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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.

Inputs

- 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.

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

Key Dependencies

- 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

Outcomes
- 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.

Inputs
- 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.

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

Key Dependencies
- 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 blueprint.

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.

**Inputs**
- 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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Tool</th>
<th>Who?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application development team fully staffed</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Functional specification template prepared and approved</td>
<td>SAP Solution Manager</td>
<td>Global process teams</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Technical specification template prepared and approved</td>
<td>SAP Solution Manager</td>
<td>Application development team</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Functional specifications prepared for each custom object</td>
<td>SAP Solution Manager</td>
<td>Global process teams</td>
<td>Month Eight</td>
</tr>
<tr>
<td>Technical specifications prepared for each custom object</td>
<td>SAP Solution Manager</td>
<td>Application development team</td>
<td>Month Nine</td>
</tr>
<tr>
<td>Unit test plans prepared and approved</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Nine</td>
</tr>
<tr>
<td>Unit tests performed and passed</td>
<td>SAP Solution Manager</td>
<td>Application development team</td>
<td>Month Nine</td>
</tr>
<tr>
<td>Custom objects reviewed and approved</td>
<td>SAP Solution Manager</td>
<td>Global process owners</td>
<td>Month Nine</td>
</tr>
</tbody>
</table>

**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
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

The following tasks should be executed during this stage.
**Key Dependencies**

- 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
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

The following tasks should be executed during this stage.
<table>
<thead>
<tr>
<th>Task</th>
<th>Tool</th>
<th>Who?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully staffed training team available</td>
<td>MS SharePoint</td>
<td>PMO</td>
<td>Month Six</td>
</tr>
<tr>
<td>Assign subject matter experts to support training developers</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Course curriculum proposal</td>
<td>MS SharePoint</td>
<td>Training team</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Course curriculum approved</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Seven</td>
</tr>
<tr>
<td>Course outlines submitted</td>
<td>MS SharePoint</td>
<td>Training team</td>
<td>Month Nine</td>
</tr>
<tr>
<td>Course outlines approved</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Nine</td>
</tr>
<tr>
<td>Training material developed</td>
<td>MS PowerPoint</td>
<td>Training team</td>
<td>Month Twelve</td>
</tr>
<tr>
<td>Training material reviewed and approved</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Thirteen</td>
</tr>
<tr>
<td>Course instructors selected</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Fifteen</td>
</tr>
<tr>
<td>Train-the-trainer sessions scheduled</td>
<td>MS Outlook</td>
<td>Training team</td>
<td>Month Fifteen</td>
</tr>
<tr>
<td>Train-the-trainer sessions held</td>
<td>MS SharePoint</td>
<td>Training team</td>
<td>Month Fifteen</td>
</tr>
<tr>
<td>Translator vendor selected</td>
<td>MS SharePoint</td>
<td>Training team</td>
<td>Month Fifteen</td>
</tr>
<tr>
<td>Training system available</td>
<td>MS SharePoint</td>
<td>Basis team</td>
<td>Month Sixteen</td>
</tr>
<tr>
<td>Materials submitted to translation vendor</td>
<td>MS Outlook</td>
<td>Training team</td>
<td>Month Sixteen</td>
</tr>
<tr>
<td>Materials received from translation vendor</td>
<td>MS Outlook</td>
<td>Training team</td>
<td>Month Seventeen</td>
</tr>
<tr>
<td>Classes scheduled and facilities assigned</td>
<td>Learning management system</td>
<td>Training team</td>
<td>Month Seventeen</td>
</tr>
<tr>
<td>End user training conducted</td>
<td>MS SharePoint</td>
<td>Training team</td>
<td>Month Eighteen</td>
</tr>
</tbody>
</table>
### Key Dependencies
- 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
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.

**Inputs**
- 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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Tool</th>
<th>Who?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration test entrance review conducted</td>
<td>MS PowerPoint</td>
<td>PMO</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Test scenarios defined</td>
<td>Testing system</td>
<td>Test team</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Test scripts written and reviewed</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Test scripts loaded to testing system</td>
<td>Testing System</td>
<td>Test team</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Tester team selected</td>
<td>MS SharePoint</td>
<td>Test team</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Tester training conducted</td>
<td>MS PowerPoint</td>
<td>PMO</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Test data loaded to QAS</td>
<td>SAP QAS</td>
<td>Data team</td>
<td>Month Ten</td>
</tr>
<tr>
<td>Complete integration test cycle one (configuration)</td>
<td>Testing system</td>
<td>Global process owners</td>
<td>Month Eleven</td>
</tr>
</tbody>
</table>
Key Dependencies

- 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

The following tasks should be executed during this stage.

<table>
<thead>
<tr>
<th>Task</th>
<th>Tool</th>
<th>Who?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>User acceptance test entrance review conducted</td>
<td>MS PowerPoint</td>
<td>PMO</td>
<td>Month Fourteen</td>
</tr>
<tr>
<td>Test scenarios defined</td>
<td>Testing system</td>
<td>Test team</td>
<td>Month Thirteen</td>
</tr>
<tr>
<td>Test scripts written and reviewed</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Thirteen</td>
</tr>
<tr>
<td>Test scripts loaded to testing system</td>
<td>Testing system</td>
<td>Test team</td>
<td>Month Fourteen</td>
</tr>
<tr>
<td>User test team selected</td>
<td>MS SharePoint</td>
<td>Global process owners</td>
<td>Month Thirteen</td>
</tr>
<tr>
<td>User testers trained on system and on testing processes</td>
<td>MS PowerPoint</td>
<td>Test team and global process owners</td>
<td>Month Thirteen</td>
</tr>
</tbody>
</table>
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
Outcomes
- 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
The following tasks should be executed during this stage.

<table>
<thead>
<tr>
<th>Task</th>
<th>Tool</th>
<th>Who?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cutover schedule available</td>
<td>MS SharePoint</td>
<td>PMO</td>
<td>Month Eighteen</td>
</tr>
<tr>
<td>Cutover leads assigned</td>
<td>MS SharePoint</td>
<td>PMO</td>
<td>Month Eighteen</td>
</tr>
<tr>
<td>Regional and site cutover teams</td>
<td>MS SharePoint</td>
<td>Cutover team</td>
<td>Month Eighteen</td>
</tr>
<tr>
<td>Freeze plans set for production</td>
<td>MS SharePoint</td>
<td>Cutover team</td>
<td>Month Eighteen</td>
</tr>
<tr>
<td>sites</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Key Dependencies**

- 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
Cutover

- Super user support plan
- Data load and verification plan

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