No Method = no success! Utilizing the CRP Method to Make your eBusiness Project a Success – it works!

Paper/article also found in:

OAUG *Insight March 2008*

CRPs: Myth, Method or Madness?

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Agenda

- Opening Comments
- Objectives of Session
- Who is OATC?
- Typical Project Approach (level set)
- Diving into CRPs, ...breaking down phase 4
- Diving into CRPs, ...the method!
- Diving into CRPs, ...management and control
- Q&A
- Closing

Objectives of Session

- Users will learn how to use the method to define and execute conference room pilots (CRPs) for enterprise projects.

Objectives of Session

- Learn how to design, build, and execute deliverables associated with conference room pilots

  – Regardless of the enterprise application software; whether it is for Oracle Applications 11i, R12, Fusion; PeopleSoft; JD Edwards; Siebel; or the latest Oracle acquisition – this method works!

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Objectives of Session

- The primary objective of this approach is to:

  – minimize and expedite tasks related to these complex projects

  – Creating a repeatable process for your organization

  – Streamlining the business requirements definition, setups, test scenario and step development, master test planning and measuring progress for success.

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Who is OATC?

- "OATC" - Oracle Applications and Technology Consulting

  – Founded in August 2002 by Bill Dunham, renowned Oracle Applications and Technology consultant

  – Focus on executing Oracle application and technology projects; *implementations, upgrades, and custom projects, any Oracle!*

  – Enterprise applications and technology advisory services

  – Over 20 years experience with Oracle technology, and over 16 years with Oracle Applications (*starting with release 7.9*)

  – Involved with many successful 11i projects of varying sizes from small to large teams, single to multiple locations

  – Co-author of two Oracle Application books (11.0.3 & 11i)

  – Author and presenter of many Oracle application and technology whitepapers for OAUG and Oracle

  – Check out our latest article in OAUG Insight March 2008

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Typical Project Approach...
lets get everyone on the same page

High-Level Project Plan

- Sample high-level plan removed because of size.
  Will be in presentation.

sample

Project Phases

- *Phase 1: Planning and Governance Phase*
  - Creating a "project charter" that defines scope, objectives, approach, schedule, budget, operating procedures and various strategies (*communication, change management, data conversion, training, testing, technical architecture, etc.*)

- *Phase 2: Definition and Analysis Phase*
  - Project kickoff, team orientation, define business requirements, install new hardware, software, document/catalog customizations, implement and configure any products to be used during the project, such as Mercury QC

Project Phases (cont.)

- *Phase 3: Solution Design, Development, and Testing Preparation Phase*

  – Begin test scenario identification and development; analyze gaps for 11i, begin setups, data conversion, project instance plan, begin work on known customizations, create Master Test Plan *(key for project stakeholders)* for Conference Room Pilot (CRP)1or pre-CRP

Project Phases (cont.)

- *Phase 4: CRP1 Phase (can be considered a "pre CRP" as well)*
  - Execute and confirm test scenarios, identify and resolve issues, prepare for next CRP, CRP2
  - Only core team members are involved

- *Phase 4: CRP2 (iterative)*
  - Execute test scenarios, structured and unstructured testing is acceptable
    - If you have multiple locations, identify a testing liaison per location
  - Have users document unstructured tests and send feedback to liaison
  - Additional CRPs?
    - CRP 3
    - CRP 4, etc.   It really depends...
  - Advancing to UAT does not happen until users are ready!!

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Project Phases (cont.)

- *Phase 5: User Acceptance Testing (UAT)*

  – Re-execution of testing, one final time, and sign-off by users – users accept the product you are delivering!

  – Sign off on exceptions as well, any outstanding issues, or perhaps customizations not ready for production

  – For some projects this phase can be a non-event!

Project Phases (cont.)

- Phase 6: End User Training
  - Prepare for and execute, could use learning management software, internally generated from business and test scenarios
  - Typically <u>overlaps</u> testing effort
  - Separate applications instance for training team

- Phase 7: Production Migration and Stabilization
  - Final installation, or upgrade, depending on the type of project, production transition strategies
  - Stabilizing production – working go-live issues, etc.

Diving into CRPs

...breaking down phase 4

Defining CRPs

What is a CRP?

...a CRP is a Conference Room Pilot...a round of thorough testing!

and according to APICS, CRPs are prototyping, as in

... "a <u>product</u> model constructed for <u>testing and evaluation</u> to see how the product performs before releasing the <u>product to production</u>"

In this case, the CRP is being used for an 11i upgrade...

- Product   = Oracle Applications 11i (11.5.10.2)
- Testing and evaluation   = the upgraded 11.0.3 to 11i apps via CRPs and UAT
- Product to production   = preparing 11i production environment for release to end users

Defining Requirements

Where do business requirements come from?

- Previously defined from earlier in the project
- Possibly from *as-is* or *to-be* process models
  - Keep in mind just because another organization may have the same applications as you doesn't mean they use the apps the same way!
- Don't over do it... keep the effort simple but effective
- Eventually these requirements will be validated via test scenarios

Focus on customizations:

- Each customization should be prototyped and executed during a series of tests
- Tests should target a specific *stage, event, business scenario, or business process – internal within the application not external processes…*
- Document a specific result, such as *success or failure*

Defining Test Scenarios

Creating Test Scenarios and Steps:

- Core to all CRPs
- Have separate and integrated tests —
  - structured tests
  - unstructured tests, provides freedom to users!
- Conduct module workshops, or prototyping sessions per department to identify and validate requirements, business scenarios and test scenarios, thoroughness of tests (depth/width), as well as validation of customizations
- Get the entire project team (users as well) involved with process
- Assign clear roles and responsibilities during testing, who's doing what?
- Helps validate interoperability of business processes and customizations
- All business scenarios identified should be tested, all testing scenarios should be tied to business scenarios…

Why the CRP approach?

Some reasons why the CRP approach works…

- CRPs offer multiple iterations of testing – users involvement key
- Use of application in a hands-on, real working environment
- When upgrading or implementing;
  - helps ease doubts about the product and project
- Experienced consultants remain on-site to guide and help
- Residual effect of CRP activities is organizational learning
- Uses your organizations data, replicate production, users really like this!
- Various departments, locations, business units get involved, there involvement leads to much higher confidence, learning and easier acceptance
- Turns users into "change agents" as they learn and accept the upgraded environment – eases change management
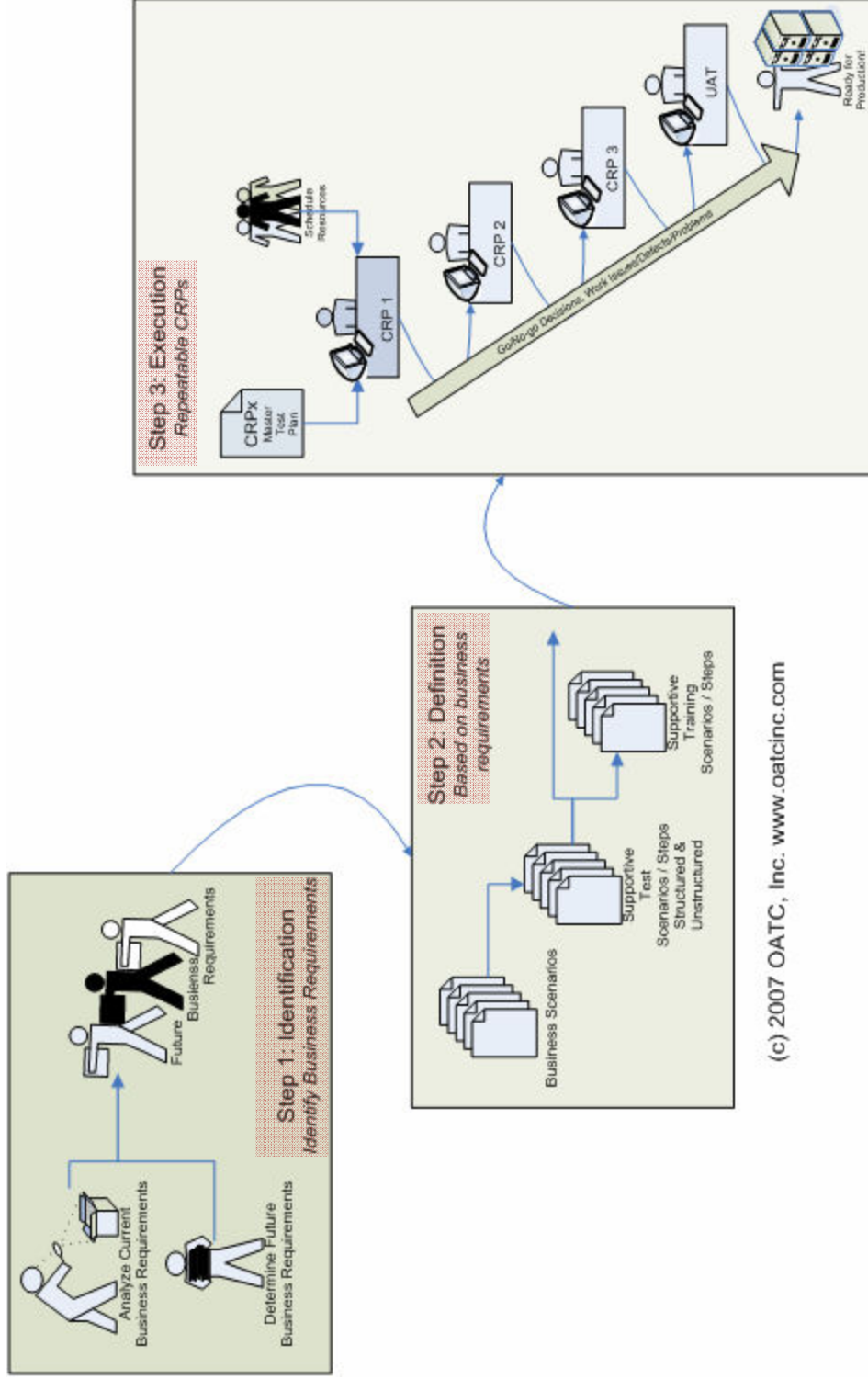
When to use CRPs?

When to use CRPs?

- Implementation of Oracle Applications, or any enterprise application
- When implementing additional modules after the initial install
  - Can be done on a smaller scale, reuse of deliverables, method and approach
- Implementation of third party products
  - This approach works for really any product
- For upgrades to applications (11i, R12, etc)
  - A common approach
  - This approach is applicable to any enterprise application; PeopleSoft, JD Edwards, Siebel, or the latest Oracle acquisition!
- Significant Patch efforts
- Major business process changes
- Workflow modifications or additions
- Integration with non Oracle Apps, or custom applications

Diving into CRPs

...the method

The CRP Method!

Step 1: Identification
Identify Business Requirements

Analyze Current Business Requirements

Determine Future Business Requirements

Future Business Requirements

Step 2: Definition
Based on business requirements

Business Scenarios

Supportive Test Scenarios / Steps Structured & Unstructured

Supportive Training Scenarios / Steps

Step 3: Execution
Repeatable CRPs

CRPx Master Test Plan

CRP 1

CRP 2

CRP 3

Schedule Resources

UAT

Go/No-go Decisions, Work Issues/Defects/Problems

Ready for Production!

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CRP Method: Step 1

CRP Step 1: Identification

- Analyze current business processes, from current process models, interviews, typical business requirements gathering, etc.

- Determine any new future business requirements, from statement of direction, product features, or changing business needs, etc.

- Yielding "future" business requirements

Note: Obviously this is one approach and processes could be added, updated or removed, to make the it more effective for your organization.

CRP Method: Step 2

CRP Step 2: Definition

- Generate a list of business scenarios that support business requirements identified in Step 1

- Create test scenarios and steps for each business scenario, important to connect these for future validation

Leverage these documents to:

- Create training strategy and training scenarios, material, end user, or use case documentation

CRP Method: Step 2

CRP Step 2: Definition

- Critical activities for remainder of project

- Testing scenarios should use realistic data

- Test scenarios and scripts (structured) are to support and test business scenarios

- Allow unstructured testing, but keep track of what users do, you want documented feedback

- Capture time to execute test… will see how this is used later

CRP Method: Step 2

CRP Step 2: Definition (continued)

- Get users involved with creation of these documents
  - learning activity for project team
- Leverage these documents from previous projects
- Create training documents directly from testing documents
  - Leverage the testing documents, existing business scenarios, etc., saves time and money!
  - Copy and clean-up does wonders in a short period of time

CRP Method: Step 3

CRP Step 3: Execution

- Create a master test plan (per CRP)
  - Defines scope of effort for testing
  - Provides details to all stakeholders involved
  - Schedule all resources
  - Gets the testing effort organized
  - Apps instance details (owners, usage, etc.)
  - "go/no-go" criteria
- Begin execution of CRP iterations
- Document and resolve CRP issues
  - Track open issues and defects – these are different!
  - Also, obtain sign-off at the completion of each CRP
  - Document and obtain sign-off for any open issues or defects

CRP Method: Step 3

<u>CRP Step 3: Execution *(continued)*</u>

- Time zone considerations

- Confirms remote testing, bi-product that network is working, performance is optimal, etc.

- Focus on 3 CRPs at a minimum – or until the users complain, they will let you know when they've had enough!

- Highly recommend multiple CRPs, the more testing performed, issues and defects worked, the less you experience these problems in production!

CRP Method: Step 3

CRP Step 3: Execution (*continued*)

- Progress to CRP3 may go quick or slow depending on issues

- Track all CRP problems

- Meet regularly, each day to start out each CRP, then adjust depending on progress/issues/defects

- Manage and control progress tightly!

- If the CRPs work well, UAT should be a snap!

  UAT – what does this mean?

  user acceptance testing = sign-off = happy users = happy management = happy vendor

Diving into CRPs

...management & control

We like Mercury Quality Center!

- Heavy use of this product, we used to capture:
  - No necessary to use this product!
  - Business requirements
  - Manage and categorize customizations
  - Document Test Scenarios/Steps
    - Subsequently CRP execution and reporting, and monitoring
    - Monitoring overall progress of each CRPs
  - Defect tracking and management
    - Oracle SR management and notes
  - Identifying and validating internal controls (via a CRP)

Diving into CRPs

...management & control

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\<pull graphs because of file size\>

In Conclusion…

Conclusion

- Are using conference room pilots a myth, method or madness of enterprise application projects?

- The details of this presentation show that it is a method not a myth and that the madness only comes from not having a solid method or approach.

Conclusion

- The CRP Method for executing enterprise projects is not necessarily new, though not explicitly documented.

- Components of the CRP Method can be found in many methods, though the CRP Method distills the monolithic methods into a concise, focused and repeatable effort that any organization can use.

- In conclusion, the CRP Method is real, not a myth; sanity, not madness; and a method that is noteworthy, effective and efficient.

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Questions & Answers

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