



CRPs: Myth, Method or Madness?

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OATC, Inc.

VOUG & ESOAUG Fall Meeting

October 13, 2010



Agenda

- Introductions
- CRP Method
 - Phase Highlights
 - Project Management Status Reporting
 - Sample Project Status Report
- Questions/Open Discussion

Introductions



“OATC”- Oracle Applications and Technology Consulting

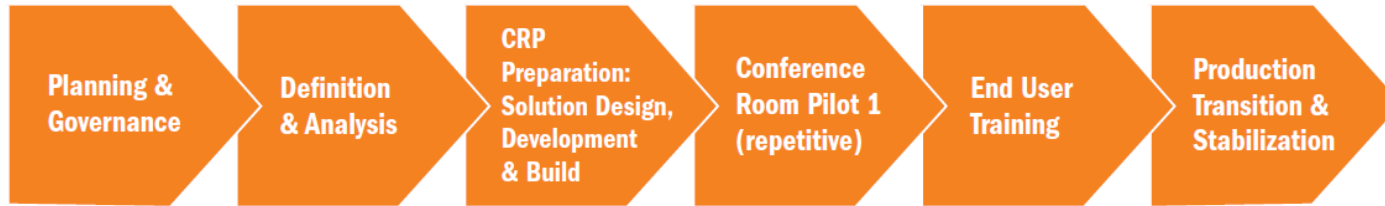
- www.oatcinc.com - visit us!
- Founded in August 2002 by Bill Dunham, renowned Oracle Applications and Technology consultant
- Focus on Oracle application and technology projects & support; *implementations, upgrades, and custom projects*
- Enterprise applications and technology advisory services
- Superior Project Managers , Functional & Technical consultants, DBAs
- Our resources have:
 - Many years with Oracle Applications (*starting with MPL 7*)
 - Many years experience with Oracle technology, since 4.x
 - Involved with many successful 11i & R12 projects of varying sizes from small to large teams, single to multiple locations
 - We are co-authors of two Oracle Application 11i books
 - Author of many Oracle application and technology whitepapers
 - Presenters at many Oracle Applications User Groups and Oracle OpenWorld conferences

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“It took us five days to figure out how to finish our project two days early. That’s why we’re three days late.”

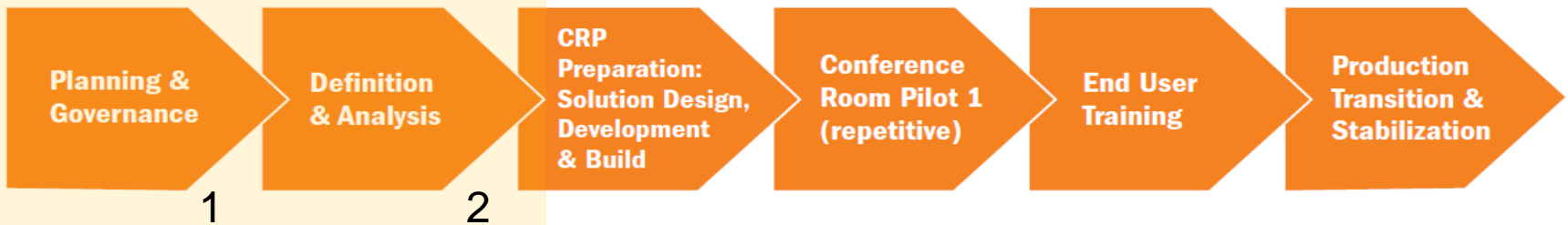
CRP METHOD



Overview of CRP Method phases and activities

“
Using CRPs offers multiple iterations of testing, as well as opportunities to get the project team engaged and users involved by participating in testing.
”

CRP Method: Phases 1 & 2



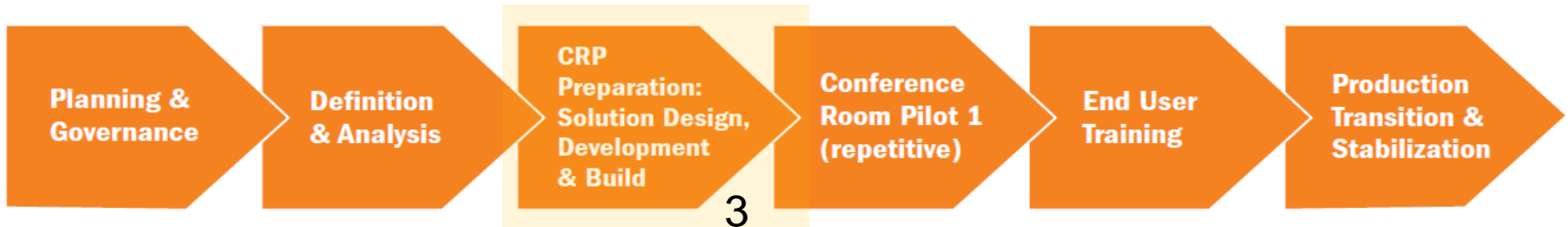
■ Planning and Governance

- Project Planning
- Project Management deliverables; High Level Plan, PM Procedures, Customization Strategies, Project Organization and other strategies as needed
- Install and setup hardware and sandbox apps if applicable

■ Definition and Analysis

- Formal Project Kickoff
- Perform initial Technical Activities (installation/upgrade)
- Business Requirements Defined/Updated (see next slide)
 - Business Processes/Test Scenarios
 - Catalog/organize Customizations/Extensions (CEMLIs)

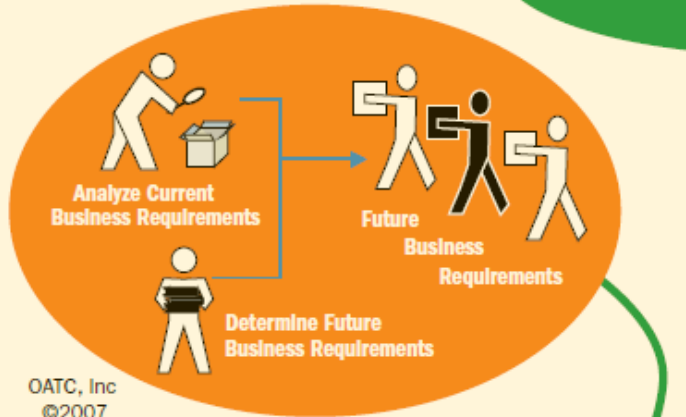
CRP Method: Phase 3



■ Solution Design, Dev. And Testing Preparation

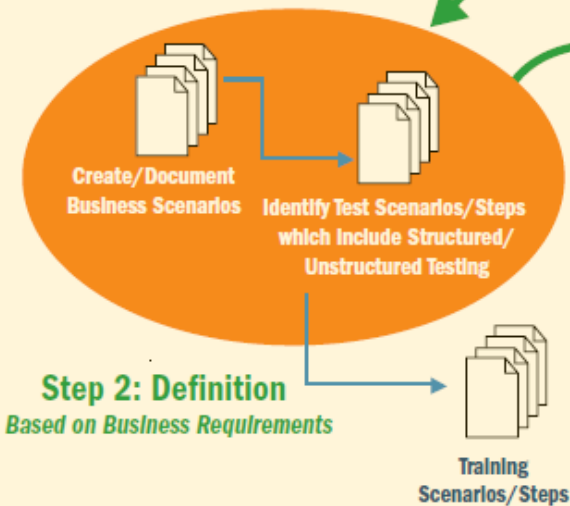
- PreCRP activity – internal team only
- Create Test Scenarios (review existing and update accordingly for new release)
 - Structured vs. unstructured testing
- Create Master Test Plan for CRP 1
- Readiness Checks, formal/informal

STEPS OF THE CRP METHOD



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Step 1: Identification *Identify Business Requirements*



Step 2: Definition *Based on Business Requirements*

Step 3: Execution *Repeatable CRPs*

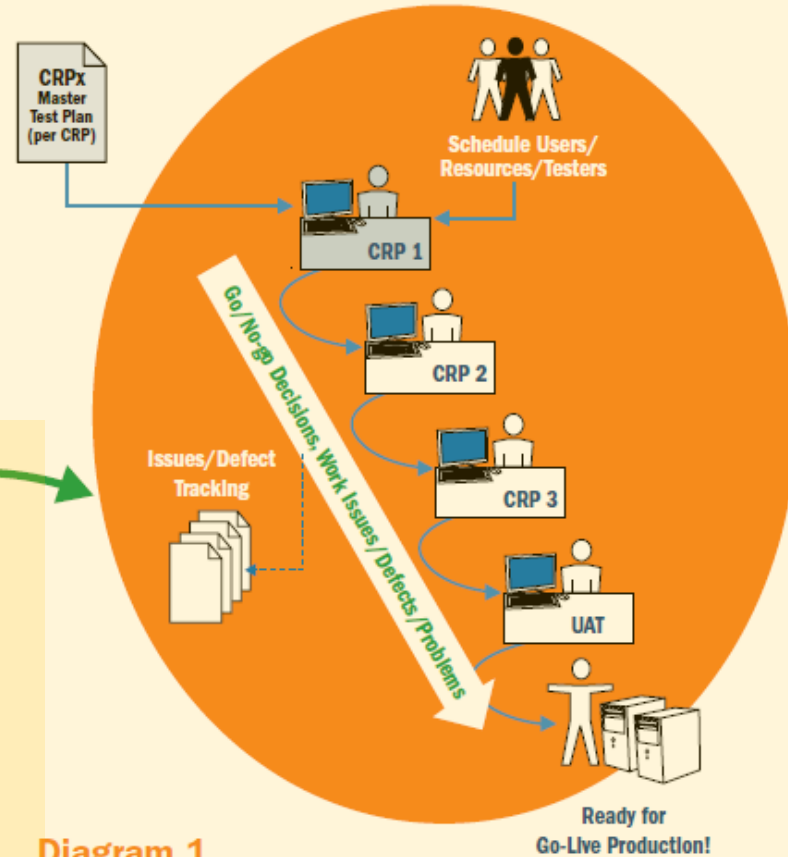
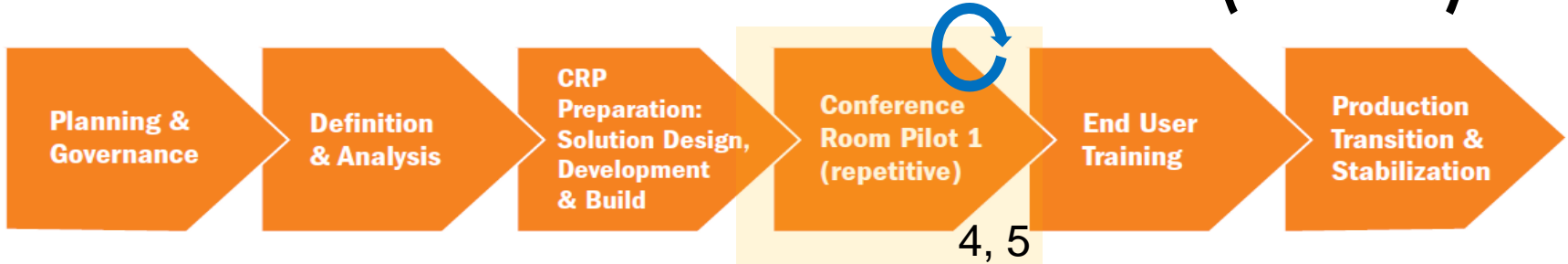


Diagram 1

CRP Method: Phases 4 and 5 (CRPs)



■ CRP 1 (Internal “core team” only) (Phase 4)

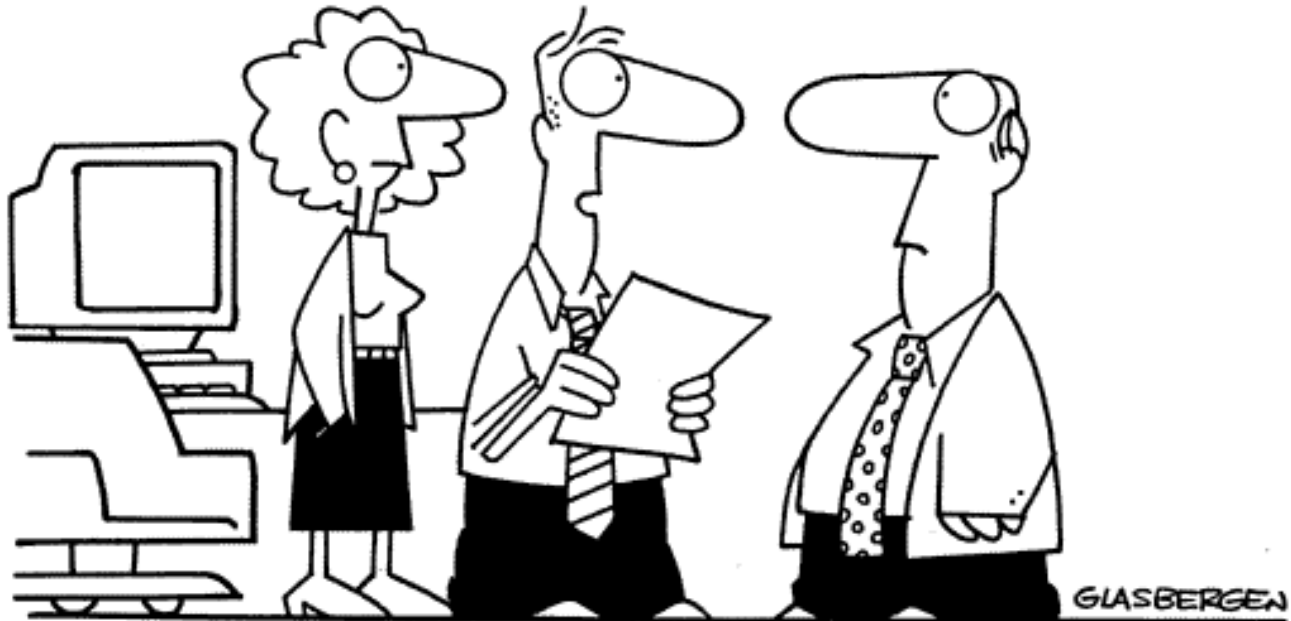
- ❑ Execute test scenarios created in Phase 3 (preCRP)
- ❑ Work issues and problems found during testing – document!
- ❑ Create Master Test Plan for CRP 2

■ CRP 2 (introduce additional testers) (Phase 5)

- ❑ Depending on progress and issues may have multiple iterations

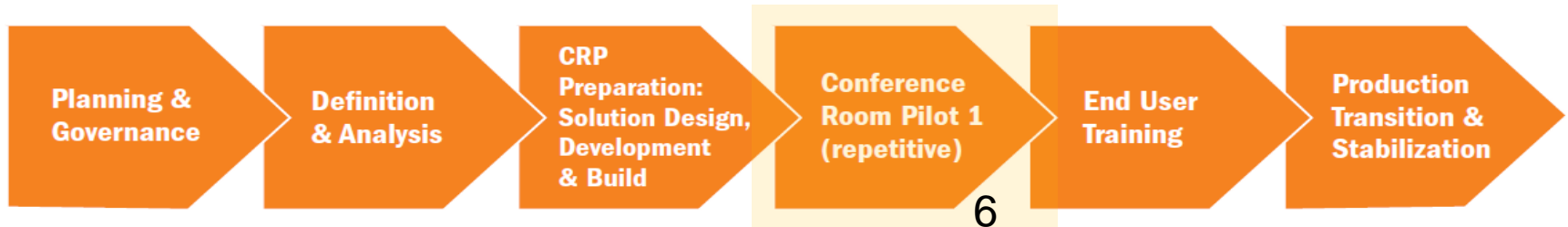
■ Execute Unit and Integration Testing (within phases)

- ❑ Test Business Requirements
- ❑ Update Master Test Plan for UAT
- ❑ Prepare of End User Training



“We were way ahead of schedule, so we revised the schedule. Now we’re way behind schedule because we lost too much time revising the schedule. What we need is a schedule to help us revise our schedules on schedule.”

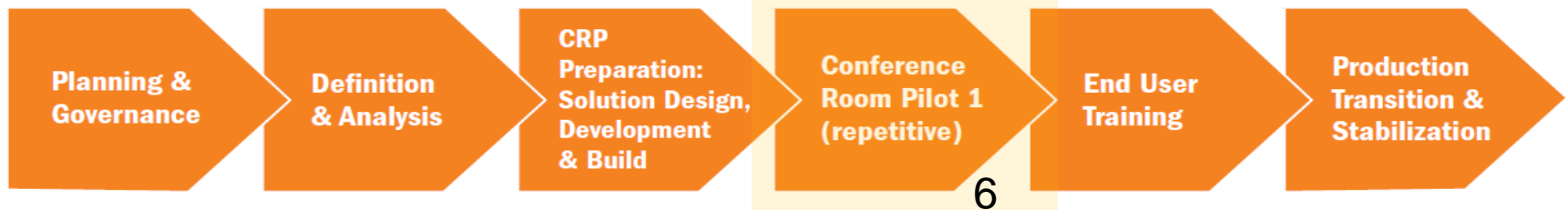
Phase 6 – User Acceptance Testing (UAT)



■ User Acceptance Testing (Phase 6)

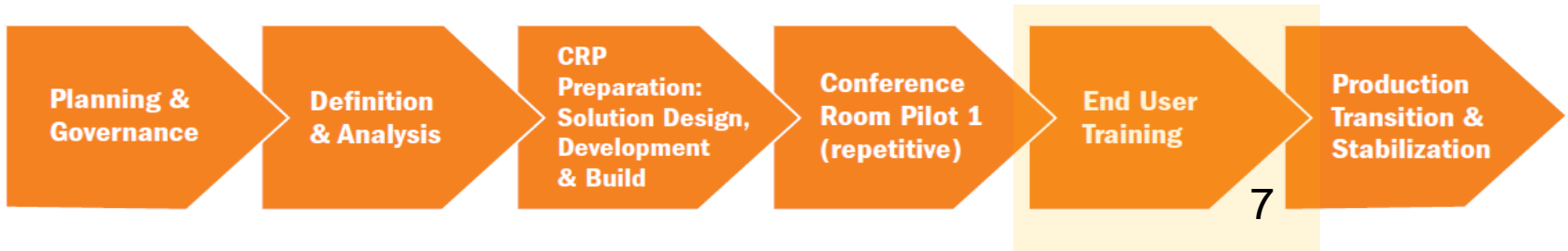
- ❑ Execute test scenarios one last time, sign-off by end users
- ❑ Prepare for transition to new business applications
- ❑ Performance testing as needed
 - Locations, world-wide accessibility and time zone considerations
- ❑ Refine training materials
 - Finalize revisions, published content on internal websites, etc.
- ❑ Finalize end user training schedule

Phase 6 – User Acceptance Testing (UAT)



“
**UAT = user acceptance testing =
sign-off = happy users =
happy management = happy vendor =
SUCCESS!**
”

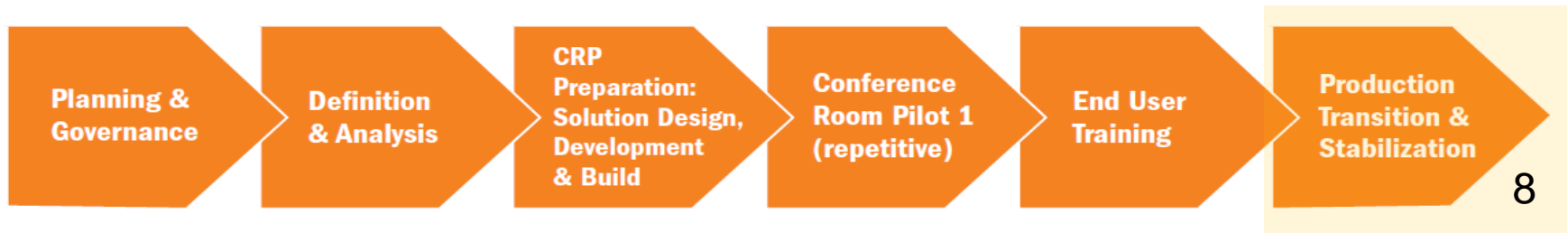
CRP Method: Phase 7 End User Training



■ End User Training

- ❑ Typically a “train the trainer” approach
- ❑ Training conducted by functional leads and various team members
- ❑ Product training from vendor sometimes recommended
- ❑ Use of Readiness Checklists to prepare for Production cutover
- ❑ QA Review and Audit Phase

CRP Method: Phase 8 Prod Transition & Stabilization



■ Production Transition and Stabilization

- ❑ Perform final Production transition steps (transition plan)
 - Final installation or upgrade steps performed
- ❑ “Go Live”
- ❑ QA Review and Audit Phase
- ❑ Production Support and Stabilization Invoked
 - Typically anywhere from 2-6 weeks after go-live
 - When the real work begins!

Project Mgmt: Status Reporting

Project Management Procedures/Project Organization

- Individual Status Reports – weekly
 - Submitted to Project Manager for input into overall status report, all participating team members are required to submit a status report
- Project Status Reports – weekly
 - Overall project status report submitted to steering committee, core team members and other designated stakeholders

Project Mgmt: Individual Status Report

- By team members who have actively worked on project
- Activities completed this week
- Activities planned for next two weeks
- Templates provided

- Depending on progress and issues a daily “two minute drill” status report is submitted via email, containing:
Bullet points of :
 - Good things that happened today
 - Bad things that happened today
 - Brief issues/problems today or which remain open

Project Mgmt: Project Status Report

- Used for overall project status reporting
- Reviewed at weekly status meeting
- Contents:
 - Updated timeline with milestones and completed activities
 - Key Project Indicators: Budget, Schedule, Scope, Service Requests
 - Open Project Issues by Severity
 - Open Service Requests by Severity
 - Top 10 issues (as needed)
 - Written high-level status, executive summary
 - Completed activities this week by team member
 - Complete activities planned for next two weeks
 - Links to Open Issues and Vendor Service Requests details

Project Mgmt: Status Report Sample

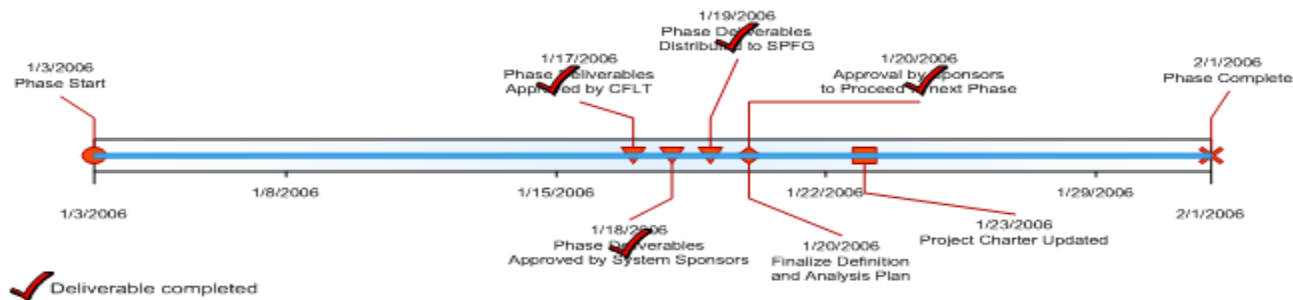
Period Ending : January.27., 2006
Project Name: Oracle Applications Upgrade
Project Manager: Bill.Dunham Ph:

Rep No: 002

Distribution List:
Steering Committee:
System Sponsors:
Cross.Functional.Leadership.Team:
Audit:
Corporate Communications:

Project File

1) Project Status Overview



2) Key Project Indicators

+ Project to date (Current)

Indicators	Status	Support
Budget:	■	
Schedule:	◆	Minor items remain open and are discussed below. Not critical items as they relate to this Phase.

Estimate to Complete (Future)

Indicators	Status	Support
Budget:	◆	Overall project funding pending approval.
Schedule:	◆	Schedule for future phases set due to issues related to Oracle post 12/06 support.

Project Mgmt. Status Report Sample

2) Key Project Indicators

Project to date (Current)			Estimate to Complete (Future)		
Indicators	Status	Support	Indicators	Status	Support
Budget:	■		Budget:	◆	Overall project funding pending approval.
Schedule:	◆	Minor items remain open and are discussed below. Not critical items as they relate to this Phase.	Schedule:	◆	Schedule for future phases set due to issues related to Oracle post 12/06 support.
Scope:	■		Scope:	■	
Oracle Support:	■		Oracle Support:	■	
Issues:	■		Issues:	■	

■ positive, on plan no impact
 ◆ some issues, minor/moderate impact
 ⊗ negative, moderate/major impact

2) Key Project Indicators (continued)

Category	Previous Period	New (+)	Closed (-)	Total Outstanding
Issues/High Priority	4	0	1	3
Issues/Other (+)	16	0	2	14
Risks	0	0	0	0
TARs	5	0	0	5
<i>Totals</i>	25	0	3	22

[Issues/High Priority Details \(click on link for details\)](#)

Priority	Issue Description
1. High	32802-How do we work MH
2. High	34291-Compliance support of release 11.03 past Oracle desupport dates.
3. High	34366-Lack of technical experience doing an upgrade

Project Mgmt: Status Report Sample

3) Project Status

Overall: The progress of this phase continued with the sign-off of the Project Charter items by the Cross functional team members this week. The following documents were accepted Project Charter: Objective, Assumptions and Constraints, Strategy to Achieve Objectives, Scope, Project Organization, Project Dependencies, Critical Success Factors, and Measuring Success. Issues remain stable with 3 high priority items open and being worked on. Communication of the project to the Sponsor Program Focus Group continues with a presentation of the High Level Project Plan to the group. There were few questions asked of the group but comments were they felt the overview was informative and helpful. There are four outstanding activities from Phase 1 which have little bearing on progressing to Phase 2. These items support the Schedule indicator of "yellow" below. The approval of the project budget remains an issue which is why the Budget Future indicator is yellow. The "yellow" indicator for the Schedule Future is based on the current interactions with Oracle regarding 11.0.3 support after 12/31/06. This issue being worked and a meeting with Oracle will take next week to clearly understand their position and RF's next move related to this subject.

4) Key Activities for PREVIOUS Week (first report, includes all activities)

Project Management	Team Members
1. Reviewed Planning Phase Deliverables with CFLT <ul style="list-style-type: none"> a. Project Charter <ul style="list-style-type: none"> • <i>Deliverables reviewed and approved: Objective, Assumptions and Constraints, Strategy to Achieve Objectives, Scope, Project Organization (which has already been reviewed and revised), Project Dependencies, Critical Success Factors, and Measuring Success</i> 	M.Reagan, J.McDermott, M.Bartoletti, B.Teliska, P.Kelly, J.Kramer, B.Ramage
2. Corporate Infrastructure <ul style="list-style-type: none"> a. IS Procedures defined 	B.Dunham
3. Participated at Sponsor Program Focus Group meeting reviewed Oracle Upgrade Project high-level Phase diagram.	
Functional Activities	
1. Continued with ICE Project Activities 2. Phase 1 Charter deliverables, reviewed, updated and approved by CFLT	M.Reagan, J.McDermott, M.Bartoletti, B.Teliska, P.Kelly, J.Kramer, B.Ramage
Technical Activities	
3. Continued work on Master Customizations Catalog, estimating and categorizing. 4. Preliminary Oracle Applications 11i upgrade performed. Attempt was successful given it was the first pass. Documented effort and will leverage for second pass.	P.Manley, I.Paris, G.Peloquin J.Saunders (DBA), W.Winslow, J. Busdiecker



QUESTIONS/OPEN DISCUSSION