



# **IFS IMPLEMENTAIONS-FUNDAMENTALS**

**IFS ASSOCIATE**

# IFS IMPLEMENTATION - FUNDAMENTALS

## COURSE OBJECTIVES

- to understand the principles of the IFS Implementation methodology including explaining the accelerators and phase deliverables and topics within:
  - Introduction to the methods and tools
  - Project organizations and roles
  - Define solution scope, project and services
  - Initiate project & Confirm Prototype
  - Establish solution
  - Implement solution & Go Live
  - Project management process
  - Scope management



# AGENDA



**01**

INTRODUCTION TO  
THE METHODS AND  
TOOLS

**02**

DEFINE SOLUTION  
SCOPE, PROJECT  
AND SERVICES

**03**

INITIATE PROJECT  
AND CONFIRM  
PROTOTYPE

**04**

ESTABLISH  
SOLUTION

**05**

IMPLEMENT  
SOLUTION AND GO  
LIVE

**06**

PROJECT  
MANAGEMENT  
PROCESS

**07**

SCOPE  
MANAGEMENT

**08**

IFS PROJECT  
MANAGEMENT  
BODY OF  
KNOWLEDGE





# INTRODUCTION TO THE METHODS AND TOOLS

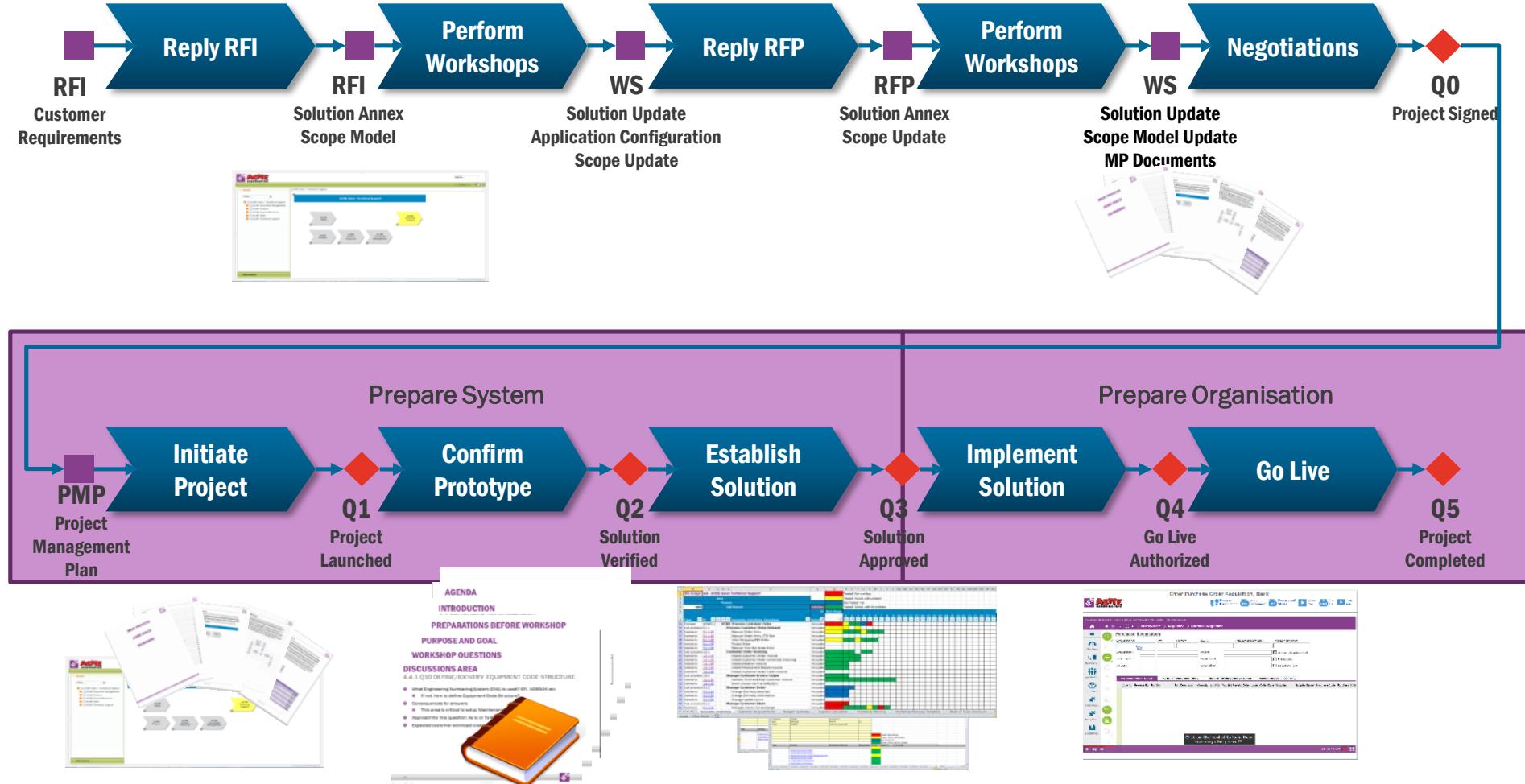
# METHOD CORNER STONES/MAIN PRINCIPLES

## EFFICIENT DESIGN

- Clear scope visualization from the start accelerates the project
- Early-stage prototyping ensures clear understanding of the solution
- Step by step approach for building the complete solution ensures quality and reduces risk.
- Clear deliverables for detailed control of project progress

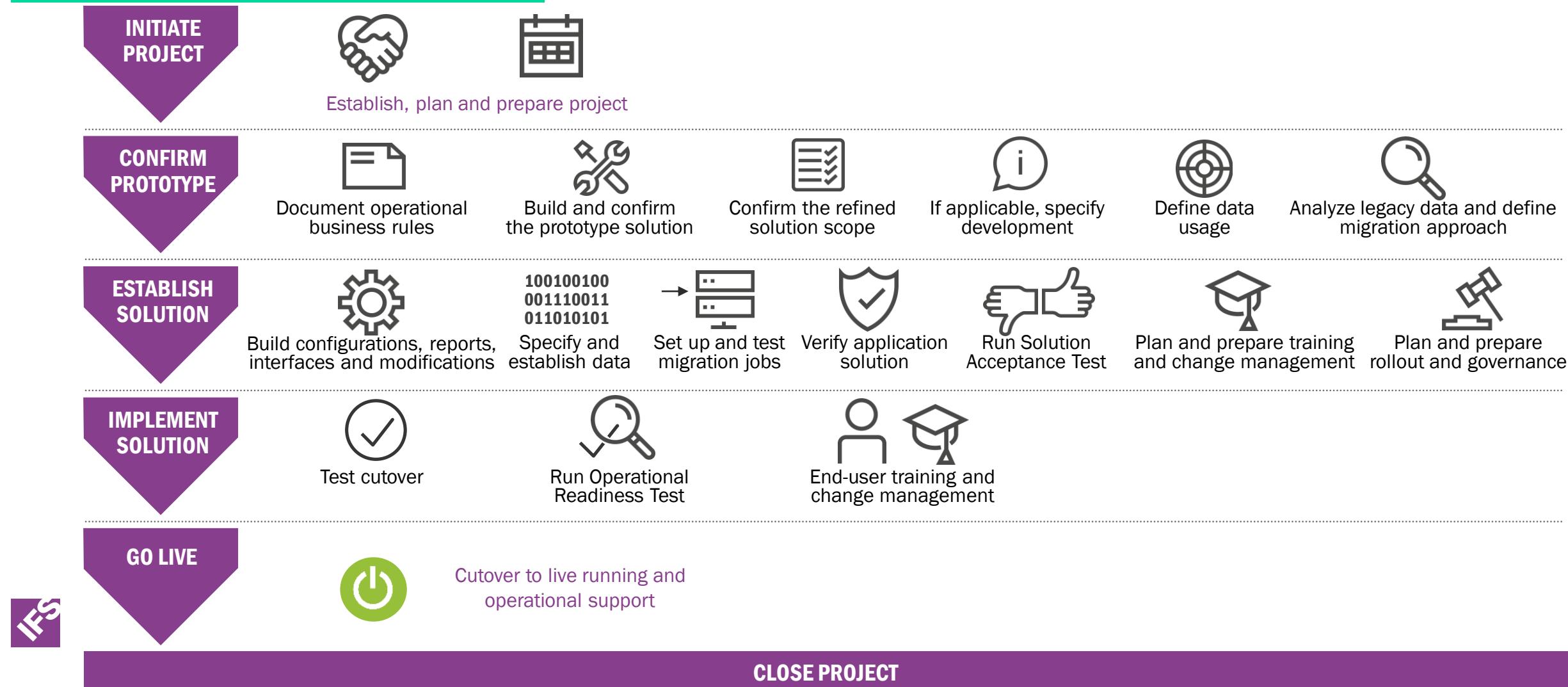
# IFS PROJECTS

## START ALREADY IN SALES



# IFS IMPLEMENTATION

## METHODOLOGY



# IMPLEMENTATION



**DEFINE SCOPE AND PROJECTS** Define baseline for solution, project and services.

**INITIATE** Initiate, plan and prepare project work and Applications.

**CONFIRM PROTOTYPE** Confirm that the Solution scope and Specifications meets the agreed customer requirements and that the Prototype solution will be the basis for the full Application solution delivered in Establish solution project phase.

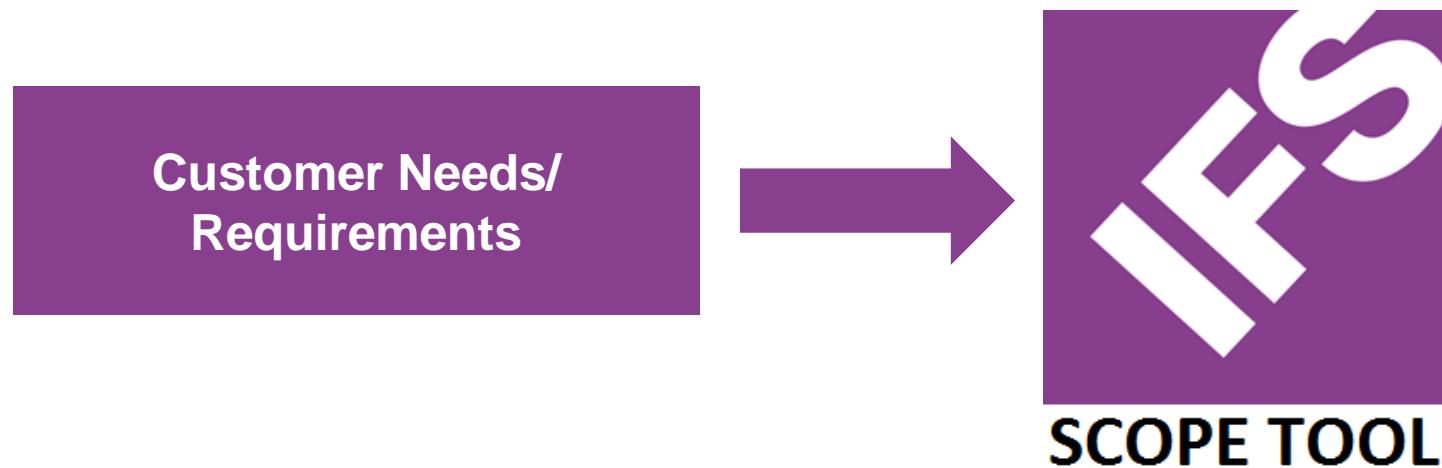
**ESTABLISH** Verify that the established application solution fulfill agreed requirement and solution scope.  
Prepare cut over, change management and training.

**IMPLEMENT** Prepare receiving organization, validate cut over and operational readiness and approve Go live.

**GO LIVE** Put the new solution in operation and close the project.

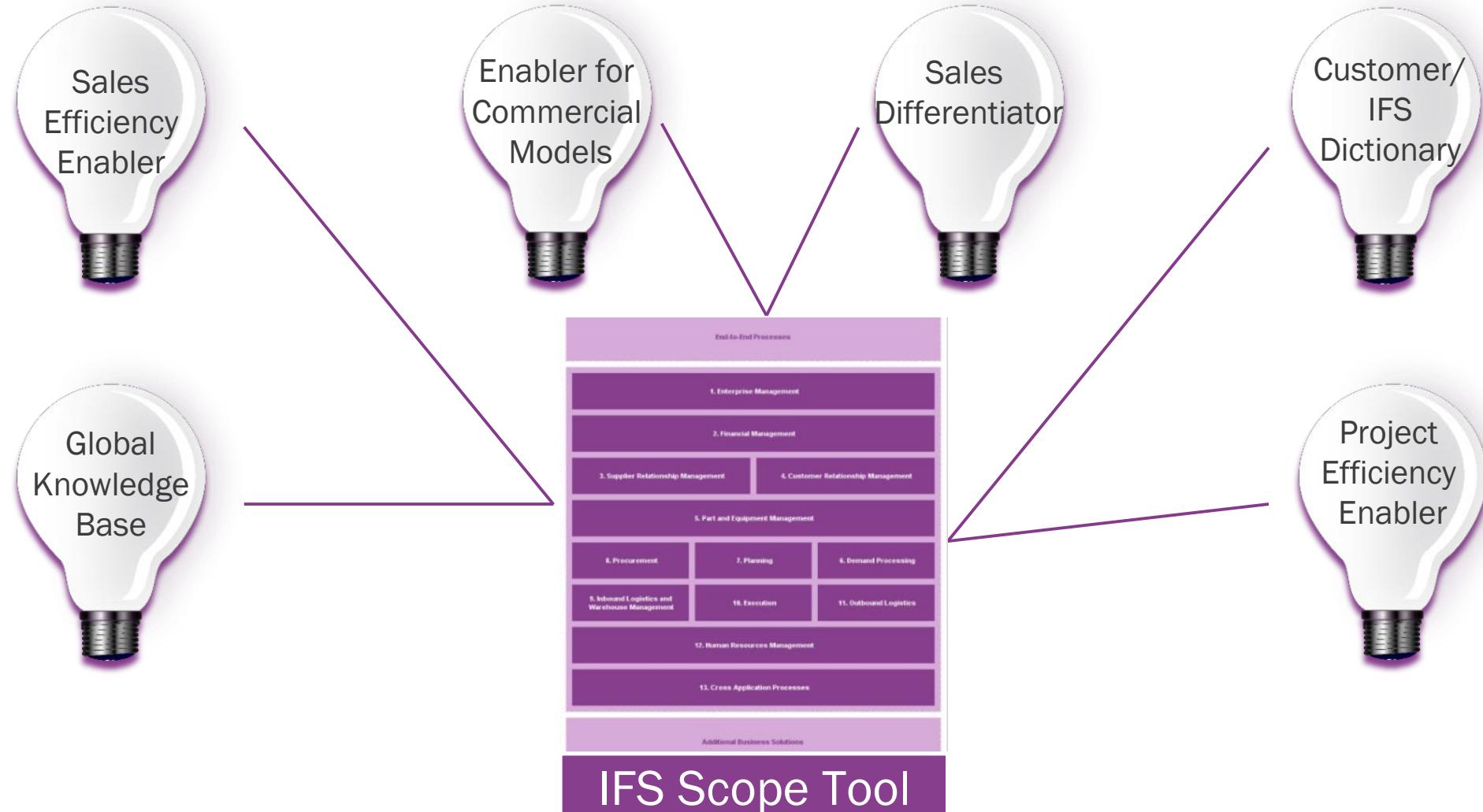
# IFS IMPLEMENTATION METHODOLOGY

## IFS SCOPE TOOL



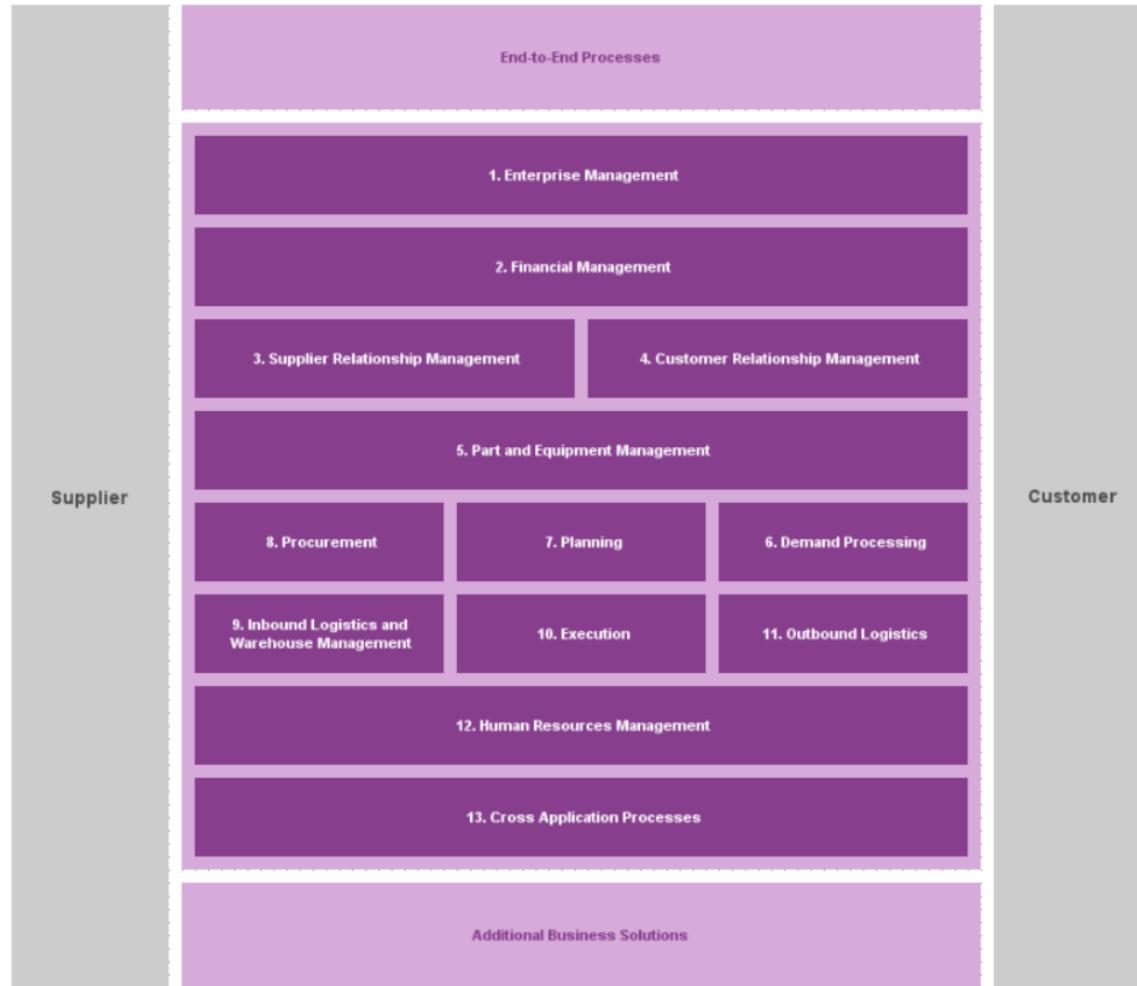
# WHAT IS

## IFS SCOPE TOOL?



# THE IFS IMPLEMENTATION METHODOLOGY

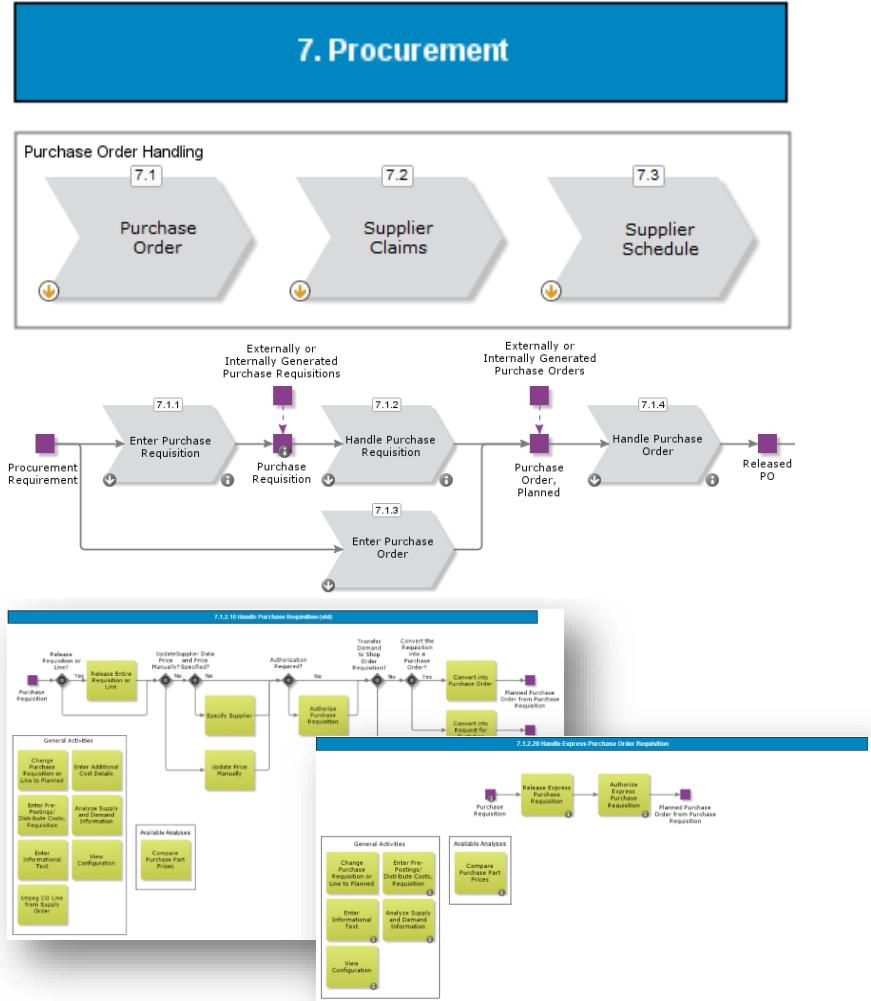
## IFS SCOPE TOOL - LIBRARY



- All IFS Applications
- Process driven (vs Modules)
- Partner Products Included

# IFS IMPLEMENTATION METHODOLOGY

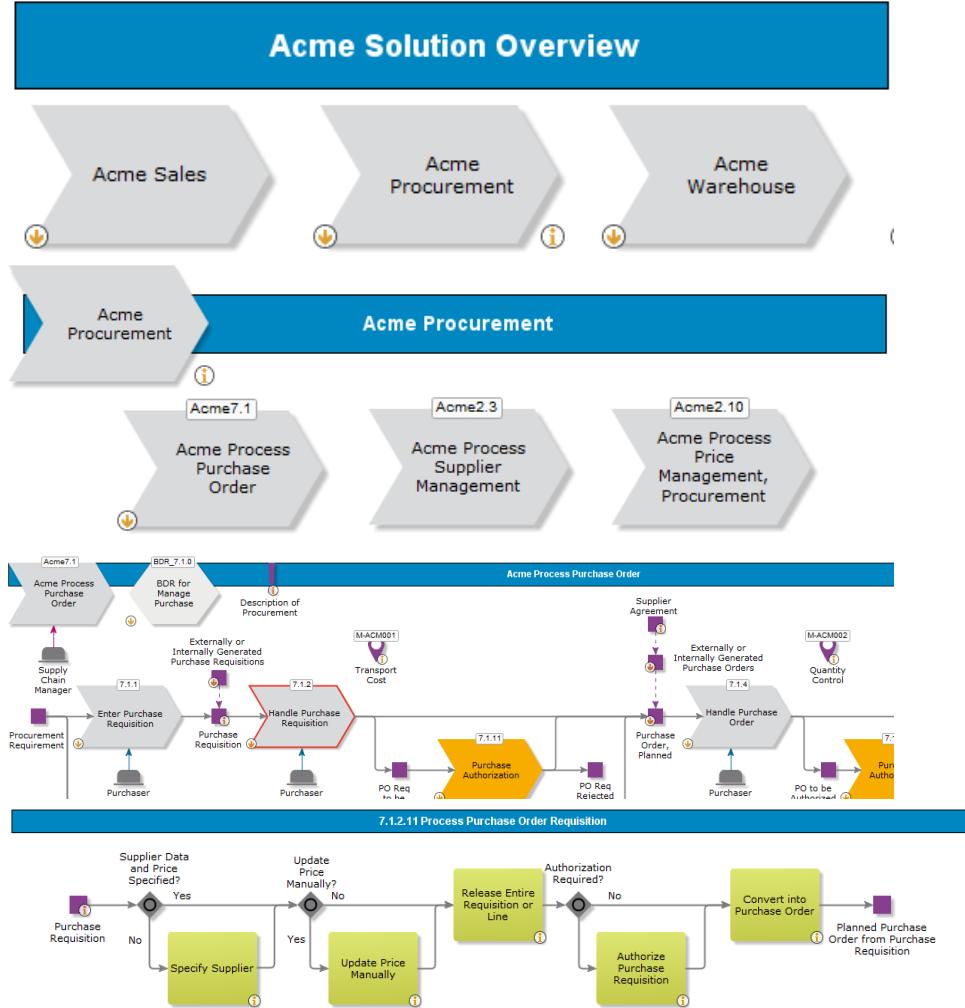
## IFS SCOPE TOOL – 4 LEVELS



- Level 1 Main Process Level  
(one digit, 7 = Procurement)
- Level 2 Process Level  
(two digit, 7.1 = Process Purchase Order)
- Level 3 Sub Process Level  
(three digit, 7.1.2 Handle PO Req)
- Level 4 Scenario Level – Activity Flow  
(four digit, 7.1.2.10 Handle PO Req (std))
  - Sub process describing one to many scenarios for different use of same Sub process
  - Ex. Normal PO Req, Express PO Req

# IFS IMPLEMENTATION METHODOLOGY

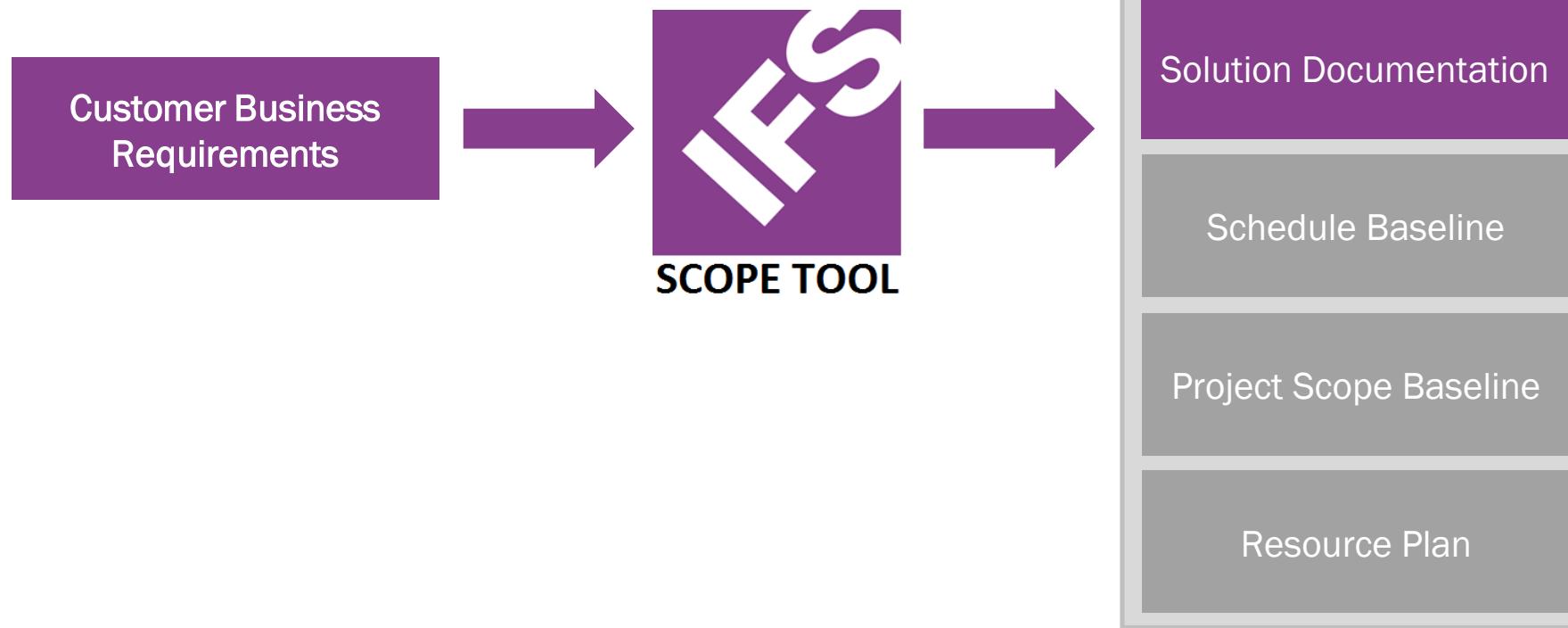
## SCOPE TOOL - BUILD FLEXIBLE CUSTOMER SOLUTION



- Customer Top Model and Main Processes is created manually to reflect customer language
- Customer Processes are Cloned from Scope Tool Library
- Standard Sub processes inherits from cloned process
  - Remove and/or Add Sub processes
- Std Scenarios are broken down from Sub proc.
  - Status “flagged” as Included/Excluded ...
  - Can be modified

# IFS IMPLEMENTATION METHODOLOGY

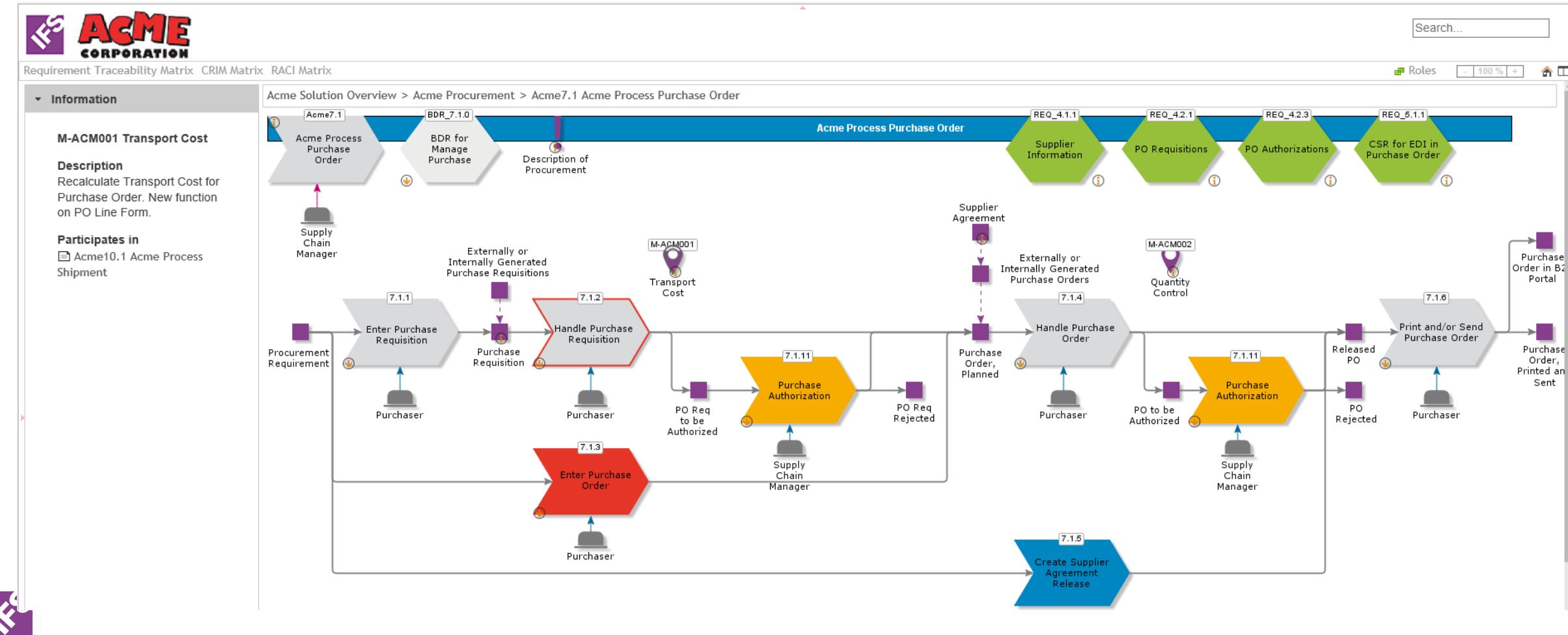
## IFS SCOPE TOOL



Greyed out means = Phase 2 for partners but can be expected to be in place for subcontracted partner employees.

# IFS IMPLEMENTATION METHODOLOGY

## SOLUTION SCOPE - HTML MODEL



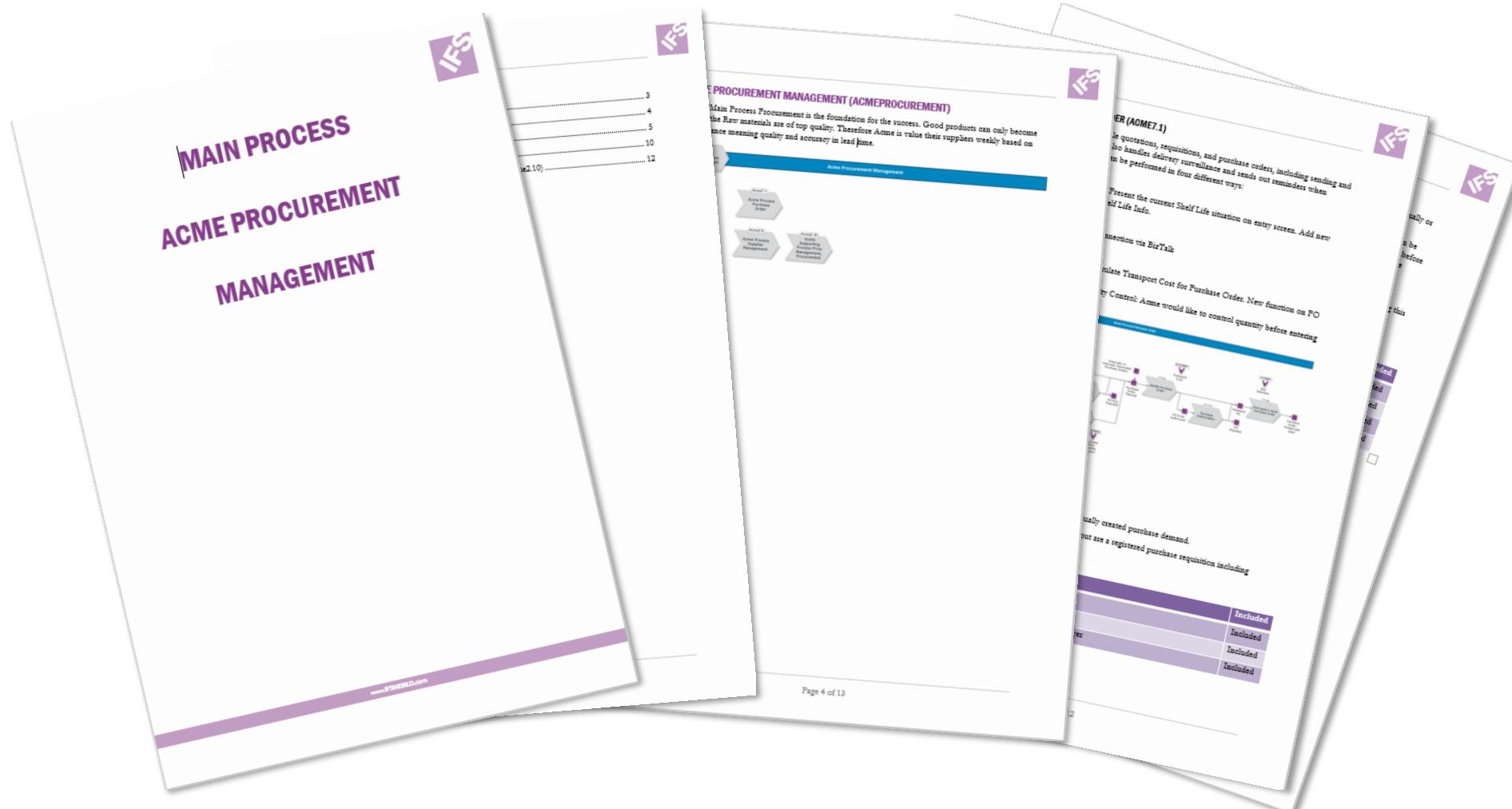
# IFS IMPLEMENTATION METHODOLOGY

## REQUIREMENT SCOPE

Requirement Traceability Matrix									
		Acme10.1 Acme Process Shipment Acme2.3 Acme Process Supplier Manag Acme2.4 Acme Process Supplier Agree Acme5.1 Acme Process Sales Order Acme7.1 Acme Process Purchase Order Acme8.1 Acme Process Receipt							
REQ_4.1.1 Supplier Information		✓		✓					
REQ_4.1.2 Supplier Agreements			✓						
REQ_4.2.1 PO Requisitions				✓					
REQ_4.2.3 PO Authorizations					✓				
REQ_5.1.1 CSR for EDI in Purchase Order					✓				
REQ_5.1.2 CSR for EDI in Warehousing		✓				✓			
REQ_5.1.3 CSR for EDI in Customer Order		✓		✓					

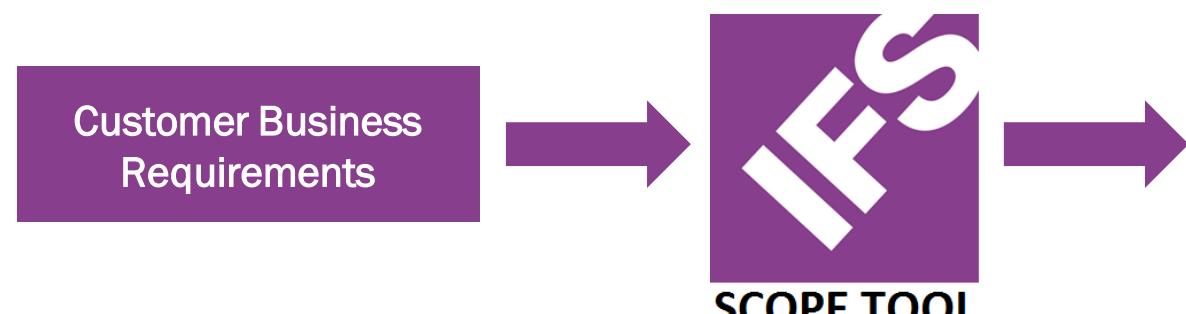
# IFS IMPLEMENTATION METHODOLOGY

## SOLUTION SCOPE – MAIN PROCESS DOCUMENTS



# IFS IMPLEMENTATION METHODOLOGY

## IFS SCOPE TOOL



### Sales Phase

Solution Scope

Requirement Scope

Solution Documentation

Schedule Baseline

Project Scope Baseline

Resource Plan

### Project Delivery

Workshop Material

Data Migration Scope

CRIM Matrix

Test Protocol

Training Material

Project Tracker (Earned Value)



Greyed out means = Phase 2 for partners but can be expected to be in place for subcontracted partner employees.

# IFS IMPLEMENTATION METHODOLOGY

## WORKSHOP MATERIAL

### WORKSHOP QUESTIONS SUMMARY

#### ACME PROCESS PURCHASE ORDER

- 7.1.2.Q10 Use of Requisitions
- 7.1.2.Q11 Purchase Requisitions handling
- 7.1.2.Q12 Critical information for Purchase Requisition
- 7.1.2.Q30 Demand types for Purchase Requisitions
- 7.1.2.Q40 Usage of Suppliers agreement in Purchase Requisition
- 7.1.2.Q50 Requisitioners/departments on Purchase Requisitions

Acme Procurement  
Management

Acme Process  
Purchase Order

Acme Process  
Supplier  
Management

Acme Supporting  
Process Price  
Management,  
Procurement

# IFS IMPLEMENTATION METHODOLOGY

# DATA MIGRATION SCOPE

# IFS IMPLEMENTATION METHODOLOGY

## CRIM MATRIX (CONFIGS, REPORTS, INTERFACES, MODS)

The screenshot displays the IFS CRIM Matrix interface, which is a requirement traceability matrix. The left sidebar shows a navigation menu with 'Information' selected, displaying details for requirement M-ACM001 Transport Cost. The requirement description is: 'Recalculate Transport Cost for Purchase Order. New function on PO Line Form.' It participates in Acme10.1 Acme Process Shipment and is associated with Acme7.1 Acme Process Purchase Order, both managed by the Supply Chain Manager. A Procurement Requirement is also listed.

The main area is titled 'CRIM Matrix' and contains a grid of requirements against various processes. The columns represent processes: Acme10.1 Acme Process Shipment, Acme5.1 Acme Process Sales Order, Acme7.1 Acme Process Purchase Order, and Acme8.1 Acme Process Receipt. The rows represent requirements:

	Acme10.1 Acme Process Shipment	Acme5.1 Acme Process Sales Order	Acme7.1 Acme Process Purchase Order	Acme8.1 Acme Process Receipt
C-ACM001 Customer Tracking System	✓			
I-ACM001 EDI Interface to Customer	✓			
M-ACM001 Transport Cost	✓	✓		
M-ACM002 Quantity Control		✓		
R-ACM001 Receiving Report			✓	

On the right side of the matrix, there is a vertical timeline or process flow diagram showing the progression from 'Purchase Order in B2 Portal' through 'ender' to 'Purchase Order, Printed and Sent'. The IFS logo is visible at the bottom left, and the page number 21 is at the bottom right.

# IFS IMPLEMENTATION METHODOLOGY

## TEST PROTOCOL

A	B	C	D	E	H	I	J	K	L	M	Q	
1	Test overview	7.1.1.11	Enter Purchase Order Requisition, Basic					Case: A	1 Purch	Test Scenario Case A	Test Scenario B	
2	Test Responsible:		Hans Persson		Date:		4/27/2018		Case Description:		Test Scenario C	
3	Status:											
4	Scenario Data:											
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18	Step	Activity	Mandatory/Optional	Responsible	Result		Result	Expected Result	Comment	Issue ID	Result	Result
19	0											
20	1	<a href="#">Enter Requisition Header</a>										
21	2	<a href="#">Enter Part Line, Requisition</a>										
22	3	<a href="#">Enter Exchange Components, Requisition</a>										
23	4	<a href="#">Connect Purch Req Line to Proj Activity</a>										
24	5	<a href="#">Enter No-Number Part Line, Requisition</a>										
25	6	<a href="#">Text Processing, Requisition</a>										
26	7	<a href="#">Compare Purchase Part Prices</a>										
27	8											
28	9	General Activities										
29	10	<a href="#">Enter Informational Text</a>										
30	11	<a href="#">Enter Pre-Postings/Distribute Costs, Requisition</a>										
31	12	<a href="#">Analyze Supply and Demand Information</a>										
32	13	<a href="#">Disconnect Purch Req Line frm Proj Activity</a>										
33	14	<a href="#">Enter Additional Cost Details</a>										
34	15											
35	16											
36	17											
37	18											

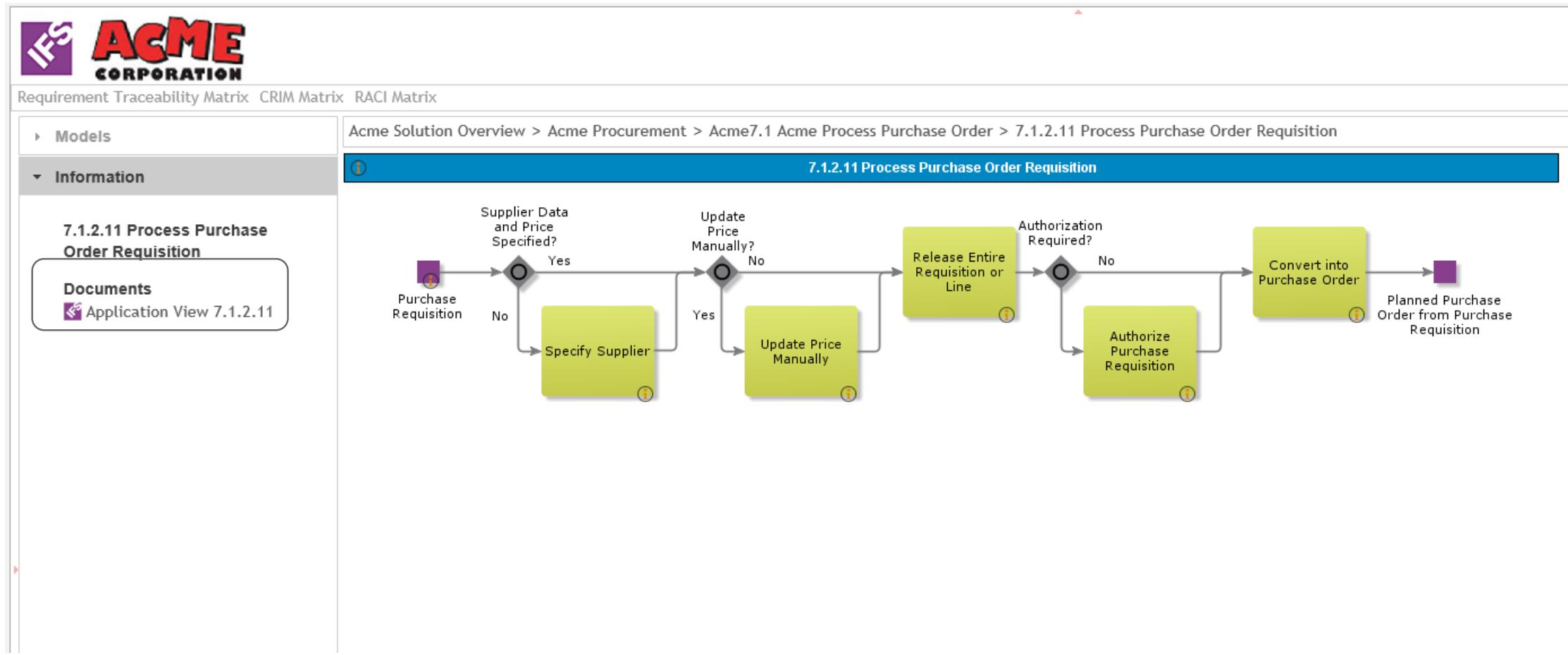
# IFS IMPLEMENTATION METHODOLOGY

# TEST PROTOCOL

IFS Scope Tool - Test overview					Tested, Not working
Area					Tested, Works with problem
Process			Pre defined		Not Tested Yet
48	Sub Process		Original S		Tested, Works with No problem
				Test Steps	
Type	ID	Scenarios, Functions, Questions	Differentiate	1 2 3 4 5 6 7 8 9 10 11 12	
Area 2	AcmeProc	Acme Procurement Management			
Process	Acme7.1	Acme Process Purchase Order			
Sub process	7.1.1	Enter Purchase Requisition			
Scenario	<a href="#">7.1.1.10</a>	Enter Purchase Order Requisition			
Scenario	<a href="#">7.1.1.11</a>	Enter Purchase Order Requisition, Basic			
Scenario	<a href="#">7.1.1.12</a>	Enter Purchase Order Requisition with Pre-Posting			
Scenario	<a href="#">7.1.1.20</a>	Enter Express PO Requisition			
Scenario	<a href="#">7.1.1.40</a>	Enter Purchase Requisition with eBuyer			
Sub process	7.1.2	Handle Purchase Requisition			
Scenario	<a href="#">7.1.2.10</a>	Handle Purchase Requisition			
Scenario	<a href="#">7.1.2.12</a>	Process PO Requisition to Quotation			
Scenario	<a href="#">7.1.2.20</a>	Handle Express Purchase Order Requisition			
Scenario	<a href="#">7.1.2.30</a>	Handle Purchase Requisition, Automatic Order Processing			
Sub process	7.1.3	Enter Purchase Order			
Scenario	<a href="#">7.1.3.10</a>	Enter Purchase Order			
Scenario	<a href="#">7.1.3.11</a>	Manually Created Purchase Order			
Scenario	<a href="#">7.1.3.12</a>	Copy Purchase Order			
Scenario	<a href="#">7.1.3.13</a>	Enter Purchase Order, Basic Flow			
Sub process	7.1.4	Handle Purchase Order			
Scenario	<a href="#">7.1.4.10</a>	Handle Purchase Order			
Scenario	<a href="#">7.1.4.11</a>	Handle Purchase Order (Basic)			
Scenario	<a href="#">7.1.4.15</a>	Modify Purchase Order Terms or Alternate Delivery Address			

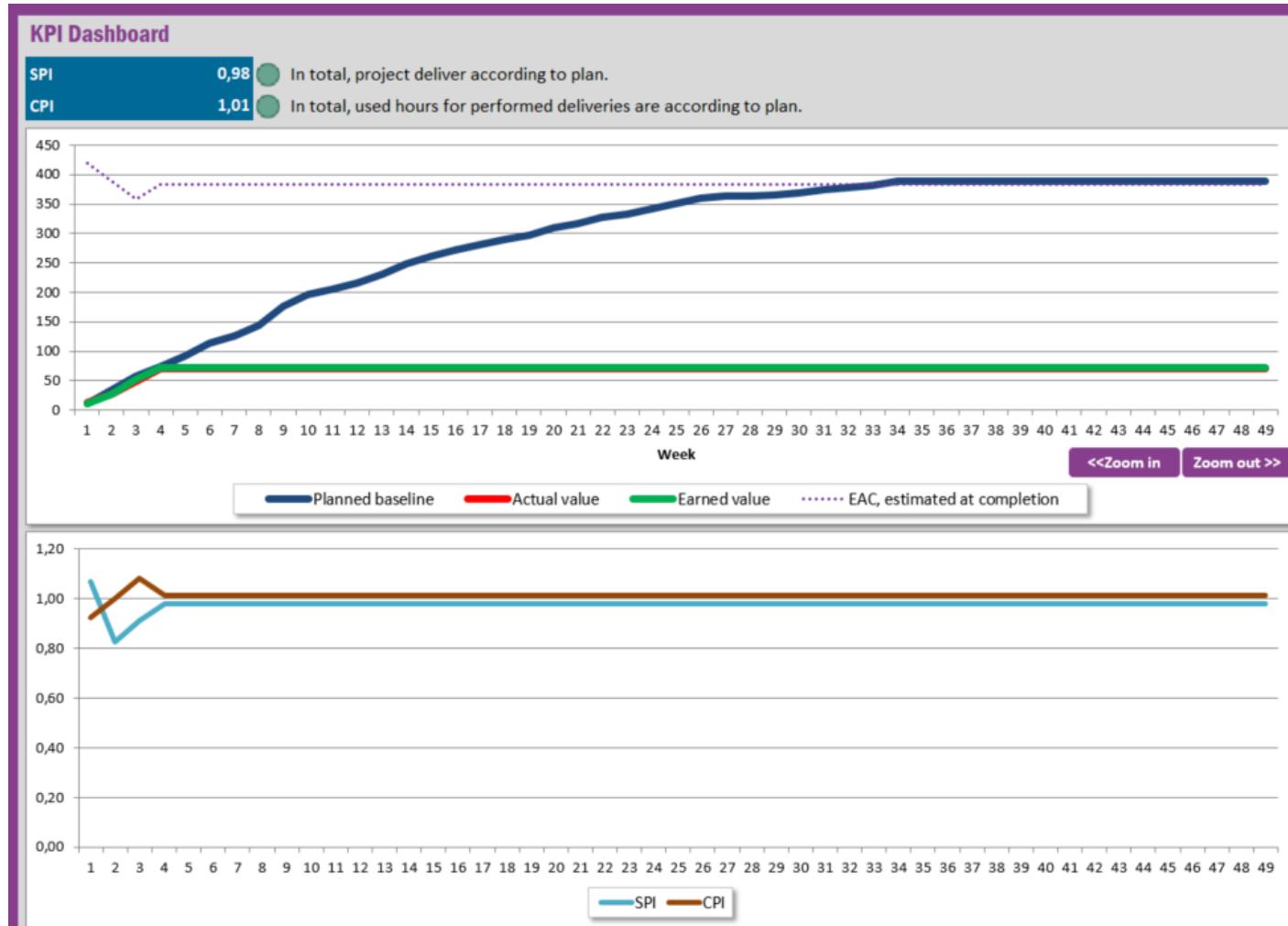
# IFS IMPLEMENTATION METHODOLOGY

## TRAINING MATERIAL



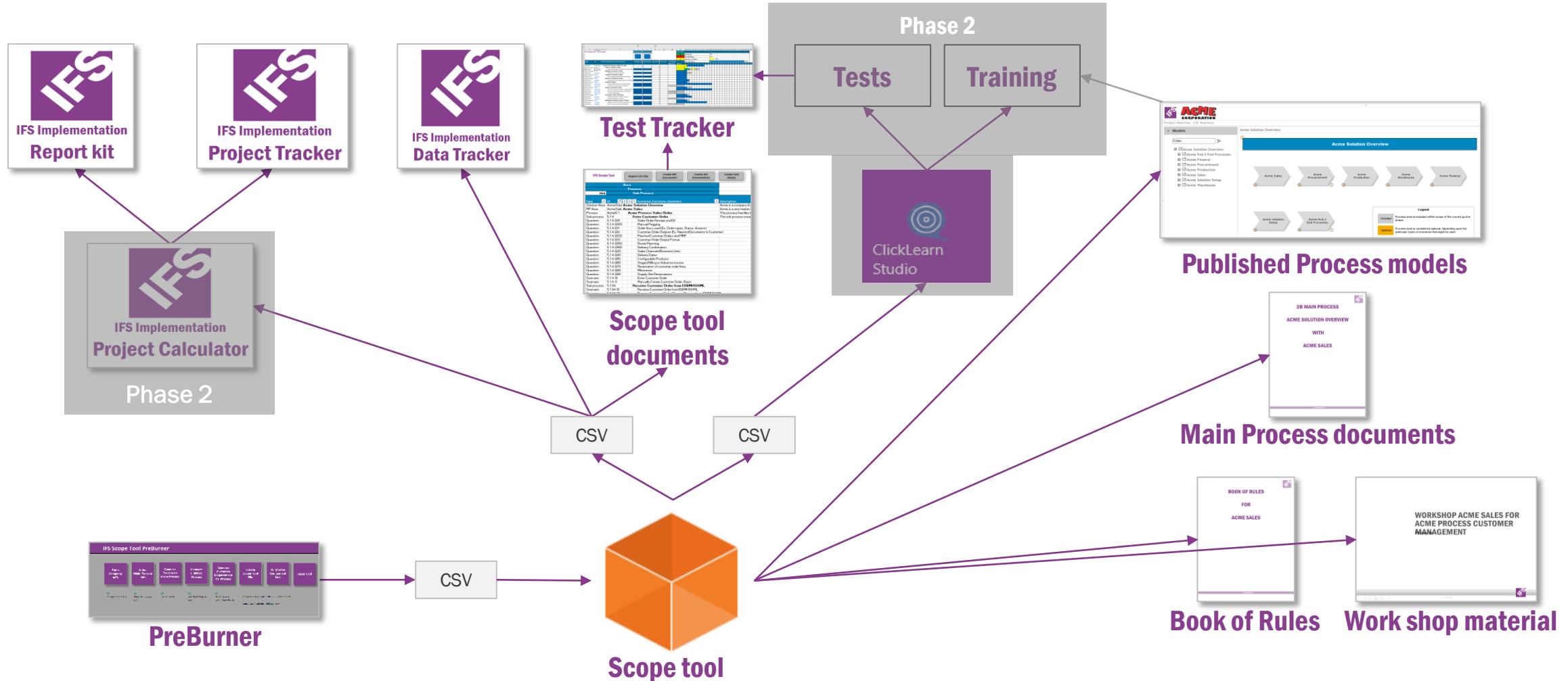
# IFS IMPLEMENTATION METHODOLOGY

## PROJECT PROGRESS CONTROL



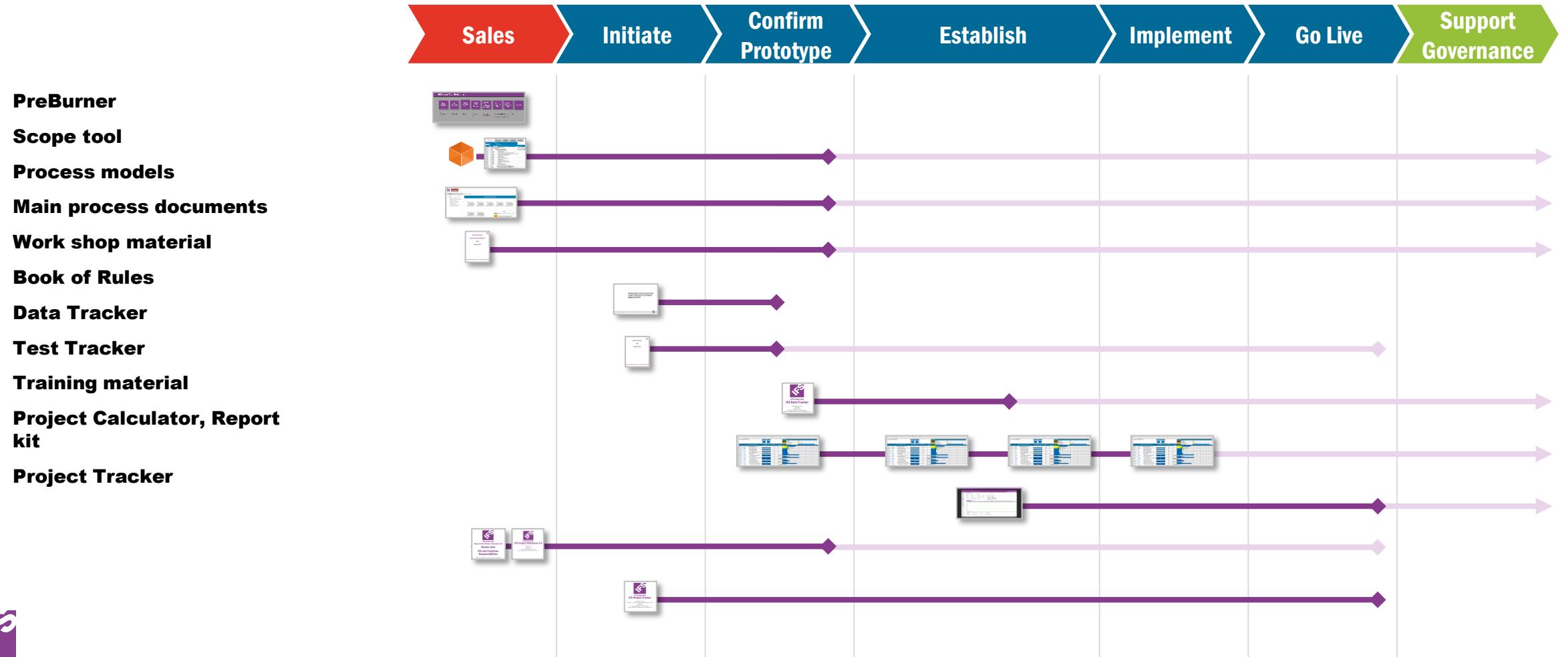
# THE TOOLS

## HOW THEY ARE CONNECTED



# THE TOOLS

## WHEN THEY ARE USED





**DEFINE SOLUTION SCOPE**

**PROJECT AND SERVICES**

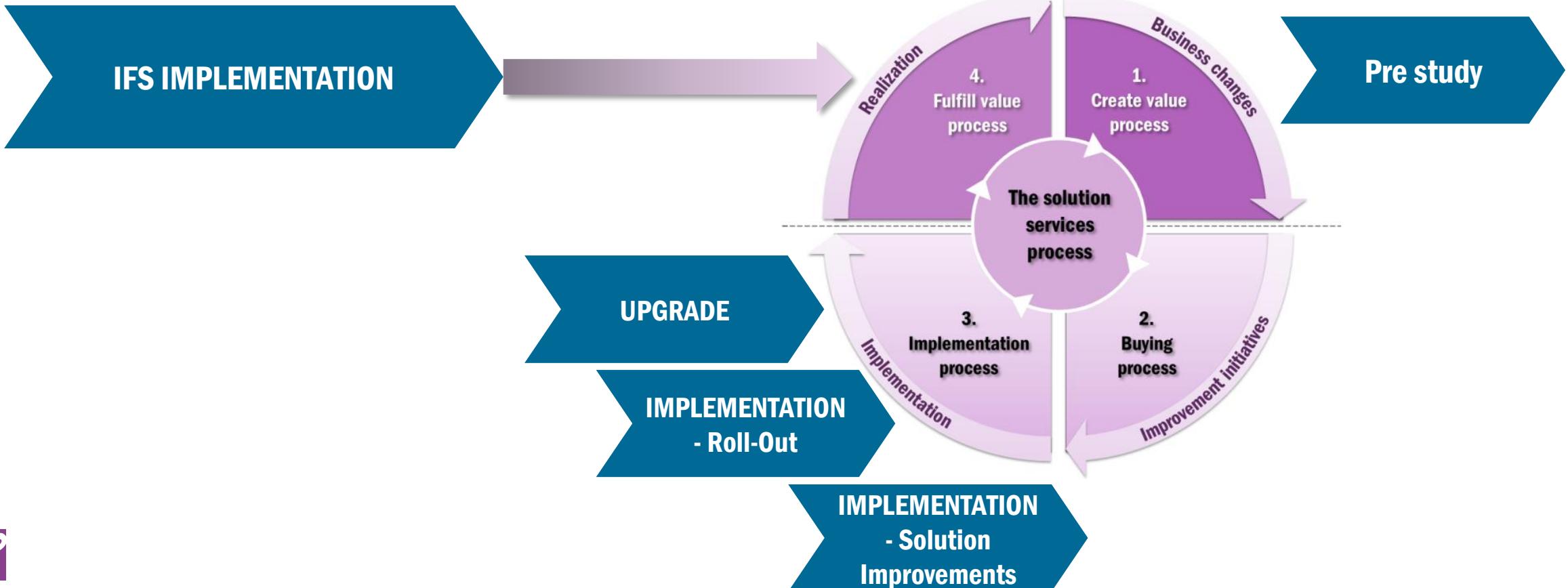


# PROJECT APPROACH

# PROJECT APPROACH

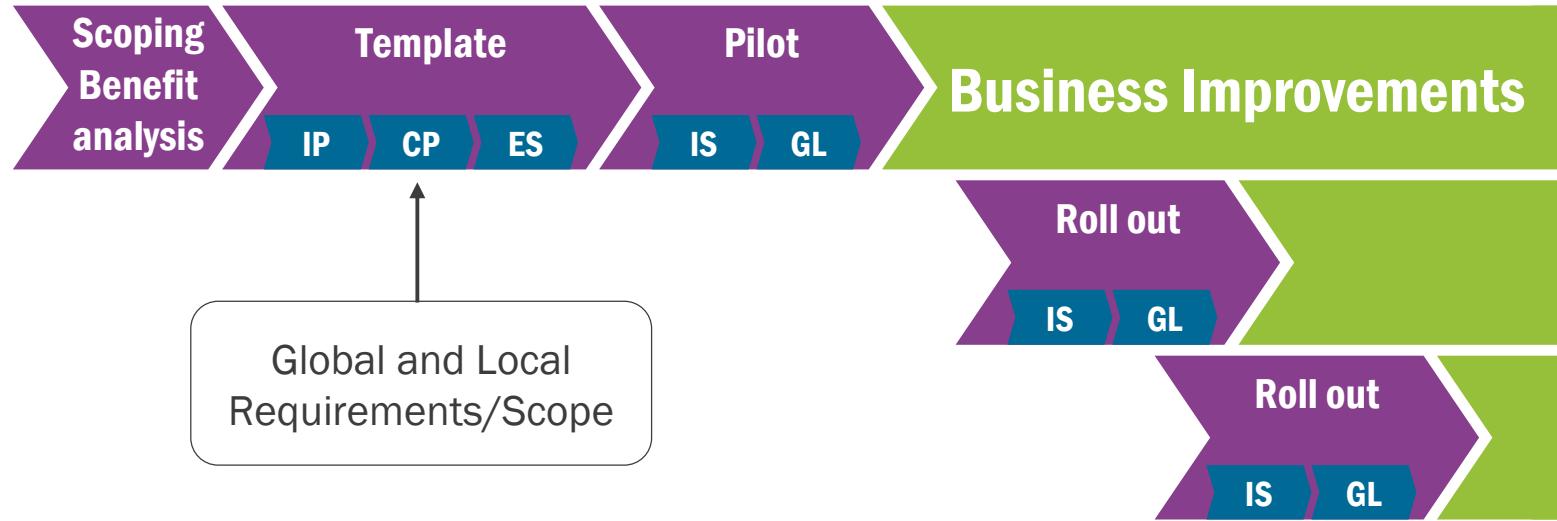
## AND STRATEGY

### NEW IMPLEMENTATION

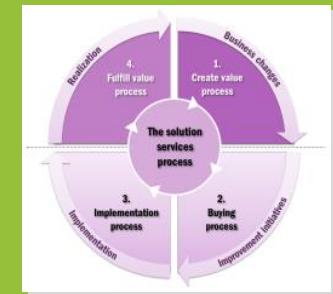


# PROJECT APPROACH AND STRATEGY

## FULL TEMPLATE APPROACH



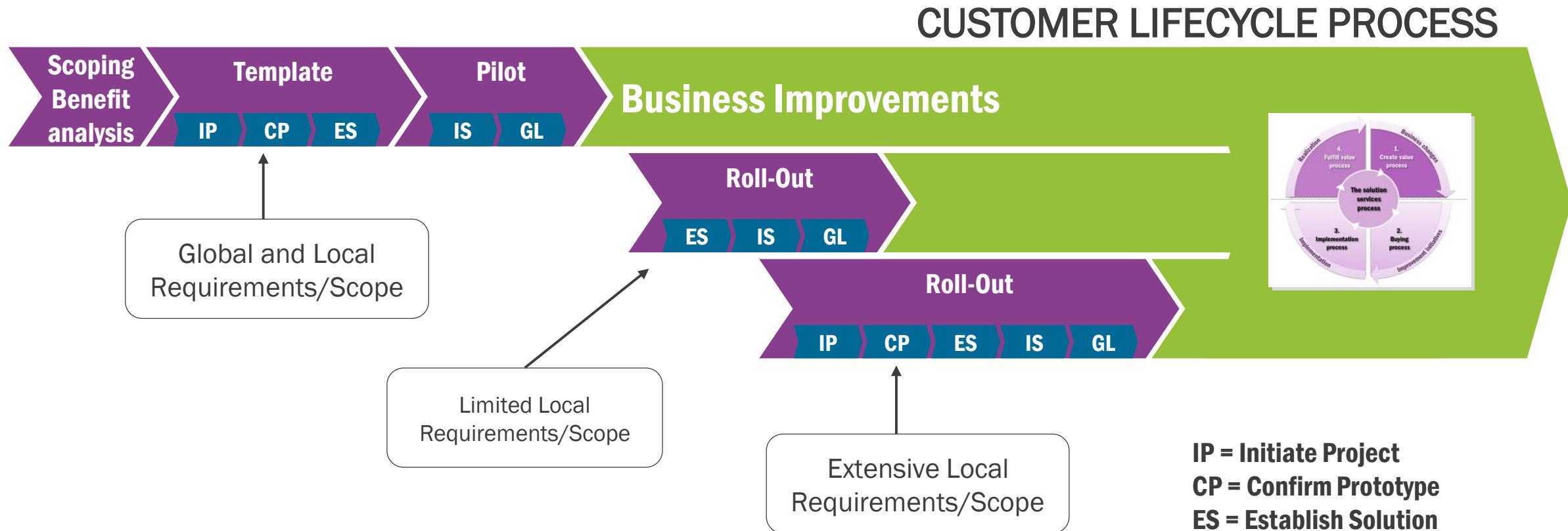
## CUSTOMER LIFECYCLE PROCESS



**IP** = Initiate Project  
**CP** = Confirm Prototype  
**ES** = Establish Solution  
**IS** = Implement Solution  
**GL** = Go Live

# PROJECT APPROACH AND STRATEGY

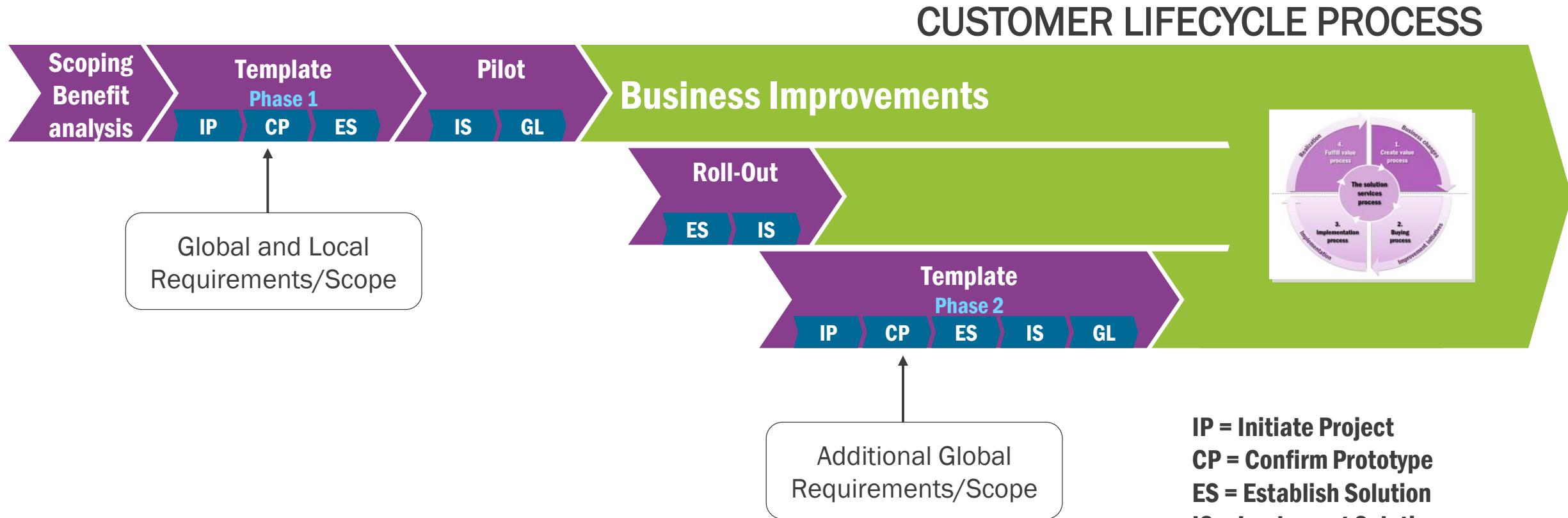
## LOCAL REQUIREMENTS MANAGED IN ROLL OUTS



**IP = Initiate Project**  
**CP = Confirm Prototype**  
**ES = Establish Solution**  
**IS = Implement Solution**  
**GL = Go Live**

# PROJECT APPROACH AND STRATEGY

## STEP BY STEP TEMPLATE APPROACH

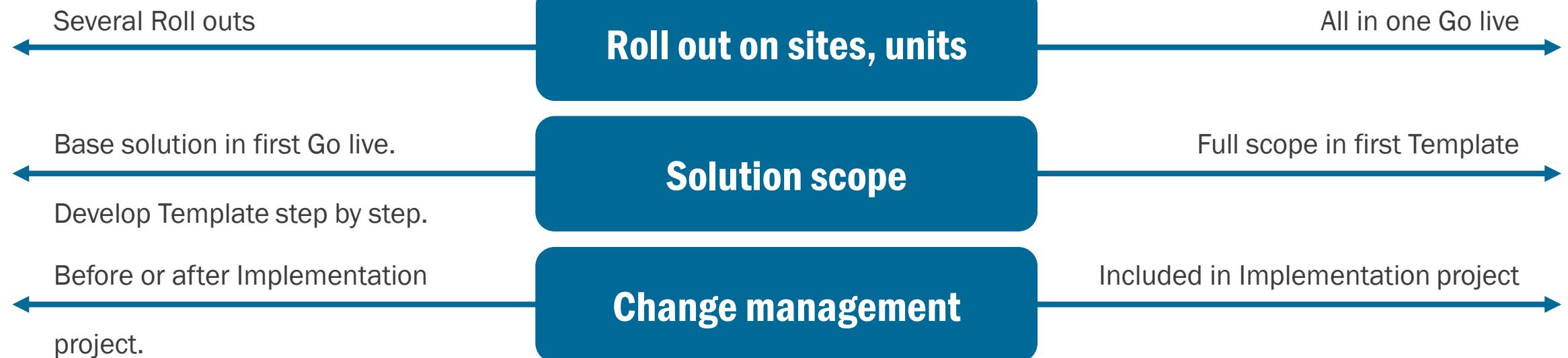


# PROJECT APPROACH

## AND STRATEGY

**Step by step**

**Big bang**



# PROJECT APPROACH

## AND STRATEGY

Centralized

Decentralized





# SERVICE APPROACH

# SERVICE APPROACH

## IFS SERVICE LEVELS

### BASIC

Companies with

- Extensive ERP knowledge.
- High ERP project experience.
- High level commitment for internal staffing of the project.
- Strategy for internal ownership of support and governance process.
- Projects to extend, change or redesign the solution.
- Roll out projects.

### STANDARD

Companies with

- Limited ERP knowledge
- Limited ERP project experience.
- Commitment for internal staffing of the project.
- Strategy for internal ownership of support and governance process.

### ENHANCED

Companies with

- No or limited ERP knowledge
- No ERP project experience.
- Limited capacity to staff the project.
- Strategy to source support and governance outside own organization.

**Customer Services**

**IFS services**



**Customer Services**

**IFS services**

**Customer Services**

**IFS services**

# SERVICE APPROACH

## IFS SERVICE LEVELS

CUSTOMER

IFS

### BASIC

Confirm solution scope and assist with prototype.  
Build data, configuration and reports.  
Test and approve solution.

Perform change management and training.  
Perform cut over and migration.

Plan, manage and report the project.  
Define methods/tools for project work.

Basic support with the solution and function.  
Train in project tools.

Plan, manage and report IFS deliveries.

Develop code in IFS Applications.  
Train customer project team.  
Define solution scope and build the prototype.

### STANDARD

Confirm solution scope and prototype.  
Build data, configurations and reports.  
Test and approve solution.

Perform change management and training.  
Perform cut over and migration.

Plan, manage and report implementation of the solution.

Support with knowledge about the solution and functions during build of data, configurations, reports and tests.

Guide in project methods and tools.  
Plan, manage and report the first phases.

Develop code in IFS Applications.  
Train customer project team.  
Define solution scope and build the prototype.

### ENHANCED

Confirm solution scope and prototype.  
Build data, configurations and reports.  
Test and approve solution.

Perform change management, end user training and cut over.

Plan, manage and report Customer deliveries.  
Additional services to build data, configurations, reports, prepare migration/cut over and prepare/perform training.

Extended support with knowledge about the solution and functions during build of data, configurations, tests, training and cut over.

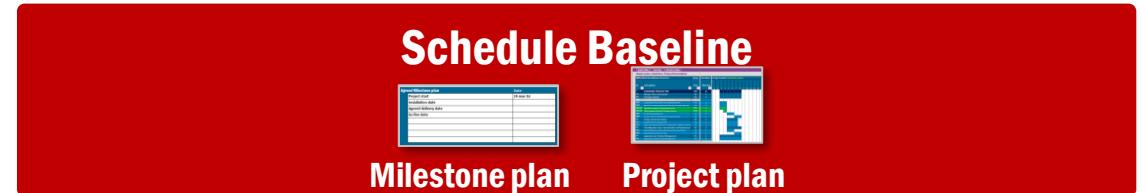
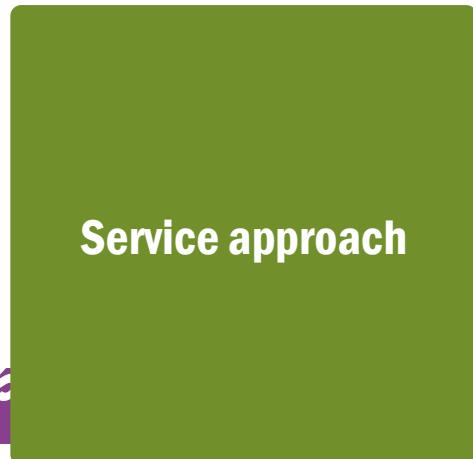
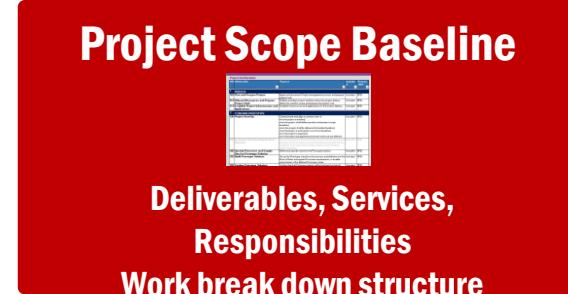
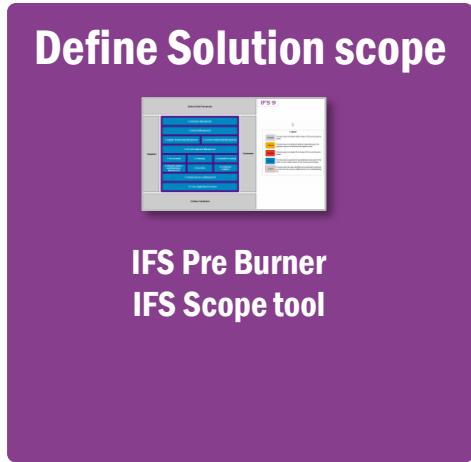
Guide in project methods and tools.  
Plan, manage and report the project.

Develop code in IFS Applications.  
Train customer project team.  
Define solution scope and build the prototype.



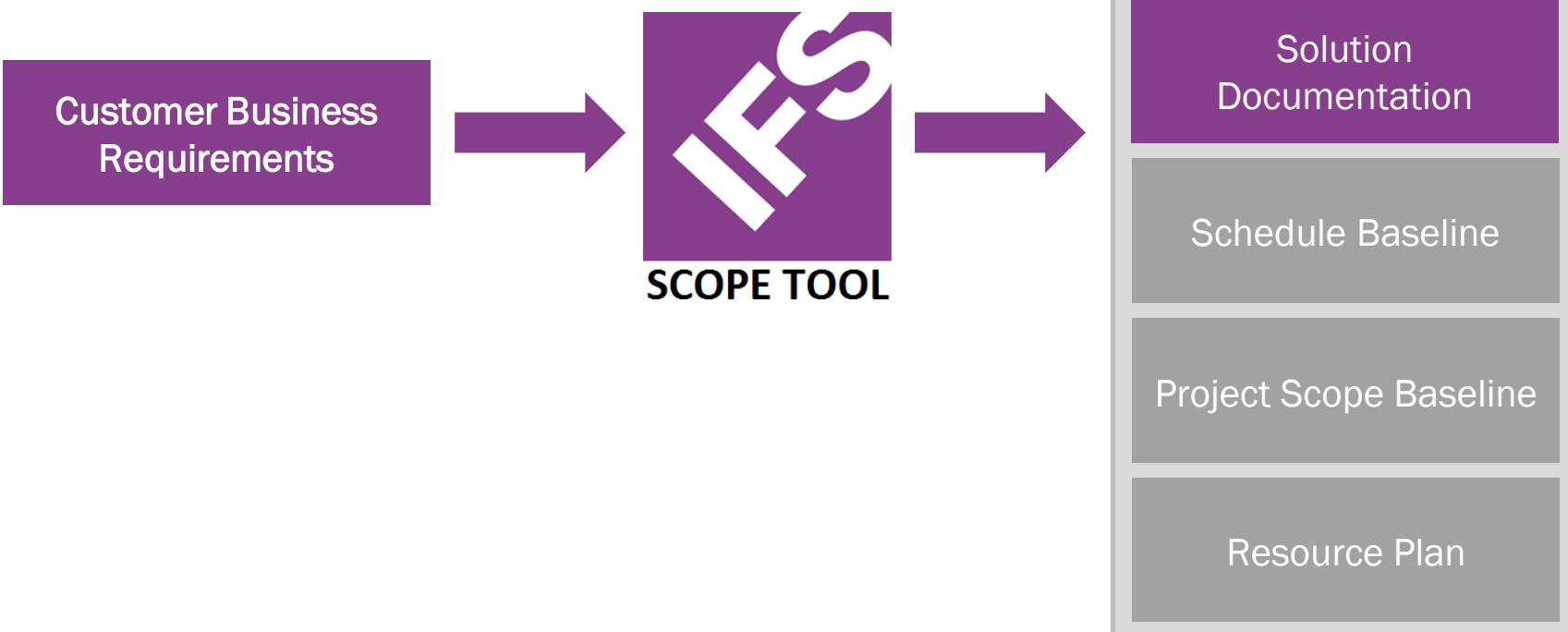
# DEFINE SCOPE

## AND PROJECT



# IFS IMPLEMENTATION METHODOLOGY

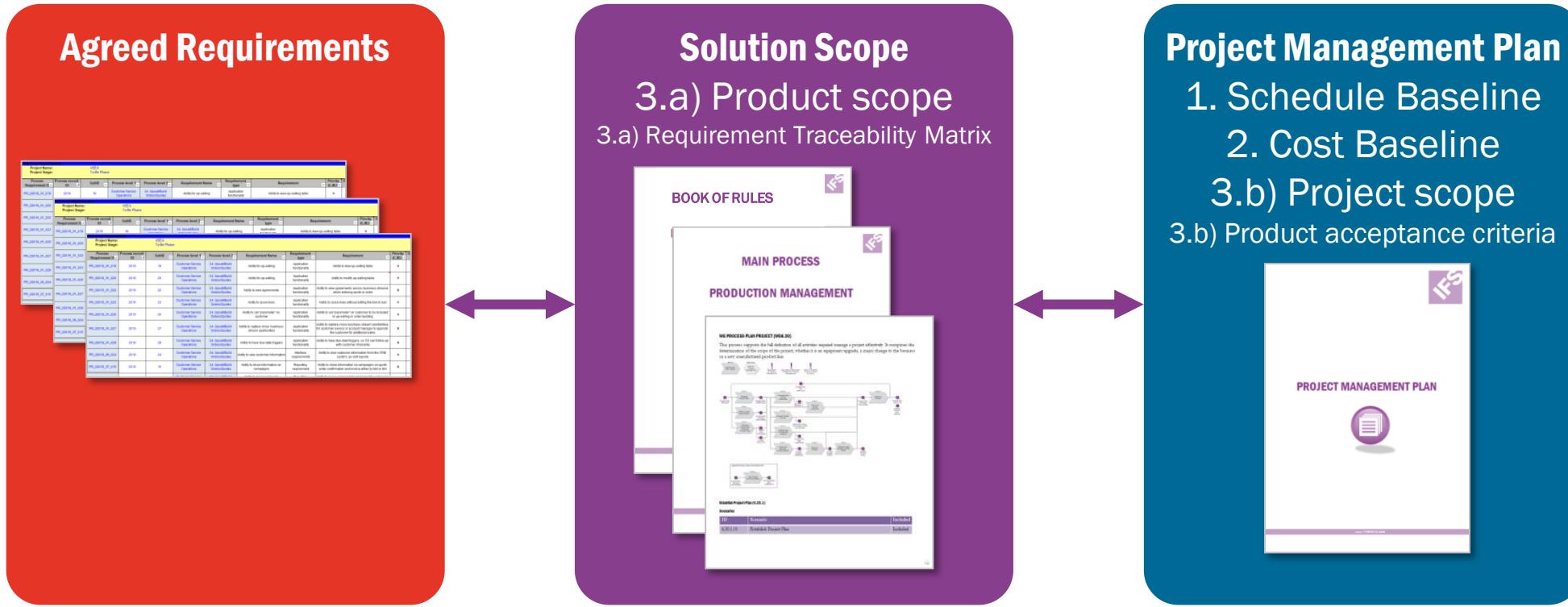
## IFS SCOPE TOOL



Greyed out means = Phase 2 for partners but can be expected to be in place for subcontracted partner employees.

# OUTPUT FROM THE SCOPING PROCESS

## = BASELINE FOR THE PROJECT DELIVERY

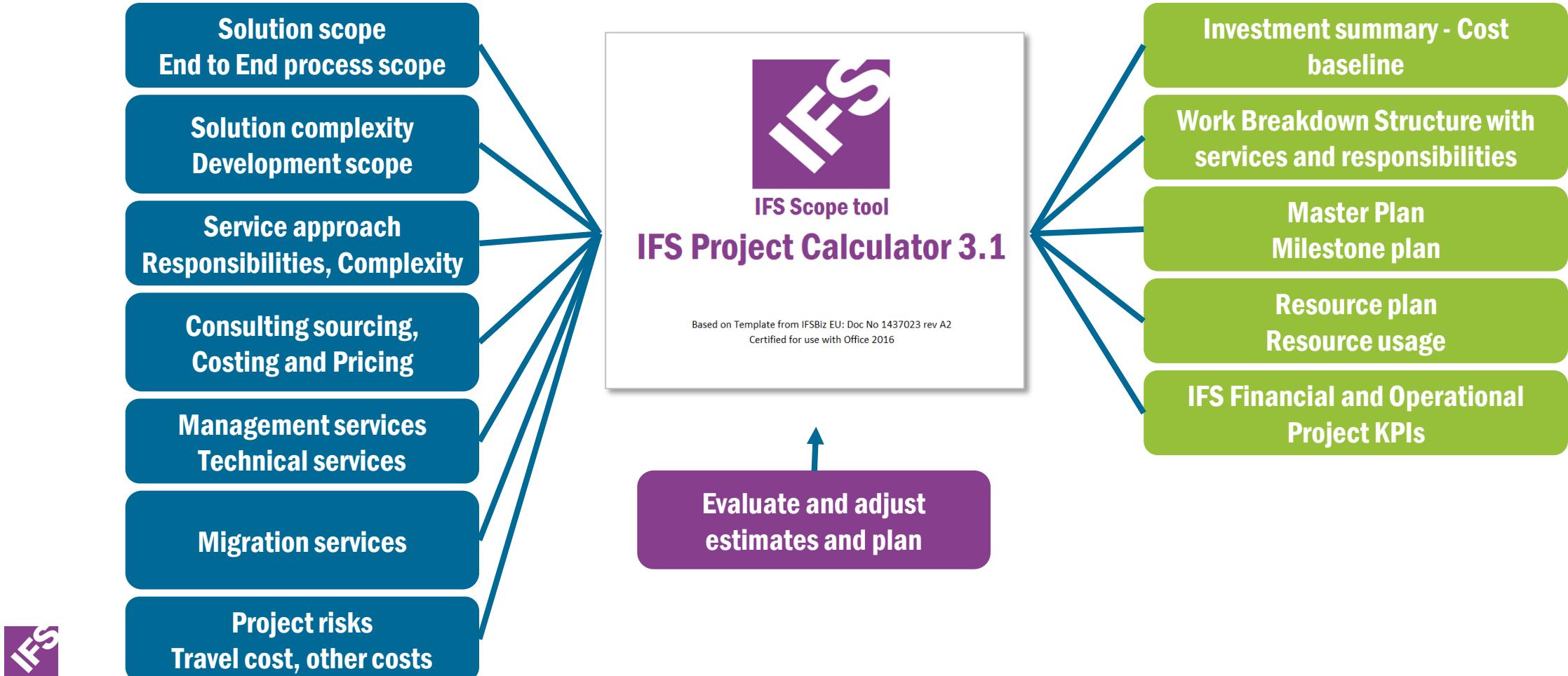


# Product scope

# Project scope

# PROJECT CALCULATOR

## OPERATED BY IFS – OUTPUTS AVAILABLE TO PARTNERS



# DEFINE PROJECT

## AND SERVICES

- Introduction to the Calculator and to the service approach
  1. Import Solution scope
  2. Cost and price list for consulting services
  3. Service approach
  4. Staffing and Sourcing
  5. Review resource plan
  6. Review and update plan
  7. Update PM and architect services.
  8. Create Report kit.

# IFS IMPLEMENTATION METHODOLOGY

## MASTER PLAN AND BOTTOM UP BUDGET

WBS, Work Breakdown Structure		Resp.	Estimated	Duration	Calendar weeks/Project duration weeks																																												
Id	Description				Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35									
S	PROJECT SUMMARY		3.825	34																																													
P	DEFINE SCOPE AND PROJECT	IFS	0	0																																													
1.	INITIATE	IFS	378	2																																													
1A	Manage Project	IFS	152	2																																													
1B	Plan and prepare Project	IFS	32	1																																													
1C	Onboard resources and prepare project work	IFS	126	1																																													
1T	Establish project infrastructure and applications	IFS	68	2																																													
2.	CONFIRM PROTOTYPE	IFS	1.114	7																																													
2A	Manage Project and Solution	IFS	532	7																																													
2B	Prototype Solution	IFS	539	6																																													
2C	Specify Solution	IFS	0	2																																													
2D	Data Migration Scope, Harmonization and Requirements	IFS	14	5																																													
2T	Application and Technical management	IFS	28	7																																													
3.	ESTABLISH SOLUTION	IFS	1.465	13																																													
3A	Manage Project and Solution	IFS	710	13																																													
3B	Application Solution	IFS	445	11																																													
3C	Migrated Data Solution	IFS	18	8																																													
3D	Solution Acceptance Test	Cust	108	6																																													
3E	Change management Planned and Prepared	Cust	0	5																																													
3F	Roll out and Governance Defined	Cust	28	5																																													
3T	Application and Technical management	Cust	156	13																																													
4.	IMPLEMENT SOLUTION	Cust	434	5																																													
4A	Manage Project and Solution	Cust	215	5																																													
4B	Implement Initiated	Cust	0	0																																													
4D	Operational Readiness Test	Cust	120	5																																													
4E	Change management and Training	Cust	53	5																																													
4F	Go live Decision	Cust	16	1																																													
4T	Application and Technical management	IFS	30	5																																													
5.	GO LIVE	Cust	434	7																																													
5A	Manage Project and Solution	Cust	217	7																																													
5B	Go live	Cust	128	6																																													
MS SGL	Go Live date																																																
5C	Evaluate project, Hand over Solution and Close project	Cust	48	1																																													
5T	Application and Technical management	Cust	42	7																																													

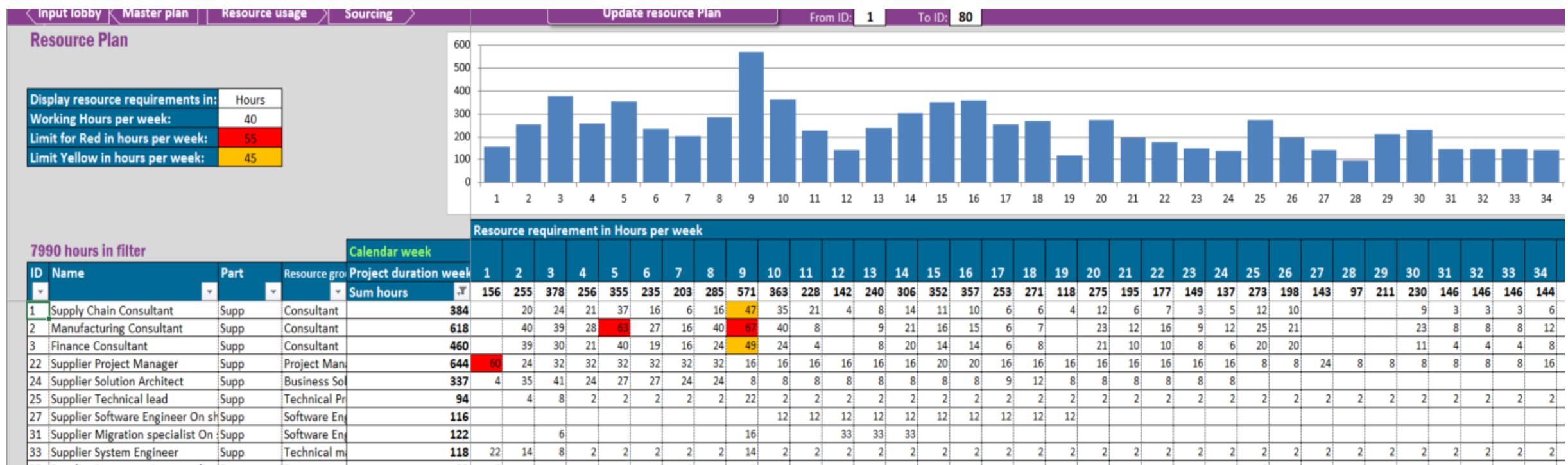
# IFS IMPLEMENTATION METHODOLOGY

## RESPONSIBILITY MATRIX/RACI CHART - EXAMPLE

Work Breakdown Structure and Responsibilities														
WBS, Work break down structure				RACI (R)=Responsible; (A)=Accountable; (S)=Support; (C)=Consulted; (I)=Informed								Agreed Services		
WBS id	Description	Additional description	Included	Responsible Party	Responsible Supplier Role	Responsible Customer Role	Accountable Supplier Role	Accountable Customer Role	Supportiv Supplier Roles	Supportiv Customer Roles	Assistance level	Supplier Responsibility	Customer Responsibility	
2B3-10	Build Prototype Solution	Input: Specification for Prototype Solution Delivered , Prototype sample data Delivered, Enterprise Book of Rule Approved, Book of Rules per Main process Area Approved. Output: Prototype Built, Prototype presentation Ready, Solution scope Refined.	Included	SUPP	IFS Solution architect (R)	Customer Solution owner (S)	IFS Project manager (A)	Customer Project manager (C)	IFS Solution team members (S)	Customer Solution team members (S)	-	Supplier leads and performs work. Supplier approves deliverables.	Customer assists with solution and application knowledge up to agreed number of hours.	
2B4	Confirm Prototype Solution	Purpose: Confirm that the Prototype solution will be the basis for the full Application solution delivered in Establish solution project	Included	SUPP										
2B4-10	Demonstrate Prototype Solution	Input: Prototype Built, Prototype presentation Ready, Solution scope Refined, High level functional specifications Approved, Design Approved. Output: Open areas for Design or Development Defined, Prototype solution Confirmed.	Included	SUPP	IFS Solution architect (R)	Customer Solution owner (S)	IFS Project manager (A)	Customer Project manager (C)	IFS Solution team members (S)	Customer Solution team members (S)	-	Supplier leads and performs work. Supplier documents deliverables.	Customer participates in and contributes in work. Customer reviews and approves deliverables.	
2B4-20	Demonstrate Prototype Solution for Steering Committee, Optional		Included	Cust	IFS Solution architect (S)	Customer Solution owner (R)	IFS Project manager (C)	Customer Project manager (A)	IFS Solution team members (S)	Customer Solution team members (S)	Normal	Supplier participates in work.	Customer leads and performs work. Customer approves deliverables.	
2C	Confirm Solution Scope	Confirm Solution Scope	Included	SUPP										
2C1	Create Book of Rules for the Complete Solution	Purpose: Confirm that the customer business rules are adequately captured with design principles as prerequisites for the full solution in the Book of Rules.	Included	SUPP										
2C1-10	Review and Refine Financial and Operational Steering Models	Input: Work shop material Prepared, Book of Rules Prepared, Kick off performed, Training in standard application Performed. Output: Enterprise Book of Rule Approved.	Included	SUPP	IFS Solution architect (R)	Customer Solution owner (S)	IFS Project manager (A)	Customer Project manager (C)	IFS Solution team members (S)	Customer Solution team members (S)	-	Supplier leads, prepares and performs work. Supplier documents deliverables.	Customer prepares and contributes in work. Customer reviews and approves deliverables.	
2C1-20	Define Business Rules for Set Up of the Complete Solution	Input: Work shop material Prepared, Book of Rules Prepared, Kick off performed, Training in standard application Performed. Output: Book of Rules per Main Process Area Approved.	Included	SUPP	IFS Solution team leads (R)	Customer Solution team leads (S)	IFS Solution architect (A)	Customer Solution owner (C)	IFS Solution team members (S)	Customer Solution team members (S)	-	Supplier leads, prepares and performs work. Supplier documents deliverables.	Customer prepares and contributes in work. Customer reviews and approves deliverables.	

# IFS IMPLEMENTATION METHODOLOGY

## RESOURCE PLAN



# IFS IMPLEMENTATION METHODOLOGY

## INVESTMENT SUMMARY AS INPUT TO AGREEMENT

	Sum	Initiate	Confirm	Establish	Implement	Go Live	Define Scope and Project	Additional Services	Update and Upgrade
<b>Investment Summary</b>									
Sum	365.747								
Software	0								
Licence	0								
Licence Other Applications	0								
Consulting Services	365.747	34.852	113.368	171.798	21.929	23.800	0	0	0
Time and Material	365.747	34.852	113.368	171.798	21.929	23.800	0	0	0
Fixed price	0	0	0	0	0	0	0	0	0
Travel Cost	0								
Other Costs	0								

All numbers in EUR

	Sum	Initiate	Confirm	Establish	Implement	Go Live	Define Scope and Project	Additional Services	Update and Upgrade
<b>Cost for Supplier Services</b>									
IFS assistance services are presented in a separate table below.									
Sum Supplier services	278.735	34.852	107.603	114.119	8.440	13.720	0	0	0
Fixed price included in amount above	0	0	0	0	0	0	0	0	0
Project Management services	88.240	11.760	26.880	37.280	4.480	7.840	0	0	0
Solution services	135.650	17.452	73.383	41.694	0	3.120	0	0	0
Cut over and Go live services	0	0	0	0	0	0	0	0	0
Migration services	2.420	0	660	1.760	0	0	0	0	0
Change management services	1.680	0	0	0	1.680	0	0	0	0
Application development services	34.385	440	4.080	27.665	880	1.320	0	0	0
Technical services	14.160	4.320	2.160	5.280	960	1.440	0	0	0
Support services	2.200	880	440	440	440	0	0	0	0
Additional Consulting services	0	0	0	0	0	0	0	0	0
Update and Upgrade services	0	0	0	0	0	0	0	0	0

All numbers in EUR



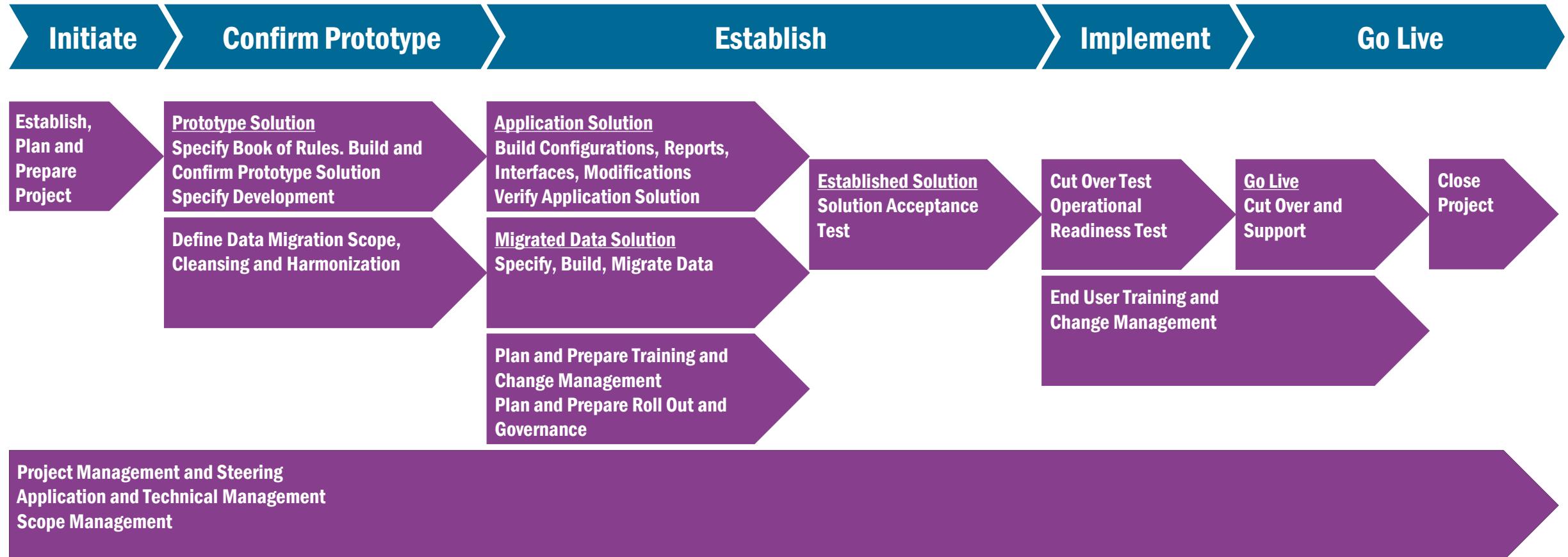


# INITIATE PROJECT

# AND CONFIRM PROTOTYPE

# IFS IMPLEMENTATION

## METHODOLOGY

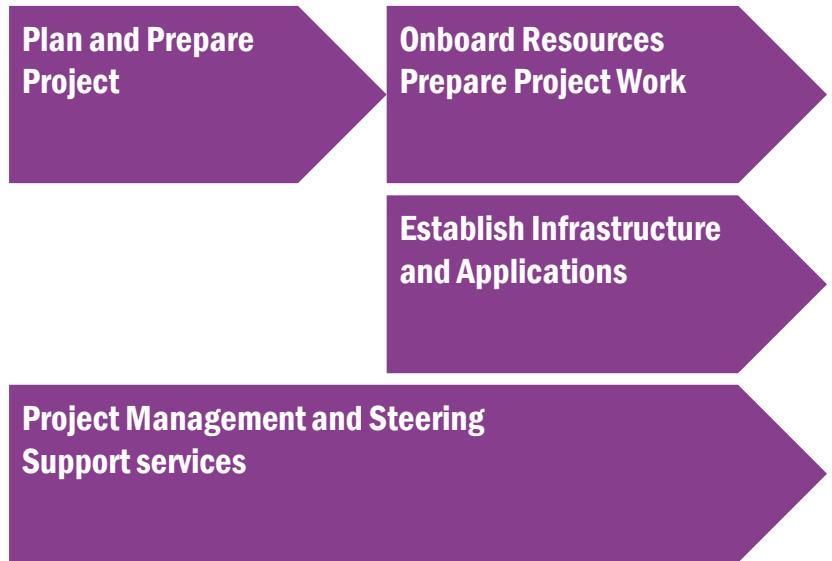




# INITIATE PROJECT

# INITIATE

## PROJECT



### PROJECT PLANNED AND ESTABLISHED

- ✓ Project management plan updated
- ✓ Project plans and tools established
- ✓ Project organization mobilized
- ✓ Project work prepared

### PROJECT INFRASTRUCTURE ESTABLISHED

- ✓ Technical infrastructure established
- ✓ Applications installed



PLAN AND  
PREPARE PROJECT

# PREPARE IFS

## HAND OVER

Material from the sales team are secured. This can include:

- Contract
- Book of rules or other document from sales with solution assumptions and pre requisites
- Solution scope defined in Main Process documents
- Requirement specification or matrix, Acceptance/Test criteria
- Statement of work/Project management plan including RASCI/Service Scope, Master plan and any other document defining the project delivery or the services
- Any communication send or presented to the Customer about Solution or Services
- Any documented internal assumptions about Solution or Services
- IFS Scope tool repository
- Project Calculation

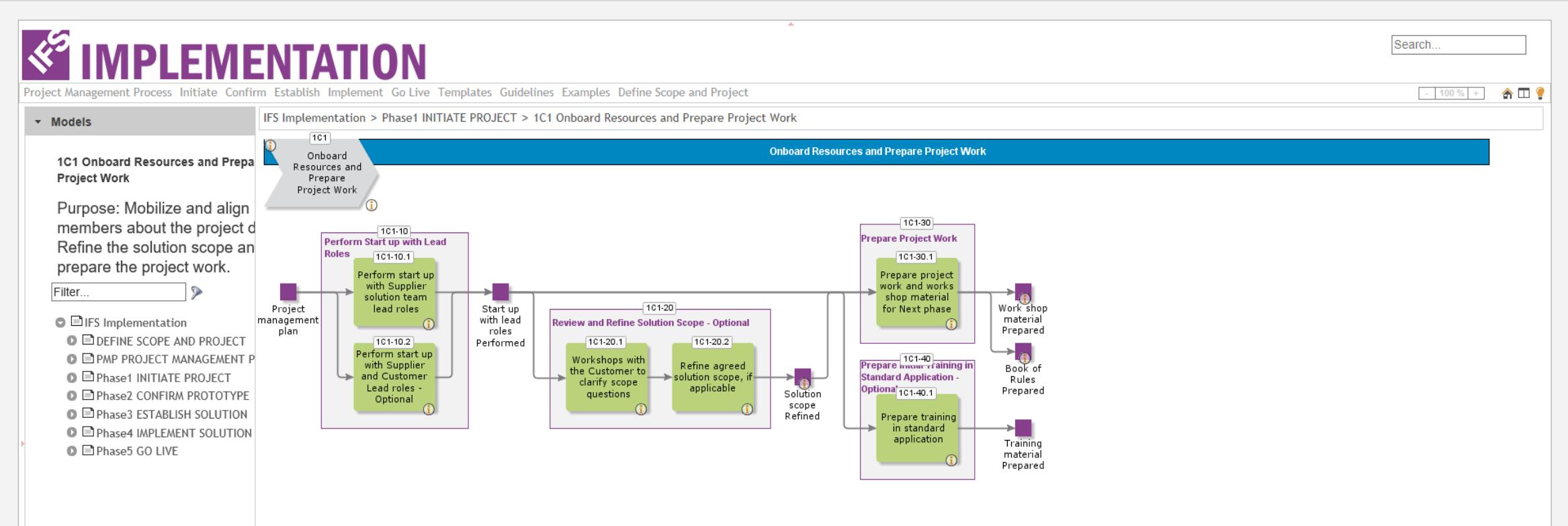
# AGENDA IFS

## HAND OVER

- Customer information, business case, stake holders
- Information about the sales process
- Pricing and other contractual pre requisites
- Agreed requirements and acceptance criteria
- Agreed solution scope and assumptions regarding the solution
- Agreed application scope and agreed technical platform
- Agreed services and project organization
- Agreed Statement of work or Project management plan and contractual mile stones
- Agreement with partners and sub contractors
- Project locations and other practical prerequisites
- Products or services committed to on a free of charge basis by Sales
- Customer expectations



# INITIATE PROJECT





WORKSHOPS WITH THE CUSTOMER

**TO CALRIFY SCOPE QUESTIONS**

# PERFORM

## WORKSHOP

1C1-20.1

Workshops with  
the Customer to  
clarify scope  
questions



- Responsible: IFS Solution architect
- Participates:  
Customer Solution owner and Customer Project manager.  
If applicable IFS Solution consultants.
  
- For each question, explain why we need the information. Review possible prepared answers from the customer.
- Document answers during the workshop direct in the presentation.

# INITIATE

## PROJECT

- Create Project tracker
- Produce work shop material and Book of Rules documents
- By issuing workshop material in Initiate and sending up-front to the customer, the Book of Rules workshops in Confirm Prototype can be executed much more efficient:
  - with all participants well-prepared
  - With the right participants in the workshop
  - With answers available for the workshop
  - And finally to prevent the situation where some customers feel IFS asks questions that the customer representatives miss answers to and therefore appear 'unprepared'



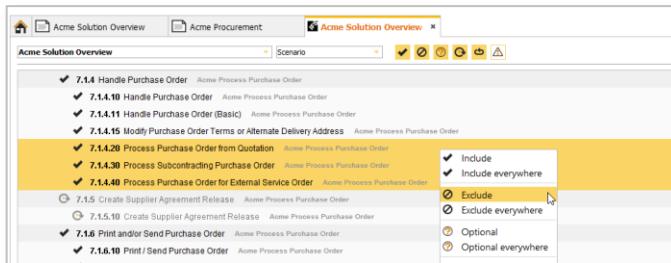
# REFINE AGREED SOLUTION SCOPE

# REFINE AGREED SOLUTION SCOPE

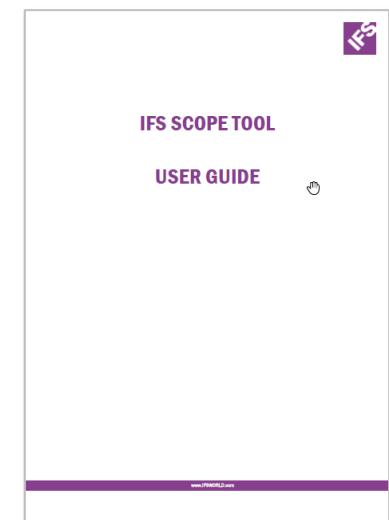
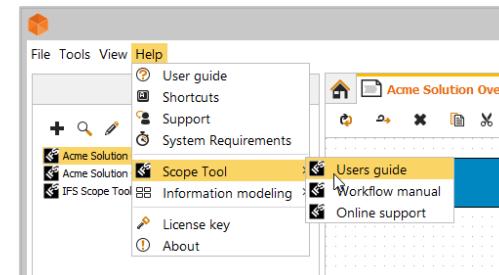
101-20.2

Refine agreed  
solution scope, if  
applicable

- Solution scope is refined by the IFS Solution architect. Solution team members or Solution leads from sales phase contribute if applicable.
- If applicable update process models in IFS Scope tool.
- Refine agreed solution scope down to scenario level.



- For functional guidance see Scope tool User guide available from Scope tool.



# REFINE AGREED SOLUTION SCOPE

101-20.2

Refine agreed  
solution scope, if  
applicable



- Assess if the updated and refined solution scope have any impact on cost or duration for the project delivery. Any impact is managed according to the agreed change request process.
- Generate new Scope CSV file.
- Publish updated HTML process model.
- Generate Updated Main process documents.

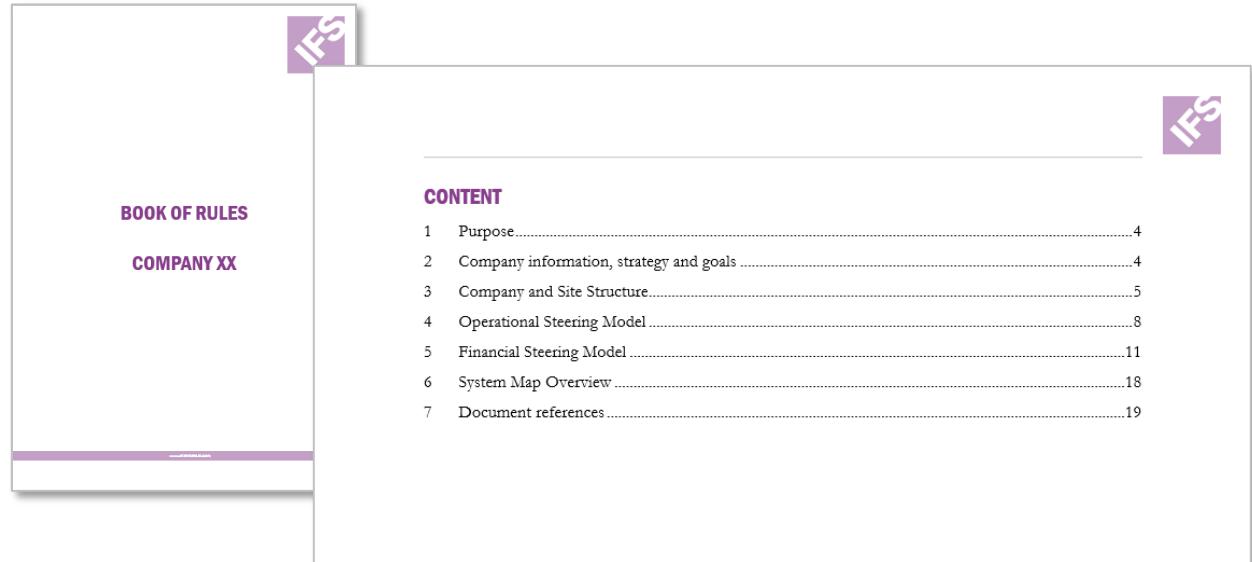
Prepare project work and works shop material for Next phase



# PREPARE ENTERPRISE

## BOOK OF RULES

- Create the Enterprise Book of Rules. If there is a version available from the contract or from the sales process, create a new version of this document. Otherwise create a new document from Template - Enterprise Book of Rules.
- Review the content and update with available formation.
- Identify missing information and prepare questions to be asked to Customer during Book of Rules workshops.



# PREPARE BOOK OF RULES PER MAIM

## PROCESS AND WORKSHOP PRESENTATIONS

1C1-30.1

Prepare project work and works shop material for Next phase



- Generate workshop presentation and Book of Rules per Main process area with the Scope Tool publishing functionality:

The screenshot illustrates the process of generating workshop presentations and a Book of Rules using the Scope Tool's publishing functionality.

**Publish models Dialog:** This window lists various publishing options:

- Acme Solution**: Acme Solution
- Report profile**: Report profile with default settings. (Standard 2c8)
- 1A Main Process**: Process Level
- 1B Main Process**: Processes w SubProc Desc
- 1C Main Process**: Processes w Scenario List
- 2A Main Process**: Processes w SubProc Desc & Scenario List
- 3A Main Process**: All in Detail
- Book of Rules**: Creates Book of Rules for selected process areas.
- Workshop questions**: Creates workshop questions for a selected process.
- Excel profile**: Publish information about models and objects to Microsoft Excel.

The item **2A Main Process** is highlighted with a red border.

**Generated Presentations:** Three presentation slides are shown:

- BOOK OF RULES FOR ACME PROCUREMENT**: A slide with a purple header and footer.
- WORKSHOP ACME PROCUREMENT FOR ACME PROCESS SUPPLIER MANAGEMENT**: A slide with a white header and footer.
- WORKSHOP ACME PROCUREMENT FOR ACME PROCESS PURCHASE ORDER**: A slide with a white header and footer.

# PREPARE BOOK OF RULES PER MAIM

## PROCESS AND WORKSHOP PRESENTATIONS

1C1-30.1

Prepare project work and works shop material for Next phase



- The generated workshop questions presentations and Book of Rules per main process area will include all predefined workshop questions relevant for the defined solution scope.
- Review workshop presentations and remove, adjust or include new questions if applicable.
- Send the workshop material to the customer for preparations to the Book of Rules workshops in Confirm Prototype.

### WORKSHOP DISCUSSIONS

#### 2.4.1.Q11 TYPES OF SUPPLIER CONTRACTS

- Are there different types of supplier contracts?
- If yes, how are they different?
- Are contracts valid global, local, group agreements (several sites)?
- Are there specific types of goods used for a given contract/groups?

# REVIEW

## WORKSHOP PLAN

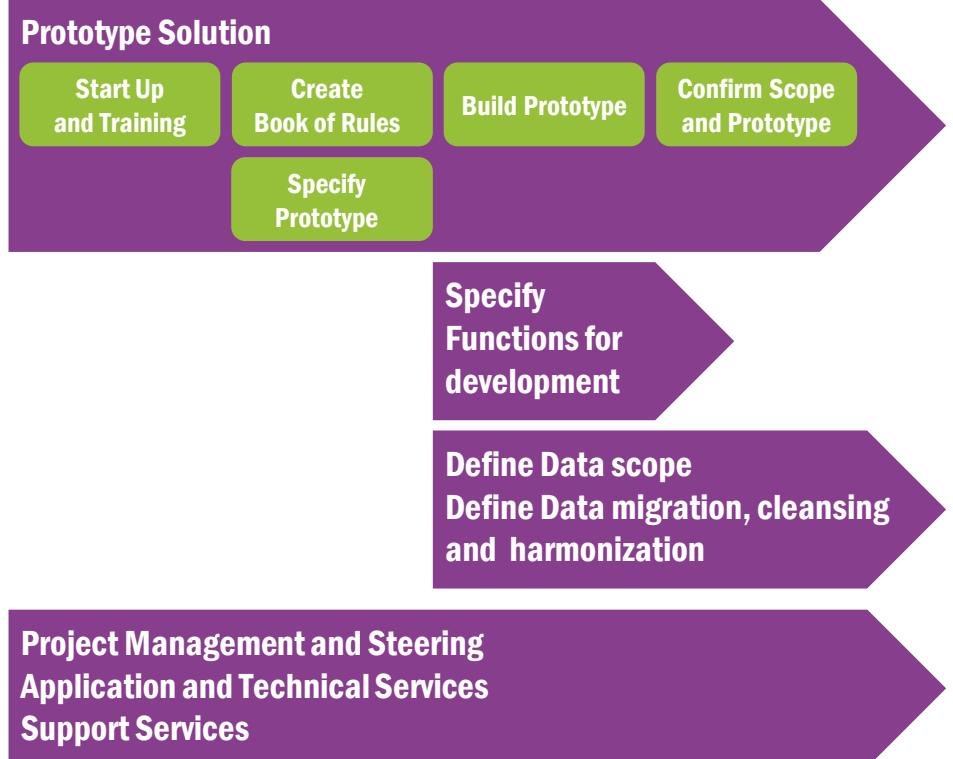
- Review and refine number of Book of Rules workshops planned in the Confirm Prototype phase. Perform possible changes or refinement of workshop plan according to the agreed project planning process in the Project Management Plan



CONFIRM  
PROTOTYPE

# CONFIRM

## PROTOTYPE



### SOLUTION CONFIRMED AND SPECIFIED

- ✓ Book of Rules approved
- ✓ Solution scope refined and approved
- ✓ Prototype Solution confirmed
- ✓ High Level Specifications for CRIM objects (Configurations, Reports, Interfaces, Modifications) approved

### Migration Planned

- ✓ Data scope defined
- ✓ Data migration scope defined
- ✓ Data cleansing and harmonization defined



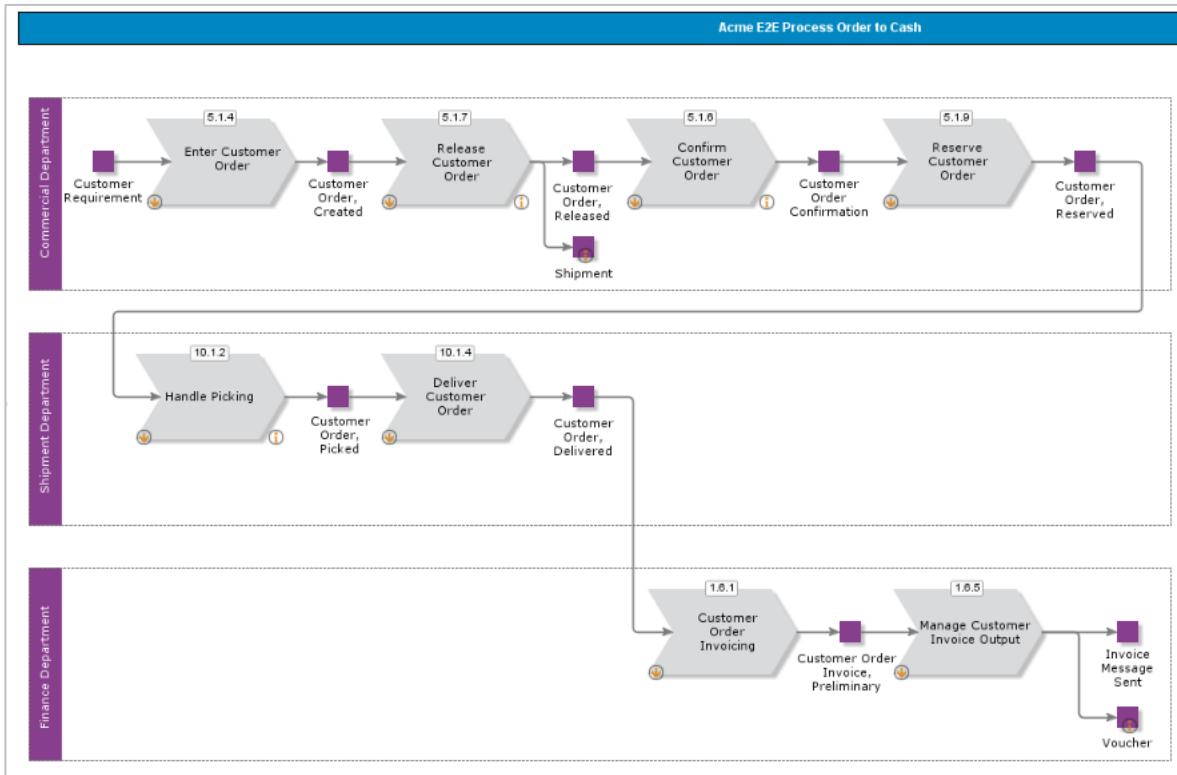
# SPECIFY PROCESSES AND

## SAMPLE DATA FOR PROTOTYPE SOLUTION

# DEFINITIONS

## ■ End to End Processes

A description of Customer business processes is based on Sub processes in a Swim lane format in IFS Scope tool. Example:



# DEFINITIONS

- Prototype cases for End to End processes

A Prototype cases is a defined way to run an End to End process with defined scenarios, functions, data and expected result.

There can be one or more Prototype cases for each End to End process.

- Prototype cases for other specific Functional areas

Prototype cases can also be defined for a critical processes or a specific important functional area with specific requirement that have to be confirmed in the prototype.

- Prototype cases

Prototype cases defines and specifies set up of the Prototype.

- Prototype

The prototype is a set up of IFS Applications to enable presentation of the defined Prototype cases. It shall demonstrate the functional solution for the agreed scope.

The prototype is not a complete system configuration showing all scenarios, processes and sub processes. It is end-to-end oriented and can as exception be setup to show very critical scenarios but is otherwise happy-flow oriented.

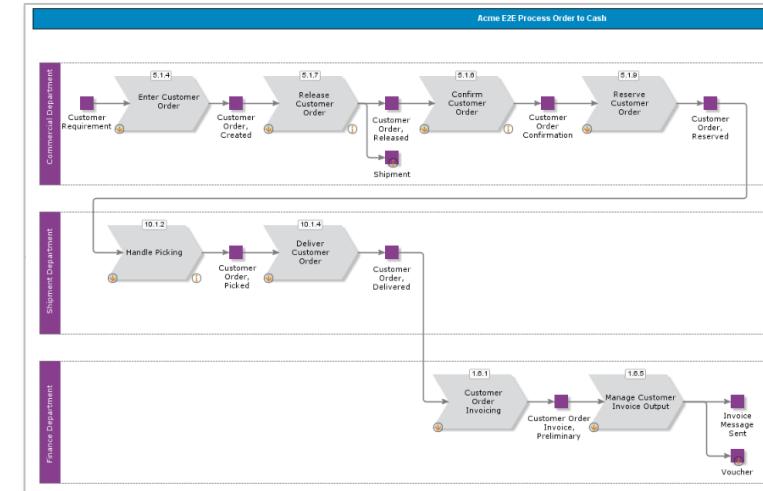
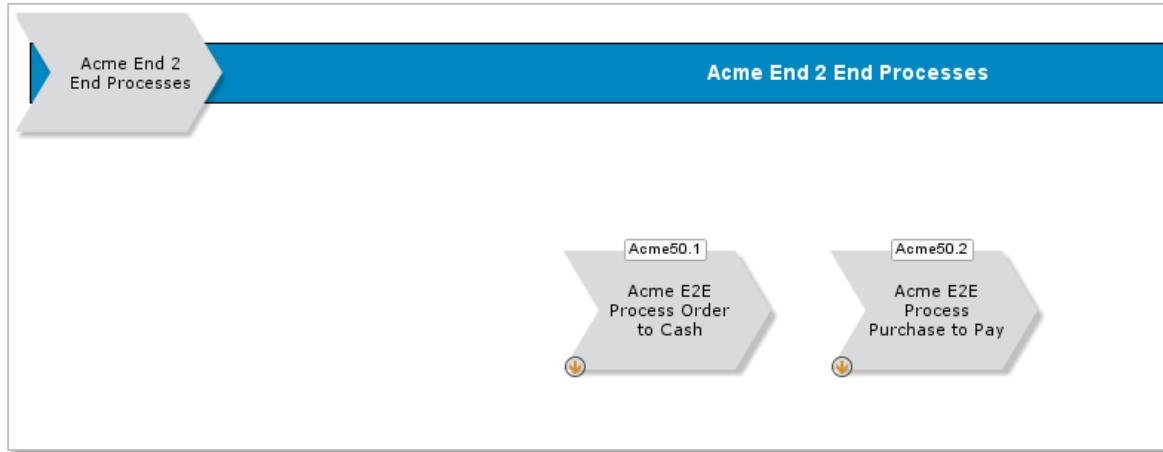
The prototype is a set up of standard IFS Applications, without configurations, reports, interfaces, modifications, profiles or permission sets. As exception some base profile or configurations can be set up if applicable to prove a solution for a critical scenario or requirement.

# DEFINE

## PROTOTYPE PROCESSES

2B3-10.1  
Define and specify prototype cases for End to End processes and other critical solution areas

- Perform work shop with customer to define
  - End to End processes
  - Other specific Functional areas with specific requirement that have to be confirmed in the Prototype.
- Both End to End processes and other specific Functional areas shall be documented as swim lane models in IFS Scope tool under “End 2 End Processes”.



# PROVIDE SAMPLE DATA

## FOR THE PROTOTYPE

- Generate a Test Tracker for the Prototype Solution Scope
- Clarify to the Customer what data objects that are required.
- Clarify what data that is required for each object.
- Customer

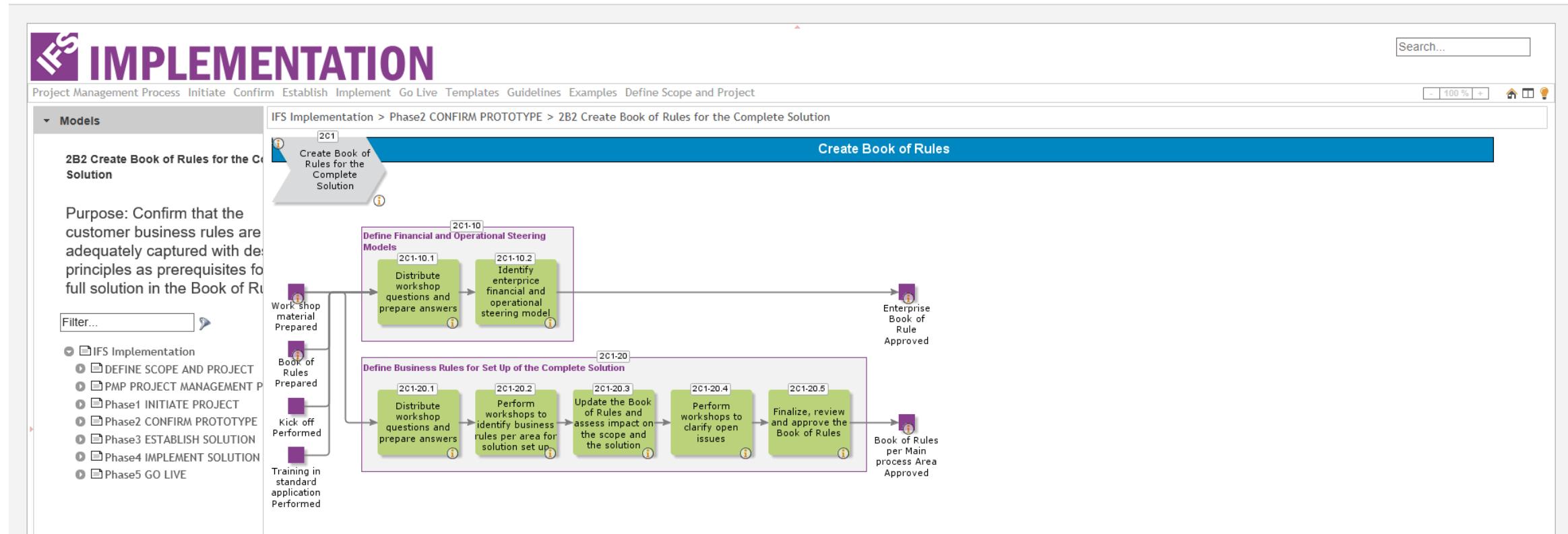
A	B	C	D	E	H	I	J	K	L	M	N	O	P	Q	C
1 Test overview	5.1.4.11	Manually Create Customer Order, Basic			Case:	A	1 Acme	Test Scenario Case A		Test Scenario Case B		Test Scenario Case C		Test Scenario Case D	
2															
3 Test Responsible:															
4 Date:															
5 Status:															
6 Scenario Data:															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18 Step	Activity	Mandatory/Optional	Responsible	Result											
19	0														
20	1 Enter Customer Order Header														
21	2 Add Customer Order Lines														
22	3 Enter Single Occurrence Address per Order														
23	4 Enter or Change Delivery Information														
24	5 Add Customer Order Rental Line														
25	6 Enter Document Info														
26	7														
27	8 General Activities														
28	9														



# CONFIRM SOLUTION SCOPE

# CREATE BOOK

## OF RULES



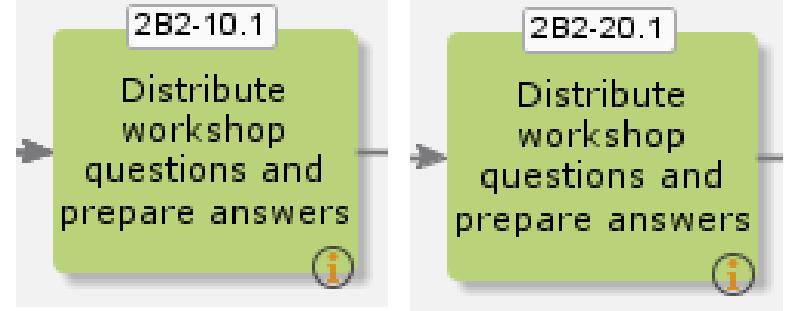


PREPARE ANSWERS TO

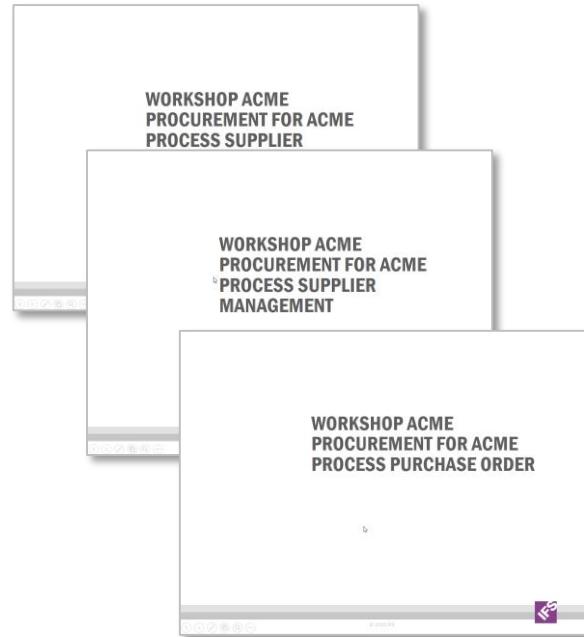
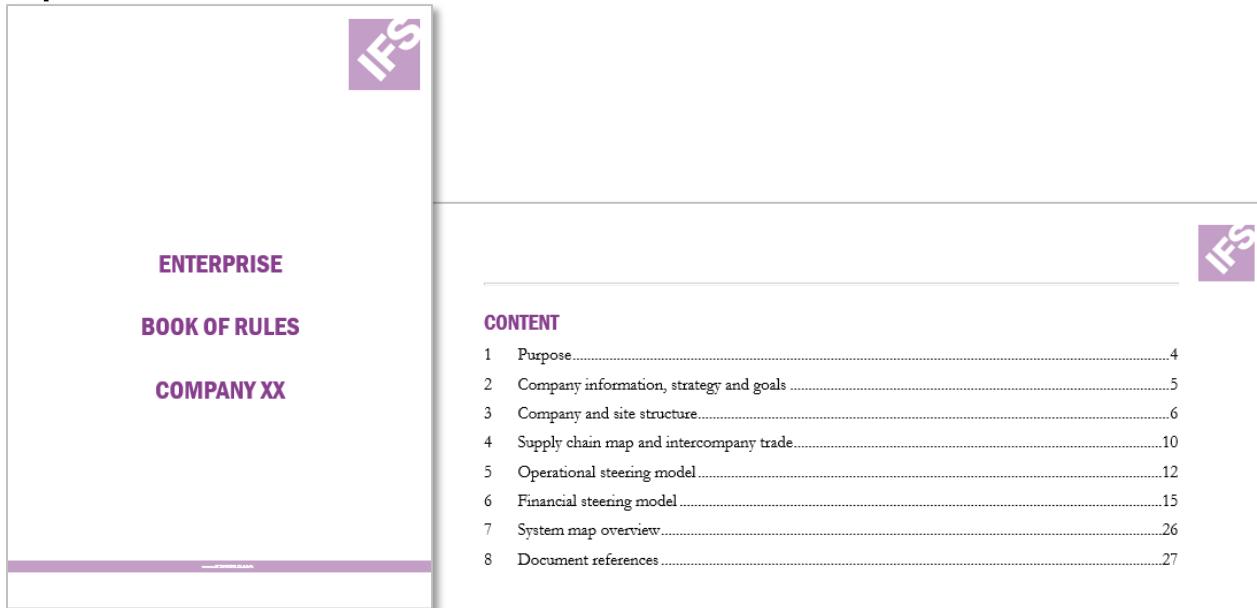
**WORKSHOP QUESTIONS**

# PREPARE

## WORK

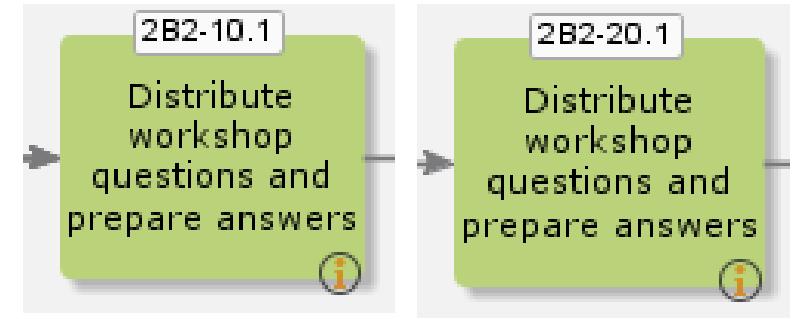


- Presentations with workshop questions, Enterprise Book of Rules and Book of Rules per Main process area are prepared during Initiate project.
- Send the workshop questions to Customer Solution owner and Solution leads after performed Start up.



# PREPARE

## WORK



- Customer prepares information related to the workshop questions.

### WORKSHOP DISCUSSIONS

#### 2.3.1.Q12 TYPES/GROUPS OF SUPPLIERS

- This question is related how the suppliers are structured and grouped depending of what types of suppliers there are.
- Describe the different type/groups of suppliers
- How are these suppliers grouped, and why?
- Grouping (Geographical, type (e.g. spare parts, critical parts, service parts) etc.)

### DECISIONS AND RESPONSIBLE

#### 2.3.1.Q12 TYPES/GROUPS OF SUPPLIERS

- Responsible:
- Decisions:



ENTERPRISE BOOK OF RULES

**OPERATIONAL AND FINANCIAL  
STEERING MODEL**

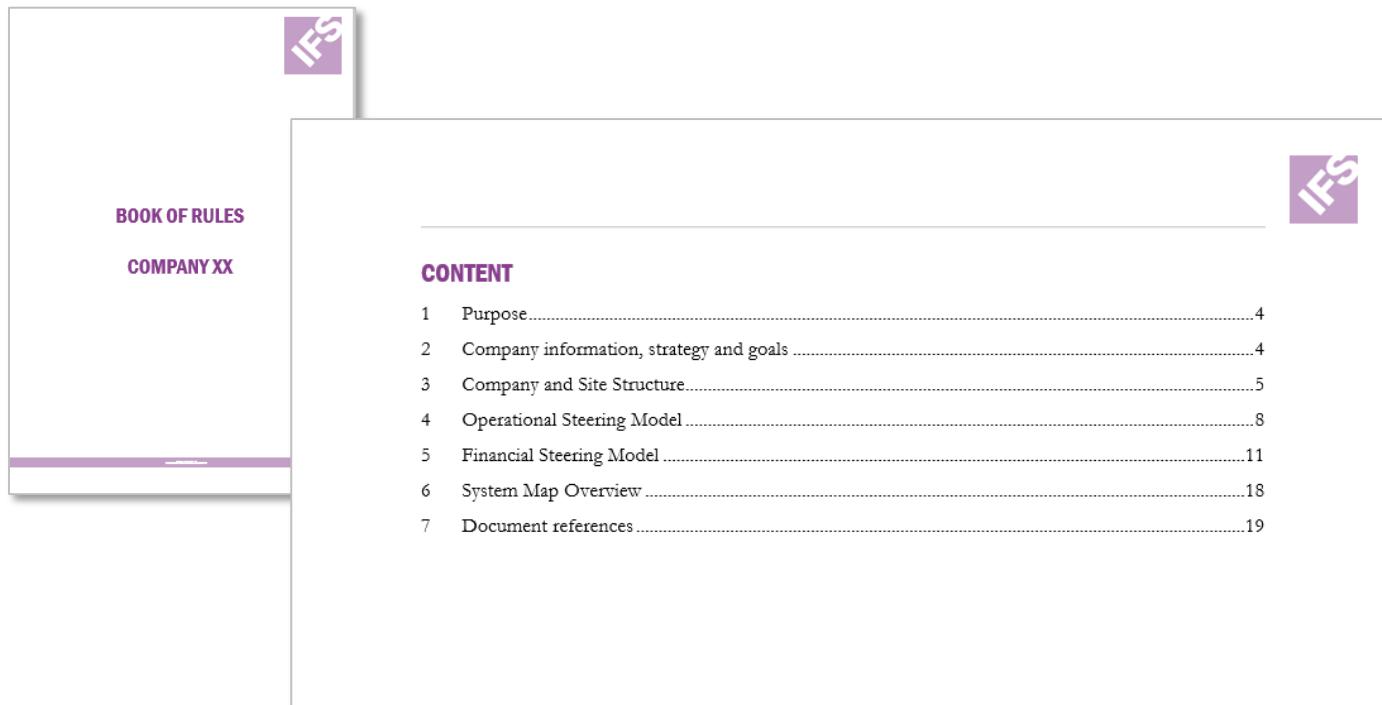
# ENTERPRISE BOOK OF RULES

2B2-10.2

Identify generic financial and operational steering model



- IFS Solution architect and Customer solution owner perform works shops to confirm, refine or define content in Enterprise Book of Rules. IFS or Customer solution team members or other customer subject matter experts are included in the workshops if applicable.



# DOCUMENTATION

## AND REVIEW

2B2-10.2

Identify generic financial and operational steering model



- All content in the Enterprise Book of Rules is expected to be provided from the Customer, either during the sales process, in the contract or provided during the workshops.
- IFS review content, define format and include the relevant information in the Enterprise Book of Rule.
- IFS Solution architect and Customer Solution owner review and agree on the content.



PERFORM WORK BOOK OF RULES

PER MAIN PROCESS AREA

# BOOK OF RULES

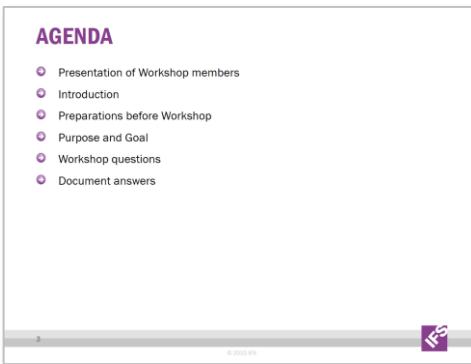
## PER MAIN PROCESS AREA

- Solution team leads perform works shops to answer workshop question. IFS and Customer solution team members participate in the workshops. Other customer subject matter experts are consulted or included in the workshops if applicable.
- Follow the agenda from the workshop material and review and refine answers and information provided by the Customer in the presentation.

**AGENDA**

- Presentation of Workshop members
- Introduction
- Preparations before Workshop
- Purpose and Goal
- Workshop questions
- Document answers

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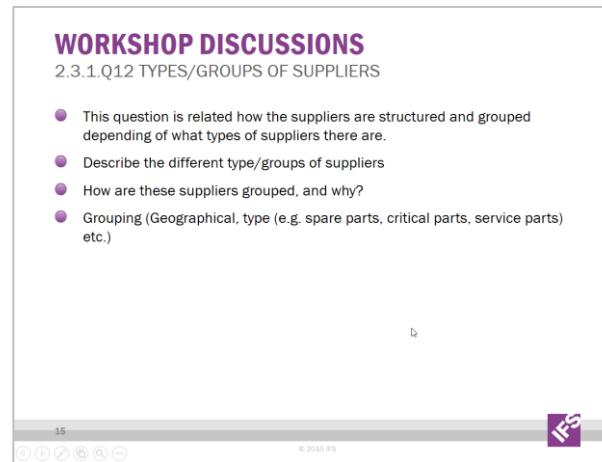


**WORKSHOP DISCUSSIONS**

2.3.1.Q12 TYPES/GROUPS OF SUPPLIERS

- This question is related how the suppliers are structured and grouped depending of what types of suppliers there are.
- Describe the different type/groups of suppliers
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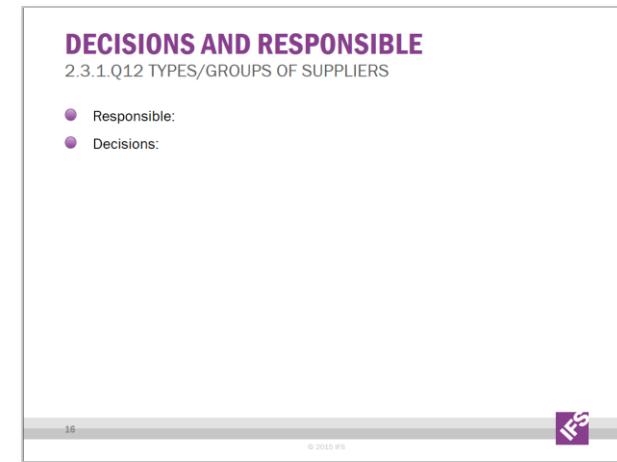


**DECISIONS AND RESPONSIBLE**

2.3.1.Q12 TYPES/GROUPS OF SUPPLIERS

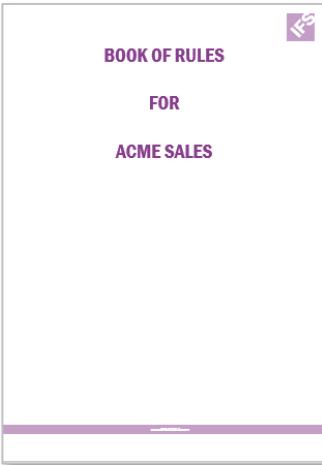
- Responsible:
- Decisions:

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# UPDATE THE BOOK OF RULES

- Solution team leads review content, define format and include the relevant information in Book of Rule per Main process area.
- Identify any need for additional information from the Customer. Define questions and send to Customer.
- Where applicable document any decisions regarding set up of the Solution under the heading **Solution design notes**.



## 1.1.1.8 Delivery Confirmation (5.1.4.0160)

Delivery Confirmation is a step in the order flow where we can change qty of delivered goods before invoice and we can postpone the cogs booking to the date of confirmation

### Questions:

Do we use delivery confirmation?

Do cost (from cost of goods sold) and revenue (from invoice) have to be in the same financial period?

How do you achieve this?

### Answers, rules, standards, pre requisites, decisions:

-

**Solution design notes**

-

# ASSESS IMPACT

## ON THE SCOPE AND SOLUTION

- Set up internal works shops with solution team members to assess if the gained information have any impact on the Solution scope or the application solution.
- If applicable, update the Solution scope in IFS Scope tool.
- For scope or solution changes with an impact on cost or ability to deliver, agree on additional design activities or additional specification activities for development objects. If applicable initiate a change request for additional services.
- If applicable initiate a change request for change of the solution scope, however it is recommended to evaluate alternative design and manage solution scope changes on an aggregated level after Confirm of the Prototype.

# CLARIFY OPEN ISSUE

## AND REVIEW BOOK OF RULES

- If applicable perform workshops with the Customer to review answers to additional questions.
- Solution team leads responsible for the Main process finalize, review and agree on the content in Book of rules per Main process area.
- IFS Solution architect and Customer Solution owner review and approve the Book of Rules per Main process area.



BUILD PROTOTYPE  
SOLUTION

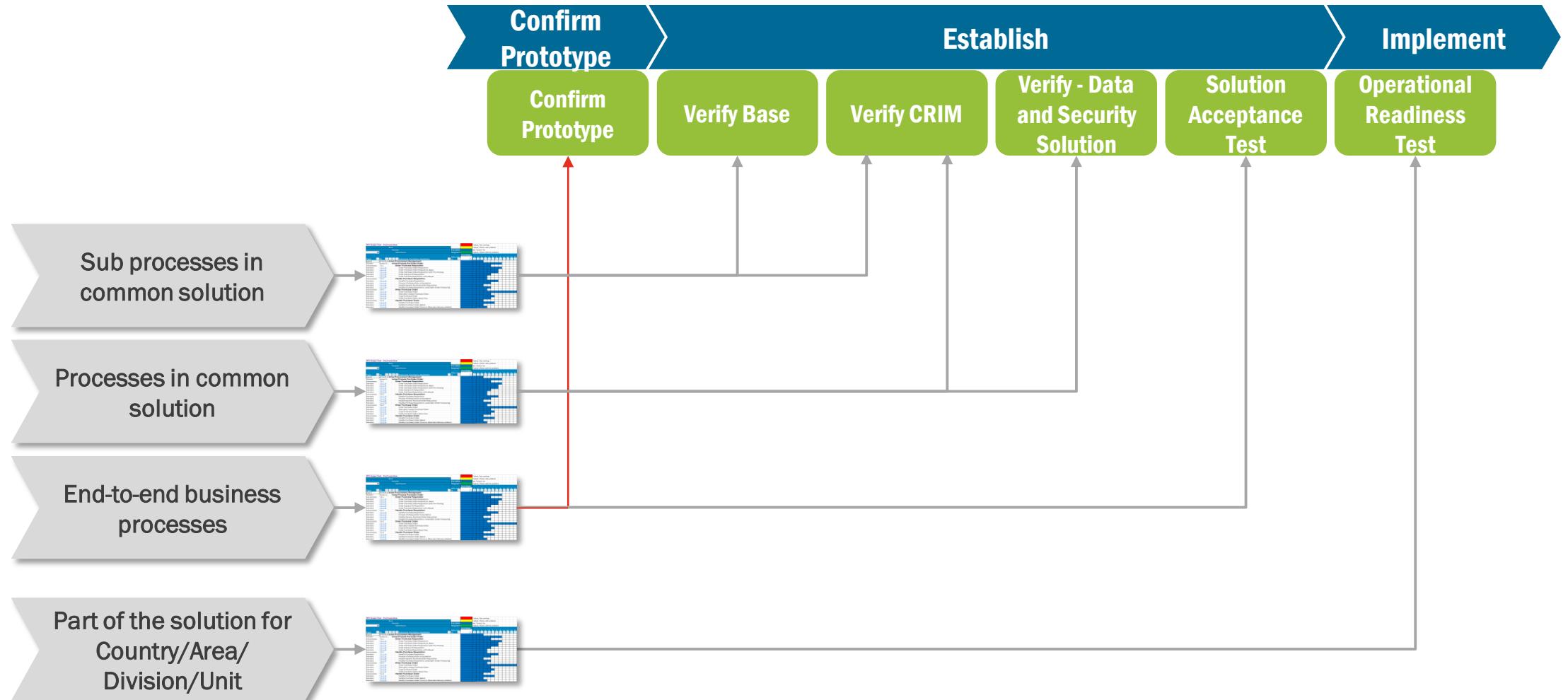
# DEFINITIONS

## PROTOTYPE

- A **prototype** in the IFS Implementation Methodology means an early release of the solution built to enable confirmation of the solution scope and used to evaluate the solution design. Furthermore, the prototype serves to provide specifications for the configuration of the live system in the Establish phase as well as providing a basis for creating specifications for CRIM objects (Configurations, Reports, Interfaces and Modifications) included in the scope.
- The prototype is not a complete system definition including all variances of scenarios and processes but illustrates the main end-to-end processes and optionally few processes earlier identified as Highly critical to the customer business.

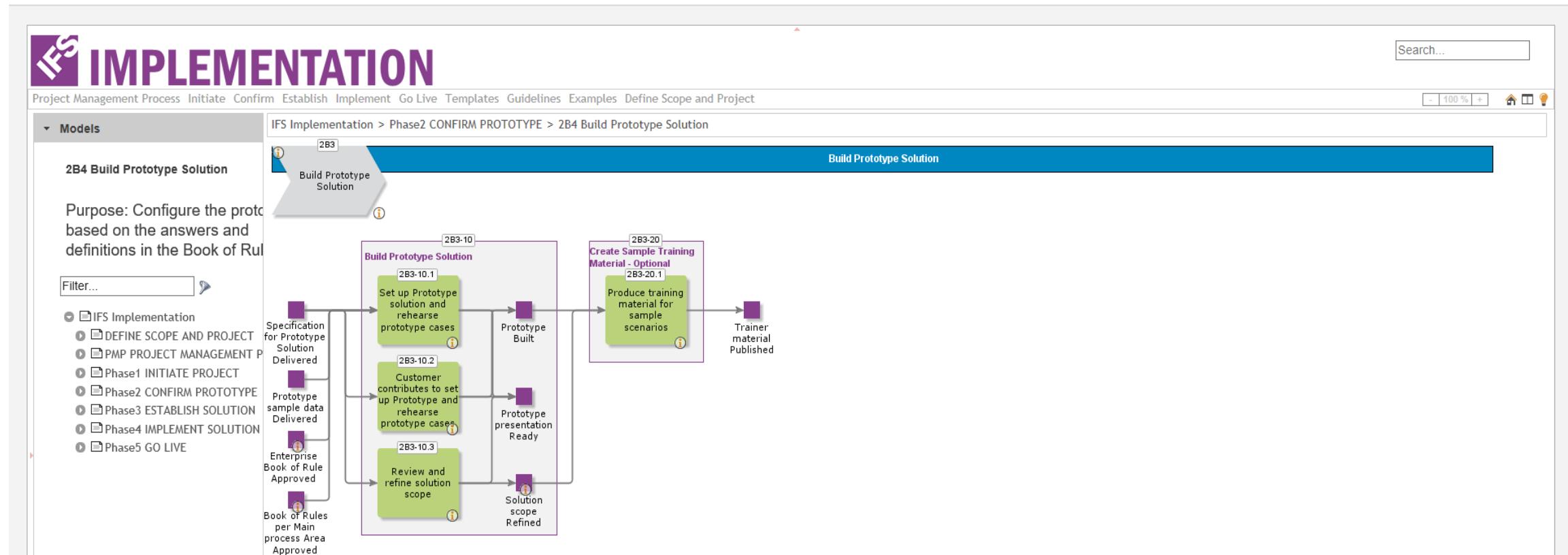
# OVERVIEW OF PROTOTYPE

## VERIFY AND TEST WORK



# WORK PACKAGE

## AND ACTIVITIES



# SET UP

## PROTOTYPE SOLUTION

- The Prototype set up and supporting presentations shall be prepared at good enough level to ensure that the Customer will understand the workflow of the presented processes.
- The prototype solution shall be set up with data, parameters, configurations and transactions to demonstrate the defined prototype cases. If the solution requires interfaces or modifications, presentations based on high level functional specifications are to be prepared.

# SET UP

## PROTOTYPE SOLUTION

- If possible, transactions shall be generated from the operational flows in the defined Prototype cases. If not possible, additional transactions and values shall be added during set up of the Prototype.
- By default, Configurations, Reports, Interfaces and Modifications shall not be developed for the Prototype. Although, if required to achieve an acceptable flow, some objects can be developed:
  - Custom objects (for example critical custom fields, menus, events, tabs, enumerations, information cards, Lobbies and user profiles for the more important business roles/user groups).
  - Reports used to prove important KPIs.
  - Interfaces, preferably based on simplified input and output files.



CONFIRM PROTOTYPE

SOLUTION

# WORK PACKAGE

## AND ACTIVITIES

### IFS IMPLEMENTATION

Project Management Process Initiate Confirm Establish Implement Go Live Templates Guidelines Examples Define Scope and Project

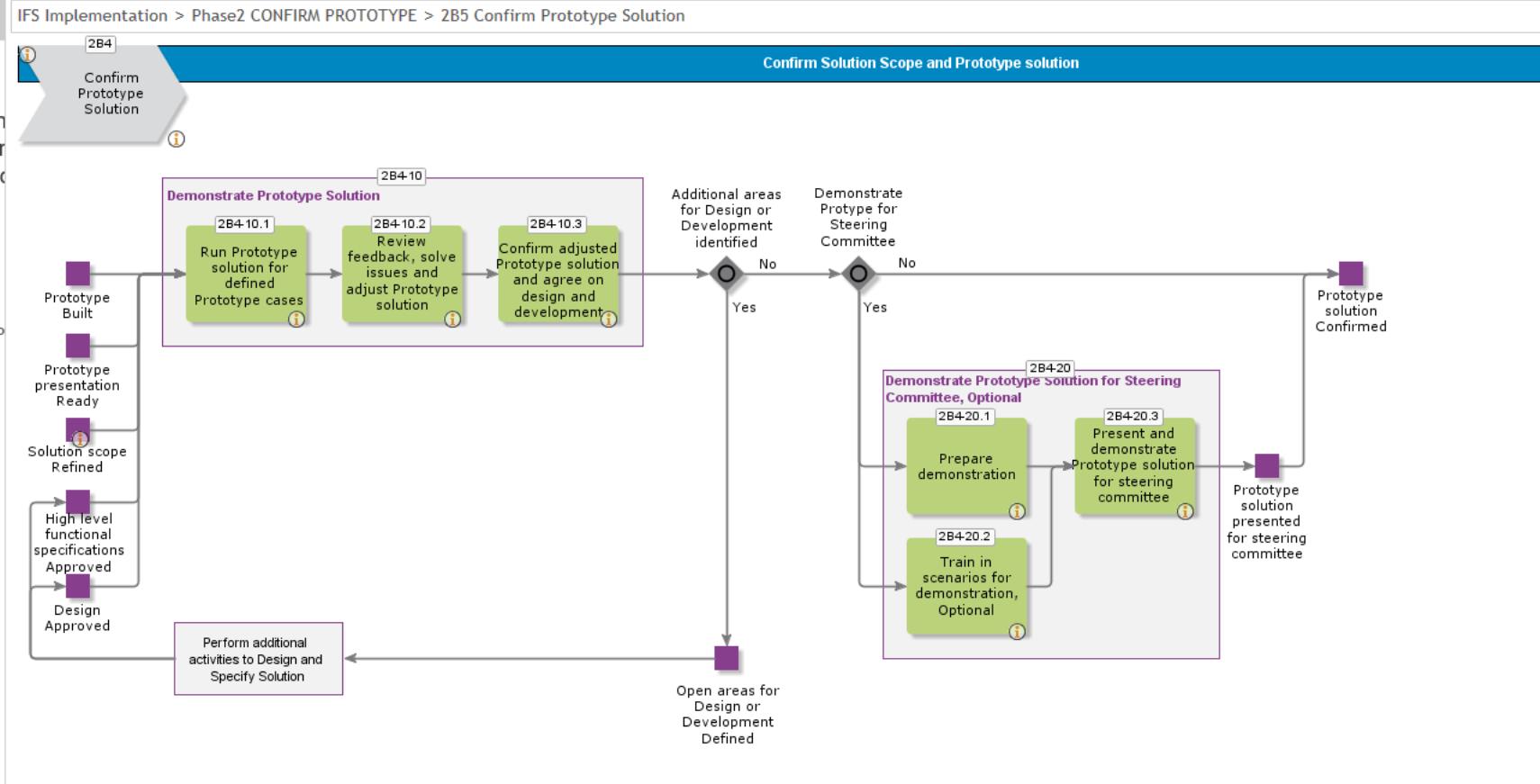
#### Models

##### 2B5 Confirm Prototype Solution

Purpose: Confirm that the final scope defined in the Main Project documents meets the agreed customer requirements.

Filter...

- IFS Implementation
  - DEFINE SCOPE AND PROJECT
  - PMP PROJECT MANAGEMENT P
  - Phase1 INITIATE PROJECT
  - Phase2 CONFIRM PROTOTYPE
  - Phase3 ESTABLISH SOLUTION
  - Phase4 IMPLEMENT SOLUTION
  - Phase5 GO LIVE



# CONFIRM THE PROTOTYPE SOLUTION

- Based on the presented prototype solution and the high level specifications, the Customer is expected to:
  - Confirm that the Prototype fulfills the agreed requirements/business needs.
  - Approve that the Prototype shall be the basis for the full Application solution delivered in Establish solution project phase.
  - Confirm that previous design decisions are correct.
  - Confirm and approve that high level specifications fulfil identified gaps between standard application and agreed requirements and that the specifications can be the base for development of the functions.
  - Decide on changes or updates of agreed requirements/solution scope.
- Identified gaps are documented, investigated and if needed the prototype can be rerun for selected areas of the application or high-level specifications are produced for development work.



# CONFIRM SOLUTION SCOPE

# WORK PACKAGE

## AND ACTIVITIES

**IFS IMPLEMENTATION**

Project Management Process Initiate Confirm Establish Implement Go Live Templates Guidelines Examples Define Scope and Project

Models

2C3 Confirm Solution Scope for the Complete Solution

Filter...

IFS Implementation > Phase2 CONFIRM PROTOTYPE > 2C3 Confirm Solution Scope for the Complete Solution

2C3  
Confirm  
Solution Scope  
for  
the  
Complete  
Solution

Confirm Solution Scope

2C3-10  
Confirm Solution scope  
2C3-10.1  
Review and confirm the refined Solution scope

Solution scope Refined → 2C3-10.1 Review and confirm the refined Solution scope → Solution Scope Confirmed

IFS

# CONFIRM

## THE SOLUTION SCOPE

- If required, go through the agreed change request procedure to update the baseline based on findings in Confirm Prototype Solution.



# DEFINE DATA SCOPE

# AND DATA MIGRATION

# PURPOSE

- The purpose of the document *IFS Scope tool - Data tracker* is to define
  - data required to set up the solution.
  - data critical for set up of data financial and operation steering model.
  - status in work to define and establish data.
  - ownership of the data at customer side and within the project.
  - method for migration of data.

# DEFINITIONS

- Basic data

A set of permissible values used by other data fields in Master data and Transactional data. Basic data is typically simple data with parameters and list of values. When applied in Master data or Transactional data, it can have an impact on functionality, work flow or it can be used for financial or operational follow up.

- Master data

Non transactional business objects shared across the enterprise, between business units, between processes or used by several applications.

Master data is typically business objects defining products, manufacturing, facilities, services, agreements, internal or external parties or any other object required in a transactional process flow.

- Transactional data

Business objects defining planned or performed activities operational or financial transactions. Master data is typically plans, orders, invoices, financial or operational transactions.

# DEFINE

## BASIC DATA USAGE

- Design decisions regarding use of basic data shall be documented in the Data tracker. This can include:
  - Decisions regarding use of basic data for KPI:s, financial, operational steering model.
  - Possible design decisions regarding usage and set up of the data in the solution to support work flow or requirements.

Basic Data Tracker												
Scope tool Processes			Data objects		Customer Solution scope (from Scope tool csv file)			Usage in Solution				
Main Process	Process ID	Process	Category	Data Object Name	Customer Main Process	Customer Process	Included in Scope	Used in solution	Manual	Typ of Usage in	Comments on usage and rules	
5. Demand P	5.1	Sales Order	Basic data	Add or Modify Order Types	Acme Sales	Acme Process Sales Order	Included	Used		Solution set up data		
5. Demand P	5.1	Sales Order	Basic data	Add or Modify Shipment Types	Acme Sales	Acme Process Sales Order	Included	Used				
3. Customer	3.4	Customer Price List an	Basic data	Add Valid Sites Manually or from Site Clu	Acme Sales	Acme Process Sales Order	Included	Used				
3. Customer	3.4	Customer Price List an	Basic data	Add Valid Suppliers	Acme Sales	Acme Process Sales Order	Included	Used				
3. Customer	3.4	Customer Price List an	Basic data	Assign Freight Zones	Acme Sales	Acme Process Sales Order	Included	-	Not used			
5. Demand P	5.1	Sales Order	Basic data	Connect Route with Customer	Acme Sales	Acme Process Sales Order	Included	Used				
3. Customer	3.4	Customer Price List an	Basic data	Create Customer Price Group	Acme Sales	Acme Process Sales Order	Included	Used		KPI and Finance	Used for Sales KPI	
3. Customer	3.4	Customer Price List an	Basic data	Create Freight Map and Enter Zone Defin	Acme Sales	Acme Process Sales Order	Included	Used				
0. Enterprise	0.3	Supply Chain Setup	Basic data	Define Site to Customer Supply Chain Par	Acme Sales	Acme Process Sales Order	Included	Used				
0. Enterprise	0.3	Supply Chain Setup	Basic data	Define Site to Site Supply Chain Paramet	Acme Sales	Acme Process Sales Order	Included	Used				
5. Demand P	5.1	Sales Order	Basic data	Define Sourcing Exceptions	Acme Sales	Acme Process Sales Order	Included	Used				

# DEFINE

## MASTER DATA IN SOLUTION

- When importing the Customer Solution scope from the csv file, Master data objects relevant for the scope will be marked up as Included in scope.
- All Master data that is included in the scope is not relevant for the solution. Mark not relevant Master data as "Not used" in the column Manual in the solution.

Migration Tracker											
39 objects marked as Used in solution. 0 objects in migration scope											
Scope tool	Proc	Data objects		Customer Solution scope (from Scope tool csv file)			Usage in Solution		Migration scope, method	Se	Org
		Main Proc	Proc	Category	Data Object Description	Customer Main Proc	Customer Process	Included in so	Used in so	Manual	
3. Customer	3.3	Master data		Customers	Acme Sales	Acme Process Customer Management	Included	Used			
3. Customer	3.3	Master data		Customer Hierarchys	Acme Sales	Acme Process Customer Management	Included	Used			
3. Customer	3.4	Master data		Sales Part Base Prices	Acme Sales	Acme Process Customer Price Lists	Included	Used			
3. Customer	3.4	Master data		Sales Part Rental Base Prices	Acme Sales	Acme Process Customer Price Lists	Included	-	Not used		
3. Customer	3.4	Master data		Sales Price Lists	Acme Sales	Acme Process Customer Price Lists	Included	Used			
3. Customer	3.4	Master data		Customer Price Groups	Acme Sales	Acme Process Customer Price Lists	Included	Used			
3. Customer	3.4	Master data		Customer Agreements	Acme Sales	Acme Process Customer Price Lists	Included	Used			
3. Customer	3.4	Master data		Pack Size Charge Price Lists	Acme Sales	Acme Process Customer Price Lists	Included	Used			
3. Customer	3.4	Master data		Warranty Type Templates	Acme Sales	Acme Process Customer Price Lists	Included	Used			
4. Part and Ed	4.2	Master data		Non-Inventory Sales Parts	Acme Sales	Acme Process Customer Price Lists	Included	Used			
4. Part and Ed	4.2	Master data		Sales Parts	Acme Sales	Acme Process Customer Price Lists	Included	Used			
4. Part and Ed	4.2	Master data		Package Parts	Acme Sales	Acme Process Customer Price Lists	Included	Used			

# DEFINE

## TRANSACTIONAL DATA IN SOLUTION

- A subset of normal Transactional data are included in the Data Tracker.
- In this version there is no update of Included in scope when importing the Customer Solution scope from the csv file. This must be done manually by set "Used" in the column "Manual" under "Used in Solution".
- This is only relevant to do if the objects will be migrated.

Migration Tracker		Customer Solution scope (from Scope tool csv file)										Usage in Solution		Migration scope, methods		Selected Objects	
Scope tool	Proc	Data objects	Main Proc	Proc	Category	Data Object Description	Customer Main Proc	Customer Process	Included in scope	Used in solution	Manual	Da	Migration tool	Method	Scope	Org	
TRANSACTIONAL DATA OBJECTS (update yellow fields to include objects in migration scope)																	
01. Financial Management	Transactional data	Customer Order Invoice								Used	Used						
01. Financial Management	Transactional data	Instant Invoice								-							
01. Financial Management	Transactional data	Project Invoice								-							
01. Financial Management	Transactional data	Supplier Invoice								-							
02. Supplier Relationship	Transactional data	Order Quotation								-							

# DEFINE

## MIGRATION SCOPE, METHODS AND TOOLS

- Define migration, migration method and tools per IFS data object. If applicable define Responsibility to extract, transform and load data. Update Data tracker list with result.

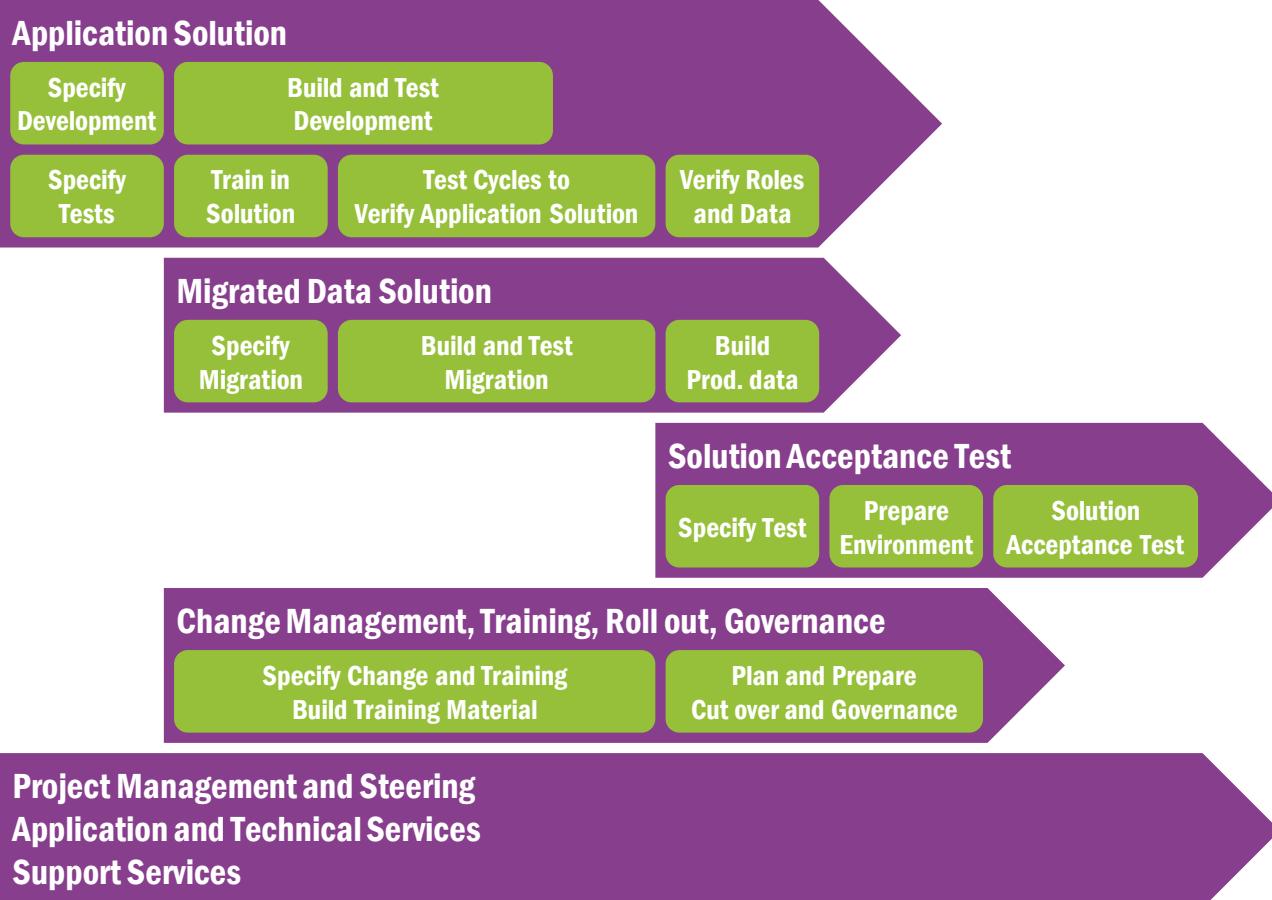
Migration Tracker				Customer Solution scope (from Scope tool csv file)						Usage in Solution		Migration scope, method		Service Responsibility		
Main Proc	Proc	Data objects	Category	Customer Main Proc	Customer Process	Included in	Used in so	Manual	Migration tool	Extract and clean	Migrate	Responsible Project team				
3. Customer	3.3	Master data	Customers	Acme Sales	Acme Process Customer Manage	Included	Used		IFS Migration tool							
3. Customer	3.3	Master data	Customer Hierarchys	Acme Sales	Acme Process Customer Manage	Included	Used		IFS Migration tool							
3. Customer	3.4	Master data	Sales Part Base Prices	Acme Sales	Acme Process Customer Price Lis	Included	Used		IFS Migration tool							
3. Customer	3.4	Master data	Sales Price Lists	Acme Sales	Acme Process Customer Price Lis	Included	Used		IFS Migration tool							
3. Customer	3.4	Master data	Customer Price Groups	Acme Sales	Acme Process Customer Price Lis	Included	Used		IFS Migration tool							
3. Customer	3.4	Master data	Customer Agreements	Acme Sales	Acme Process Customer Price Lis	Included	Used		Manual							
3. Customer	3.4	Master data	Pack Size Charge Price Lists	Acme Sales	Acme Process Customer Price Lis	Included	Used		Manual							
3. Customer	3.4	Master data	Warranty Type Templates	Acme Sales	Acme Process Customer Price Lis	Included	Used		Manual							
4. Part and Eq	4.2	Master data	Non-Inventory Sales Parts	Acme Sales	Acme Process Customer Price Lis	Included	Used		IFS Migration tool							
4. Part and Eq	4.2	Master data	Sales Parts	Acme Sales	Acme Process Customer Price Lis	Included	Used		IFS Migration tool							
4. Part and Eq	4.2	Master data	Package Parts	Acme Sales	Acme Process Customer Price Lis	Included	Used		No Migration							



ESTABLISH  
SOLUTION

# ESTABLISH

## SOLUTION



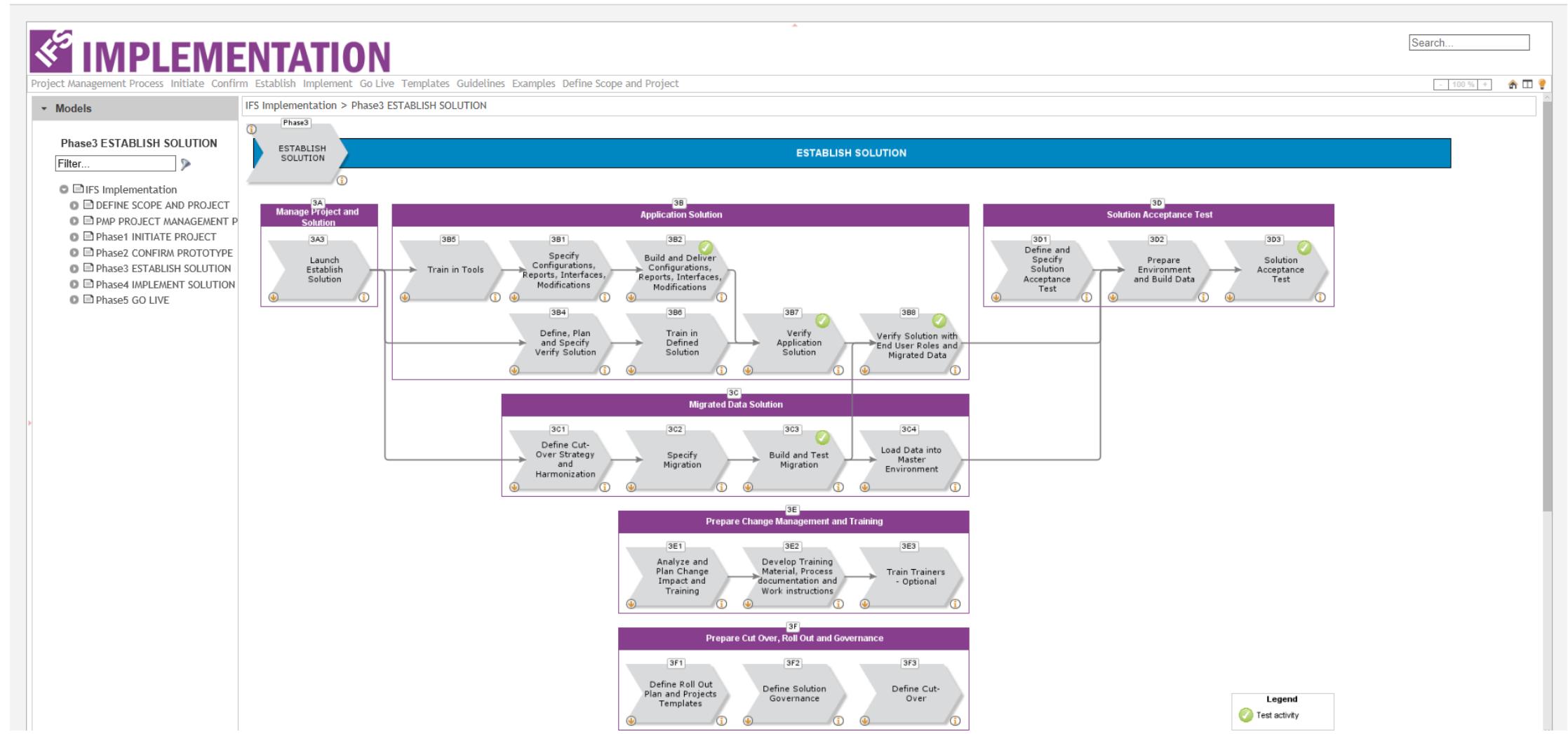
### SOLUTION ESTABLISHED AND APPROVED

- ✓ Application solution verified  
Project team trained  
CRIM objects (configurations, reports, interfaces, modifications) developed and approved  
Process/sub process scenarios verified
- ✓ Migrated data solution verified  
Migration specified, build and tested
- ✓ Solution Acceptance Test  
End to end scenarios verified  
Established solution approved

### IMPLEMENTATION PLANNED AND PREPARED

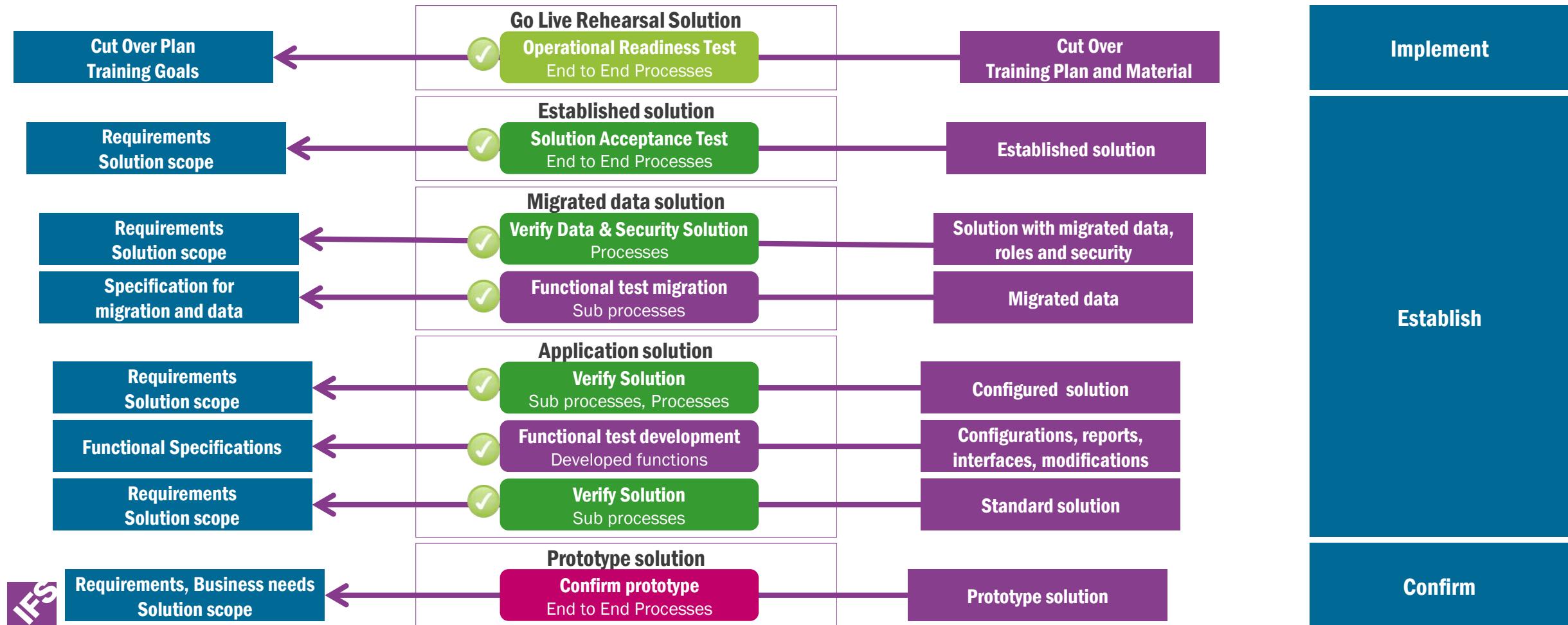
- ✓ Change management and training planned  
Change impact analysis delivered  
Change management plan delivered  
Training plan delivered  
Training material and work instructions delivered
- ✓ Cut over plan delivered
- ✓ Governance and support defined

# ESTABLISH



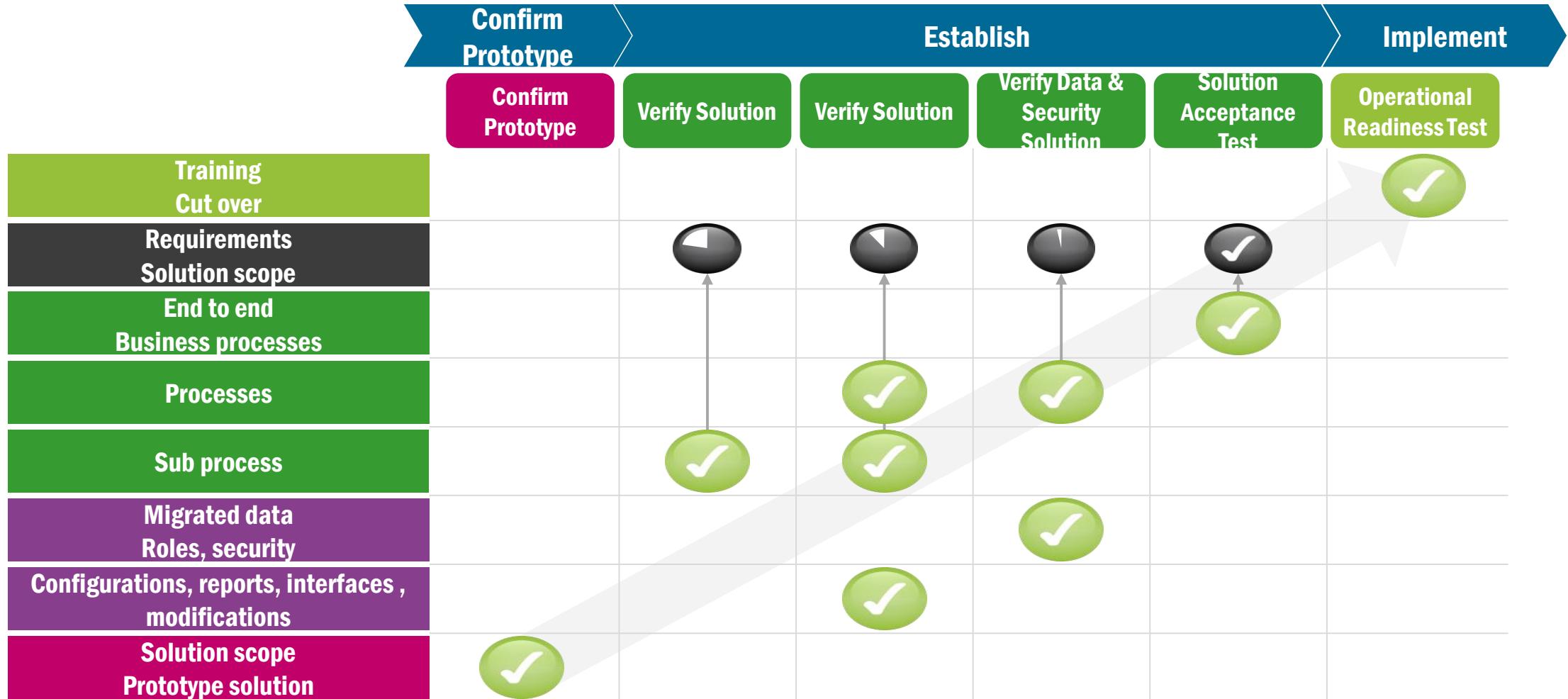
# TEST STRATEGY

## STEP BY STEP APPROACH



# TEST SCOPE

## PER TEST CYCLE



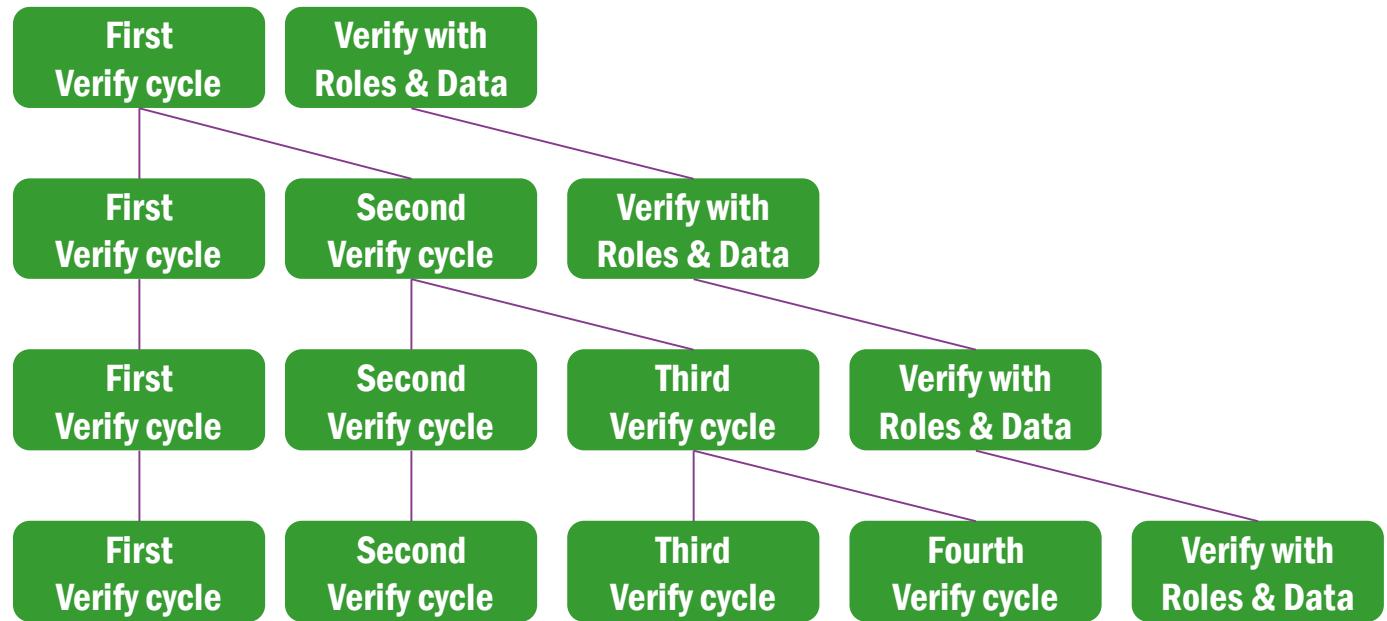
# VERIFY CYCLES

## SCALABLE APPROACH

Number of Verify cycles are defined by solution scope, delivery plan for CRIM scope and practical consideration for Customer staffing.

Examples:

1. Small basic solution
2. Default approach
3. Solution with several development cycles
4. Large solution with several development cycles



# PLAN

## TRAINING SESSIONS

- Training shall be planned before each verify cycle.
- Training scope shall include topics relevant for each verify cycle.

Train in  
solution

Prepare  
test data

First  
Verify cycle

Train in  
solution

Prepare  
test data

Second  
Verify cycle

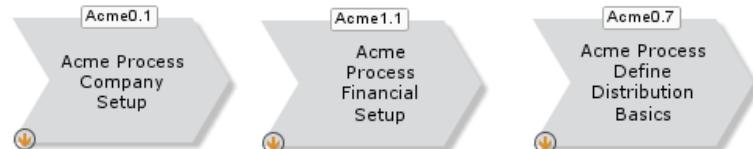
Prepare  
test data

Verify with  
Roles & Data

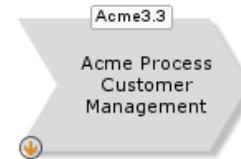
## VERIFY APPLICATION CYCLES

- Consider the logical test sequence when planning test scope per verify cycle. Remember that scenarios within set up and master data processes also shall be planned.
- Plan test of processes in a sequence according to

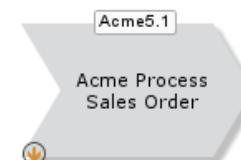
1. Set up processes



2. Master data processes



3. Operational processes

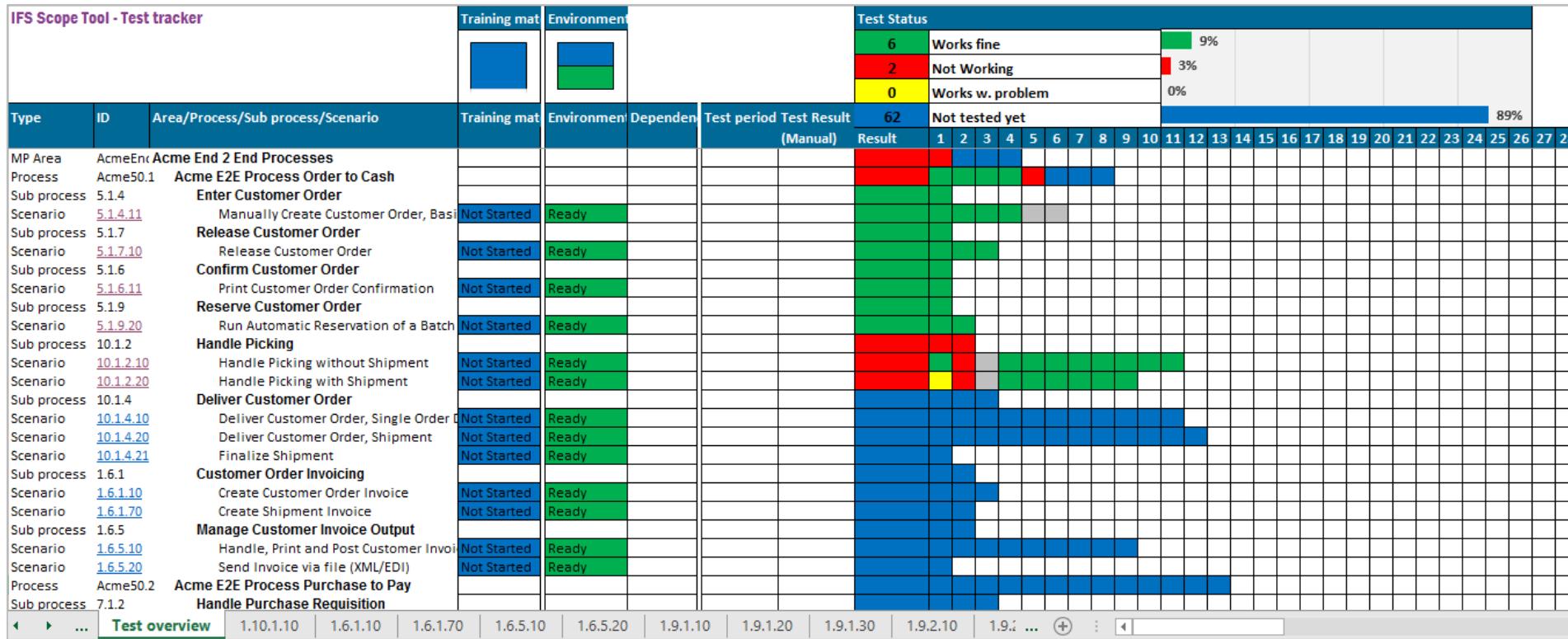


4. Financial and follow up processes



# TEST TRACKER

- Test overview for tracking of status per Main process or per End to End process. Summarizing status result from included scenarios.



# TEST TRACKER

- Detailed tracking of each scenario defining how to test and tracking status per test step.
- Possibility to test and report result for several test cases per scenario.

Test overview		10.1.2.10	Handle Picking without Shipment		Case: A		B	C	D		
Test Responsible:			1 Acme	Test Scenario Case A		Test Scen	Test Scen	Test Scen			
Date:				Case Description:							
Status:											
Scenario Data:				Data type	ID	Description	Qty, etc.				
				Not Working							
				Works w. problem							
				Not tested yet							
				Works fine							
				Not Applicable							
Step	Activity	Mandatory/Optional	Responsible	Result	Result	Expected Resu	Comment	Issue ID	Result	Result	Result
0				Red	Green	Red					
1	<a href="#">Create Pick List</a>			Red	Green	Red					
2	<a href="#">Print Pick List</a>			Red	Green	Red	Layout not ok	G3423289			
3	Perform Picking			Grey	Green	Green					
4	<a href="#">Report Picking</a>			Green	Green	Green					
5	<a href="#">Create Transport Load</a>			Green	Green	Green					
6	<a href="#">Create Consolidated Pick List</a>			Green	Green	Green					

# REPORT ENVIRONMENT

## READINESS

Report status for prepare data in test environment in the Test Tracker:

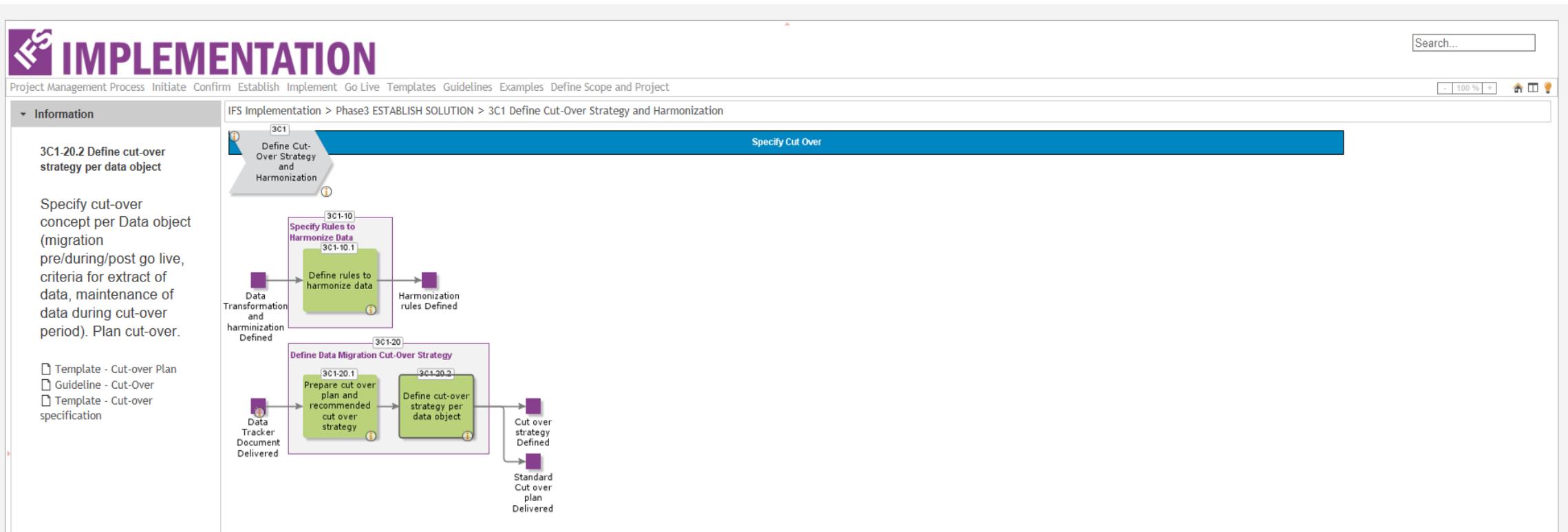
IFS Scope Tool - Test tracker				Training mat	Environment	Dependen	Test period	Test Resu
Type	ID	Area/Process/Sub process/Scenario		Training mat	Environment	Dependen	Test period	(Manual)
MP Area	AcmeSal	Acme Sales						
Process	Acme5.1	Acme Process Sales Order						
Sub process	5.1.4	Enter Customer Order						
Scenario	<a href="#">5.1.4.10</a>	Enter Customer Order		Not Started	Ready		w41	Verify Base Solution
Scenario	<a href="#">5.1.4.11</a>	Manually Create Customer Order, Basic		Not Started	Ready		w41	Verify Base Solution
Sub process	5.1.04	Receive Customer Order from EDI/MHS/XML						
Scenario	<a href="#">5.1.04.10</a>	Receive Customer Order from EDI/MHS		Not Started	Ongoing	Y	w46	Verify CRIM Solution
Scenario	<a href="#">5.1.04.20</a>	Receive Customer Order Change Request		Not Started	Ongoing	Y	w46	Verify CRIM Solution
Sub process	5.1.5	Enter Customer Order, Additional Activities or Information						
Scenario	<a href="#">5.1.5.12</a>	Handle Tax, Discount and/or Charges		Not Started	Ready		w41	Verify Base Solution
Sub process	5.1.5	Confirm Customer Order						



# CUT OVER PLANNING

# CUT OVER

## PLANNING



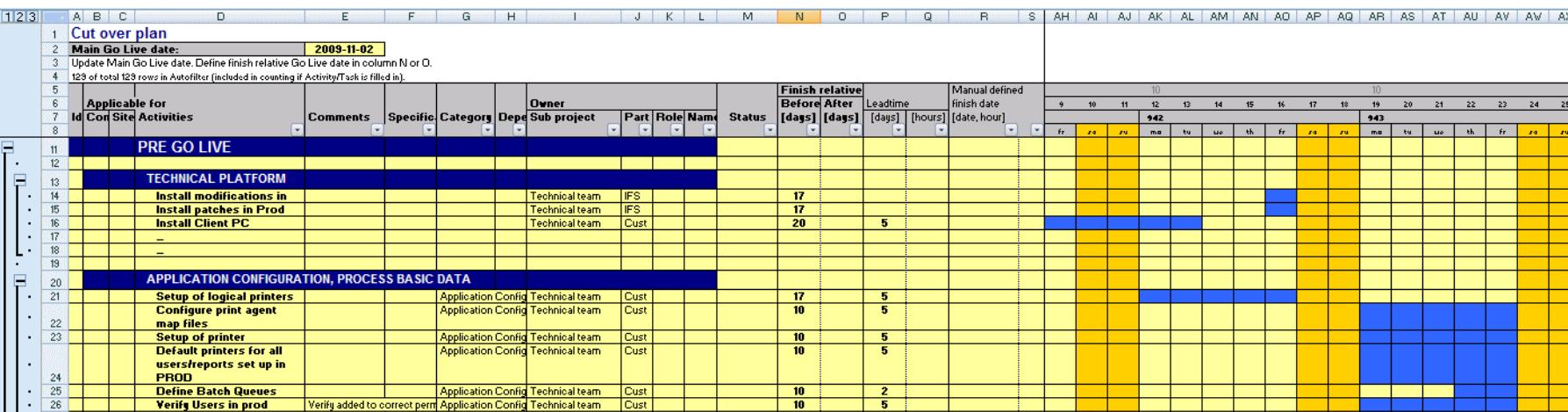
# CUT OVER PLAN

## CHECK LIST VERSION OR GRAPHICAL VERSION

- Check list oriented, recommended in most cases

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	Cut over plan			Planning													
2	Note this is example activities, they have to be revised and modified in each project.																
3	95 of total 95 rows in Autofilter (included in counting if Activity/Task is filled in).																
4		Id	Phase	Activities	Comments	Specific	Category	Depende	Owner	Sub project	Part	Role	Name	Status	Estimated time [days]	Calculated Start time	Calculated End time
5																	
6	8	Pre-Go Live	Install modifications in Prod				Technical Platform		Technical team	IFS			Not started				
7	9	Pre-Go Live	Install patches in Prod				Technical Platform		Technical team	IFS			Not started				
8	10	Pre-Go Live	Install Client PC Software				Technical Platform		Technical team	Cust			Performed				
9	11	Pre-Go Live	Setup of logical printers				Application Configuration		Technical team	Cust			Not started				
10	12	Pre-Go Live	Configure print agent map files				Application Configuration		Technical team	Cust			Not started				
11	13	Pre-Go Live	Setup of printer definition				Application Configuration		Technical team	Cust			Performed				
12	14	Pre-Go Live	Default printers for all users/reports set up in PROD				Application Configuration		Technical team	Cust			In progress				
13	15	Pre-Go Live	Define Batch Queues				Application Configuration		Technical team	Cust			Not started				
14	16	Pre-Go Live	Verify Users in prod	Verify added to correct permission set, profiles, company, site and user group			Application Configuration		Technical team	Cust			Not started				
15	17	Pre-Go Live	Verify Permission Sets				Application Configuration	X	Technical team	Cust			Not started				

- Graphical Cut over plan, if many dependencies



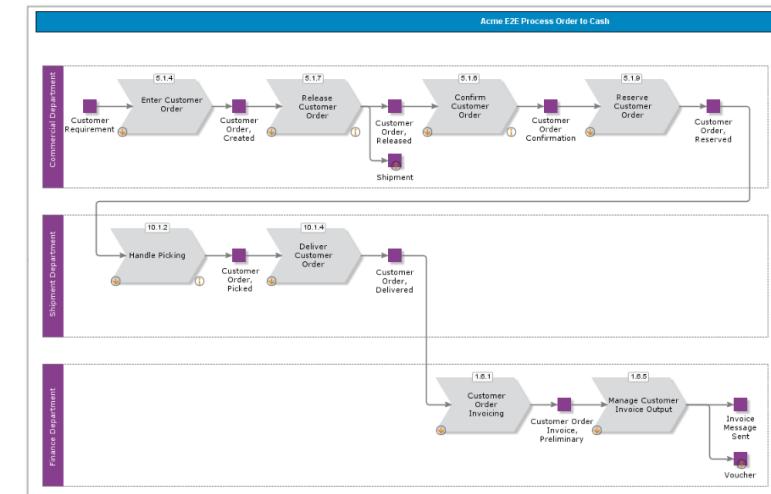
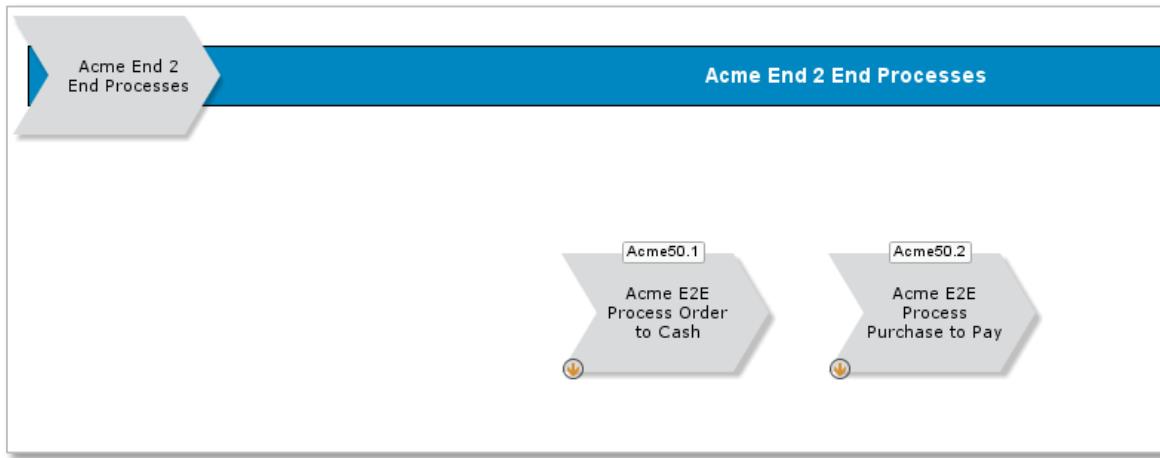


# SOLUTION ACCEPTANCE TEST

# REVIEW

## END-TO-END PROCESSES

- Perform work shop with customer to review and refine End-to-End processes.
- End-to-End processes shall be documented as swim lane models in IFS Scope tool within the Main process area “End 2 End Processes”.



# CREATE TEST SPECIFICATIONS

## PER END-TO-END PROCESS

- Use IFS Scope Tool Documents to create one Test tracker per End-to-End process.

The screenshot displays the IFS Scope Tool interface with the following components:

- Left Panel:** Shows a list of scenarios, functions, and questions. A specific scenario is highlighted: "1124 Scenario 0.5.8.10 Create Formulas".
- Top Bar:** Contains buttons for "Import CSV File", "Create MP Documents", "Create WS Presentations", and "Create Test Sheets".
- Center Dialog:** The "Generate Test Sheets" dialog is open, showing settings for generating test sheets. It includes fields for "Solution Area" (Acme Solution Overview), "Select MP Area" (Acme Sales), "Select Process" (\*All), "Prefix to Filename" (Verify Main process), and "Filename" (Verify Main process Acme Sales). A preview pane shows the generated test sheet content.
- Bottom Right:** A large spreadsheet titled "IFS Scope Tool - Test tracker" is displayed. It has columns for Type, ID, Area/Process/Sub process/Scenario, Training mat, Environment, Dependence, Test period (Manual), Result, and a grid of status indicators (0, Works fine, Not Working, Works w. problem) across multiple rows corresponding to the scenarios listed in the left panel.

# CREATE SPECIFICATIONS

## FOR END-TO-END CASES

- On each scenario tab:
  - Define what type of data that is required to build and run the scenario.
  - Set activities not relevant for the tests to Not Applicable.
  - Use the columns Expected Result and Comments to note usage of data, functions important for the scenario or other things to consider running the scenario.
  - If it's relevant to test a process with several cases, use the function in the scenario tabs to define type of cases, required data and activities included in the different cases.

The screenshot shows a Microsoft Excel spreadsheet with various tabs and sections related to test specifications:

- Test Overview:** Contains fields for Test Responsible, Date, Status, and Scenario Data.
- Manually Create Customer Order, Basic:** A main section with a table for defining data types (Customer, Part No) and their descriptions and quantities.
- Scenarios:** Multiple tabs labeled "Case: A", "Case: B", "Case: C", etc., each containing a table for defining case descriptions and pricelists.
- Activities:** A table mapping steps to activities, with columns for Step, Activity, Mandatory/Optional, Responsible, and Result.
- Results:** A table for defining expected results and comments for each step.

# PLAN SOLUTION

## ACCEPTANCE TEST WORKSHOPS

- Solution acceptance test is performed in common workshops where all core team members participate.
- Plan a sequence of workshops running one End-to-End process at a time. If several test cases are included in the test scope, plan those in sequence.
- Secure and book participants, facilities and equipment.

# ACCEPTANCE TEST

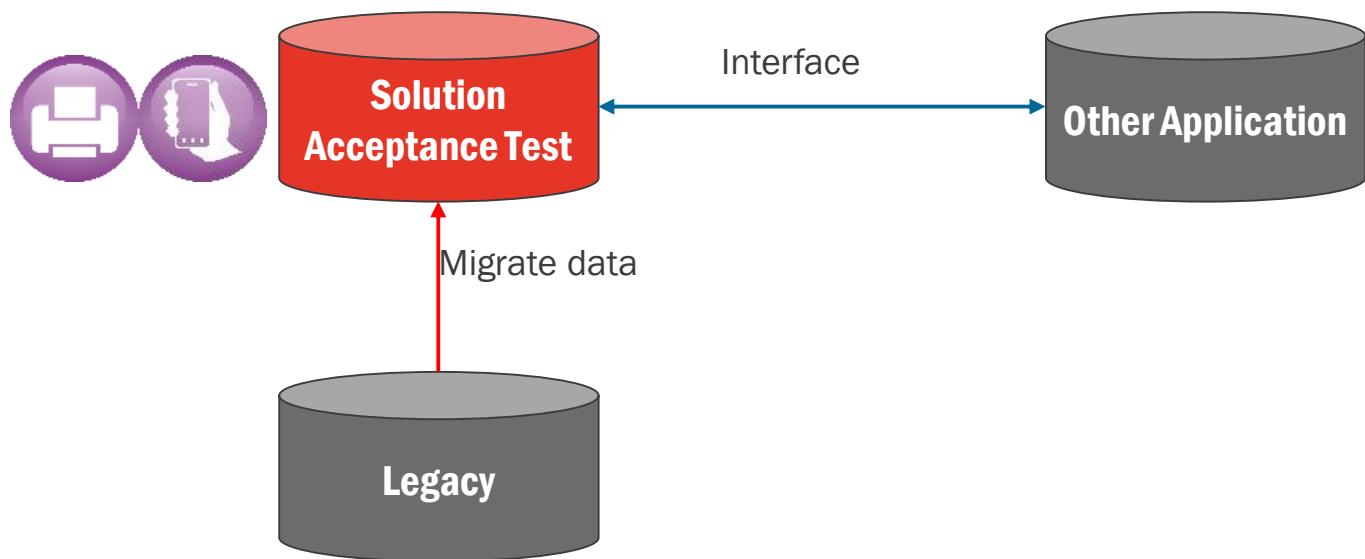
## ENVIRONMENT

- The Solution acceptance test shall be performed in an environment that contains the fully established solution. This includes:
  - Hardware:  
Technical infrastructure and devices.
  - Software:  
IFS Applications and other applications.
  - Customized applications:  
Configurations, Reports, Interfaces and Modifications. End user roles with related security and profiles.
  - Data:  
Parameters, basic data and set up of financial and operational steering model. Migrated Master data and transactional data according to cut over plan and migration scope.

# MIGRATE

## DATA

- Migrate master data and transactional data from legacy systems according to cut over plan and migration scope.



# PERFORM SOLUTION

## ACCEPTANCE TEST

- Run planned End-to-End processes according to specification, logged on as end users.
- Report test result and status in Test tracker.
- Report issues, errors and requirement status according to agreed reporting process in defined tools.

1	A	B	C	D	E	H	I	J	K	L
1	<a href="#">Test overview</a>	5.1.6.12	Email Customer Order Confirmation			Case: A				
2						1 Acme	Test Scenario Case A			
3	Test Responsible:						Case Description:			
4	Date:									
5	Status:									
6	Scenario Data:									
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18	Step	Activity	Mandatory/Optional	Responsible	Result					
19	0	<a href="#">E-mail Order Confirmation</a>								
20										
21										

**Data type:** Customer order

**ID:** TBD    **Description:** order created

**Result:** Not Working    **Expected Result:** order created

**Comment:**

**Issue ID:**

**Re:**

# EVALUATE AND

## CLASSIFY FOR OPEN ISSUES

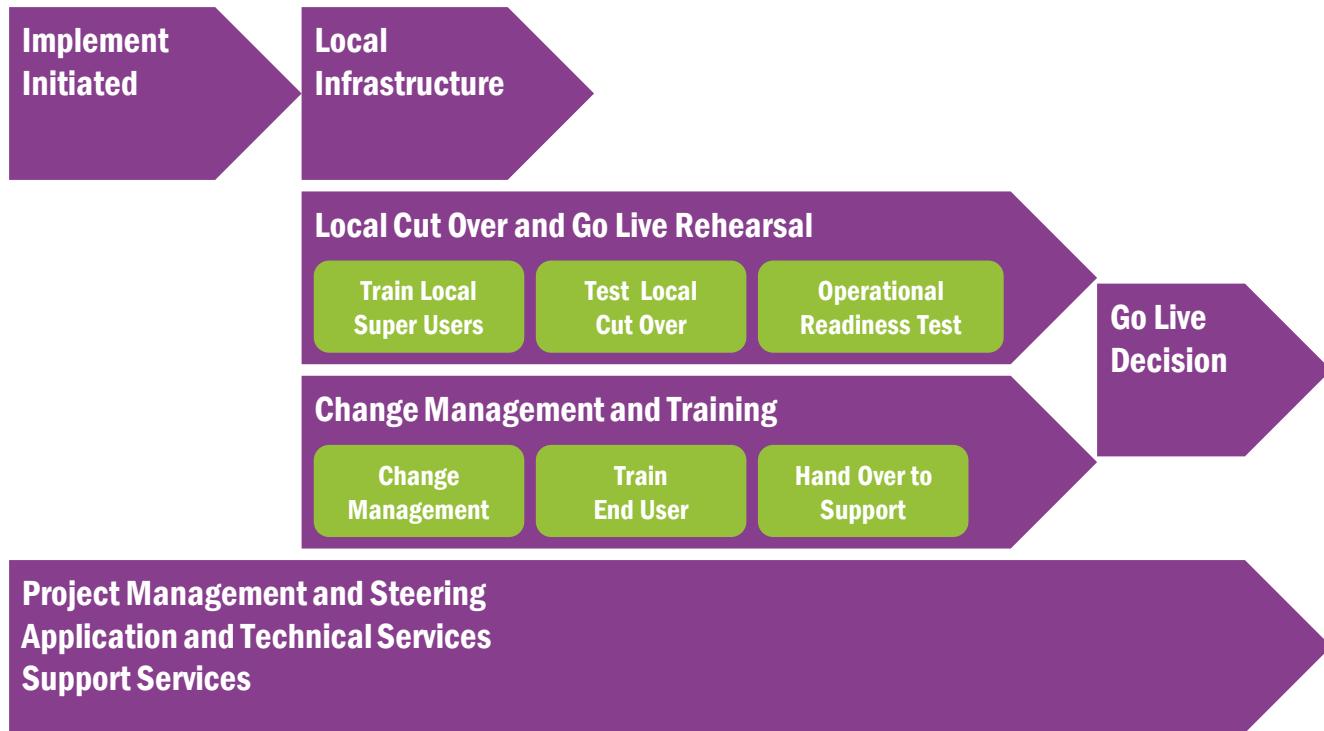
- Review reported issues and identify cause (for example: incorrect data, user error, errors in Applications, wrong solution).
- Document type of issue according to defined issue classifications.
- Assess and document if issues are critical for deployment of the established solution into Customer organization.
- Assess and document if issues are related to contractual agreed delivery or requirements that is not fulfilled due to the issue.



# IMPLEMENT SOLUTION AND GO LIVE

# IMPLEMENT

## SOLUTION



### CUT OVER AND GO LIVE VALIDATED

- ✓ Training validated  
Training plan and content validated through training of super users
- ✓ Cut over and migration verified  
Local data migrated and verified  
Cut over plan finalized and verified
- ✓ Solution readiness  
End to end scenarios verified during Operational Readiness Test

### ORGANIZATION READY FOR GO LIVE

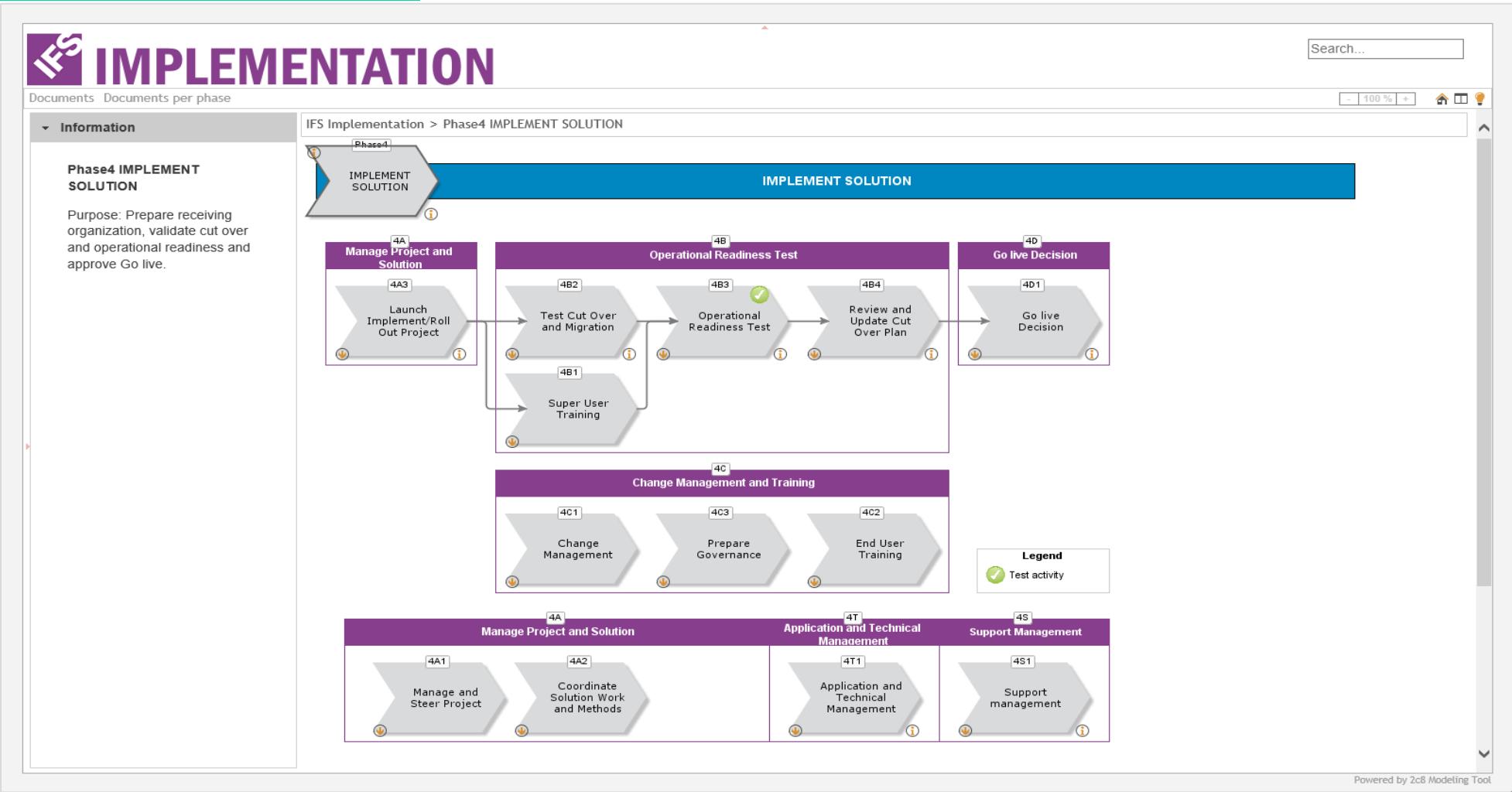
- ✓ Change management performed
- ✓ End user trained
- ✓ Solution handed over to support

### GO LIVE DECISION

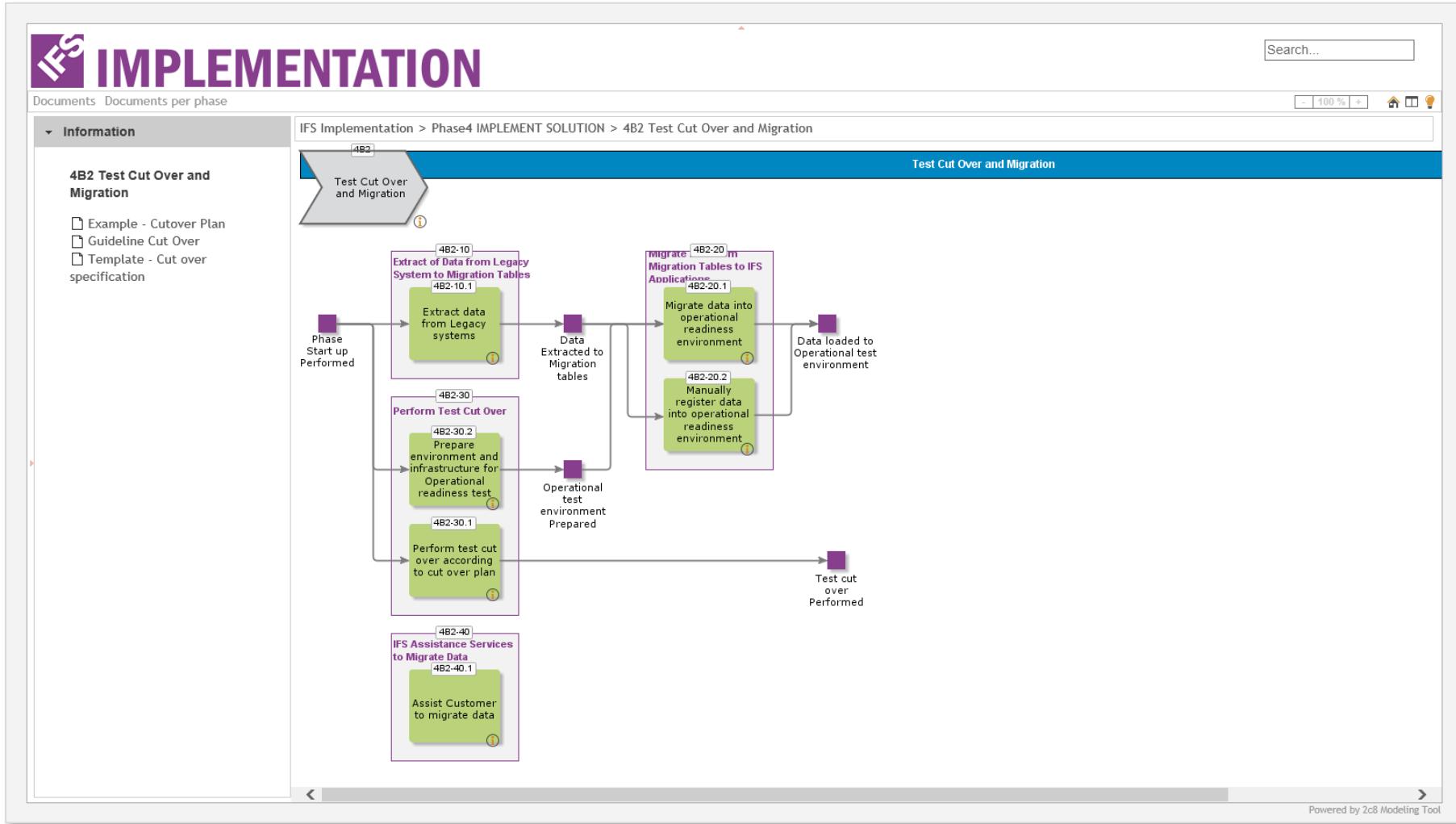
- ✓ Open issues defined and planned
- ✓ Go live decided

# PHASE

## DELIVERABLES

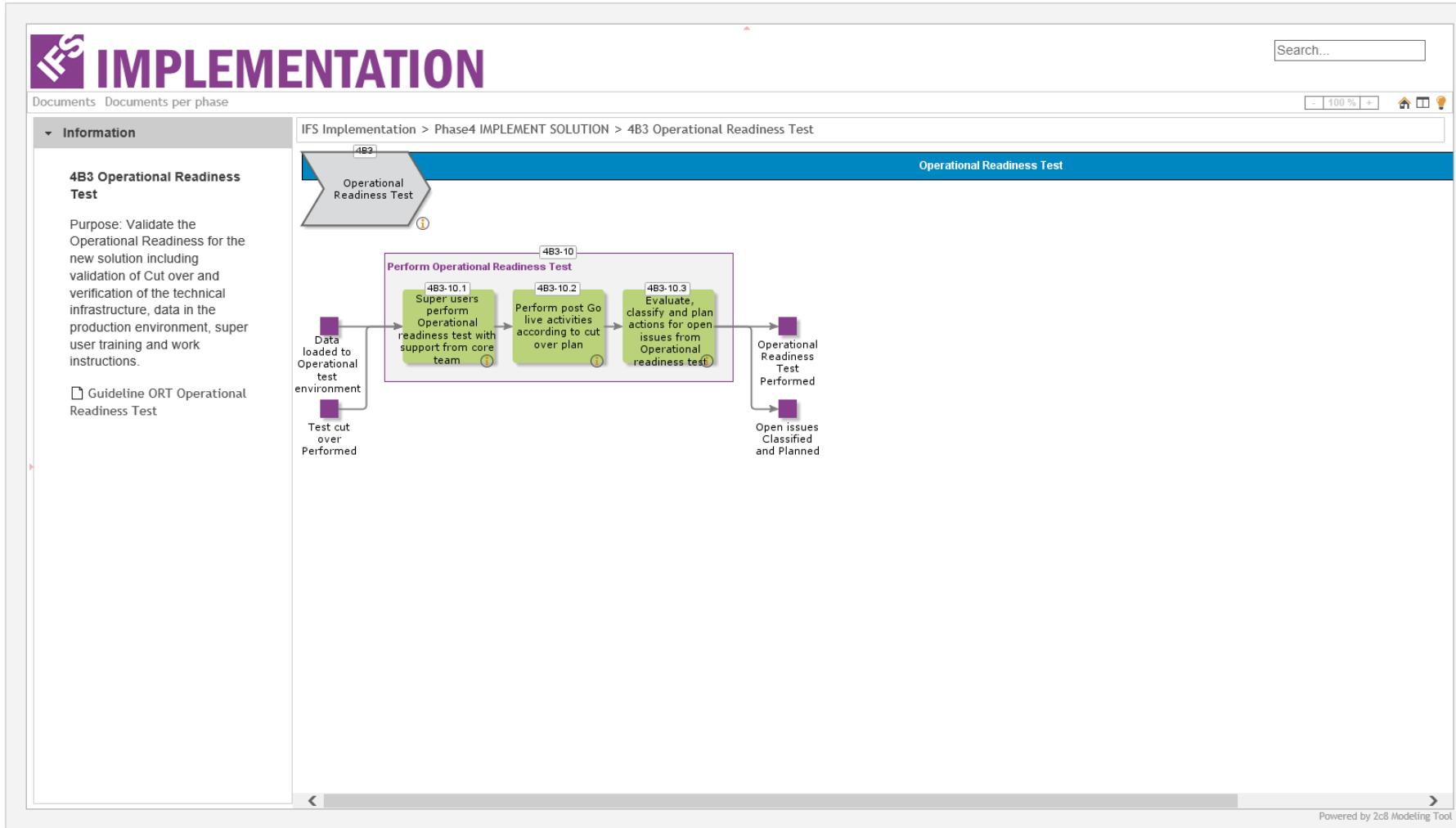


# WORK PACKAGES AND DELIVERABLES



# OPERATIONAL

## READINESS TEST



# SCOPE FOR

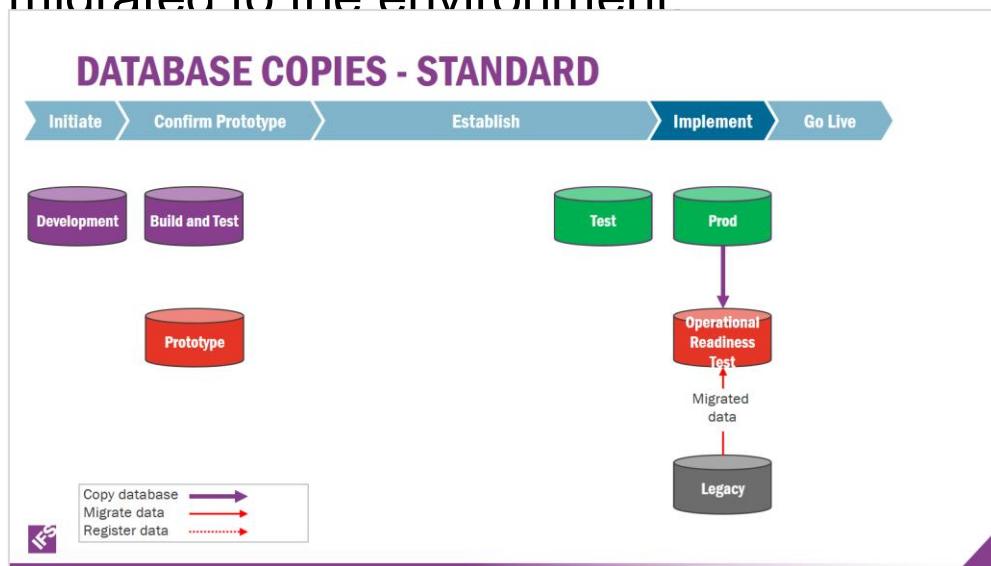
## OPERATIONAL READINESS TEST

- The Operational readiness test is a rehearsal of the real go live. If there are several planned go lives, each go live can include a sub set of the complete solution relevant for the organizational or geographical unit defined for each go live. The test is performed by running the solution for End-to-End processes relevant for each go live unit.

# ENVIRONMENT

## AND DATA

- Operational readiness test is performed in a separate environment established solely for the purpose of running this test. The environment shall be established at a technical infrastructure reflecting real conditions and performance. It shall include all type of devices and all interfaces that are relevant for the scope for the planned go live.
- The environment is copied from the production environment.
- Relevant master data are migrated to the environment



# TEST

## USERS

- Operational readiness test is performed by super users, not being involved in the project core teams earlier.
- Super users are training in the solution before operation readiness test.
- The super users are logged on as users with security and profiles relevant for Customer defined business roles. For example service technician, service manager, purchaser, account manager.

# GO

# LIVE



### SOLUTION LIVE

✓ Cut over and go live performed

### PROJECT CLOSED

✓ Solution handed over to governance organization

✓ Project evaluated and closed

# GO LIVE READINESS EXAMPLE TRACKING TEMPLATE

	① Pre-cutover	② Cutover	③ Go-Live	④ Continue Go-Live	⑤ Continue Roll-Out
1	Approver	Project Management	Project Management	Steering Committee	Steering Committee
2	Organisational readiness	(✓)			
3	Process readiness	(✓)			
4	Application readiness	(✓)			
5	Cutover readiness	(✓)			
6	Migration readiness	÷			
7	Hyper-care readiness	(✓)			
8	Support readiness	(✓)			
9	Go live readiness	(✓)			
IFS	Environmental control readiness	(✓)			

✓ Done

✓ In process according to plan

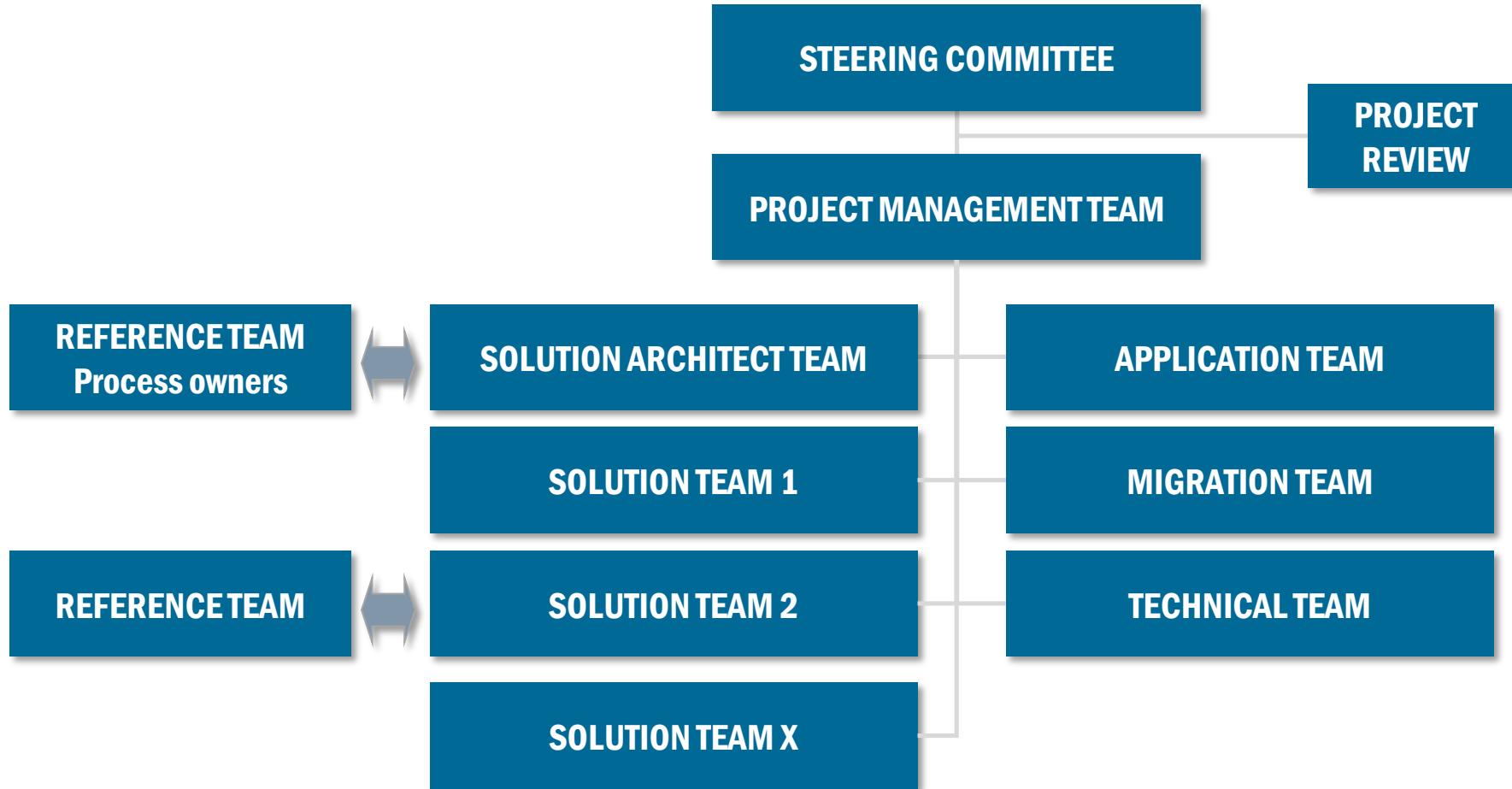
÷ In process delayed



# PROJECT MANAGEMENT PROCESS

# PROJECT ORGANIZATION

## TEMPLATE AND PILOT PROJECTS

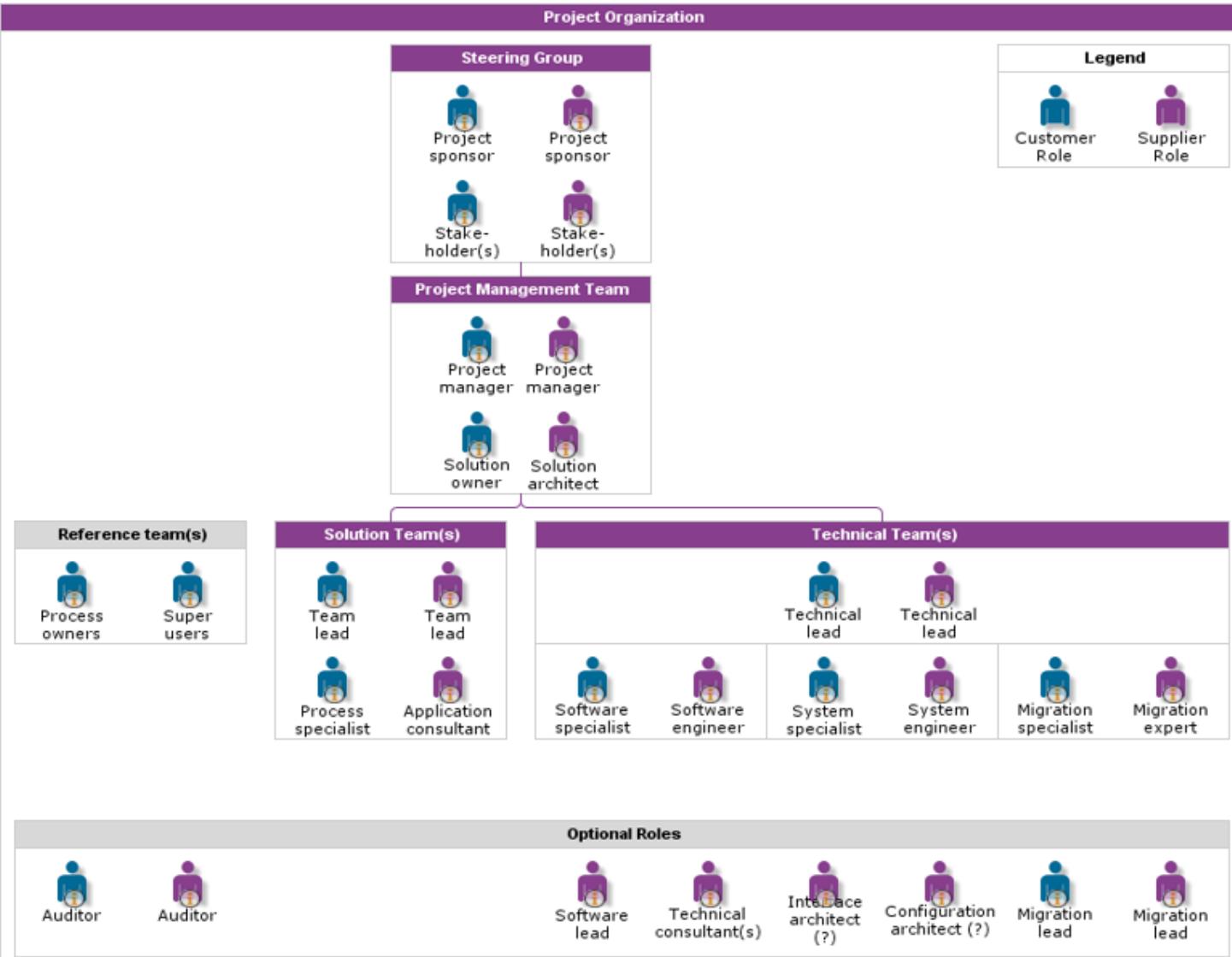


# PROJECT ORGANIZATION

## ROLL OUT PROJECTS

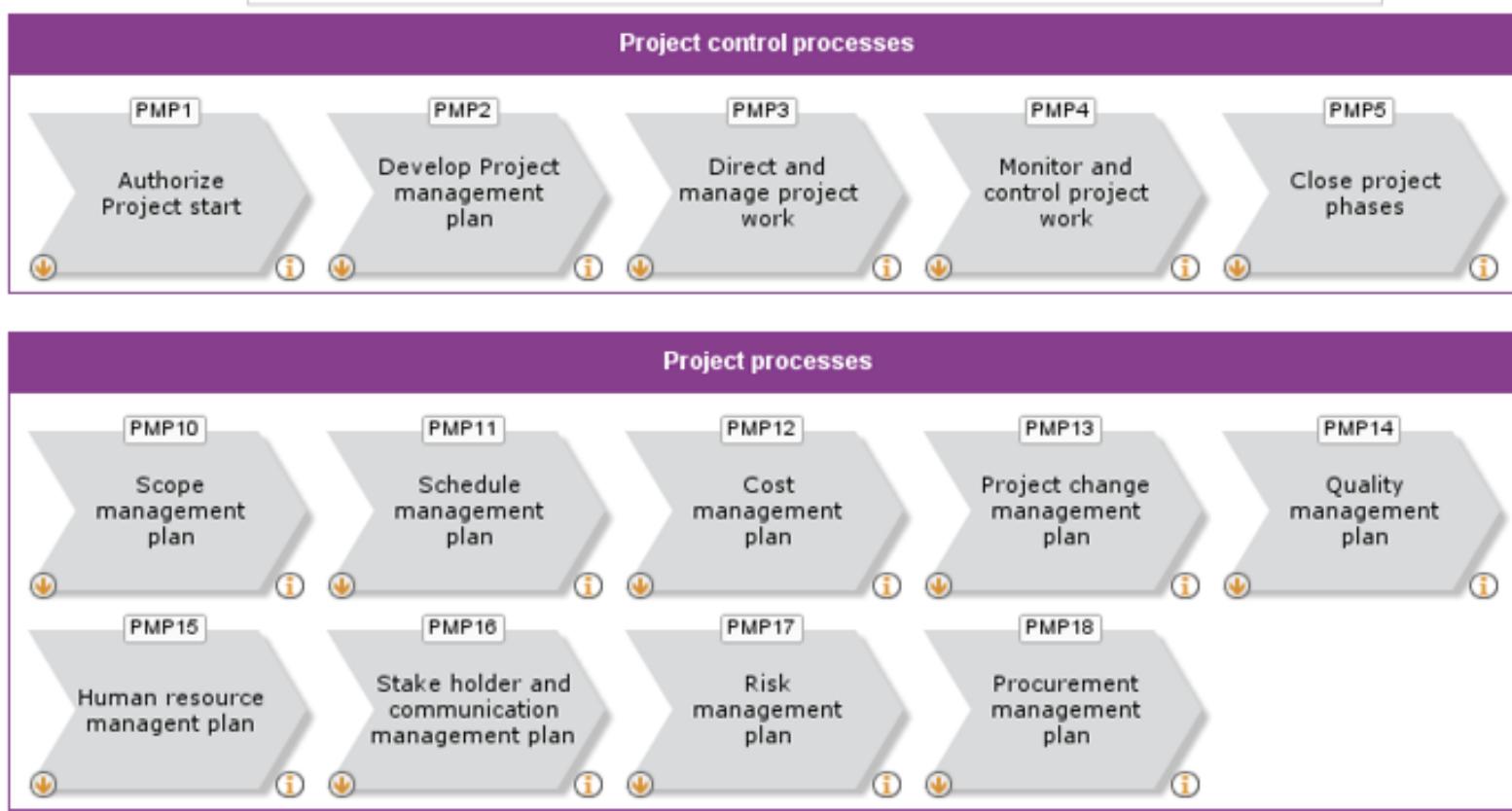


# ROLES



# IFS PROJECT

## MANAGEMENT PROCESS



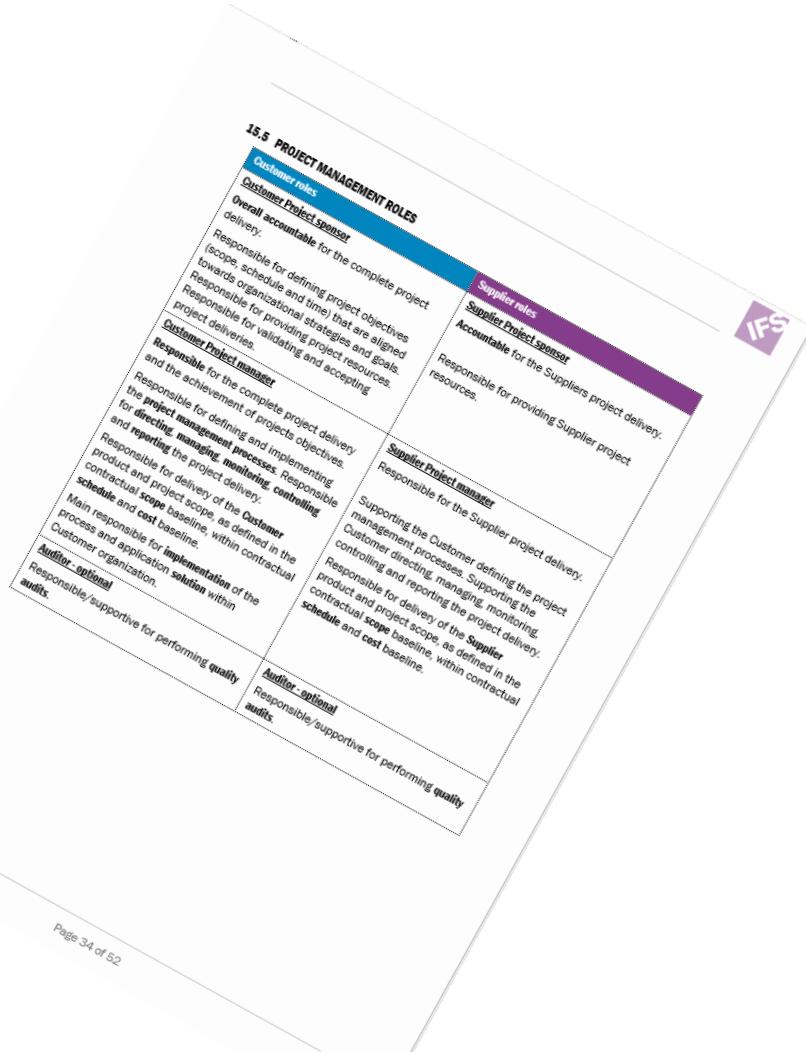
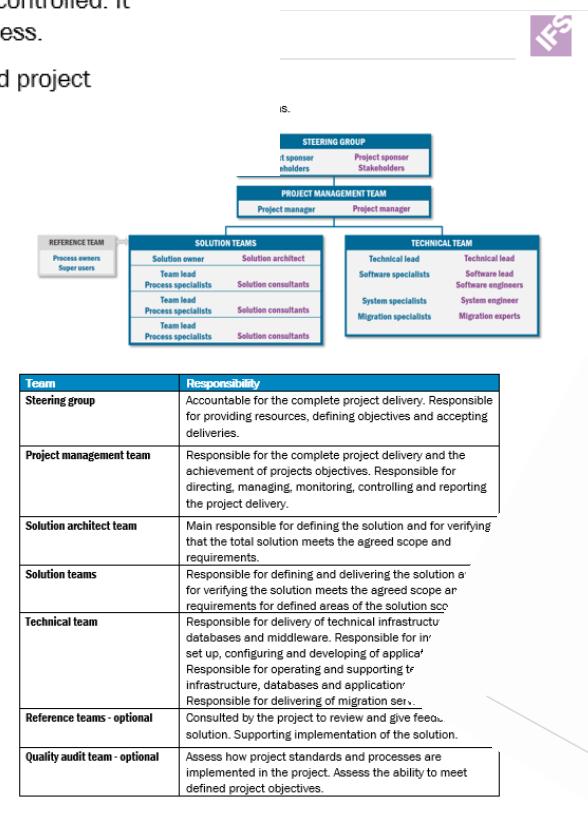
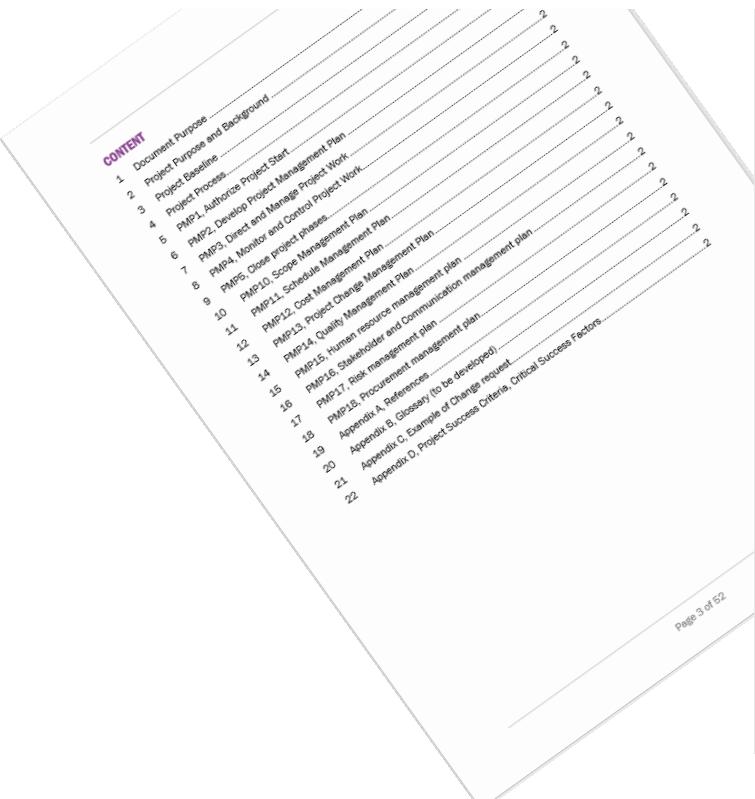
# PROJECT MANAGEMENT PLAN

## PLAN

### 1 DOCUMENT PURPOSE

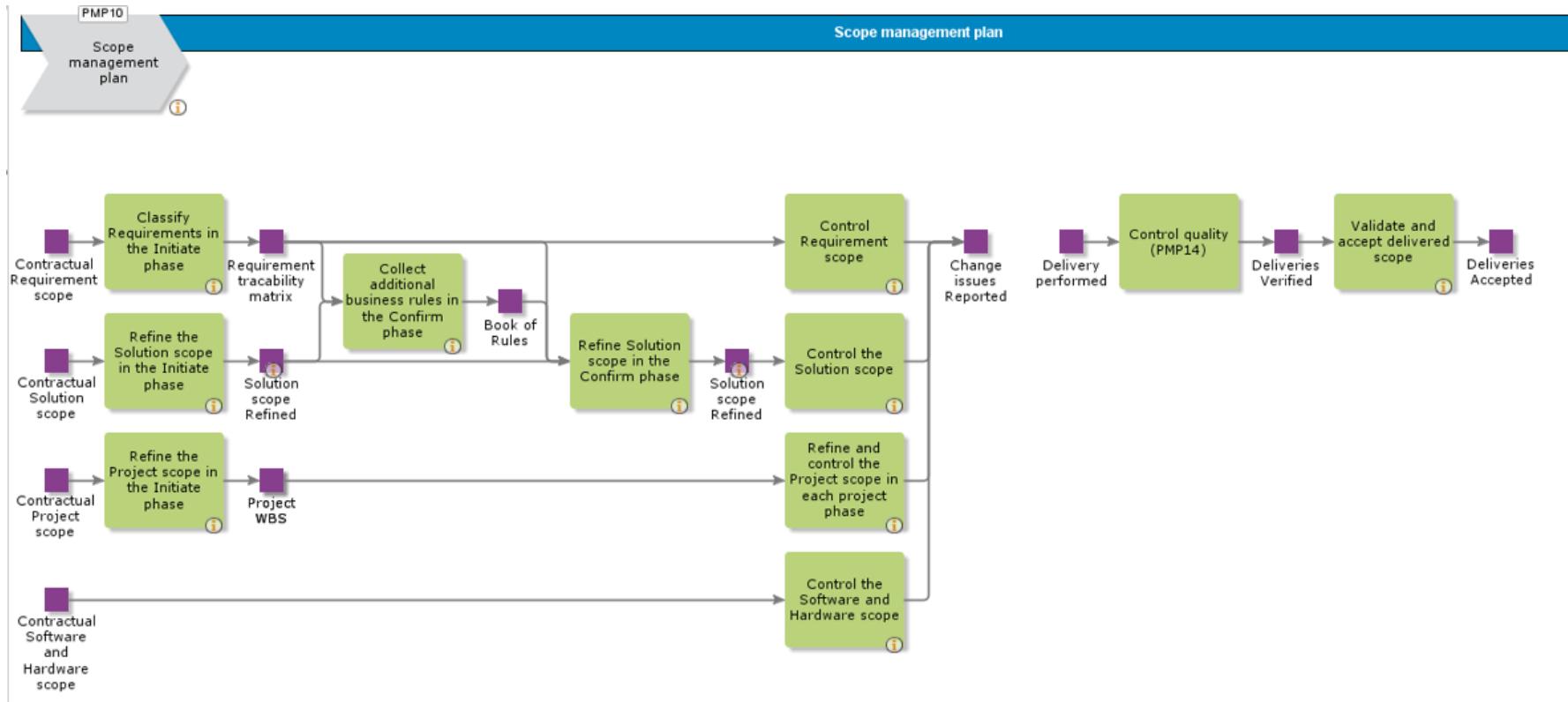
The **Project Management Plan** defines how the project will be executed, monitored and controlled. It defines standards, workflow and tools to be applied for the project management process.

The **Project Management Plan** also refers to and consolidates subsidiary contractual and project baselines for scope, schedule and cost.



# IFS PROJECT MANAGEMENT

## SCOPE MANAGEMENT

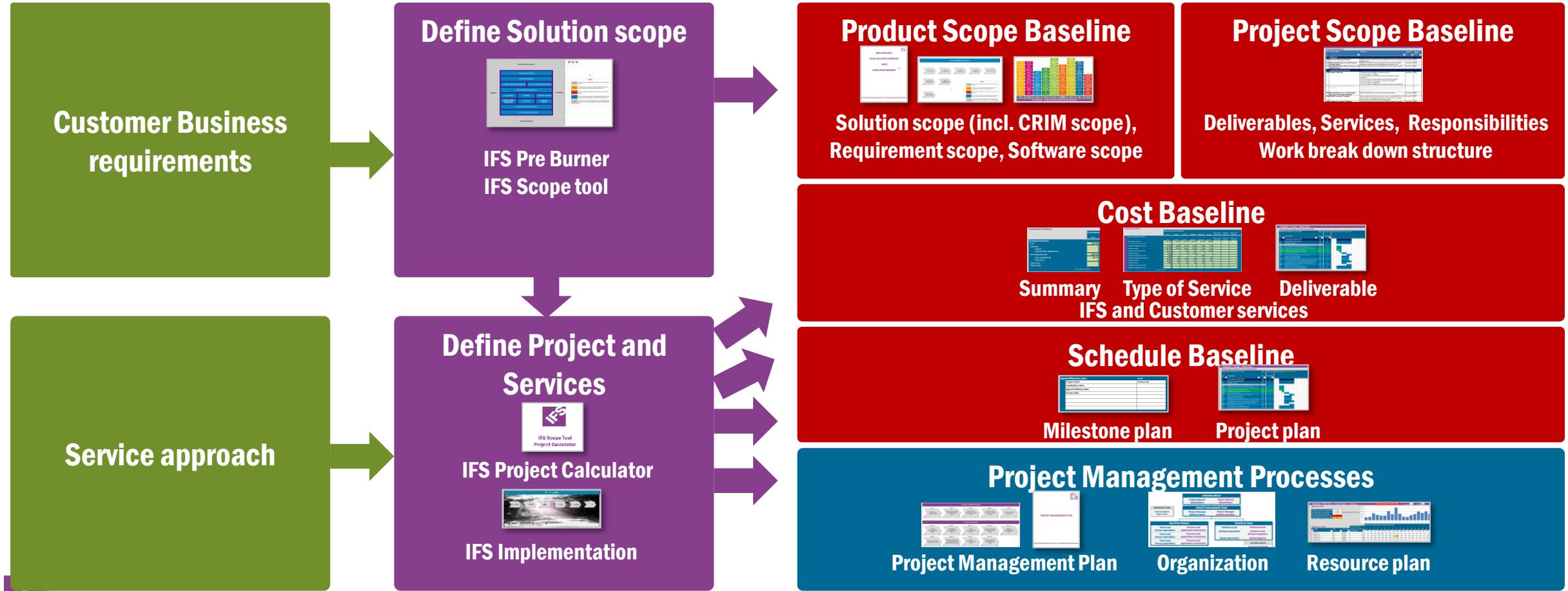




# SCOPE MANAGEMENT

# REFRESHER:

## DEFINE SCOPE AND PROJECT



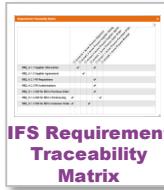
# SCOPE MANAGEMENT

## DEFINITION OF SCOPE

### PMI PROJECT MANAGEMENT BODY OF KNOWLEDGE:

1. Schedule Baseline
2. Cost Baseline
3. Scope Baseline
  - a) Product scope – The features and functions that characterize a product
    - Requirement Traceability Matrix
    - Product Scope description
    - Product Acceptance criteria
  - b) Project scope – The work that needs to be accomplished to deliver a product.
    - WBS: *Deliverables* and decomposition of the work into *Work packages*
    - WBS dictionary: *Detailed description of work, Responsibility and Delivery objects*

IFS  
IMPLEMENTATION  
METHODOLOGY



# SCOPE

## MANAGEMENT

### Product Scope Baseline



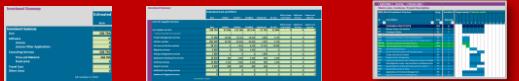
Solution scope (incl. CRIM scope),  
Requirement scope, Software  
scope

### Project Scope Baseline



Deliverables, Services, Responsibilities  
Work break down structure

### Cost Baseline



Summary Type of Service Deliverable  
IFS and Customer services

### Schedule Baseline



Milestone plan Project plan

### Project Management Processes



Project Management Plan



Organization

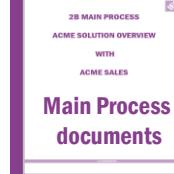


Resource plan

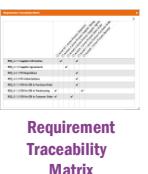
### IFS Scope Management



SCOPE TOOL



Main Process  
documents



Requirement  
Traceability  
Matrix



Solution HTML



IFS Project  
Management Plan



IFS Scope Tool  
Project Calculator



IFS Scope tool  
Report kit for Project Calculator 3.0  
Master plan  
IFS and Customer  
Responsibilities



RACI Matrix



Master Plan &  
Resource Plan



IFS PROJECT MANAGEMENT

**BODY OF KNOWLEDGE**

# IFS PROJECT MANAGEMENT

## BODY OF KNOWLEDGE

**IFS IMPLEMENTATION**

Project Management Process Initiate Confirm Establish Implement Go Live Templates Guidelines Examples Define Scope and Project

Models

IFS Implementation

Filter...

- IFS Implementation
  - PhaseP DEFINE SCOPE AND PROJECT
  - Phase1 INITIATE PROJECT
  - Phase2 CONFIRM PROTOTYPE
  - Phase3 ESTABLISH SOLUTION
  - Phase4 IMPLEMENT SOLUTION
  - Phase5 GO LIVE

IFS Implementation

WBS version 3.2 published 29 March 2018

The process models describes IFS Implementation for a project delivery based on IFS Scope tool. The models includes links to document templates, guidelines and some example documents.

For web pages, presentation, brochure and release notes, click on the documents below and follow the link in the menu to the left:

IFS Implementation on wis web Presentations Brochures Release notes

## CONTENT

**Contains the latest released version of:**

- Process Models for all work pages including
  - Purpose for each work package
  - Default Medium Service Level responsibility description per activity
- Guidelines
- Templates
- Examples
- Release Notes



# HOW TO ACCESS **IFS PMBOK**

# ACCESS REQUIREMENT

**IFS PMBOK**



## EXAMS

### COURSES

- IFS Implementation
  - Solution Scoping (Scope Tool)
  - Training & Test (ClickLearn)
  - Service Scoping
  - Deliver Solution
  - Project Management Process
  - Deploy Solution in Customer Organization



## EXAMS

### COURSES

- IFS Implementation Fundamentals

**CONSULTANT TRACK**



# PARTNER PORTAL

## ACCESS YOUR SERVICES

The screenshot shows the IFS Partner Portal homepage with a navigation bar at the top. The navigation bar includes links for 'Partner Login', 'Access Your IFS Services', 'Sign Out', 'Feedback', 'Return to IFSworld.com', and a search bar. Below the navigation bar, there are several sections for different service environments:

- REFERENCE ENVIRONMENTS FOR PARTNERS**  
Gives access to REF and TQA support environments for all IFS Applications releases 2001 and later.
- CUSTOMER PROJECT ENVIRONMENTS LKP**  
Gives access to customer project environments hosted in CoS datacenter Linköping through a Citrix desktop including all tools necessary to perform development.
- IFS IDEA WALL**
- DEMO ENVIRONMENTS FOR PARTNERS**  
Access to IFS Applications external demo environments. Environments based on the two latest Demo Environments packages of IFS Applications. Refresh of environments upon request.
- TIME REPORTING FOR PARTNERS (IFSBIZ EU)**  
Time reporting and docman through IFSBIZ Web client. Time reporting through "Project time registration" and access to Document Management. The IFS company administers access.
- IFS PROJECT MANAGEMENT BODY OF KNOWLEDGE**  
Access the process model, guidelines and templates used by IFS globally for projects.
- IFS APPLICATIONS DELIVERY MANAGEMENT FOR PARTNERS**  
Access to Life Cycle System (LCS) for partners: Customer Information Central, Case Tracking and Document Management. Partners can only access connected customization projects.
- OPENIFS**  
Gives access to openIFS for partners

# ENTRY MENU

## NEW MENU ITEM

Partner Login Access Your IFS Services

Welcome Elsa Clama | Sign Out | Feedback | Return to IFSworld.com | Search

IFS PARTNER PORTAL

Access Your IFS Services | Market | Sell | Service | Partner Support | About IFS Partner Network | World Conference 2018

Home > Access Your IFS Services

ACCESS YOUR IFS SERVICES

- Reference Environments for Partners
- Customer Project Environments LKP
- IFS Idea Wall
- Demo Environments for Partners
- Time Reporting for Partners (IFSBiz EU)
- IFS Applications Delivery Management for Partners
- OpenIFS

ACCESS YOUR IFS SERVICES



REGIONAL PARTNER SUPPORT

- Americas
- Asia Pacific
- Europe Central
- Europe East
- Europe West
- Finland, Baltics, W Russia
- Middle East, Africa, S Asia
- Scandinavia

IFS PMBOK

ACCESS TO IFS IT SERVICES

The IFS IT services available for you to access are shown to the left. Click the service name to access.

REQUESTING FURTHER ACCESS

Depending on your relation to the customer, use either of these methods to request further access (other projects or more services):

- When IFS is prime: Get in touch with your IFS project contact who will request this access for you.
- You as a partner is prime: Get in touch with your regional IFS partner office using the contact information shown to the right.

IFS PROJECT EXPLORER (IPE)

What is 'IFS Project Explorer (IPE)'?

It is the desktop tool that:

- allows a user to connect to a customer project environment defined in the IFS Life Cycle Support (LCS) system,
- enabling access to the runtime environment as well as the customer's software to perform any support, development or technical service

Email Tweet Share Share g+1

Learn more about this tool by downloading the document.





#forthechallengers

