for review and editing will help keep this initiative on track.*

Objectives:

- Review procedures with Track “process owners” for accuracy with the ultimate goal of signing-off on procedures once they accurately reflect XXX actual practice.
- Edit and Finalize “ Go Live” Version of Procedures
- Publish XXX Tutor website (Optional)

Measurability

The success of this phase will be measured in the following terms:

- The modified procedures after editing by Track Leads
- The final draft procedures published to XXX website
- The publishing of Policy Manuals based on the procedures (Optional)

Pre-requisites:

- Distribute draft documents to Track leads before editing
- Schedule a conference room for the entire duration to have a quiet space where participants can concentrate on Tutor
- Invite Track participants 10 days in advance so they have ample time to manage their schedules

**Phase IV – Risk Assessment**

Duration – To be determined and On-going

Objectives:

- Review procedure documents for risk categorization (Financial, Operations, Compliance etc.)
- Sort procedures into logical groups (Purchasing, Procure to Pay, Order to Cash etc.
- Identify High Level risks
- Associate business processes with risks
- Assign ownership
- Establish control mechanism
- Review process documented by XXX for severity, method of monitoring, remediation and results
- Transfer information to internal audit teams or risk management unit for testing and implementation.

Measurability

The success of this phase will be measured in the following terms:

- Updated Risk Matrix
- List of business procedures associated with each High level risk

Pre-Requisites:

- Updated Project implementation schedule
- Access to XXX materials and Subject Matter Experts (SME's)