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Describing Workstreams in Upgrades



Objective

After completing this lesson, you will be able to describe workstreams in upgrades.

Description of Workstreams in Upgrades

Implementation versus Upgrade

As you have learned in the previous lessons, most roadmaps focus on implementation. Nevertheless, you will find variants of the SAP Activate Roadmap methodology for some upgrade scenarios. As of January 2023, there were two upgrade roadmaps available:

- SAP Activate for Upgrade of SAP S/4HANA Cloud, public edition (3-system landscape)
- SAP S/4HANA Upgrade and Product Integration





The first thing that you will notice is the absence of several phases of the SAP Activate Methodology and workstreams. The reason for this is the nature of the product. SAP S/4HANA Cloud, public edition is Software as a Service (SaaS). It doesn't allow you to make any major changes to the product itself.

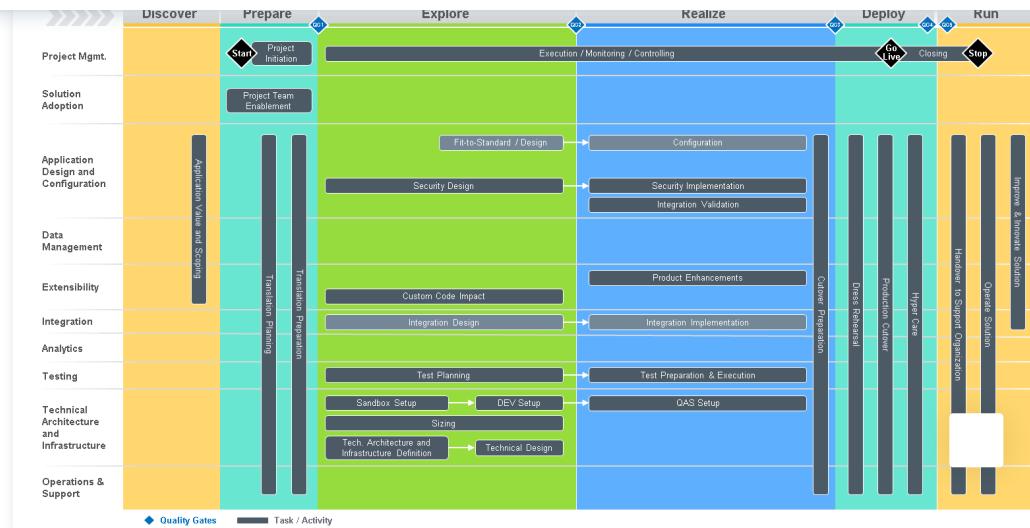
SAP releases new versions of its products at a fast pace. They bring a mix of minor changes and some major innovations, so one typical activity with a upgrade will be the update to existing business roles that grant access to new or changed features.

In the upgrade roadmap for SAP S/4HANA Cloud, you find a critical task during the Realize phase:

Revise Business Roles and Business Catalogs

The purpose of this task is to adapt existing business catalogs and business roles resulting from the addition of new scope items or an upgrade. In SAP S/4HANA Cloud, business catalogs are periodically revised.

Some business catalogs will be deprecated and replaced by new ones. The deprecated business catalogs in the customer system will be removed two releases later. Hence, it is important to review the retired business catalogs after each release and addition of new scope items, and make the necessary changes as soon as possible. You can find more information in the Identity and Access Management Release Activities accelerator.



SAP Activate proposes one common roadmap for all three upgrade scenarios. Even in the simplest scenario for purely technical approach, some activities will be critical. One example is testing (regression testing). You need to do a walkthrough of your existing business processes and interfaces, and verify if they still work. From a practical perspective, testing workstream is always a critical role here, and it can be the most resource and time intensive workstream.

SAP S/4HANA Upgrade and Product Integration Roadmap



If the new release doesn't add much to what you currently have in place, then many activities will be optional. For example, if the screens where you create a purchase requisition still work the same way, the solution adoption workstream doesn't need to address training. That is not true when you have innovations in place.

Other workstreams can play major roles due to the nature and scope of your innovations. For example, if you had SAP S/4HANA running Accounting projects, now your innovations bring extended warehouse management, procurement, and real estate. In this case, you started with an upgrade project, but within that upgrade project you have an implementation project. What do you do? Start with the upgrade roadmap but don't miss the chance to merge it with SAP S/4HANA implementation roadmaps.

Review Upgrade Roadmap Content

Steps

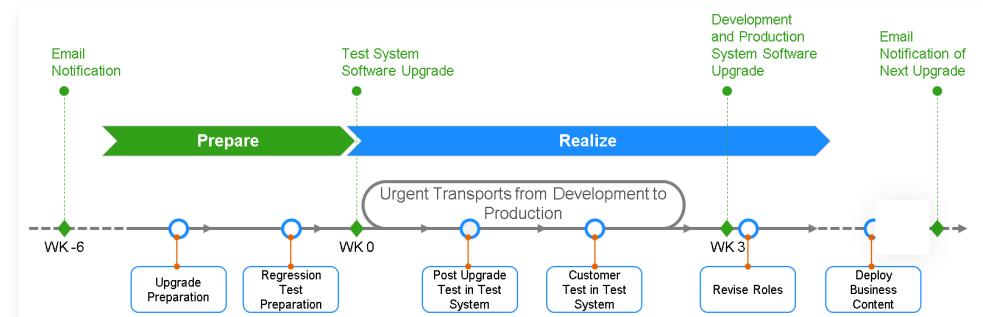
1. Review the content tab for any upgrade roadmap, and comment about the activities listed there.

- a. The answer is in the roadmap description.

Since the product will change in the upgrade, we have activities for test regression, and most likely there will be some changes to existing



edition, and doesn't have any ongoing projects. It can also be used in parallel, or have tasks added to an ongoing new implementation or continuous improvement project. It is recommended to plan an upgraded specific sprint, and have regression tests as part of the sprint."



If you face changes in functionality or while adopting new features shipped with the new release of SAP S/4HANA, you will combine this roadmap with components from the [implementation roadmap](#).

Brainstorming - What if my Project is SAP S/4HANA Cloud, Private Edition?



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Knowledge quiz

It's time to put what you've learned to the test, get 2 right to pass this unit.

1. What are the 3 key pillars of the SAP Activate Implementation Framework?

There are three correct answers.

Methodology

Content

Analytics

Tools

Correct

Correct. The 3 key pillars of the SAP Activate Implementation Framework are Methodology, Content and Tools.

2. Where can we find additional information about SAP Activate?

There are three correct answers.

[SAP Activate Community](#) SAP Learning Hub SAP Cloud ALM **Correct**

Correct. Additional information about SAP Activate can be found in Online Blogs, SAP Activate Community and SAP Learning Hub.

YOUR SCORE

2/2

**You passed
Discovering SAP
Activate**

2 Lessons

55min

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Discovering the Clean Core Concept



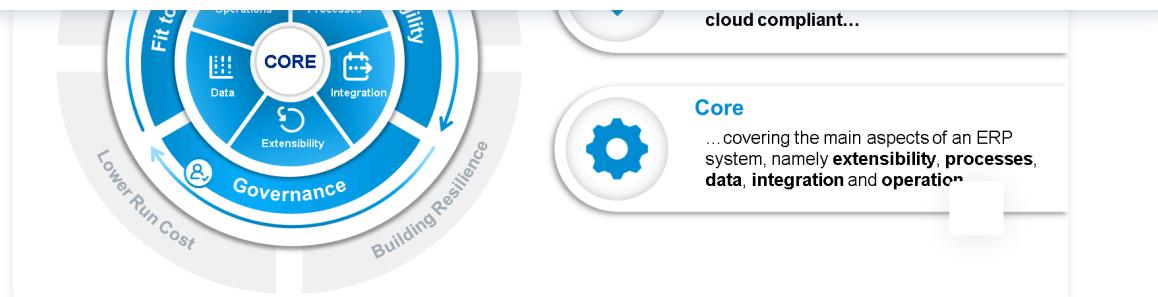
Objective

After completing this lesson, you will be able to describe Clean Core.

Clean Core Overview

To adapt to individual customer needs, the ERP solutions were adapted to a certain extent to fit the business need. This was realized through developments, which allowed customization and could be realized decoupled from SAP. Over the years, the freedom of development led to more effort during upgrades, more maintenance due to required adaptations to the existing development, when changes to the software impacted the custom code. Hence, the freedom of extending introduced disadvantages that led to increased cost. Extensive development is a driver for multiple things, for example, an increased upgrade effort. It also introduces extra maintenance effort to adjust developments and increases the risk of reduced innovation consumption due to custom solution. These disadvantages can be reduced through focus on a clean core, which has a fundament to avoid known custom extension concepts and to adhere to new extensibility concepts.





Clean core paradigm is the enabler for competitive, future-ready business; supporting companies to become innovative, agile, and stay relevant through cloud transformation. Clean core is a mind set and philosophy supported with governance and guidelines that lays a foundation for a flexible future proof solution. It considers a modern approach to extend functionality in a stable, upgrade-safe and transparent manner. Introducing Side-by-Side extension or Microservices, which allow extensibility through multiple platforms spanning from SAP Business Technology Platform (SAP BTP) over Amazon Web Services (AWS) or Google Cloud (GC) beside others.

A clean core allows faster software deployment as well as easier adoption of both. SAP innovations and the regulatory changes to software. It provides new ways to address business needs while avoiding technical debt, thus preparing organizations to maximize strategic benefits and limit cost of transformation.

It drives the adoption and consumption of SAP BTP as the "Platform of Choice" for innovation and development. It reinforces RISE with SAP as the catalyst for starting a Business Transformation Journey.

Clean core spans over multiple dimensions. Software Stack & Core, Process, Integration, Extensibility, Data, and Operations.

Processes, that adhere to clean core leverage Best Practice, reduce variants to the bare minimum and are well documented.

How to achieve a clean core in the dimension of integration? By using SAP standard integration scenarios as exposed in the [SAP Business Accelerator Hub](#), that leverage modern technologies as ODATA, SOAP or Events.

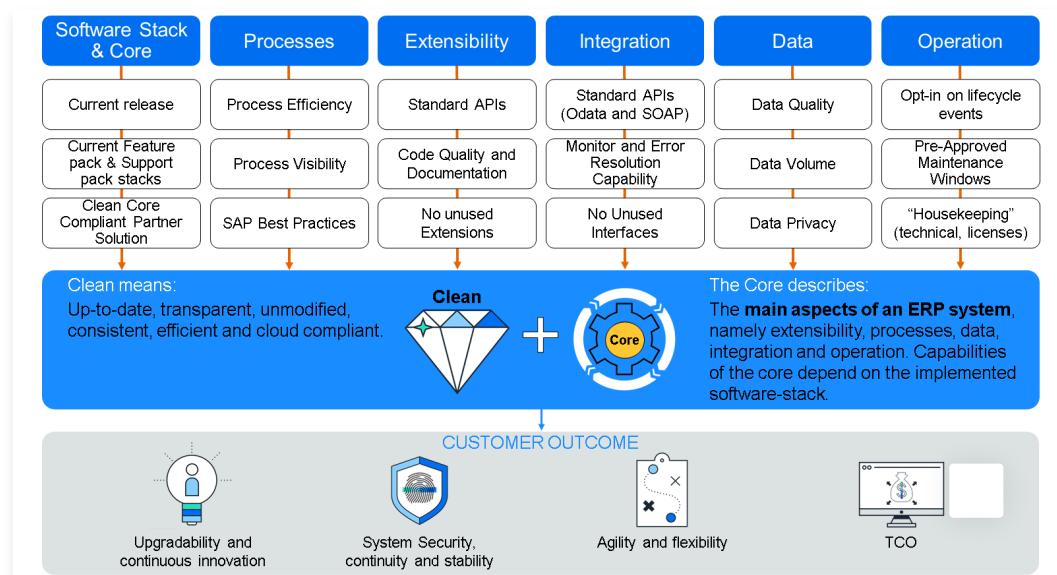
Clean core in the context of Extensibility means that customer extensions are upgrade stable and that custom code and enhancements follow SAP's



the clean core principles, embedding a governance model that considers cloud quality criteria in the End-to-End-lifecycle.



Clean Core: Dimension Details



Keep Software Stack & Core current adhering to the respective release strategy.

When looking at Processes the focus is to cultivate a standard first mind set.

To strive for process efficiency considering industry specific variants and to ensure no inconsistent nor inefficient processes are implemented. As well



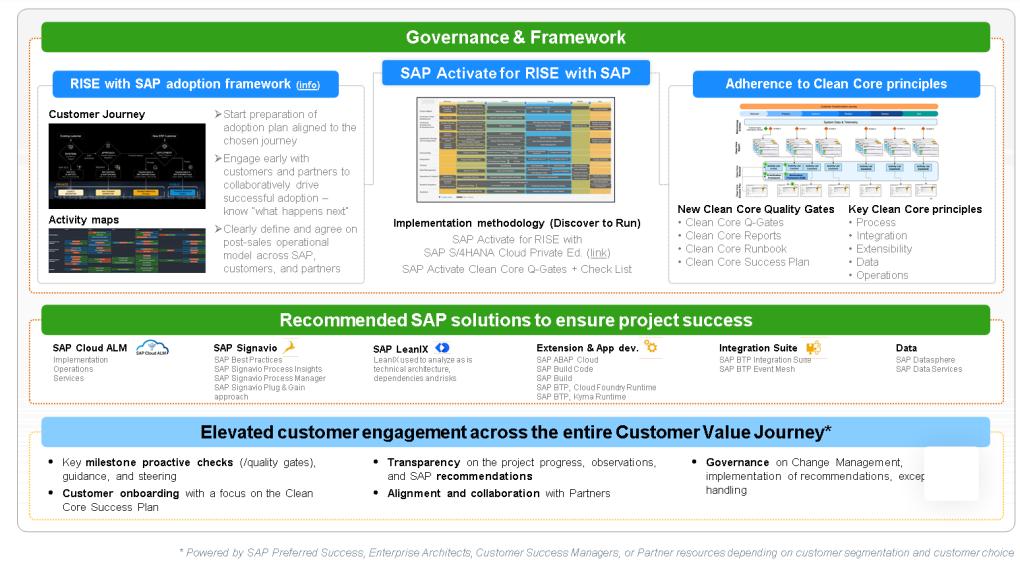
Home / Browse / Courses / Discovering SAP Activate - Implementation Tools and Methodology... described in the [SAP Application Extensibility Methodology \(AEM\)](#).

Leverage integrations where possible based on standard API's, considering proper monitoring and error resolution capabilities.

Under the Data pillar the measures need to be set in place that ensure complete, correct and compliant data adhering to industry standards and legal regulations.

Operations require focus on Solution Documentation, Test Management, and a well-defined Security concept. For example, not having unused authorizations assigned. Batch job Management to avoid performance impact. And to foster continuous Innovation and improvement.

RISE with SAP Methodology: Foundation for Continuous Clean Core Adherence



Clean core principles are embedded in Governance & Framework of the RISE with SAP Methodology.

Being anchored with quality gates, it ensures the application of this philosophy in the implementation life cycle.

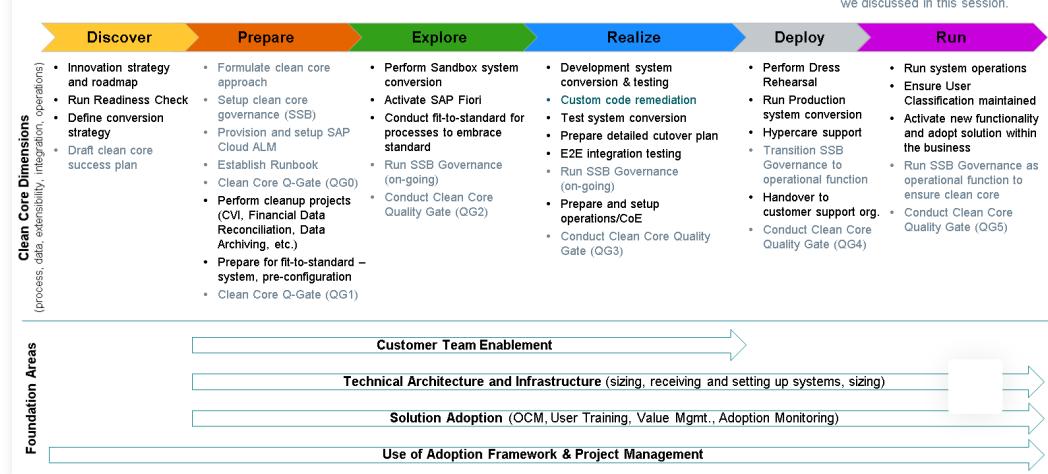
To find more details for each of the quality gates, follow these links:

- [Clean Core Quality Gate 1](#)
- [Clean Core Quality Gate 2](#)
- [Clean Core Quality Gate 3](#)



Methodology Elements Supporting Clean Core Strategy: System Conversion

Blue highlight shows the changes we discussed in this session.



This is an example of select success plan activities with highlights of the new additions to SAP Activate for RISE with SAP related to clean core.

- In Run Establish a continuous 'keep clean' process (governance model.)
- SAP Cloud ALM as operations platform. It provides integrated functionalities for monitoring and alerting and supports SAP's best practice processes for operations.
- Excellent quality of data is one of the key answers to what it means to have a "clean core". However, the impact of bad data quality on various transformational projects, important milestones, such as year-end-closing, and daily business and is-only too often- underestimated.

Further material: Feel free to explore more materials on the blog as well as the learning journey managing clean core for S4HANA Cloud.

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Discovering the Workstreams

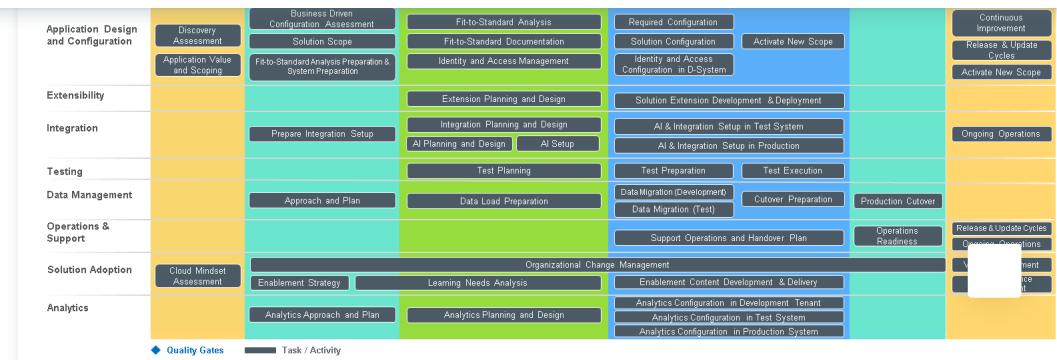


Objectives

After completing this lesson, you will be able to:

- Identify the Workstreams.
- Analyze the project management workstream.
- Discover the design and configuration workstream.
- Illustrate the workstream for analytics.
- Describe the customer team enablement workstream.
- Illustrate the solution adoption workstream.
- Illustrate the extensibility workstream.
- Summarize the testing workstream.
- Illustrate the integration workstream.
- Illustrate the operations and support workstream.
- Analyze the data management workstream.
- Illustrate the technical architecture and infrastructure workstream.

Introduction to Workstreams



SAP Activate Methodology proposes a set of workstreams for you to organize your work and establish the team's structure. That doesn't mean that depending on the project, some workstreams cannot be split into sub streams or in some cases, merged.

Each roadmap available has a proposed structure that addresses or emphasizes the specifics of each implementation. Most roadmaps are for implementation projects for different products, some guide you across upgrade projects. One characteristic of the roadmaps is that they are industry agnostic. For those working in SAP implementations, you might remember the model company concept, or if you are currently working with SAP Best Practices, you will find packages specific for the public sector.

One example is for the SAP S/4HANA Cloud Edition, Public Sector.

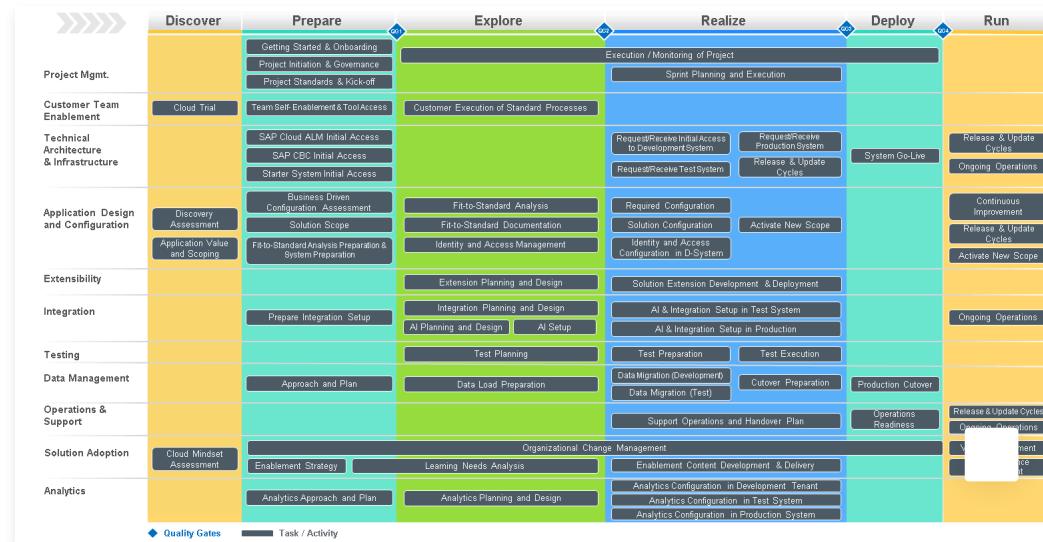
The suggested workstreams are:

- Project Management – Administrative operations, budget control, staffing up, overall control
- Customer Team Enablement – Onboarding processes, solution, and product awareness
- Technical Architecture and Infrastructure – IT design
- Application Design and Configuration – Detailed solution design, configuration, security concepts
- Extensibility – Development of additional functionalities
- Integration – Interface design, communication across applications and businesses
- Testing – Solution validation
- Data Management – Data loading, data cleansing, data lifecycle management



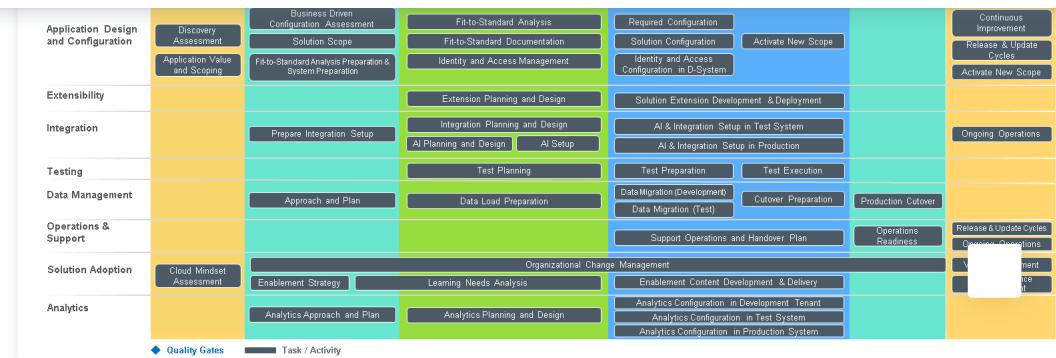


Project Management Workstream



Project Management can be seen as a generic workstream that addresses topics like:

- **Organization** – How to structure the different teams that will take part in the project.
- **Governance** – How to address roadblocks, how to reach consensus, how to escalate.
- **Standards** – What to document, how to document, with what detail, which tools should the team use to document, test, and deploy, how to report and process incidents and change requests.
- **Budget** – How resources should be allocated, how to consider a request for change and its impact.
- **Planning** – How to approach the different project goals, will you use agile or a waterfall approach, most likely a hybrid approach between these two.
- **Signoff** – How to verify if the project is ready to move on (QGates), with which criteria?



Project Governance

Project governance provides a framework in which the project manager and sponsors can make decisions that satisfy both stakeholder needs and expectations and organizational strategic objectives or address circumstances where these may not be in alignment.

© Project Management Institute, Inc. A guide to the project management body of knowledge PMBOK Guide. Sixth edition. 2017.

Project Governance includes:

- Guiding and overseeing the management of project work
- Ensuring adherence to policies, standards and guidelines
- Establishing governance roles, responsibilities and authorities
- Decision-making regarding risk escalations, changes and resources (e.g. team, financial, physical, facilities)
- Ensuring appropriate stakeholder engagement
- Monitoring performance

It is important in any project to have the standard definition of the Project Governance. It outlines the relationship between the different groups and stakeholders involved in the project.

The project governance describes the flow of information between the project and all the stakeholders. It specifies the decision making and escalation steps to resolve issues.



Engage and Maintain a High Performing Team

Enforce Standards, and Accountability

Align Organization

Establish KPIs and Measure

The governance framework has a couple of characteristics that need to be established. It focuses on realizing the business value, managing the risk and issues, and enforcing the standards and accountability for the project.

It needs to be aligned with the governance that the organization already has in place. It also has to ensure that communication and messaging fits the organization and stakeholder needs. Governance needs to be adjusted to each customer. There is no one size that fits all.

SAP provides tools to support the documentation and track the overall progress status. Traditionally, SAP Solution Manager was used but with the advent of cloud-based solutions, SAP Cloud ALM has become more common. For SAP S/4HANA cloud edition it's recommended to use SAP Cloud ALM.

In an on-premise scenario, a project manager most likely will be using SAP Solution Manager to perform its documentation and tracking activities. In a cloud scenario, SAP Cloud ALM will be more common. The trend in SAP is to evolve from SAP Solution Manager to SAP Cloud ALM.

Both tools, SAP Solution Manager and SAP Cloud ALM can provide the single source of truth for the project documentation, for all workstreams. Solution Documentation has now been used for more than 20 years in SAP projects.

This tool's functionality can cooperate with other products, SAP and non-SAP, for different purposes from documentation, testing, process modeling ... one example that is taking a major role in SAP implementations is SAP Signavio.

The Project Manager establishing the governance needs to identify the key players who will be a part of the governance and then build in the



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	Project Management	<ul style="list-style-type: none"> • Project Sponsor • Project Manager • Project Administrator • Quality Manager 	<ul style="list-style-type: none"> • Project Sponsor • Project Manager • Project Administrator 	<ul style="list-style-type: none"> • IT Helpdesk • IT Project Manager • Quality Manager (Project Manager)
	Customer Team Enablement	Education Services Consultant	Trainee	<ul style="list-style-type: none"> • Team Coordinator • Trainer
	Design and Configuration	<ul style="list-style-type: none"> • Business Solution Architect • Application Consulting Lead • Application Consultant • Application Security Consultant 	<ul style="list-style-type: none"> • Business Process Owner • Business Process Expert • Key User 	<ul style="list-style-type: none"> • Business Solution Architect • Internal Application Consultant • Authorizer Expert
	Extensibility	<ul style="list-style-type: none"> • Development Lead • Developer 		<ul style="list-style-type: none"> • Developer • Release Manager • Quality Manager (Extensibility)



SAP Project Roles by Workstream (Continued)



		<ul style="list-style-type: none"> • Data Migration Architect • Data Migration Developer • Data Volume Management Consultant 	<ul style="list-style-type: none"> • Business Data Owner (data custodian) • Data Preparation Expert • Master Data Change Requestor • Master Data Maintainer • Master Data Sponsor 	<ul style="list-style-type: none"> • Data Extraction Expert • DVM AL Process Owner • Master Data Manager (data steward)
	Integration	Integration Development Consultant		Integration Technology SME
	Testing	<ul style="list-style-type: none"> • Automation and Regression • Test Lead • Manual Testers • Performance Tester • Test Case Developer • Test Manager • Test Master Data Coordinator 	Manual Testers	<ul style="list-style-type: none"> • Manual Testers • Test Coordin



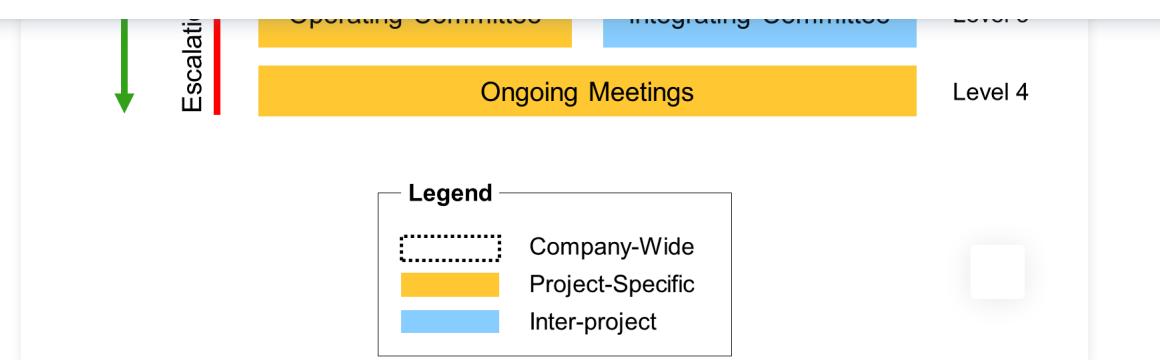
Solution Adoption	<ul style="list-style-type: none">• Organization Change Management Consultant• Value Expert• End User Training Consultant• Training Materials Developer	<ul style="list-style-type: none">• Organization Change Manager• Organization Change Coordinator• End User Training Coordinator• End User Trainer	
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SAP Project Roles by Workstream (continued)



		Business	
Technical Architecture and Infrastructure	<ul style="list-style-type: none">• Technology Architect• Technical Security Consultant• Technology Consultant• Basis Administrator		<ul style="list-style-type: none">• Technology Architect• IT Infrastructure Administrator• Technical SME• Basis Administrator• Database Administrator
Operations and Support	<ul style="list-style-type: none">• Solution Manager Consultant• ALM/CoE Management Consultant		<ul style="list-style-type: none">• ALM Sponsor / Head of CCoE• ALM Process Owner• Service Desk Expert• Service Desk Manager• Solution Manager• Administrator

SAP Project Governance Bodies



• Level 1 - Executive Board

- Sets business vision and goals
- Approves project vision
- Delegates authority to Steering Committee
- Allocates funding for the project

• Level 2 - Steering Committee

- Approves project goals
- Approves project results
- Approves project changes according to delegated authorities
- Delegates authorities to the Operating Committee
- Escalates unresolved issues to the Executive Board

• Level 3 - Operating Committee

- Monitors and coordinates activities in all workstreams of the project
- Delegates authority to Ongoing Meetings
- Escalates unresolved issues to Steering Committee

• Level 3 - Integrating Committee

- Makes decisions on integration and master data management across projects
- Defines integration and controls integration points register
- Defines release strategy across projects
- Ensures integration and consistency between deliverables of several projects

• Level 4 - Ongoing Meetings

- Clarifies ongoing open issues



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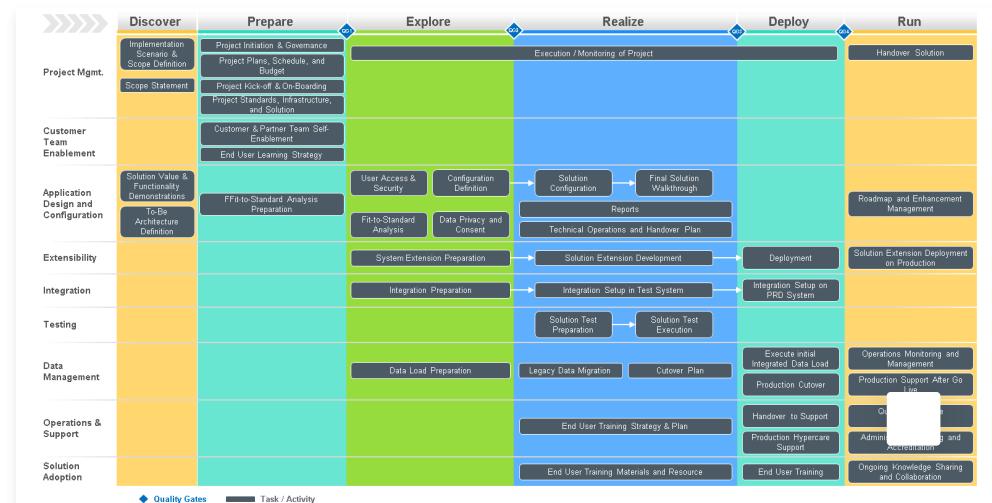


Steering Committee	Project Sponsor, Project Manager, Project Administrator	Project Sponsor (Head), Project Manager, Organization Change Manager, Business Process Owner	IT Head, Project Manager, Project Administrator
Integration Committee	Project Manager, project Administrator, Business Solution Architect, Technology Architect	Project Manager, Key User	Project Manager, Project Administrator
Operating Committee	Project Manager, project Administrator, Technology Architect, Application Consulting Lead	Project Manager (Head), Organization Change Coordinator, Business process Expert	Project Manager, Project Administrator
Ongoing Meetings	All/on-demand	All/on-demand	All/on-demand



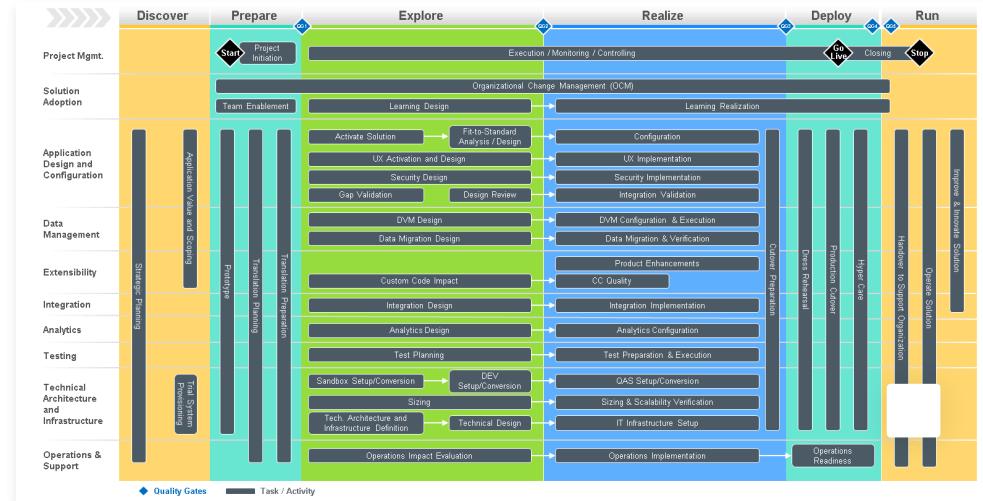
Steps

1. Access the SAP Signavio Process Navigator and browse the scope items for SAP S/4HANA Cloud.
 - a. Access the SAP Signavio Process Navigator using <https://me.sap.com/processnavigator/>, and browse the scope items for SAP S/4HANA Cloud edition, Public Sector.
2. Open the SAP Activate Roadmap Viewer (sap.com) and choose the SAP SuccessFactors implementation roadmap. Review how the different workstreams have roles to play across the different phases. Would you keep this workstream breakdown? Would you merge or split? Look at Customer Team Enablement and Solution Adoption? Merge?
 - a. Open the SAP Activate Roadmap Viewer using the link <https://go.support.sap.com/roadmapviewer/> and look at the SAP SuccessFactors implementation roadmap



Answer: It's highly dependent on the project size and complexity. In a large project, splitting workstreams could take place. Just consider a global rollout where the extensions are built, some focusing on reporting, others in transactional operations. Customer team enablement in a smaller project can have the same players as solution adoption and in that case, why not merge both streams?

3. Open the SAP Activate Roadmap Viewer (sap.com) and look at the SAP S/4HANA implementation roadmap. Why is the Customer Enablement



Answer: You will not always require all the workstreams. E.g. when you do the transition to S/4HANA one possible scenario is the system conversion. In this scenario the organization is moving from an existing solution to an evolution where much will look familiar. Customer Enablement has a more relevant role when a shift occurs into a new solution – one example: you have been running Human Resources in SAP ERP and now you move to SAP SuccessFactors, here the shift in features and functionality will be much stronger and therefore Customer Enablement work stream is strongly needed.

Explore the Demos and Trial Systems Available for SAP Cloud ALM

Steps

1. Open the SAP support portal (support.sap.com) and explore the demos and trial systems available for SAP Cloud ALM.
 - a. SAP support portal using <https://support.sap.com/en/alm/sap-cloud-alm.html> explore the demos and trial systems available for SAP Cloud ALM.



The landing page for SAP Cloud ALM features three main interactive sections:

- Discover:** Represented by a stylized head icon with colored segments.
- Try:** Represented by a cloud icon with a play button and three small human figures.
- Request:** Represented by a rocket ship icon.

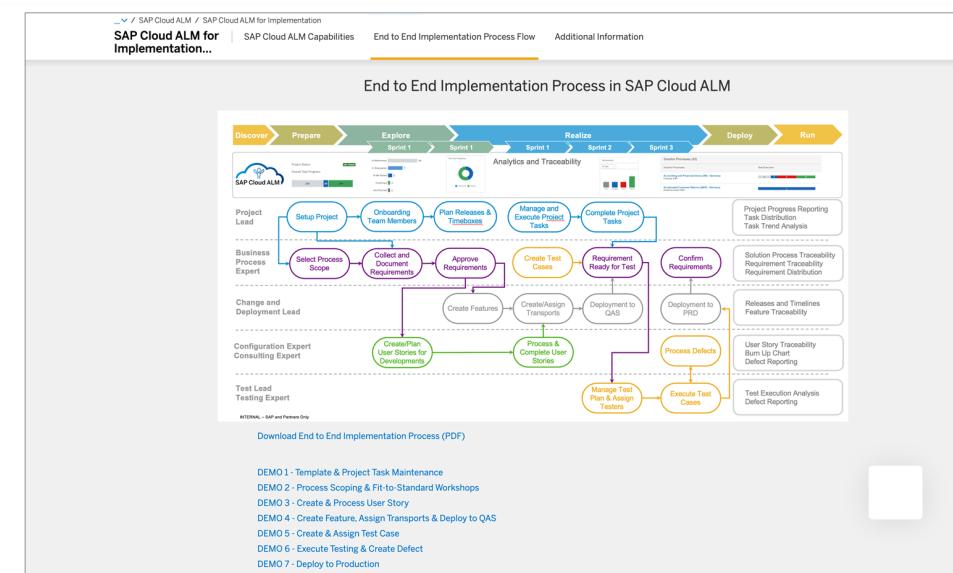
Below these sections, a large heading asks "What is SAP Cloud ALM?". A detailed description follows:

SAP Cloud ALM helps you to implement and operate intelligent cloud and hybrid business solutions. You benefit from an out-of-the-box, native cloud solution.

Explore the Expert Portal of SAP Cloud ALM

Steps

1. Open the Expert Portal and review the End to End Implementation Process Demos.
 - a. Open the Expert Portal using the link
<https://support.sap.com/en/alm/sap-cloud-alm/implementation/sap-cloud-alm-implementation-expert-portal.html> and review the End to End Implementation Process Demos.





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