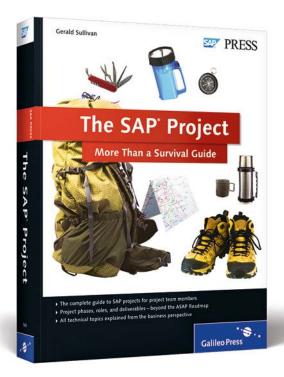
# **Project Templates**

from

The SAP® Project: More Than a Survival Guide





# **Project Templates**

The following templates are designed to give you a quick-reference list of the kinds of information you'll require for and produce during various project phases. Each SAP implementation is a little different, so be sure to adapt it to fit your project!

# **Blueprint**

Blueprint initiates the formal SAP system design. It defines how the company will use its SAP system and the business process changes that are necessary to accomplish company objectives. This process involves key process experts from major business functions and applicable regional operations.

The results of blueprinting will guide all subsequent project activities from realization through to go-live and support.



## Trail Marker

The timing listed for each segment of downloadable content assumes a three-month project preparation phase. Thus, blueprint begins in project month four.

All remaining sections in this document increment their timing based on the blueprint initiation date. Your project scope and complexity may vary considerably. Please feel free to adjust these end dates based on the unique characteristics of your project.

- ► High-level requirements
- ► Functional workstream proposed business process changes
- ► Project charter (or other scope document)
- ▶ Blueprint workshop schedule and logistics planning
- ► Kick-off session preparations
- ► Initial business process hierarchy
- ► Legacy systems interconnections

**Tasks**The following tasks should be executed during this stage.

Task	Tool	Who?	End Date
Business hierarchy review	MS SharePoint	Global process owners	Month Four
Organization hierarchy review	MS SharePoint	Global process owners	Month Four
Integration points assigned	MS SharePoint	Integration management	Month Four
Key design decisions complete	MS SharePoint	Global process owners	Month Six
Regional approval of design	MS SharePoint	PMO	Month Six
Change impacts completed	SAP Solution Manager	Global process owners	Month Six
Process design documents (PDDs) complete	SAP Solution Manager	Global process owners	Month Seven
Business controls documents completed	SAP Solution Manager	Global process owners	Month Seven
Custom objects gaps approved	SAP Solution Manager	PMO	Month Seven

- ▶ Blueprint design sessions must be complete; project sponsors and key executive must approve the finished blueprint.
- ► All PDDs and related deliverables must be complete and posted to SAP Solution Manager.
- ► All custom objects must be reviewed and approved prior to project sponsor blueprint approval.

### **Deliverables**

- ► Organization hierarchy
- ► Detailed level business processes

- ► To-be design vision
- ► Key design decisions
- ► Change impacts
- ► Key performance indicators (KPIs)
- ► Custom objects gap documents
- ► Process design documents (PDDs)
- ▶ Business controls documentation

- ► Approved design
- ▶ Localization initiation

# Configuration

Configuration forms one of the two core components in the realization build phase. During this time, the project team converts blueprint decisions into executable transactions in the SAP system. This process involves key integrator SAP transaction experts from each global process team.

Configuration sets the stage for the initiation of systems test.

- ► Process definition documents (PDDs) with process flows complete
- ► Availability of SAP development system
- ► Availability of SAP Solution Manager Implementation Guide (IMG)
- ► Realization project plan available
- ▶ Business process hierarchy (BPH) and organization hierarchy approved
- ► Realization kick-off sessions complete
- ► Necessary localizations identified

**Tasks**The following tasks should be executed during this stage.

Task	Tool	Who?	End Date
Define configuration cycles	MS SharePoint	Global process teams	Month Seven
Assign configuration analysts	MS SharePoint	Global process teams	Month Seven
Complete configuration rationale template	SAP Solution Manager	PMO	Month Seven
Train configuration analysts	MS SharePoint	PMO	Month Seven
Complete cycle one configuration (organization hierarchy and major master data)	SAP Solution Manager	PMO	Month Seven
Complete cycle two configuration (remaining master data)	SAP Solution Manager	Global process owners	Month Eight
Complete cycle three configuration (simple transactions)	SAP Solution Manager	Global process owners	Month Eight
Complete cycle four configuration (complex transactions)	SAP Solution Manager	Global process owners	Month Eight
Complete configuration rationale specifications	SAP Solution Manager	PMO	Month Nine
Post configuration rationale specifications to SAP Solution Manager	SAP Solution Manager	Global process teams	Month Nine
Review and approve configuration rationale specifications	SAP Solution Manager	Global process teams	Month Nine
Complete configuration functional testing	Test tracking system	Test team	Month Nine

- ► Trained configuration analysts are available.
- ▶ Documentation standards are defined and approved.

- ► All configuration cycles are clearly identified and scheduled.
- ► Functional test processes and tracking mechanisms are prepared.

#### **Deliverables**

- ► Configuration template
- ► Approved configuration rationale specifications
- ► Configuration rationale specification documents posted to SAP Solution Manager

#### Outcomes

- ► Configuration complete
- ► Configuration functional testing complete
- String testing readiness

# **Custom Objects**

Custom object design represents the second core component of the realization build phase. During this time, the application development team will construct those WRICEFP objects from the approved gap documents submitted in blue-printing.

Custom objects build involves a close working relationship between application developers and integrator staff assigned to the global process teams. The interplay between these groups results in functional specifications and successful testing of each object.

- ► Gap documents complete and approved
- ► Process definition documents (PDDs) with process flows complete
- ► Availability of SAP development system
- ► Realization project plan available
- ▶ Business process hierarchy (BPH) and organization hierarchy approved

- ► Realization kick-off sessions complete
- ► Necessary localizations identified

**Tasks** 

The following tasks should be executed during this stage.

Task	Tool	Who?	End Date
Application development team fully staffed	MS SharePoint	Global process owners	Month Seven
Functional specification template prepared and approved	SAP Solution Manager	Global process teams	Month Seven
Technical specification template prepared and approved	SAP Solution Manager	Application development team	Month Seven
Functional specifications pre- pared for each custom object	SAP Solution Manager	Global process teams	Month Eight
Technical specifications pre- pared for each custom object	SAP Solution Manager	Application development team	Month Nine
Unit test plans prepared and approved	MS SharePoint	Global process owners	Month Nine
Unit tests performed and passed	SAP Solution Manager	Application development team	Month Nine
Custom objects reviewed and approved	SAP Solution Manager	Global process owners	Month Nine

## **Key Dependencies**

- ► Gap documents are prepared and fully reviewed prior to the start of development
- ► Documentation standards are defined and approved.
- ► Fully staffed applications development team are assigned and on-board.

# Deliverables

► Functional specification template

- ► Technical specification template
- ► Custom object functional specifications
- ► Custom objects technical specifications
- ▶ Unit test results

- ► Custom object development complete
- ► Unit testing complete
- ► String testing ready for custom object data

### **Data Conversion**

Data conversion transfers needed data from legacy systems into the SAP system. This data provides required master data to operate the SAP system or historical transactional records to ensure continuity as part of system change.

Data conversion is a complex process that is accomplished in stages throughout realization and final preparation. The objective is to achieve accurate and complete data necessary to run the new SAP system.

#### Inputs

- ► Full date review
- ▶ Data definition documents
- ► Availability of a data conversion system (if used)
- ► Fully staffed data team
- ▶ DEV and QAS systems available

#### **Tasks**

Task	Tool	Who?	End Date
Define data conversion scope and processes	MS SharePoint	Data team	Month Eight
Schedule for iterative loads	MS SharePoint	Data team	Month Eight
Data conversion protocols	MS SharePoint	Data team	Month Eight
Prepare data functional conversion specifications	SAP Solution Manager	Data team	Month Nine
Cleansing of data from legacy systems to DEV and QAS	MS Excel	Global process owners	Months Nine through Fifteen
Complete data extracts	Data conversion tool	Data team	Months Nine through Fifteen
Transform and load legacy data to the SAP system	Data conversion tool	Data team	Months Nine through Fifteen
Review and confirm correct data loads in DEV and QAS	Testing system	Global process owners	Months Nine through Fifteen
Load legacy data into the SAP production system	Data conversion tool	Data team	Month Nineteen
Confirm accuracy of Production data loads	Testing system	Global process owners	Month Nineteen
Release data for general use	SAP production system	PMO	Month Nineteen

- ► Integration and user acceptance testing schedules are aligned with data load schedules.
- ► Data defects have been resolved prior to completion of testing or production load.
- ► Testing system is available for data verification usage.
- ▶ Data owners are available for review and verification tasks.

### **Deliverables**

► Integration and user acceptance test data

- ▶ Production data
- ► Approved data conversion scripts

- ▶ Approved and accurate data in test systems
- ► Approved and accurate data in production system

# **End User Training**

End user training prepares all users to operate the SAP system. Training is built around role requirements; end users receive training for the transactions that their roles demand. Training is developed specifically for the system as it is implemented. Thus, training materials will reflect configuration and custom objects prepared especially for the company system.

Training developers work closely with the process teams to identify necessary information for that set of users. In an iterative fashion, developers prepare curriculum, course outlines, and course materials to fit these requirements. Instructors are prepared to deliver the material, and administrators track attendance and course completion.

#### Inputs

- ► Process definition documents (PDDs)
- ► Configuration specification rationales
- ► Change impacts documents
- Project charter (and other scope documents)

#### **Tasks**

Task	Tool	Who?	End Date
Fully staffed training team available	MS SharePoint	PMO	Month Six
Assign subject matter experts to support training developers	MS SharePoint	Global process owners	Month Seven
Course curriculum proposal	MS SharePoint	Training team	Month Seven
Course curriculum approved	MS SharePoint	Global process owners	Month Seven
Course outlines submitted	MS SharePoint	Training team	Month Nine
Course outlines approved	MS SharePoint	Global process owners	Month Nine
Training material developed	MS PowerPoint	Training team	Month Twelve
Training material reviewed and approved	MS SharePoint	Global process owners	Month Thirteen
Course instructors selected	MS SharePoint	Global process owners	Month Fifteen
Train-the-trainer sessions scheduled	MS Outlook	Training team	Month Fifteen
Train-the-trainer sessions held	MS SharePoint	Training team	Month Fifteen
Translator vendor selected	MS SharePoint	Training team	Month Fifteen
Training system available	MS SharePoint	Basis team	Month Sixteen
Materials submitted to translation vendor	MS Outlook	Training team	Month Sixteen
Materials received from translation vendor	MS Outlook	Training team	Month Seventeen
Classes scheduled and facilities assigned	Learning management system	Training team	Month Seventeen
End user training conducted	MS SharePoint	Training team	Month Eighteen

Task	Tool	Who?	End Date
Ongoing assessment of required training completion	Learning management system	Training team	Month Eighteen
End users who complete training matched to SAP UserIDs	MS SharePoint	Basis team	Month Nineteen

- ▶ Role mapping is complete and roles are assigned to users.
- ► Training is mapped to roles.
- ► Facilities and infrastructure training requirements are complete.
- ▶ Instructors are available to conduct classes.
- ▶ End users are available to attend classes as per schedule.

#### **Deliverables**

- ► Curriculum proposal
- ► Course outlines
- ► Completed training materials
- ► Translated materials
- ► Training system
- ▶ Records of course attendance and completion

#### **Outcomes**

- ► Approval to issue SAP UserIDs
- ► Distribution of SAP UserIDs

# **Integration Testing**

Integration testing begins the formal assessment of the configured SAP system. It permits the project team to verify that system elements, including custom

objects, perform as intended. Integration testing confirms that company business processes operate effectively and that SAP transactions create desired results.

Integration test is often handled by the project systems integrator (assisted by the core project team) and is divided into two to four separate cycles.

- ► Completed custom objects and documentation
- ► Completed configuration and documentation
- ► Functional and unit test completion
- ► Completed string test
- ► Availability of the quality assurance system (QAS)
- ► Availability of selected testing system

**Tasks**The following tasks should be executed during this stage.

Task	Tool	Who?	End Date
Integration test entrance review conducted	MS PowerPoint	PMO	Month Ten
Test scenarios defined	Testing system	Test team	Month Ten
Test scripts written and reviewed	MS SharePoint	Global process owners	Month Ten
Test scripts loaded to testing system	Testing System	Test team	Month Ten
Tester team selected	MS SharePoint	Test team	Month Ten
Tester training conducted	MS PowerPoint	PMO	Month Ten
Test data loaded to QAS	SAP QAS	Data team	Month Ten
Complete integration test cycle one (configuration)	Testing system	Global process owners	Month Eleven
Complete integration test cycle two (limited custom objects)	Testing system	Global process owners	Month Twelve

Task	Tool	Who?	End Date
Complete integration test cycle three (remaining custom objects)	Testing system	Global process owners	Month Thirteen
Defect resolution process underway	Testing system	Test team	Month Eleven
Test status tracking underway	Testing system	Test team	Month Eleven
Integration test exit review conducted	MS PowerPoint	PMO	Month Thirteen

- ► String test of configuration and custom object must be completed and defects resolved prior to initiation of integration test.
- ▶ Project sponsors and key executive must approve entrance into integration test.
- ► Testing system, if used, must be available and configured for integration test.
- ► Integration test data must be transported to the QAS system prior to initiation of integration testing.

#### **Deliverables**

- ► Test scenarios and test scripts
- ► Test processes
- ► Confirmed system operation
- ► Defect resolution processes

#### Outcomes

- ► Confirmed design or needed alterations
- ► Preparation for user acceptance test

## **User Acceptance Testing**

User acceptance testing concludes the formal assessment of the configured SAP system. While integration testing confirms that the system operates as designed, user acceptance testing shows that the system will operate effectively when conducting company business processes.

User acceptance testing is conducted by company business users. Otherwise, it may appear very similar to integration testing; in many cases, the same test cycle structure is used and test scripts may be reused.

### Inputs

- ► Integration test exit review approval
- ► Completion of integration test to include resolution of defects
- ► Availability of additional test scripts and scenarios
- ► Availability of user testers

#### **Tasks**

Task	Tool	Who?	End Date
User acceptance test entrance review conducted	MS PowerPoint	PMO	Month Fourteen
Test scenarios defined	Testing system	Test team	Month Thirteen
Test scripts written and reviewed	MS SharePoint	Global process owners	Month Thirteen
Test scripts loaded to testing system	Testing system	Test team	Month Fourteen
User test team selected	MS SharePoint	Global process owners	Month Thirteen
User testers trained on system and on testing processes	MS PowerPoint	Test team and global process owners	Month Thirteen

Task	Tool	Who?	End Date
Test data loaded to QAS	QAS	Data team	Month Fourteen
Complete user acceptance test cycle one (configuration)	Testing system	Global process owners	Month Fourteen
Complete integration test cycle two (limited custom objects)	Testing system	Global process owners	Month Fifteen
Complete integration test cycle three (remaining custom objects)	Testing system	Global process owners	Month Sixteen
Mega-scenario testing completed	Testing system	Test team and global process owners	Month Seventeen
User acceptance test defect resolution process underway	Testing system	Test team	Month Fourteen
User acceptance test tracking status reporting underway	Testing system	Test team	Month Fourteen
User acceptance test exit review conducted and approved	MS PowerPoint	PMO	Month Seventeen

- ► The needed user acceptance test data sets are available.
- ► System training material for tester instruction is ready.
- ► Instructors are available for tester system instruction.
- ► Additional test scripts and test scenarios are available.

### Deliverables

- ► Completed test scripts
- ► Requirements traceability matrix
- ► System confirmation documentation

- ► Exit approval from user acceptance test
- ► Confirmed design to fit business processes
- ▶ Preparation to initiate cutover activities

### Cutover

Cutover takes place during the final preparation phase. It represents the last step prior to go-live and making the system available for general use.

Cutover consists of a number of interrelated steps that must be taken during a very compressed timeframe. They are intended to ensure that the business is prepared for the cutover period and the ramp-up time that comes almost immediately afterwards. Additionally there are a number of system-specific activities that must be completed in the cutover window.

### Inputs

- ► Freeze period identification
- Site readiness plans
- ► Regional and site

#### **Tasks**

Task	Tool	Who?	End Date
Cutover schedule available	MS SharePoint	PMO	Month Eighteen
Cutover leads assigned	MS SharePoint	PMO	Month Eighteen
Regional and site cutover teams assigned	MS SharePoint	Cutover team	Month Eighteen
Freeze plans set for production sites	MS SharePoint	Cutover team	Month Eighteen

Task	Tool	Who?	End Date
Ramp-down plan identified	MS SharePoint	Cutover team	Month Eighteen
Ramp-up plan and key measures identified	MS SharePoint	Cutover team	Month Eighteen
Data loaded into production	SAP system	Data team	Month Nineteen
Data verification complete	Testing system	Data team	Month Nineteen
Custom objects and configuration transports complete	SAP system	Basis team	Month Nineteen
Permission to go live received	MS Outlook	Project sponsors	Month Nineteen
Controlled start underway	MS SharePoint	Cutover team	Month Nineteen
Ramp-up underway	MS SharePoint	Cutover team	Month Nineteen
Hypercare period begins	Incident management system	PMO	Month Nineteen

- ► User acceptance test has been completed.
- ► Approval from project sponsors to move into cutover has been received.
- ► SAP production system is available.
- ► Transports for custom objects and configuration are ready.
- ► Loads of converted data to the production system are ready.

### **Deliverables**

- ► Cutover plan
- ► Ramp-up and ramp down plan
- ► Controlled start plan

- ► Super user support plan
- ▶ Data load and verification plan

- ► Readiness to go-live
- ► Readiness for system usage