

**CONFIDENTIAL**

# Fusion HCM Fixed Scope Offering

**Oracle Fusion HCM / Taleo Implementation**

by

**Filix Consulting Pvt. Ltd.**

# Introduction

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About Filix Consulting





**Oracle Gold Partner  
with expertise in both  
On-premise & Cloud**

**Oracle appointed  
Beta testers**

**Oracle Growth Partner  
(2010)  
Specialized Innovation  
Partner (2012)**



**100+ member  
Consulting Practice team**

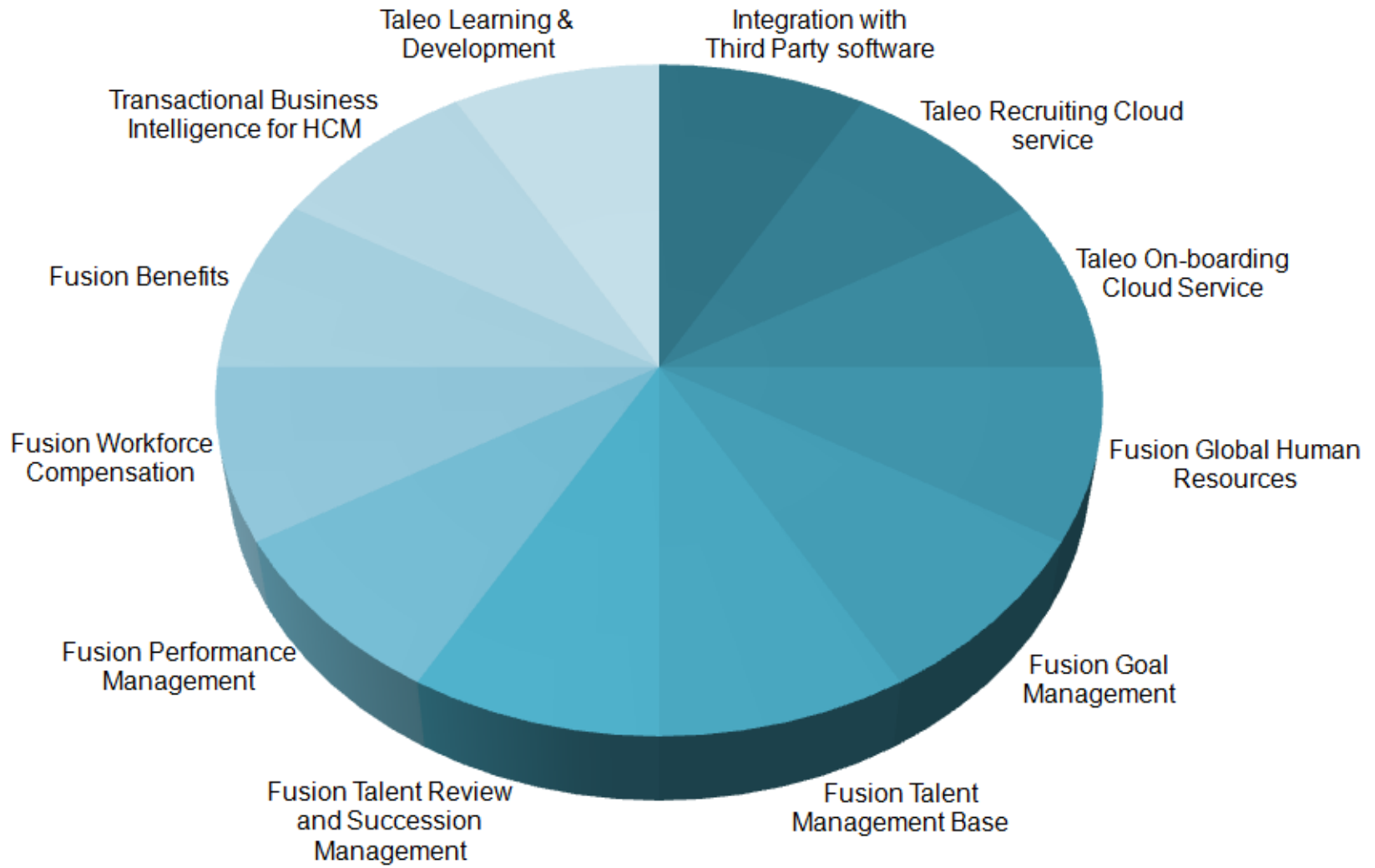
**Expertise across  
Nine Business Verticals**

**Customers  
spread across  
Nine India states**

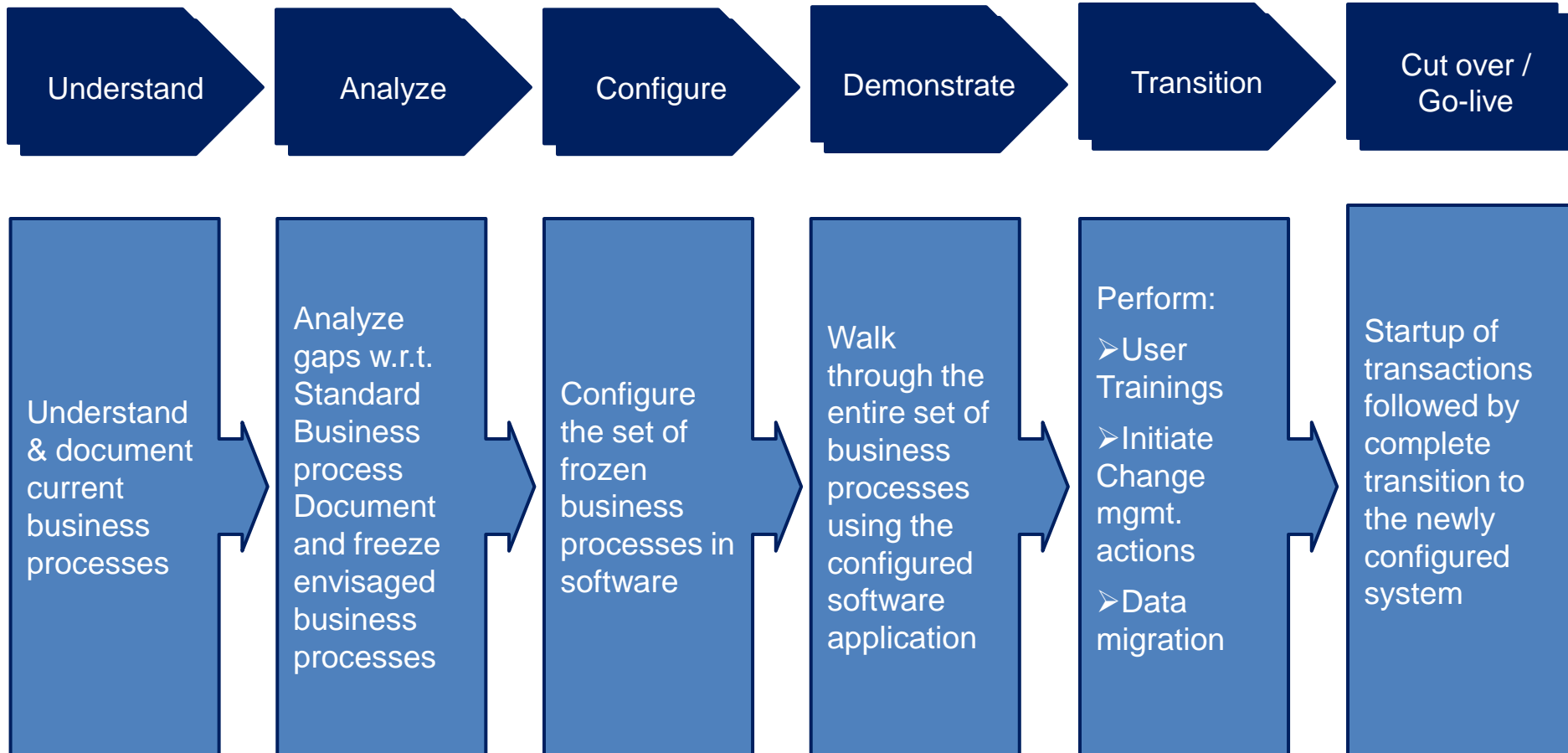
**Industry specific  
ready-made  
Bolt-on solutions**

**Infra partners:  
IBM & Netmagic  
(On-premise & Cloud)**

**Professional  
Implementation &  
Support services**

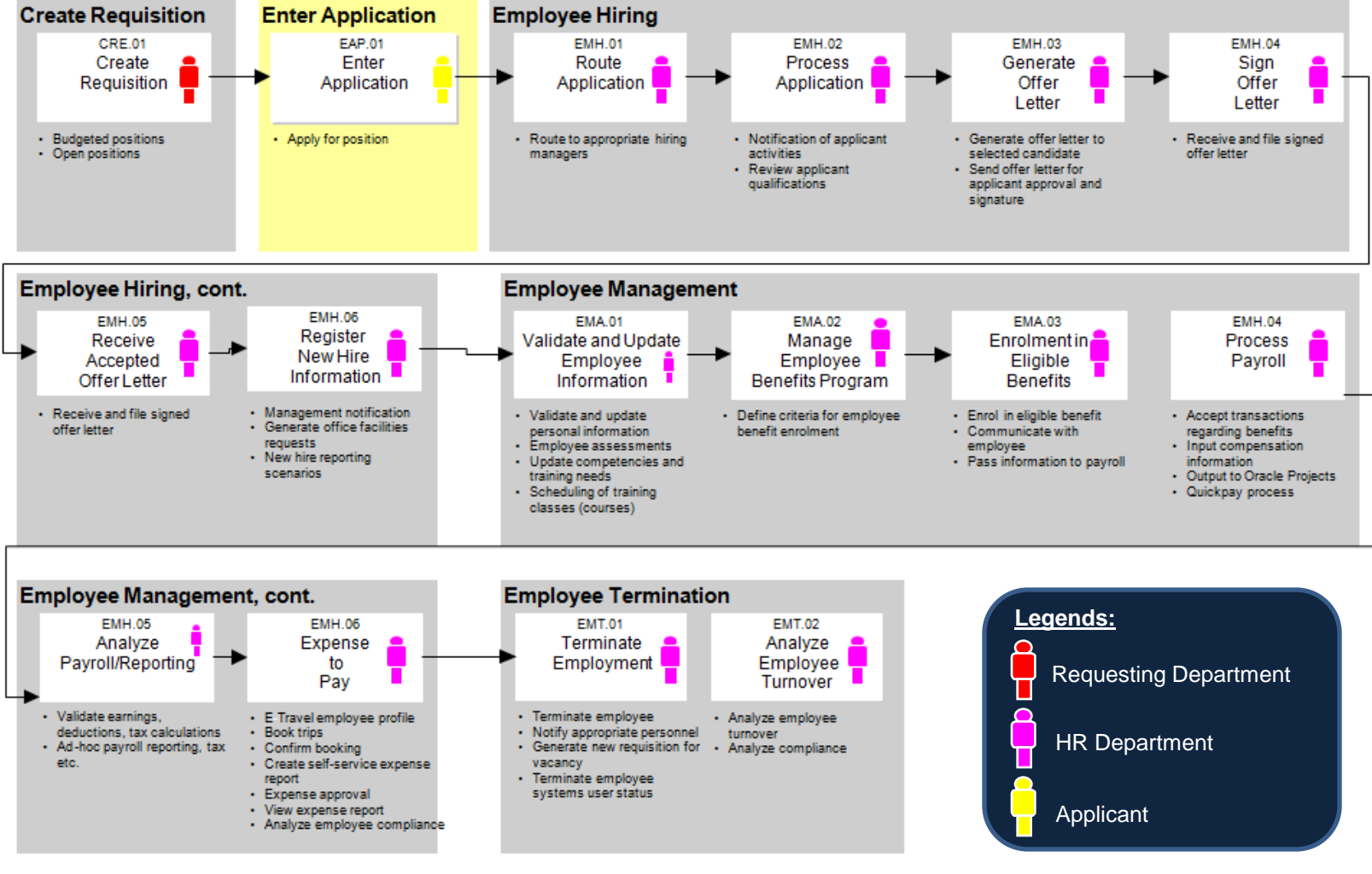


# Filix Project Implementation methodology





## Employee Life cycle management

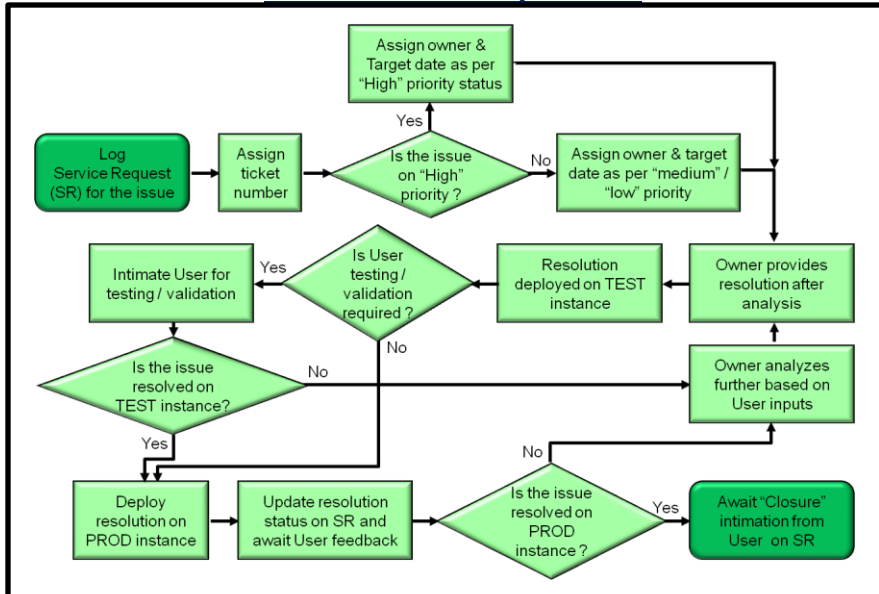


# Filix Post – Implementation Support Services



- ❑ Helpline number for direct access to Support Helpdesk (Central service desk)
- ❑ Customer Service support portal accessible on a web browser:
  - Unique login User ID & Password
  - Every Service Request assigned a unique SR number for tracking
  - E-mail to client on every update on a Service Request
  - *On-line* progress status available on each SR
- ❑ Support services team:
  - *Functional support team* to analyze and resolve functional issues
  - *Technical support team* to work on RICE components (Reports, Interfaces, Conversions, Extensions)
  - *DBA support team* for server management located centrally, deployed on-site as required

## Issue resolution process



## On-line Issue tracking on Service support web portal

Service Number	Filix Service Request #	Product Name	Opened Time	Contact	Subject	Client Priority	Service Type (Major)	Service Type (Minor)	Filix Target Closure Date	Status (Filix View)	Status (Client View)	Account
490310-116461002	HL0142	Oracle Purchasing	09-09-2011 09:30	Ashwani Bhatt	Problem_m_tax	High	Functional	Process Issue	21-09-2011	Awaiting feedback	Open	Highway Industries Limited
490310-113073916	HL0141	Oracle System Administration	08-09-2011 08:49	Ashwani Bhatt	Slow Activity	High	DBA / Admin	Performance Tuning	07-09-2011	Awaiting feedback	Open	Highway Industries Limited
490310-113073912	HL0140	Oracle Inventory	05-09-2011 08:47	Ashwani Bhatt	Period Closing	Medium	Functional	Period Closing Issue	16-09-2011	Awaiting feedback	Open	Highway Industries Limited
490310-112222392	HL0139	Oracle Inventory	02-09-2011 12:51	Ashwani Bhatt	Stock Difference	Medium	Functional	Process Issue	16-09-2011	Awaiting feedback	Open	Highway Industries Limited
490310-111551802	HL0138	Oracle Discrete Manufacturing	31-08-2011 16:12	Ashwani Bhatt	Error while doing Component Pick Release	High	Functional	Process Issue	05-09-2011	Closed	Closed	Highway Industries Limited
490310-111484902	HL0137	Oracle Account Payables	31-08-2011 12:44	Ashwani Bhatt	Error in Payment	High	Functional	Process Issue	05-09-2011	WIP	Open	Highway Industries Limited
490310-105369992	HL0136	Oracle Discrete Manufacturing	12-08-2011 12:04	Ashwani Bhatt	30017 LATING IN RANAYOT MOVE TO MACHINING	High	Functional	Process Issue	06-08-2011	Closed	Closed	Highway Industries Limited
490310-102968920	HL0135	Oracle Account Payables	28-07-2011 00:00	Ashwani Bhatt	Change in Creditors Ledger/ Host	Medium	Technical	Report - Enhancement	12-08-2011	Awaiting feedback	Pending	Highway Industries Limited
490310-102968922	HL0134	Oracle Account Payables	13-07-2011 00:00	Ashwani Bhatt	Cash Flow Report	Medium	Technical	Report - New	28-07-2011	Awaiting feedback	Open	Highway Industries Limited
490310-102968918	HL0133	Oracle Account	13-07-2011	Ashwani Bhatt	Emailing: Missing_HL_Creditor	Medium	Technical	Report - Bug	28-07-2011	Closed	Closed	Highway Industries Limited

# Implementation Project brief

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- Engagement scope
  - ✓ Business function coverage
  - ✓ Data migration
  - ✓ Generic
  - ✓ Out of scope
- Implementation approach
- Data migration methodology
- Project time plan
- Filix Project resources
- Client Project resources (expected)
- Key assumptions
- Project deliverables
- Budgetary pricing







## Business functions

## Oracle product

Employee Recruitment & On-boarding process

Taleo Recruiting & On-boarding Cloud service

Employee Lifecycle Management

Fusion Global Human Resources

Employee Goal Management

Fusion Goal Management

Employee Performance Management

Fusion Performance Management

Employee Compensation Management

Fusion Workforce Compensation

Employee Compensation Management

Fusion Benefits

Employee Training

Taleo Learning & Development

Employee Development

Fusion Talent Management Base

Fusion Talent Review and Succession Management

Payroll

(Integration with external Payroll software)

Business Analytics

Fusion Transactional Business Intelligence for HCM



Master data and open transactional data would be migrated as of a predetermined mutually agreed cut-off date, based on legacy data provided in standard Data loading templates.

Key data elements that would be migrated:

Organizational data –

- Company
- Business Unit
- Location
- Department
- Job
- Grade

Employee data –

- Employee base data
- Employee Assignments
- Employee Compensation data
- Company & Department Goals
- Employee Goals for current year
- Employee Performance review data for current year
- Employee Training history
- Job Description templates
- Applicant data bank



Item	Remarks
Project office	Project would be executed centrally from the designated Project office
Enterprise structure	Configuration for two Legal Entities and two Business Units would be part of the standard offering. Mapping of any additional ones would be done on chargeable basis.
Countries	Configuration for one country would be part of the standard offering
Languages	One language in addition to English would be within the scope
HR Processes	Business Process review to compare the company HR Processes with standard functionality
Self service functionality	Business Process review to identify gaps w.r.t. standard functionality, if any
Reports	Configuration of up to 10 reports would be within the scope of the standard offering. Additional reports would be on chargeable basis
Interfaces	Interfacing with Third –Party software for Payroll would be part of the project work scope



Item	Remarks
Data migration	Data preparation by Filix Team would be out of scope
Hardware	Availability / Maintenance of Hardware is not included in the scope of work
Networking	Availability of Network equipment and Networking issues are not included in the scope of work



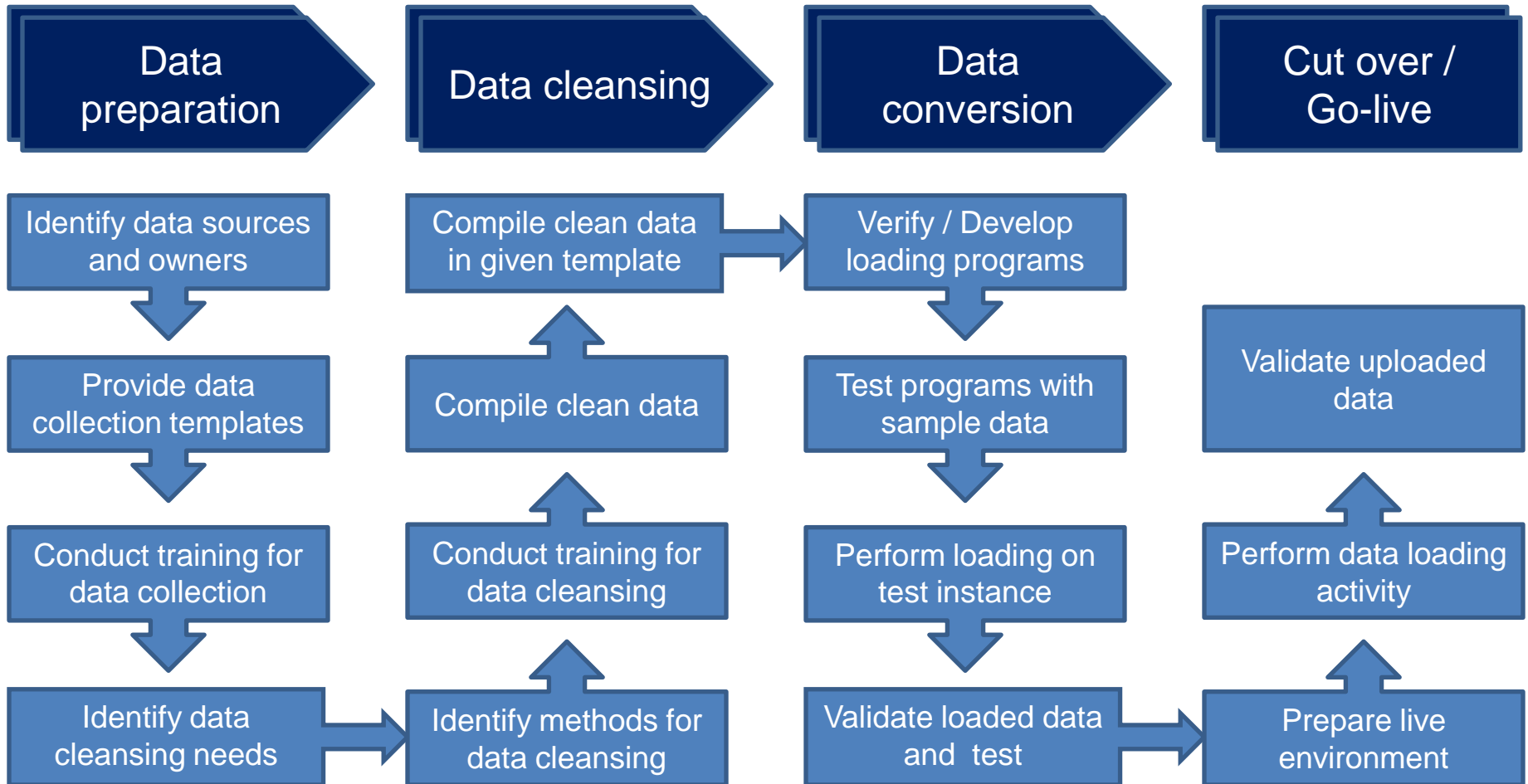
## ❑ Phased approach –

- Prioritize key business processes
- Maximize user coverage
- Maximize user adoption
- Minimize impact on current business operations

## ❑ Structured implementation methodology –

- **Business study:** Understand & document current business processes
- **Future state documentation:** Document and freeze envisaged business processes
- **Conference Room Pilot (CRP):** Demonstrate the envisaged processes after configuration on the software
- **User training:** User training using “Train-The-Trainer” method to enable change management
- **User Acceptance Testing (UAT):** User concurrence on the configured processes
- **Data migration** of legacy data
- **Cut-over & Production Go-live:** Preplanned startup of transactions followed by complete transition to the newly configured system

*Project plan lists the detailed set of activities to be performed in accordance with the above approach*





## **Phase 1**

### **Modules / Activities to be implemented:**

- Taleo Recruiting Cloud service
- Fusion Global Human Resources
- Fusion Transactional Business Intelligence for Human Capital Management

### **Total duration:**

Three calendar months (12 weeks)\*

## **Phase 2**

### **Modules / Activities to be implemented:**

- Fusion Goal Management
- Fusion Talent Management Base
- Fusion Talent Review and Succession Management
- Fusion Performance Management
- Fusion Workforce Compensation
- Fusion Benefits
- Taleo Learning & Development
- Fusion Transactional Business Intelligence for Human Capital Management
- Integration with external Payroll software

### **Total duration:**

Three calendar months (12 weeks)\*

*\*from Project phase kick-off date (with the assumption that Oracle HCM cloud environment has been provisioned)*

# Project Time Plan – Phase 1



Activity	Deliverable milestone	Resp.		Week											
		Prim.	Sec.	1	2	3	4	5	6	7	8	9	10	11	12
<b>Phase 1: Initialization &amp; Planning</b>															
Project kickoff		Client	Felix	★											
Key decisions meeting (s)		Felix	Client												
<b>Phase 2: Analysis &amp; Design</b>															
Envisioned state (To-Be) process documentation		Felix	Client												
"To-Be" document sign-off	Y	Client	Felix												
Identification of requirements for Reports		Felix	Client												
Gathering of sample data on standard templates (for UAT)		Felix	Client												
<b>Phase 3: Configuration &amp; Testing</b>															
Configuration on TEST Instance		Felix	Client												
Conference Room Pilot session (CRP)		Felix	Client												
Incorporation of feedback of CRP session		Felix	Client												
"CRP" sign-off	Y	Felix	Client												
Training of Key Users (using Train-The-Trainer concept)		Felix	Client												
User Acceptance Testing (UAT) by Key Users		Felix	Client												
UAT Issues resolution		Felix	Client												
UAT sign-off	Y	Felix	Client												
Data collection & cleanup		Client	Felix												
<b>Phase 4: Production cutover</b>															
Configuration on PROD instance		Felix	Client												
Data loading on PROD Instance		Felix	Client												
Production cutover		Felix	Client												
Go-Live event	Y	Felix	Client												★



# Project Time Plan – Phase 2



Activity	Deliverable milestone	Resp.		Week											
		Prim.	Sec.	1	2	3	4	5	6	7	8	9	10	11	12
<b>Phase 1: Initialization &amp; Planning</b>															
Project kickoff		Client	Felix	★											
Key decisions meeting (s)		Felix	Client	■											
<b>Phase 2: Analysis &amp; Design</b>															
Study of current business processes & "As-Is" documentation		Felix	Client	■	■										
"As-Is" document sign-off	Y	Client	Felix			■									
Envisioned state (To-Be) process documentation		Felix	Client			■	■								
"To-Be" document sign-off	Y	Client	Felix				■								
Identification of requirements for Reports and Integrations		Felix	Client		■	■									
Gathering of sample data on standard templates (for UAT)		Felix	Client			■	■								
<b>Phase 3: Configuration &amp; Testing</b>															
Configuration on TEST Instance		Felix	Client				■	■	■						
Conference Room Pilot session (CRP)		Felix	Client					■	■						
Incorporation of feedback of CRP session		Felix	Client					■	■						
CRP sign-off	Y	Felix	Client					■	■						
Development of integration with Third-Party Software for Payroll		Felix	Client				■	■	■						
Training of Key Users (using Train-The-Trainer concept)		Felix	Client						■	■	■				
User Acceptance Testing (UAT) by Key Users		Felix	Client							■	■	■			
UAT Issues resolution		Felix	Client								■	■			
UAT sign-off	Y	Felix	Client									■			
Data collection & cleanup		Client	Felix						■	■	■	■			
<b>Phase 4: Production cutover</b>															
Configuration on PROD instance		Felix	Client										■	■	
Migration of interfaces to PROD instance		Felix	Client											■	■
Data loading on PROD Instance		Felix	Client												■
Production cutover															■
Go-Live event	Y	Felix	Client												★

# Filix Project Resources



Filix Resource	Role
Filix Team Project Manager	Filix Project coordinator and key point of contact for Client Project Team
	Responsible to ensure timely Project deliverables and Customer Satisfaction through delivery of tested software solution conforming to the business blueprint document
	Responsible for coordination of all project activities with Client team and for organizing required Filix resources during the project
	Responsible for providing solutions to potential gaps using standard business practices and functionalities through workarounds while considering impact on related processes
	Responsible for ensuring that the project is executed as per the defined scope of work and contractual cover is secured from Filix & Client Mgmt. teams for any budget or time overruns
Lead Consultant – Fusion HCM	Responsible for coordination and execution of all activities related to HCM
	Responsible for providing training and enablement of key users
	Responsible for data migration and development of any Third Party Integrations
Lead Consultant – Taleo	Responsible for coordination and execution of all activities related to Recruitment
	Responsible for providing trainings to client key users responsible for Recruitment
	Responsible for data migration and development of any Third Party Integrations

## Client Project Resources (expected)



Client Resource	Role
Client Team Project Manager	Project coordinator and key point of contact for Filix Project Team to facilitate discussions between Filix consultants and various client personnel whenever required
	Responsible to ensure that client business requirements are reflected in the system design document (Business blueprint document)
	Must be empowered to take / facilitate fast decision making about functional / technical areas of the system under implementation to minimize delays w.r.t. the project timelines.
	Ensure appropriate priority and resource commitment to the project to ensure required level of participation and time allocation of relevant client team members to facilitate: <ul style="list-style-type: none"> <li>▪formulation of Business Process documents</li> <li>▪review of Filix project deliverables such as documents, configured system etc.</li> <li>▪hands-on user trainings on the configured system</li> <li>▪legacy data compilation and cleanup for data migration</li> <li>▪resolve inter-departmental issues</li> <li>▪timely sign-off on project deliverables executed</li> </ul>
	Responsible to ensure project progress as per defined project timelines, reporting of project progress and escalation unresolved issues to the Project Steering Committee
Key Team member	Knowledge sharing of relevant Business Processes with Filix consultants
	Review of Filix deliverables like Business blueprint documents / Conference Room Pilot
	User Acceptance Testing (UAT) and necessary approvals thereof



- ✓ Standard business flows and Oracle standard functionality would be the base for the implementation.
- ✓ Configuration of the standard system is performed without customizations.
- ✓ Due diligence for fitment of the Oracle products into the relevant business processes has been done by the client along with Oracle Corporation.
- ✓ “Train-the-Trainer” approach would be followed for training of end users by the key users.
- ✓ Organizational Change Management will be client’s responsibility.
- ✓ Timely review and feedback on gaps in the configured system w.r.t. to the Business process blueprint document would be ensured by client, to facilitate project progress.
- ✓ Adherence to the defined Project engagement scope would be client’s responsibility and contractual cover would be provided for any budget or time overruns
- ✓ Data provisioning in timely manner on Filix provided data templates would be client’s responsibility.
- ✓ Part of the configuration activities would be carried out off-site.



- “Current State” (As-Is) document set
- “Future State” (To-Be) document set
- Conference Room Pilot (CRP)
- User Manuals
- Training of Key users (“Train the Trainer” approach)
- User Acceptance Testing (UAT)
- Data migration
- Go-Live

# Budgetary pricing

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S.No.	Item	Price* (INR Lacs)															
1	<b>Implementation services<sup>†</sup> to implement the following:</b> <ul style="list-style-type: none"> <li>▪ Taleo Recruiting Cloud service</li> <li>▪ Fusion Global Human Resources</li> <li>▪ Fusion Goal Management</li> <li>▪ Fusion Talent Management Base</li> <li>▪ Fusion Talent Review and Succession Management</li> <li>▪ Fusion Performance Management</li> <li>▪ Fusion Workforce Compensation</li> <li>▪ Fusion Benefits</li> <li>▪ Taleo Learning &amp; Development</li> <li>▪ Fusion Transactional Business Intelligence for Human Capital Management</li> <li>▪ Integration with external Payroll software</li> </ul>	xx															
<p><b><u>Payment terms &amp; conditions:</u></b></p> <p>* Price quoted is exclusive of applicable taxes, as well as all travel, boarding and lodging expenses. These would be charged extra on actuals.</p> <p>† Implementation price would be payable on milestone achievement as detailed below:</p> <table border="1"> <thead> <tr> <th>S.No.</th> <th>Milestone</th> <th>Payable</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Team Mobilization Advance along with Purchase Order</td> <td>25%</td> </tr> <tr> <td>2</td> <td>On receipt of Sign off on “To-Be” document</td> <td>25%</td> </tr> <tr> <td>3</td> <td>On successful completion of CRP session</td> <td>25%</td> </tr> <tr> <td>4</td> <td>On declaration of Go-Live</td> <td>25%</td> </tr> </tbody> </table>			S.No.	Milestone	Payable	1	Team Mobilization Advance along with Purchase Order	25%	2	On receipt of Sign off on “To-Be” document	25%	3	On successful completion of CRP session	25%	4	On declaration of Go-Live	25%
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3	On successful completion of CRP session	25%															
4	On declaration of Go-Live	25%															

# Thank you



Look forward to service you soon ....

**.... We are available at [connect@filixconsulting.com](mailto:connect@filixconsulting.com)**