Implementation Tools:
Implementation Methodology

SAP Business One
Version 9.0

In this topic, you will learn about SAP's recommended methodology and tools for managing implementation projects.

Objectives

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- Describe the purpose and milestones of each phase in the Accelerated Implementation Project methodology (AIP)
- Explain how the AIP methodology and related tools can help to manage risk-free projects
- Use the embedded project plans in SAP Business One as the basis for your own projects and create new project plans in accordance with the methodology.

On completion of this topic, you will be able to:

- Describe the Accelerated Implementation Project methodology, including the purpose and milestones in each phase.
- Explain how the AIP methodology and related tools can help to manage risk-free projects.
- Use the embedded project plans in SAP Business One as the basis for your own projects, and create new project plans in accordance with the methodology.

Business Example

As a new partner, you want your first implementation project to be a success. You need to create a project plan. Where do you start? How do you ensure the plan includes all the necessary tasks?

Solution: Successful projects follow a structured, phased approach. SAP's Accelerated Implementation Program (AIP) provides a proven methodology for an SAP Business One implementation. It is based on the practical experiences of SAP and many partners. Within this methodology, you will find project plans, as well as tools and documents to help you be successful.

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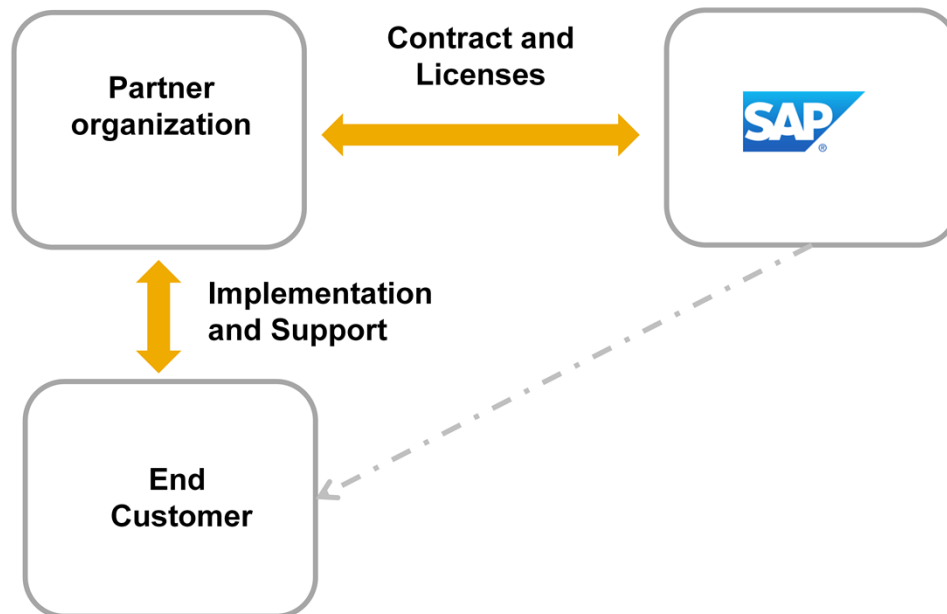
Agenda

- **Methodology**
- Tools, Templates and Documents

The first part of this topic examines the AIP methodology.

Engagement of Implementation Consultant

- As an implementation consultant, you are usually engaged at the end of the sales cycle, after the partner sales team signs a contract with SAP.

- The partner sales team purchases the required SAP Business One user licenses on behalf of the customer.

- Thus, from a contractual standpoint, there is no direct relationship between SAP and the end customer.

- The partner is responsible for implementation and support of the customer. SAP is responsible for defects in the SAP Business One software.
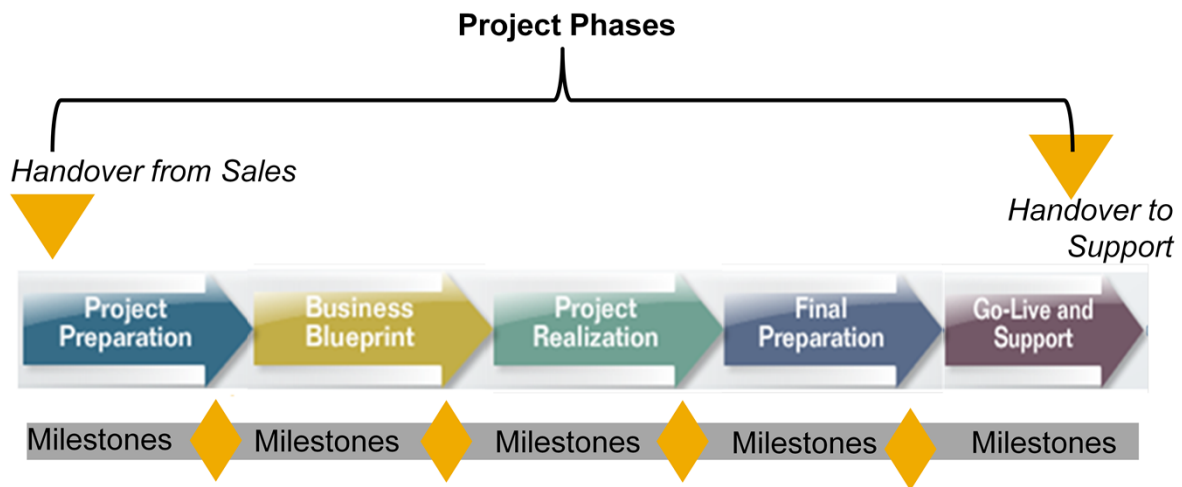
Quiz

What strategies can you use to be successful in an implementation project?

☐ Leverage SAP's experience

☐ Leverage the expertize of other partners

☐ Use a detailed project plan to ensure all necessary tasks are completed

☐ Set and manage the customer expectations

☐ Thoroughly understand the requirements and scope of the project

☐ Have a change management process

☐ Involve the customer in major project decisions

☐ Assess and mitigate risk continually during the project

- What strategies can you use to be successful in an implementation project?
- Take a few moments to review the list and identify one or more strategies that you would use to increase your chances of success.
- Would you:
  - Leverage SAP's experience?
  - Leverage the expertize of other partners?
  - Use a detailed project plan to ensure all necessary tasks are completed?
  - Set and manage the customer expectations?
  - Thoroughly understand the requirements and scope of the project?
  - Have a change management process?
  - Involve the customer in major project decisions?
  - Assess and mitigate risk continually during the project?

AIP Implementation Methodology

Project Phases

Handover from Sales

Handover to Support

Project Preparation → Business Blueprint → Project Realization → Final Preparation → Go-Live and Support

Milestones   Milestones   Milestones   Milestones   Milestones

- Successful implementation partners follow a structured or phased process for implementation.

- The SAP Accelerated Implementation Program (AIP) is specifically designed for SAP Business One implementations.

- The AIP methodology divides an implementation into five phases. These phases cover the period starting with the *handover from the sales team* to right before the *handover to the support organization*.

- The methodology provides *milestones* for each phase. Each milestone marks the completion of a discreet activity in the project: software installation, system configuration, testing, and so on. The milestones have been selected by SAP and partners as crucial checkpoints in your project plan.

- Since all the methodology materials are published as a template, partners have the opportunity to adapt the methodology to their own practices.

Project Preparation

Start | Project kick-off

Project Preparation → Business Blueprint → Project Realization → Final Preparation → Go-Live and Support

Customer transitions from the sales cycle to implementation mode

- Key Activities:
  - Handover from sales
  - Project plan
  - Kick-off meeting
  - Delivery and installation of SAP Business One software

The AIP methodology provides sample templates for a pre-sales business analysis, handover from sales meeting, project plan, and kick-off meeting.

- **Project Preparation** is the first phase in the implementation, during which the customer transitions from the sales cycle to implementation mode.

- For the implementation partner, the key activities are to:
  - Conduct a project handover with the sales team
  - Create a project plan for the implementation
  - Conduct an official kick-off meeting with the customer team
  - Deliver and install the SAP Business One software and demo database at the customer site.

- Note that the customer project manager and other key team members should have been appointed during the sales cycle.

- You can use the sample templates provided in the AIP methodology for a pre-sales business analysis of the customer, handover from sales meeting, project plan, and kick-off meeting.

Project Preparation - Milestones

1.1	Clear understanding of the sales process and the customer
1.2	Kick-off meeting conducted with customer
1.3	SAP Business One software delivered and installed
1.4	Phase sign-off by customer

To keep the project focused and on track, you should complete four milestones in this first phase:

1. First, you must clearly and thoroughly understand all aspects of the sales process, including the customer background, business processes, any risks or constraints, and any special or unusual requirements. You must have this information before you meet the customer. The handover meeting with the sales team is crucial to ensure a smooth transition of the customer from sales to implementation.

2. The kick-off meeting is the next milestone. This meeting marks the official start of the project. Ideally this meeting should be a face-to-face meeting, since that gives you the opportunity to create a relationship with the customer team and to set correct expectations for the implementation. Make sure you cover the agenda items outlined in the kickoff meeting template.

3. After the kickoff meeting, the delivery and installation of the software is important contractually. The software, including add-ons, must be fully installed. The implementation consultant should install the demo database (OEC Computers) for use later in the project.

4. The last milestone is a checkpoint. A big advantage of the AIP methodology is as a **control mechanism for keeping the project on track**. To achieve this, the customer project manager is asked to acknowledge the completion of the phase with a signature. This final checkpoint gives you the opportunity to ascertain that the customer is happy with the project and does not have unrealistic expectations before the project moves on.

Business Blueprint

Focus is detailed analysis of customer's business processes

- Key Activities:
  - Business processes analysis workshops
  - Business blueprint

> The AIP methodology provides templates for assessing business processes

- **Business Blueprint** is the second phase in the project and the project team focuses on a detailed analysis of the customer's business processes and requirements. The requirements are now mapped to a solution in SAP Business One. The documentation of the solution is known as the business blueprint.

- The AIP methodology recommends you conduct workshops with the customer representatives from each business area or department. In these workshops, you should analyze the detailed steps in each of the customers processes. In addition to major processes such as sales, purchasing, and service, you should cover reporting and financial processes. At the same time, you should identify the sources and volume of the legacy data that needs to be migrated.

- Check the templates provided in the AIP for assessing business processes.

Business Blueprint - Milestones

2.1	Requirements gathering workshops conducted with customer
2.2	Business Blueprint defined and accepted by customer
2.3	Changes to project scope and timeline agreed with customer
2.4	Phase sign-off by customer

The AIP recommends **four milestones** for this phase:

1. First you must complete the requirements gathering workshops for each of the customer's processes.

2. Next, perform a "**fit/gap analysis**" to map the processes to an SAP Business One solution. The documented solution must be reviewed and accepted by the customer. The blueprint then becomes the focal document for the next phase of the project.

3. This third milestone serves as a checkpoint to ensure that you assess the impact to the project of any gaps or change requests you identify during the fit/gap analysis. It is possible that these changes will affect the scope (work effort, timeline and/or cost) of the project. Factors that can increase scope include a large amount of customized reports, or high volumes of legacy data. It is important that the project plan is updated based on the Business Blueprint and that the customer agrees to the new schedule. Some partners prefer to conduct the requirements gathering exercise as a separate project, so that the scope can be fully defined and agreed prior to the start of the implementation. This is not a problem for the AIP methodology - phases 1 and 2 can be switched in sequence.

4. As in all phases, there is a final milestone that is a checkpoint. To keep the project on track, the customer should agree that all the phase deliverables and milestones have been met.

Project Realization

Implementation of customer's business and technical requirements

- Key Activities:
  - Configuration of company database
  - Import of master data
  - Validation and testing
  - Plans for training and cutover

- **Project Realization** is the heart of the project, and in this phase the consultants implement all the business process and technical requirements defined during the previous phase.

- In addition, the legacy master data is migrated.

- The newly-built system and master data is validated and tested by the customer using a test copy of the customer database. All issues arising during testing should be logged and resolved before moving onto the next phase.

- At the same time, the project manager draws up plans for training end users, and for the cutover period. The cutover periods happens just before go-live, when many activities must take place in the correct sequence and in a very short timeframe, so that the new system can fully run the production workload.

Project Realization - Milestones

3.1	Production system installed and configured based on Business Blueprint
3.2	System setup validated by customer
3.3	System and integration testing completed
3.4	Plans defined for training and cutover
3.5	Phase sign-off by customer

The AIP has **five milestones** for this phase:

1. Milestone one is the Production system installed and configured based on the documented business blueprint. This includes the import of legacy master data.

2. The second milestone is the validation of the configured system by the customer. Validation involves an iterative process whereby the customer tests each configuration change made by the consultant. This activity is sometimes known as "unit testing".

3. The third milestone is provided to cover the broader testing that is required once the individual processes have been validated. System and integration testing involves the testing of entire business processes end-to-end, including the integration with other processes and external systems. This testing is performed exclusively by the customer team, with support from the implementation team.

4. The next milestone is a project planning milestone. While the production system is being built and tested, the project manager focuses on planning for go-live. A plan for training end users and a cutover plan must be completed and are crucial to the success of the project.

5. The final milestone is the checkpoint for completion of the phase. Sign off for this phase indicates that the customer has accepted the new system functionality.

Final Preparation

Transition of the SAP Business One system and the client into production

■ Key Activities:

- ▪ Training of end users

- ▪ Decision and date for go-live agreed with customer

- ▪ Accounting balances and final transactions transferred to production system (cutover)

■ The **Final Preparation** phase coves the time period prior to go-live. During this phase, the SAP Business One system and the client organization are transitioned into production mode.

■ This includes training end users to use the new system.

■ A decision and date for go-live is agreed with the customer.

■ Accounting balances and final transactions from the legacy system are transferred to the production system. The transfer of the balances takes place before go-live in what is called the "cutover" period.

■ The actual switch to go-live happens at the end of this phase.

Final Preparation - Milestones

| Project Preparation | Business Blueprint | Project Realization | Final Preparation | Go-Live and Support |

The AIP methodology provides a *Phase and Risk Analysis* tool to help you manage the system readiness and cutover activities.

4.1	End user training delivered
4.2	System readiness for go-live confirmed with customer
4.3	Cutover activities completed
4.4	Phase sign-off by customer

■ The AIP includes **four milestones** for this phase:

1. End users must be fully prepared to use the new system. Escalations can occur if end users are not trained in the new system. Depending on the contract terms, end user training is sometimes the responsibility of the customer. Even so, the partner still has a responsibility to assess that users can perform their jobs effectively.

2. System readiness is a key decision that you and the customer make together. Is the system ready for production operations? Everything must be in place: users trained, IT procedures written, backup and recovery tested, external interfaces working, and so on. The AIP methodology provides a *Phase and Risk Analysis* tool to help you manage the system readiness and cutover activities.

3. The third milestone stipulates that all cutover tasks are completed. There are many critical activities that must be completed in a short period of time to transfer operations from the legacy system to the new SAP Business One system, including:

   ■ Import of open transactions from the legacy system

   ■ Entering opening balances from the legacy balance sheet

   ■ Reconciliation of accounting between the legacy system and the new system

   ■ Closing down the legacy system and starting production on SAP Business One

4. The last milestone is the checkpoint for the phase. Sign-off indicates that the customer agrees that all the conditions for go-live have been met. The SAP Business One system can now be put into production, at an agreed time and date.

Go-Live and Support

Key Activities:

- Monitoring of new system in production
- Resolution of outstanding issues
- Handover to customer, partner support organization and to SAP support
- Project review

- **Go-Live and Support** is the final phase in the project. As the name suggests, the newly-built system is now running in production.
- The implementation team should monitor and resolve any critical problems, then hand over the system to the customer team, to the partner support organization, and to SAP support.

Go-Live and Support - Milestones

5.1	SAP Business One system fully implemented and in production
5.2	Sign-off for phase and final project completion
5.3	Review and optimization conference conducted

The new system is now running in production. The AIP includes three milestones for this final phase:

1. Once the new system has been running with no critical issues for a designated period of time, you should hand over the system to your support group, and to SAP support. It is a good idea to provide your support staff with the documented Business Blueprint. At the same time you must ensure that the customer can manage the day to day administrative tasks such as backup.

2. The second milestone marks the closure of the project. In this sign-off, the customer is acknowledging and accepting the system in production.

3. The final milestone is met when a "Review and Optimization" conference takes place, to review how well the project went. The sales account manager and the sponsor from the customer side should attend. This meeting also provides an opportunity to plan for a further phase or additional enhancements.

AIP Project Plan in Microsoft Excel

- Project plan provided with AIP methodology

- In Microsoft Excel

- Master document for the AIP phases, tasks, milestones and best practices

		Task Description	Startdate	Enddate	Status
0	**Project Handover**				
0.1	**Dependencies**		1/0/1900	1/0/1900	0%
1	**Project Preparation**				
1.1	**Internal prep**		1/0/1900	1/0/1900	0%
1.1.1		Conduct handover with sales team			0%
1.1.2		Allocate project resources (partner side)			0%
1.1.3		Create high-level project plan (outline)			0%
1.1.4		Conduct Initial planning call with client team			0%
1.1.4.1		Confirm project scope with the client			0%
1.1.4.2		Identify project team members (client side)			0%
1.1.4.3		Confirm availability of hardware and software to be provided by client			0%
1.1.4.4		Derive project timelines and project tasks for the project plan (with client)			0%

- A complete project plan is provided with the AIP implementation methodology. The project plan is in Microsoft Excel, and you can easily adapt the plan to your needs.

- This plan serves as the master document for the AIP phases, and contains all the required tasks, milestones and best practices.

- You can use the plan to assign tasks and manage task status.

AIP Project Plan - Embedded

Administration > System Initialization > Implementation Center > Implementation Project

Template plans available in all supported languages:

- Detailed (all AIP phases)
- Narrowed (configuration-only phases)
- Pre-configured (Starter Package)

Can also create own plans from scratch

- The same project plan is also embedded in the SAP Business One application at release 9.0 and above. You can access this plan from the *Implementation Center* menu.

- There are three template project plans available, in all languages supported by SAP Business One:
    - Detailed project plan. This plan allows you to manage an implementation based on the five phases defined in SAP's Accelerated Implementation Project (AIP) methodology.
    - Narrowed project plan. This plan contains tasks for just the configuration phases of the Accelerated Implementation Project methodology.
    - Pre-configured project plan. This plan contains the necessary tasks to manage an implementation based on the entry-level SAP Business One Starter Package.

- You can edit the plan templates as needed, or create your own plans based on a template, or you can create a new blank project plan and add your own tasks.

AIP Project Plan – Embedded (Cont.)

***Administration > System Initialization > Implementation Center >
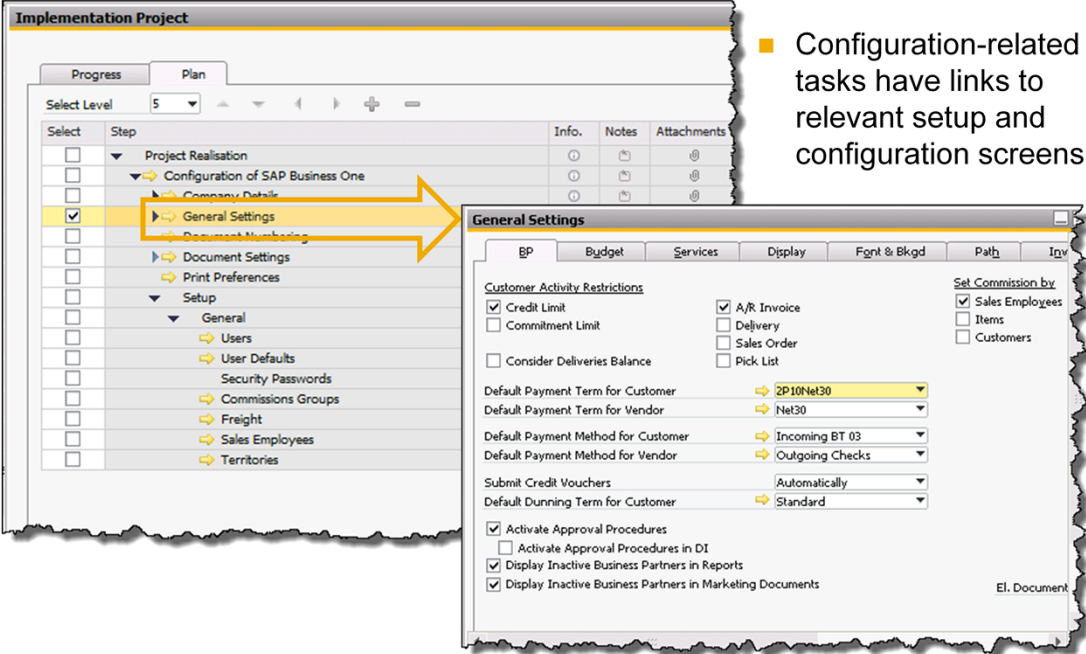Implementation Project***

- Embedded plan can be used by multiple consultants and customer project team members

- Can attach project documents, information and notes to any task
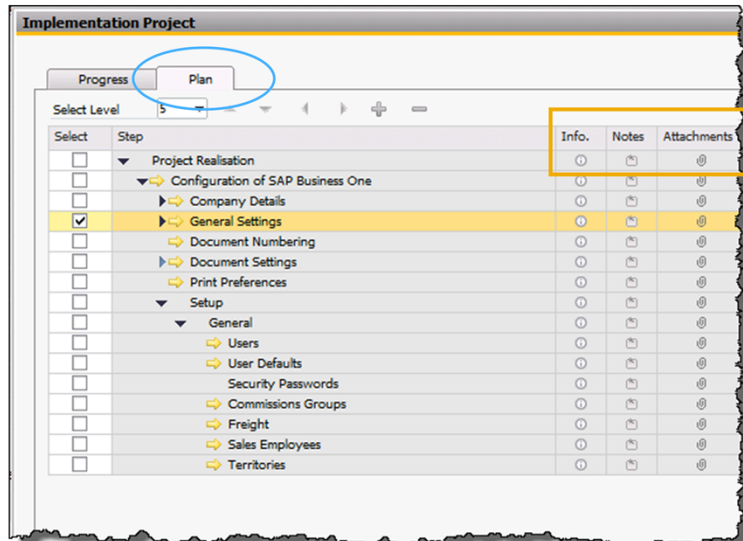
- There are some advantages in using an embedded project plan. You can maintain the plan at the customer site, enabling multiple consultants to share the plan, including customer project team members. Each person on the team and can view their required tasks with completion dates.

- On the *Plan* tab, you can also attach project documents and notes to any of the tasks. This is a very useful way of storing project files and sharing them with the project team members.
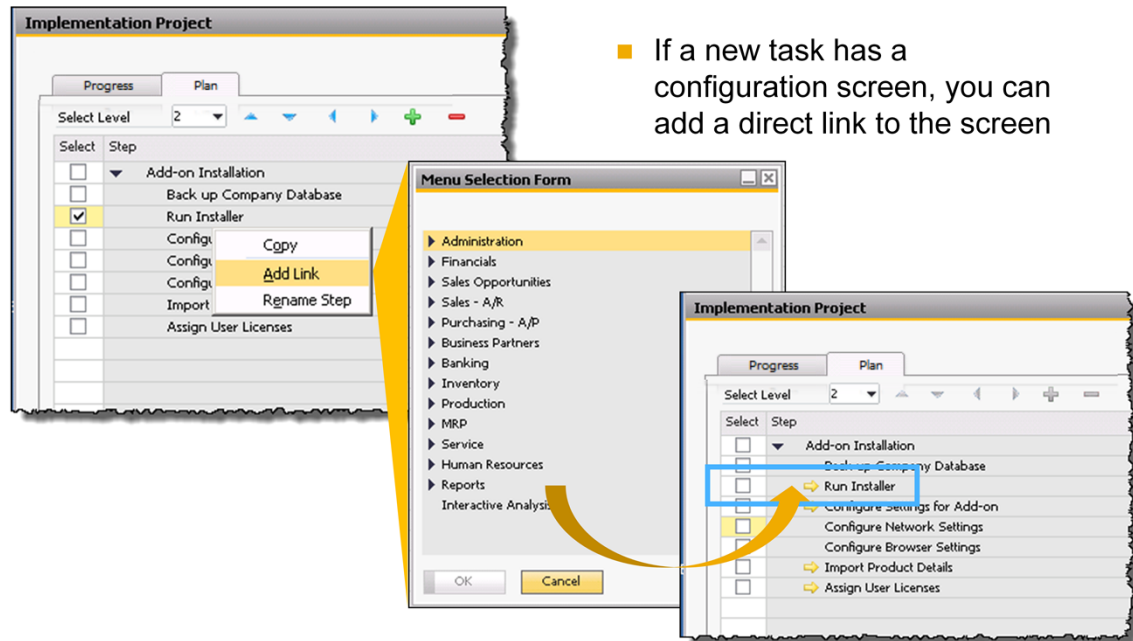
Integration with Configuration Screens

■ Configuration-related tasks have links to relevant setup and configuration screens

■ The embedded project plans contain links to the relevant SAP Business One configuration screens.

■ In the example shown, when you select the link arrow for the task "General Settings", the *General Settings* window automatically opens.

■ As you can imagine, this can speed up the time for a consultant to make the configuration settings. Once the setting is done, the consultant can then select the task complete checkbox to indicate as a record that the configuration is done.

Embedding Links for a Task

- If a new task has a configuration screen, you can add a direct link to the screen

- When you add a new task to an existing plan, or to a new plan, you have the option to add links to related configuration screens. This is useful if you have an add-on as part of the solution – you can add tasks for installing the add-on and provide links to the configuration of the add-on.

- To add a link to a task:
  - First, select the checkbox for the task.
  - Next, right-mouse click and choose *Add Link* from the context menu.
  - In the *Menu Selection Form*, you can select the appropriate menu item from the SAP Business One menu. You can select an existing SAP Business One menu item, or new menu items that you created using the Software Development Kit.
  - After you make a selection, the orange link arrow appears to the left of the task name.

Agenda

- Methodology
- **Tools, Templates and Documents**

The second part of this topic looks at the tools, templates and documents that support the AIP methodology.

AIP Methodology – Tools, Templates and Documents

	Pre sales / Project Preparation	Blueprint	Realization	Final Preparation	Go Live & Support
Business Process Analysis	▪ Pre-Sales Analysis ▪ Handover from Sales	▪ Blueprint Process questions ▪ BPML tool ▪ BPML User guide	▪ Data Migration guide	▪ Data Migration guide	
Configuration / Infrastructure / Testing	▪ Software Delivery receipt	▪ Blueprint Configuration ▪ Data Migration Assessment ▪ Data Migration guide	▪ Blueprint Configuration ▪ Migration Object list ▪ BPML tool ▪ Test Strategy guide ▪ Test Cases		
Project Management	▪ Kickoff Meeting presentation ▪ Service Level Agreement	▪ Training guide ▪ Change Request form	▪ Change Request form ▪ Training Plan by Role ▪ Training guide ▪ Issue and Change log	▪ Training Plan by Role	
	▪ Project Plan ▪ Meeting Agenda ▪ Meeting Minutes ▪ Phase and Risk Analysis tool ▪ Phase Sign-off				

- ■ The downloaded AIP materials include tools, templates, and documents organized according to each phase and by purpose:

  - ■ **Business Process Analysis tools and templates** are provided for pre-implementation scoping and fact finding, for gathering detailed business process requirements, and for gathering data migration requirements. A Business Process Master List (BPML) tool is provided for defining complex processes and roles. A Data Migration Guide provides a step-by-step approach to data migration and can be used in multiple phases.

  - ■ **Configuration, Infrastructure and Testing tools and templates** are provided to record the handover of software to the customer, and to document the setup and configuration. A tracking spreadsheet tool is provided for object migration. Sample test cases are provided in a spreadsheet, along with a Test Strategy guide.

  - ■ **Project Management tools and templates** include a PowerPoint template for the initial kick-off meeting with the customer, and a sample Service Level Agreement (SLA). You can use the Training Guide as a reference for planning training during the implementation. Also supplied is a Change Request form and a change/issue log for managing issues during the implementation. The final tool worth a mention is the Phase Sign-off form. You should use this to get customer sign-off for a key deliverable or phase in order to keep the project on track.

- ■ A selection of the tools, templates and documents are explained next.

Kick-off Meeting Template

Recommended agenda and content for initial kick-off meeting with customer:

Agenda

1. Introduction and Project Goals
2. Project Timeline
3. Project Team Organization
4. Project Scope
5. Project Team Roles
6. Project Procedures

The kick-off meeting with the customer serves as the foundation for the project. The AIP template can help you plan this meeting. The template includes the following agenda:

- Introductions and Project Goals. The goals should summarize your understanding of the customer's goals and the success factors.

- Project Timeline. The plan should inform the customer of the timeline and key events, including project meetings. The plan may be revised later, once the detailed requirements are gathered in Phase 2.

- Project Team Organization. The success of the project depends on participation from the business process owners from each area, as well as the IT administrator.

- Project Scope. Describe how you did the scoping or how you came up with the estimates.

- Project Team Roles and Responsibilities. Team members need to understand the roles and their individual responsibilities as a member of the project team.

- Project Procedures. You should cover project-related administration. For example, space for implementation consultants to work on site, and remote access. You should also cover where project documentation will be stored.

Business Process Templates

> Templates can help you get a high-level picture of the customer's business before the project start, and gather detailed requirements during the Business Blueprint phase.

You can also find templates to help you with the business requirements analysis:

- The Pre-Sales Analysis and the Handover from Sales can be used before the start of the implementation, to get a high-level picture of the customer's business.

- The Blueprint Process Questionnaire and the Data Migration Assessment can be used during the Business Blueprint phase to gather the details of the customer's business processes.

Phase and Risk Analysis Tool

TOPIC	TASKS	ANSW. (YES/NO)	RISK LEVEL (1 to 10)	ACTIVITIES TO MITIGATE THE RISK
Risk Assessment	**Solution**			
	1. The customer's business objectives are unclear, lack detail, or are poorly documented.	No	Fill	
	2. The critical success factors are unclear, lack detail, are poorly documented, or are not available to us.	No	Fill	
	3. The customer has no or very little experience with business management software.	Yes	3	Training
	Product			
	1. The solution will	No	Fill	
	2. There are gaps			Work with add-on vendor
	and the business	Yes	8	
	functional fit, loca			
	external requirem			
	3. Significant dev			
	meet the custome	No	Fill	
	total implementati			
	Customer Develop			
	4. The solution wil			
	or interfaces whe	No	Fill	
	requirements.			
	5. Performance is			
	high number of transactions, product limitations, or volumes are unknown.	No	Fill	
	Commercial			
	1. The customer may be unable or unwilling to meet its financial obligations under the contract.	Fill	Fill	
	2. The consulting estimates and assumptions are not documented in sufficient detail.	Fill	Fill	

- Tool asks a series of critical questions to evaluate and document the risk

- Use the questions as a checklist for reviewing a completed phase, or to anticipate the risk in an upcoming phase

- The *Phase and Risk Analysis* tool can be used in all phases of a project. The spreadsheet contains a worksheet for each of the five phases. The tool asks a series of critical questions and you can assess the risk to the project based on your answer to each question.

- In this way, you can use the questions as a checklist for reviewing a completed phase, or as a checklist for anticipating risk in an upcoming phase.

Business Process Master List Tool

1. Define the users
2. Select the roles
3. Select the processes to be implemented
4. Select the transactions to be used
5. Fine tune authorizations, if needed
6. Assign roles to the user names
7. Tool provides a default assignment of processes, transactions and authorizations

Elementary Data
- Users — 1
- Roles — 2
- Process — 3
- Transactions — 4
- Authorizations — 5

Manual Assignment
- Assign Roles to Users — 6
- Assign Process to Roles — 7
- Assign Transactions to Process — 7
- Assign Authorizations to Roles — 7
- Assign Authorizations to Transactions — 7

Automatically computed
- Transactions to Roles
- Transactions to Users
- Authorizations to Users
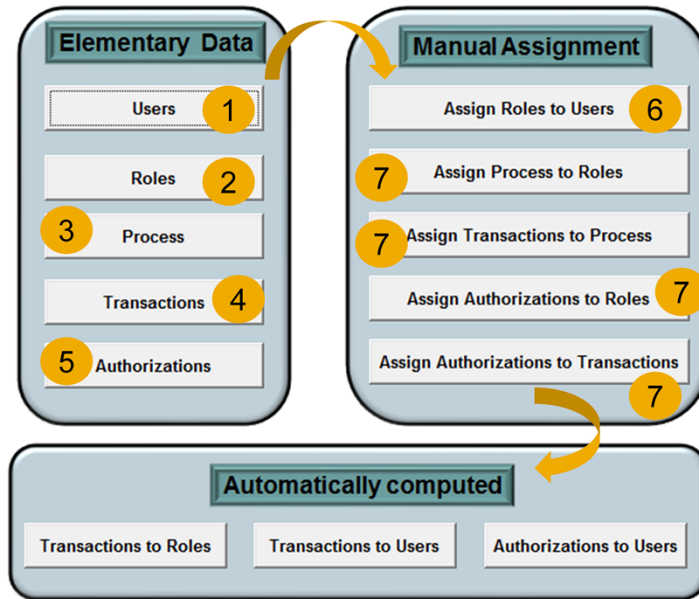
- The *Business Process Master List* (BPML) tool is recommended for larger companies with many users. It helps to define complex job role s and authorizations according to the processes in SAP Business One. Much of the required data is pre-loaded and you need only to:
  - Define the names of the users.
  - Select the roles in use, or define new roles.
  - Select the processes in use, or define new processes.
  - Select the SAP Business One transactions that will be used by the customer, or define new transactions.
  - Fine tune the list of authorizations, if needed,
- Once you have defined the elementary data, you can assign roles to the user names. This assignment automatically associates the processes, transactions and authorizations to each role, so all you need to do is review these assignments and make necessary adjustments.
- For more information, refer to the BPML User Guide provided with the AIP materials.
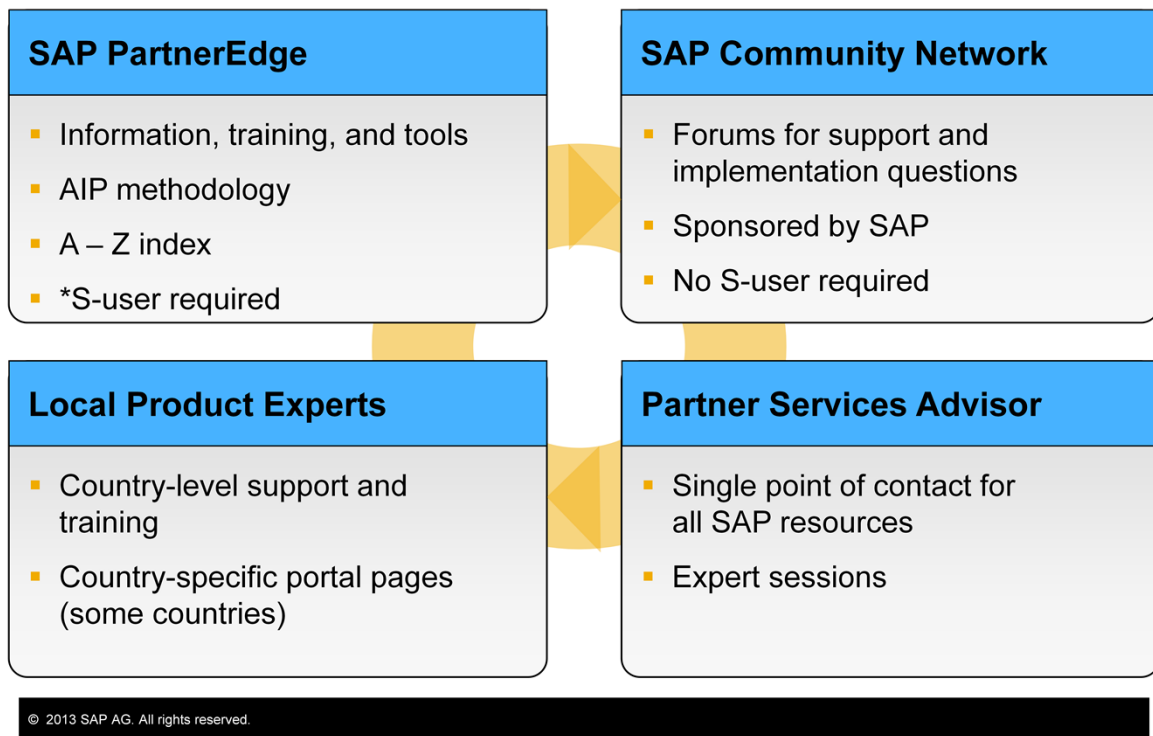
Data Migration Object List Tool

The slide contains a spreadsheet screenshot with columns: Mig, Loc, Include?, Status, Type, Object Menu Path, Object, Data Volume, Input method, Include UDF?, DTW Template Path, Legacy System Source

Mig	Loc	Include?	Status	Type	Object Menu Path	Object	Data Volume	Input method	Include UDF?	DTW Template Path	Legacy System Source
Y		Y	In Progress	Master	Financials | Cha	Chart of Accounts	500	Predefined or DTW	N	Financials | Chart of Accounts | OACT - ChartOfAcc	accounting package
				Master	Financials | Bu	Budget Scenarios		B1 client		Financials | Budget Setup | Budget Scenarios | OE	
				Master	Financials | Bu	Budget Distribution		B1 client		Financials | Budget Setup | Budget Distribution |	
				Master	Financials | Bu	Budget		B1 client		Financials | Budget Setup | Budget | OBGT - Budg	
Y				Master	Business Partne	Business Partner Master Data	50,000	DTW		Business Partners | Business Partner Master Data	
Y	Y			Master	Business Partne	Deduction Tax Hierarchies		DTW		Business Partners | Deduction Tax Hierarchies | O	
				Trans.	Banking | Incom	Incoming Payments		DTW		Banking | Incoming Payments | Incoming Payment	
				Trans.	Banking | Outg	Outgoing Payments		DTW		Banking | Outgoing Payments | Outgoing Payments	
				Trans.	Banking | Incom	Payments Drafts		DTW		Banking | Incoming Payments | Payments Drafts |	
				Trans.	Banking | Outg	Checks for Payment		DTW		Banking | Outgoing Payments | Checks for Paymen	
						actions		DTW		Banking | Bill of Exchange | Bill of Exchange Trans	
							10,000	DTW		Inventory | Item Master Data | Inventory | Item Ma	
						log Numbers		DTW		Inventory | Item Management | Batches | Busines	
								DTW		Inventory | Inventory Transactions | Goods Receip	
								DTW		Inventory | Inventory Transactions | Goods Issue |	
								DTW		Inventory | Inventory Transactions | Inventory Tran	
						ances		DTW		Inventory | Inventory Transactions | Inventory Post	
								B1 client		Inventory | Inventory Transactions | Inventory Reva	
								DTW		Inventory | Price Lists | Price Lists | OPLN - PriceLis	
								DTW		Inventory | Price Lists | Special Prices | Special Pri	
								DTW		Inventory | Pick and Pack | Pick List | OPKL - PickLis	
								DTW		Production | Bill of Materials | OITT - ProductTrees	
								DTW		Production | Production Orders | OWOR - Productio	
								B1 client		MRP | Sales Forecast | OFCT - SalesForecast.xlt, FC	
								DTW		Service | Service Call | OSCL - ServiceCalls.xlt , SCL	
						Card		DTW		Service | Customer Equipment Card | OINS - Custon	
								DTW		Service | Service Contract | OCTR - ServiceContracts	
						ions		DTW		Service | Knowledgebase Solutions | OSLT - Knowl	
								DTW		...ces | Employee Master Data | HEM	
										OHTM - Teams.xlt, HT	

- Document data migration requirements and data volumes during Business Blueprint phase
- Tool shows options for migrating each object
- Track the migration of each object during Project Realization

- The *Data Migration Object List* can be used to document the data migration requirements and data volumes from the legacy system, during the Business Blueprint phase.

- The tool shows the input method options for migrating an object. For example, some objects can be easily entered manually, whereas high volume master data should be imported using the Data Transfer Workbench.

- Lastly, you can use the tool to track and sign-off each object after migration, during the Project Realization phase.

Resources

SAP PartnerEdge	SAP Community Network
▪ Information, training, and tools ▪ AIP methodology ▪ A – Z index ▪ *S-user required	▪ Forums for support and implementation questions ▪ Sponsored by SAP ▪ No S-user required
Local Product Experts	**Partner Services Advisor**
▪ Country-level support and training ▪ Country-specific portal pages (some countries)	▪ Single point of contact for all SAP resources ▪ Expert sessions

■ SAP provides various resources to help you as an implementation consultant. Going clockwise from left to right, the resources are:

  ■ The **SAP PartnerEdge** at *http://service.sap.com/smb*. Note that you need a user ID (the S-number), which authorizes you to the services on the portal. You can download the AIP methodology materials from here, as well as free training courses.

  ■ The **SAP Community Network** is a series of forums sponsored by SAP where you can post implementation questions and have them answered by other partners.

  ■ A **Partner Service Advisory** (PSA) organization provides you with a single point of contact to all SAP resources and provides guidance and advice to implementation partners. The Partner Services Delivery also facilitates enablement sessions on a variety of topics for implementation consultants.

  ■ Most countries have a country product specialist (**Local Product Expert**) who is an expert in the SAP Business One product and the requirements of your localization. There are also country-specific portal pages for many countries.

■ *Every employee from an SAP Business One partner should get a personal user ID. If your organization has signed SAP's partner agreement, one person from your organization will be authorized to request a user ID for you from SAP. You can use a Single-Sign-On passport to log on to the portal. Note: If you do not know who your super-administrator is, contact your local support office (see *http://service.sap.com/local-support*) or send an e-mail to *support@sap.com.*

Key Points

Key points from this topic:

- SAP's Accelerated Implementation Program (AIP) is a proven methodology for an SAP Business One implementation.

- The AIP methodology divides an implementation into phases. These phases cover the period from the *handover from the sales team* to right before the *handover to the support organization*.

- The phases are: Project Preparation, Business Blueprint, Project Realization, Final Preparation and Go-Live and Support.

- The project plan is the master document for the AIP methodology.

- The project plan is available as a template in Microsoft Excel format. Several plan templates are also provided in the Implementation Center in SAP Business One. An embedded plan can be shared by the customer team, and you can store project attachments.

- You can create a new plan based on one of the template plans, or add a new plan with your own tasks.

- Here are some key points to take away from this session.

  - SAP's Accelerated Implementation Program (AIP) is a proven methodology for an SAP Business One implementation. It is based on the practical experiences of SAP and many partners.

  - The AIP methodology divides an implementation into phases. These phases cover the period starting with the *handover from the sales team* to right before the *handover to the support organization*:

    – Project Preparation: The project plan is created for the implementation. A kick-off meeting is held with the customer, and the software is delivered.

    – Business Blueprint: The focus is on analyzing the customers business processes and requirements, and mapping them to a solution.

    – Project Realization: The heart of the project where the company is configured to match the business blueprint. Testing also takes place.

    – Final Preparation: The focus is on preparing for go-live. The go-live date is set, the users are trained, and the final balances transferred over.

    – Go-Live and Support: After go-live the customer moves into support mode.

  - The project plan is the master document for the AIP methodology. Since the plan is based on SAP's experience plus the experience of many partners, you can ensure that no critical tasks are missed.

  - The AIP project plan is available as a template in Microsoft Excel format. Several plan templates are also provided in the Implementation Center within SAP Business One. An embedded plan can be shared by the customer team, and you can store project attachments in the plan.

- You can create a new plan based on one of the template plans or you can add a new plan in SAP Business One, with your own tasks. You can add drill-down links to new tasks if there is an applicable menu screen.

Thanks!

You have completed the topic for the AIP
Implementation Methodology.

Thank you for your time!

You have completed the topic for the AIP Implementation Methodology. Thank you for your time!