Business Transformation Services/System Landscape Optimization (SLO)

An Introduction to SLO Solutions

Stefan Neubig, SAP America Inc.
Presentation Topics

- Overview of SLO and Available Solutions
- Data Harmonization / Conversion Services
- Organizational Structure changes
- System Landscape changes
- Summary/Benefits of SLO Solutions
- Overview of Business Process Methodology for Master Data
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SLO Mission Statement

SAP solution dedicated to ease and fully leverage our customers’ significant change by efficiently aligning IT systems and landscapes thereby supporting adaptability.

- SLO is a practice of the Business Transformation group within Global PSO
- SLO offers services to optimize system landscapes to reduce total cost of ownership and provide more flexibility to adapt to new business requirements
Why an SLO offering?

Global market challenges

• Requirement to realize increasing globality of corporate activities
• Continuous pressure to maximize efficiency of operations
• Need to effectively adapt business structures and processes to new market requirements

Customer changes

• Expansion of corporate networks
• Major strategic reorganization measures (e.g. M&A, centralization)
• Frequent business process changes

Required system changes

• Challenge to integrate/desegregate multitude of systems (M&A, divestiture)
  → Fast and sound integration required
• High alteration rate of requirements at IT structures
  → Alignment of IT systems to new business processes necessary
• Decentralized, heterogeneous and regionally disperse systems
  → Inefficient number of IT systems in operation
Corporate headquarters has created a new global Chart of Accounts (COA). All reporting must be provided with this new COA.

You started without a group currency but you want to use it now or you want to use a different currency.

Your materials have different numbers in different systems. You experience difficulties in reducing acquisitions since the MRP run cannot optimize your production efficiently.
Drivers for system changes (II)

- Different Vendor/Customer numbers increase reporting cost for your global reporting

- You are in calendar year 2003 but your G/L shows 2004 because of a shortened fiscal year in 2002

- You want to eliminate one of your IT data centers by merging two of them to meet your cost reduction goals

- You want to sell a part of your business with the IT system and structure
SLO Solutions Focus

Restructuring system landscapes

Changing organizational structures

Harmonization of configuration and data
SAP's SLO Services Structure

SAP's solution: „System Landscape Optimization“

Core value

Conversion Services/Data Harmonization Consulting

Consolidation and harmonization of data interfaces and data exchange

Organizational Structure Change Consulting

Alignment of IT structures and processes to radical business-driven change

System Landscape Change Consulting

Optimization of architecture and interfaces of disperse and heterogeneous system landscapes
A comprehensive analysis of your current IT landscape will identify the opportunities for optimization.

**Overview SLO Service Suite (1/2)**

### Project Management

<table>
<thead>
<tr>
<th>Performance Consulting</th>
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<tbody>
<tr>
<td>7x24 Operations</td>
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<td>Archiving</td>
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<td>DB-Migration</td>
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### SLO Analysis

<table>
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<tr>
<th>Process Analysis</th>
<th>Landscape Analysis</th>
<th>Infrastructure Analysis</th>
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<tr>
<td>IT Landscape Architecture</td>
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<td></td>
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<tr>
<td>IT Infrastructure Architecture</td>
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</table>

### Recommendation

- Migration Services
- Conversion Services
- Application and Technical Consulting
- Programming and Individual Development

### SLO Analysis

- Comprehensive analysis of your business processes and IT structures
- Identification of system alignment needs and optimization potentials
- Quantification of savings potentials

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A suite of SLO expertise and solutions ensures successful and full delivery of SLO projects

Overview SLO Service Suite (2/2)

Project Management

Performance Consulting

7x24 Operations

Archiving

DB-Migration

SLO Analysis

Process Analysis

Landscape Analysis

Infrastructure Analysis

SLO Solution delivery

• Design of the most effective system and landscape architecture (based on analysis)

• Multitude of expertise and tailored solutions to be employed as needed

Recommendation

IT Landscape Architecture

IT Infrastructure Architecture

Implementation

Migration Services

Conversion Services

Application and Technical Consulting

Programming and Individual Development

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What options might a customer consider?

- Options are dependent on the software in use
  - one/multiple SAP systems / 3rd party systems

- Start from scratch (new system approach)
  - Like a new implementation (similar time / employees / consultants / learning curve)
  - Similar cost to a new project / no sufficient history

- Build interfaces, depending upon project scope

- SLO Tools to change existing environment
  - Deletion of company codes (copy and delete for split situation)
  - Merge R/3 systems
  - Renaming objects (material numbers / vendors … )
  - Change of basic currency settings
  - Tools convert historical data
  - Project time is much shorter than the start from scratch option
Cost-saving Potentials in Optimization of Organizational Structures and Processes

Reduction in process administration
  ■ Unifying of master data management worldwide

Optimal representation of current organization in the system
  ■ Implementation of centralized purchasing department
  ■ Divestiture of a division and integration into a new company

Process Standardization
  ■ Change of system landscape according to product lines

Easier Consolidation for management reporting
  ■ Harmonized Chart of Accounts
  ■ Harmonized Customer/Vendor numbering schemes
  ■ Common Controlling Area
Solution:
System Landscape Optimization
- Tool-based services
- Reorganization
  - Mergers, Acquisitions
  - Divestitures
- System mergers
- Data harmonization

Benefits
- Reduce operating cost
- Tailor landscape to business
- Leverage SAP and partner expertise

“The project scope is to merge 25 systems into 6. This will save 20% of operating costs.”

Phil Thompson, CIO IBM
Available services

Data Harmonization
- Chart of Account conversion
- Fiscal year conversion
- Converting a controlling area to ‘All Currencies’
- Converting currency key
- Introducing Parallel FI-currency

Data Harmonization - Renames
- Material number conversion
- Customer number conversion
- Vendor number conversion
- Rename of controlling area
- Rename of company codes
- Rename of plants
- Rename of sales organization
- Rename of cost center
- Rename of profit center
- Rename of other CO objects

Organization structure changes
- Company Code Merge
- Company Code Deletion
- Controlling Area Deletion
- Controlling Area Merge
- Controlling Area Split

Client Merge
- Customizing analysis
- Repository analysis
- Client merge package

Other services
- Coding scan
- Report variant scan
Presentation Topics

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Conversion Service consists of both

- Conversion Package:
  Predefined rule sets, programs and tables for technical database conversion

- Delivery of service by SLO Consulting:
  Executing conversion by trained SLO specialists

Benefits of Conversion Services

- Alternative to individual, time consuming solutions
- Flexible
- Reduces costs
- Saves time
Conversion using Conversion Services

- Changes the data directly in the database
- Affects all of the client’s dataset
- Is executed without duplication of existing data (old data records no longer available)
- Is executed without reference to business transactions (No logical check during conversion, no change documents)
- Master, Customizing and Transactional data are all affected
- Certain Conversions have specific prerequisites
Conversion at table level
- Tables affected by the conversion are changed directly in the database
- Affected tables and data fields determined using
  1. SAP domains
  2. Analysis and interpretation of application-specific data update logic
- Customer-developed tables are included as long as they follow SAP-standard naming of domains

Conversion programs are generated in customer system
- Conversion programs are not delivered ready-made by SAP, rather they are generated in the customer system, using the prerequisites specified in that system
- A conversion program is generated for every affected table

Conversion using clusters (as of Rel. 4.0*)
- Programs can be restarted
- Independent of the size of individual tables
Technical Background

1. Domains
2. Tables
   - Fields
3. Conversion logic
   - (Field-) Contents
4. Conversion ABAPs
5. SAP System

- search
- find
- develop
- alter
- generate
Example: Material Number Conversion

Why a material number conversion?

- Harmonize material numbers for like materials across systems
- Allows you to rename material numbers individually or collectively according to a defined rule or change to a lexicographical representation or display
- Customer-defined tables are converted
  - Must refer to standard SAP domains for the material number (MATNR, MDKEY, EQUNR)
- Material numbers changed in both material management AND financials tables.
- Not possible to merge materials
Example: Material Number Conversion

Renaming Options:

- All material numbers in a number range are renamed according to uniform rule
  - Mat. Numbers are transferred from one number range interval to another
  - Change length of material number
  - Add prefix/suffix to material number
- New individual number is defined for each material number
- Some material numbers are renamed according to uniform rule, while others are renamed individually
- All material numbers are converted to lexicographical material number display.
- All material numbers are converted to lexicographical material number display, while some are renamed individually.

  NOTE: not possible to rename by uniform rule and convert to lexicographical material number display at same time.
Internally reconciled conversion concept must be available

- Which objects are to be converted, and how?
- For example, assignment of old and new material numbers for material number conversion (renaming)

Agreement with the external / internal auditor

- Conversion documentation must meet the external / internal auditor’s requirements. Generally, the following suffice:
  - System situation before the change
  - System situation after the change
  - Controlling information for the conversion (What is converted, how and where?)
Conversion involves cooperation between SLO Consulting and the customer project team

Project team (customer)

- Employees from user departments
  - Must be involved in the conversion, because
    - Conversion is commercially motivated
    - Conversion causes changes to daily business processes. For example, work with new material numbers
  - Are contact persons for business and organizational questions from SLO Consulting
    - Determine controlling information for conversion, for example rules for renaming materials
    - Test the conversion
Project team (customer)

- System administrators / IT employees
  - Are contact persons for technical questions for SLO Consulting
    - Create a data backup
    - System settings
    - ...

Project team participants must be available for the complete project period (especially the weekend of the productive conversion).

If IT is outsourced, customer must ensure their availability.
Technical Prerequisites (I)

Access to server SAPSERV<X>
- Conversion package is made available using transport order

Remote OSS connection
- Conversion of test and productive system are usually executed via remote connection
- Users with corresponding authorization must be set up (possibly SAP_ALL)

Set up test system
- Test system = current copy of productive system
  - Hardware and application data comparable with those of productive system
- Test system only available for conversion tests during the complete project period
- No changes in Customizing for the productive system from start of last test conversion
  - For example, no new applications, no new tables, no new business transactions and so on.
Technical Prerequisites (II)

Productive conversion

- The productive system is locked for the duration of the conversion
  - Even clients that are not affected directly cannot be used during this system downtime
  - Conversion is typically executed on a weekend to avoid disruption to daily business

- Hardware differences between the test and productive systems influence estimates for the runtime of the productive conversion

Data backup before conversion

- It must be possible to reload the data backup, in case there are problems during conversion!
Schedule

Copy of Production → Import SLO Tool → Configure Tool to Customer needs

↓

Perform Test Conversion* → Project Team performs Application test → Sign off on Test Conversion

↓

Productive conversion

*Multiple test conversions may be needed

SAP → Customer
Data which is not converted

Archives
- Archives will not be converted. (May be considered for special development.)
- In general, archived data can be read, but not always re-inserted into the database system.

Authorizations and Authorization objects need to be manually adjusted

Human Resources data
- HR data is not covered by all conversions. Check with SLO Development for latest status
- Changes to HR data may need to be made manually, but standard functionality is often sufficient

IS-Data and MySAP-products
- Individual concepts need to be developed for these systems

Other objects
- ABAPs: Y/Z-Reports which make use of hard-coded values
- Report variants

FI validation and substitution rules - still reasonable?
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Organizational Structure Changes

Solutions available:

- Company Code Merge
- Company Code Deletion
- Controlling Area Deletion
- Controlling Area Merge
- Controlling Area Split
Example: Company Code Merge

Merge company codes and newly assign them to the higher-level organizational entities, e.g. controlling areas.

Adjust the assignment of lower-level organizational entities, e.g. plants, purchasing and sales organizations.

Also merge affected financial management areas and companies.
Organizational structure BEFORE the merge

Controlling area K001

- Company code B001
  - Plant W001
  - Plant W002

- Company code B002
  - Plant W003

- Company code B003
  - Plant W004
  - Plant W005
Organizational structure AFTER the merge

Controlling area K001

- Company code B001
  - Plant W001
  - Plant W002
  - Plant W003

- Company code B003
  - Plant W004
  - Plant W005
Preconditions for a Company Code Merge

- Same system
- Same client
- Same chart of accounts
- Same controlling area
- Company Code currency and other local currencies are the same
- Same fiscal year variant
- Merge throughout full data history, no delimiting by dates possible
- Same use of business areas
- Valuation area at plant level
- LIFO/FIFO valuation at valuation area level

...
Preanalysis tool

- checks the feasibility of a company code merge using the conversion tool

Conversion packages for selected areas

- Company codes
- Document numbers / Number ranges
- Main asset numbers
- Companies
- Financial management
- Real estate management
- Treasury management
Preanalysis - Is a Company Code Merge feasible?

Checks the preconditions with respect to

- Customizing
  - same chart of accounts, ...

- Master Data
  - G/L accounts
    - currencies
    - open items management, ...
  - Accounts receivable, Accounts payable
    - reconciliation accounts, ...

Table size analysis

- which tables are filled with data
- how many data sets has each table
Customizing

- the target company code inherits the customizing of one of the source company codes
  ⇒ less customizing data after the merge

Master Data / G/L accounts, accounts receivable, accounts payable

- similar to customizing
  ⇒ less master data segments after the merge

Master Data / Main asset numbers

- kept unique by use of a renaming rule
  ⇒ number of main asset numbers remains unchanged
Transaction Data / Company Code-dependent documents
   ■ kept unique by use of a renaming rule
      ⇒ number of documents remains unchanged

Transaction Data / totals tables, e.g. GLT0, ...
   ■ totals tables are summed up
      ⇒ less data sets after the merge
Preanalysis: Goal - Execution - Result

Goal:
- Decision support if Company Code Merge is feasible
- Generate a „To Do“ list for the customer (which has to be cleared before conversion project start)

Execution:
- In customer‘s productive system
- After having checked the basic preconditions
- Minimum of 3 months before planned productive conversion

Result:
- Protocols in system, showing customizing / master data differences (execute prog. RADPROTA, enter name of protocol)
Preanalysis - Scope

Customizing analysis
- Organizational structure
- Analysis of number ranges
- Analysis of credit control areas
- Use of business areas
- ...

Master data analysis
- customer / vendor customizing
  - Reconciliation accounts
  - Blocking indicators
- G/L accounts
  - Open item management
  - Account currency
  - Reconciliation account
  - Blocking indicators

Determination of data volume to be converted
- Determination of table size, grouped by organizational units to be converted
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- Customizing of source company codes will be compared against the customizing of the reference company code.
- Always enter the reference company code as a source company also.
### Analysis of Charts of Accounts:

All CoCds have the same chart of accounts

- CoCd: 0810 CoA: FUG
- CoCd: 0811 CoA: FUG
- CoCd: 0812 CoA: FUG

### Analysis of Fiscal Year Variants:

All CoCds have the same fiscal year variant.

- CoCd: 0810 Periv: V9
- CoCd: 0811 Periv: V9
- CoCd: 0812 Periv: V9

### Analysis of Local Currency:

All CoCds have the same local currency.

- CoCd: 0810 LCurr: DEM
- CoCd: 0811 LCurr: DEM
- CoCd: 0812 LCurr: DEM

### Analysis of Second Local Currency:

All CoCds have the same or no second local currency

- CoCd: 0810 LCur2:
### KNB1_20020317

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</table>
If the customer is unable to resolve issues on their own, then often Application Consulting assistance is required.

Once open issues are resolved from the Preanalysis, the configuration of the tool by SLO Consulting for the first test conversion can begin.

IMG-Phase structure similar to EURO conversion
Phase ‘Package settings’

R/3 Conversion Service

- Display procedure monitor
- Notes
- Package settings

- Add more users
- Find additional tables and fields
- Maintain customer-defined and generated tables
- Maintain customer-defined and generated fields
- Save changed tables and fields
- Check package and flag empty tables
- Find unknown text objects
- Maintain and check text object table
- Find unknown change document objects
- Maintain and check change document object table

- Mapping tables
- Preprocessing programs BEFORE system lock
- Generation
- System settings BEFORE conversion
- Preprocessing programs DURING system lock
- Conversion
- Postprocessing programs DURING system lock
- System settings AFTER conversion
- Postprocessing programs AFTER system lock
- Test
Phase ‘Mapping tables’

R/3 Conversion Service
- Display procedure monitor
  - Notes
  - Package settings
  - Mapping tables
- Log renumbering automatically
- List company codes for merging
- Find FM areas and companies for merging
- Determine number ranges relevant for conversion
- Check number ranges relevant for conversion
- Maintain conversion rules for number ranges
- Update number range information
- Simulate number range conversion
- Determine duplicate asset numbers
- Maintain table for renaming assets
- Simulate fixed asset renaming
- Preprocessing programs BEFORE system lock generation
- System settings BEFORE conversion
- Preprocessing programs DURING system lock conversion
- Postprocessing programs DURING system lock
- System settings AFTER conversion
- Postprocessing programs AFTER system lock
- Test
Phase ‘Preprocessing programs before system lock’

- R/3 Conversion Service
  - Display procedure monitor
  - Notes
  - Package settings
  - Mapping tables
  - Preprocessing programs BEFORE system lock
    - Prepare tests
    - Find matchcode IDs
    - Determine SL objects and create programs
  - Generation
  - System settings BEFORE conversion
  - Preprocessing programs DURING system lock
    - Conversion
  - Postprocessing programs DURING system lock
  - System settings AFTER conversion
  - Postprocessing programs AFTER system lock
  - Test
Phases: 'Generation / System settings before conversion'
Phase ‘Preprocessing programs during system lock’

- R/3 Conversion Service
  - Display procedure monitor
  - Notes
  - Package settings
  - Mapping tables
  - Preprocessing programs BEFORE system lock
  - Generation
  - System settings BEFORE conversion
  - Preprocessing programs DURING system lock
    - Generate and start jobs for SL objects
    - Analyze object number indexes for reconciliation objects
    - Update number range information
    - Simulate number range conversion
    - Simulate fixed asset renaming
  - Conversion
  - Postprocessing programs DURING system lock
    - System settings AFTER conversion
  - Postprocessing programs AFTER system lock
  - Test
Phase ‘Conversion’

- R/3 Conversion Service
  - Display procedure monitor
  - Notes
  - Package settings
  - Mapping tables
  - Preprocessing programs BEFORE system lock
    - Generation
  - System settings BEFORE conversion
  - Preprocessing programs DURING system lock
    - Conversion
  - Check system settings
  - Start conversion
  - Postprocessing programs DURING system lock
  - System settings AFTER conversion
  - Postprocessing programs AFTER system lock
  - Test
Phase ‘Post processing programs during system lock’

- Display procedure monitor
- Notes
- Package settings
- Mapping tables
- Preprocessing programs BEFORE system lock
- Generation
- System settings BEFORE conversion
- Preprocessing programs DURING system lock
- Conversion
- Postprocessing programs DURING system lock
- Reset table buffers
- Reload number range table
- Carry out postprocessing for document numbers
- Carry out postprocessing for cash budget management
- System settings AFTER conversion
- Postprocessing programs AFTER system lock
- Test
Phases 'System settings / Post processing after system lock'

- R/3 Conversion Service
- Display procedure monitor
- Notes
- Package settings
- Mapping tables
- Preprocessing programs BEFORE system lock
- Generation
- System settings BEFORE conversion
- Preprocessing programs DURING system lock
- Conversion
- Postprocessing programs DURING system lock
- System settings AFTER conversion
  - Switch on system logging
  - Execute sample conversion test
  - Create data backup
  - Schedule background jobs
  - Unlock users
- Postprocessing programs AFTER system lock
  - Build pool tables for matchcode IDs
- Test
  - Execute tests
  - End conversion
Presentation Topics

- Overview of SLO and Available Solutions
- Data Harmonization / Conversion Services
- Organizational Structure changes
- System Landscape changes
- Summary/Benefits of SLO Solutions
- Overview of Business Process Methodology for Master Data
Client Merge Project Design Phase

- Introduction of Service
- Perform Overview of Customer Environment
- Customizing Comparison
- Organizational Unit Analysis
- Repository Object Analysis
- Client Independent Table Analysis
- Archiving Analysis
- Estimated Cost for Services and Project Timelines
- Customer Responsibilities and Prerequisites
The SLO services suite offers a Client Merge service to help our customers facilitate their business and IT driven change and assist in the optimization of their R/3 systems.

The Project Design Phase is the initial step in preparing for a Client Merge Project. Within this phase we will provide an in-depth gap analysis between the clients to be merged.

Depending on the customer’s needs, we can identify the gaps in customizing, organizational units, and repository objects. Upon completion of this design phase, the SLO team will deliver a detailed design report along with a project timeline for the completion of the Client Merge Project.

This report along with the timeline will provide the customer with a basis for designing their internal project team along with identifying project resource allocation.
Introduction of Service

Depending on the customer’s needs, there are three tiers of analytical services that can be scaled to satisfy each customer’s requirements:

**Tier-One Services**
- Overview of Customer Environment
- Customizing conflicts – Client dependent tables
- Organizational Unit analysis
- Project Timeline and Cost Estimate

**Tier-Two Services**
- Tier-One components
- Repository Object Comparison
- Client Independent table analysis

**Tier-Three Services**
- Tier-One and Tier-Two components
- Archiving Assessment
Perform Overview of Customer Environment

Assess current state of landscape and applications
- For all clients involved, determine release info, database size, applications in use and major business processes supported, # of users, etc.

Assess ongoing business process support
- Quarterly/year-end closing cycles, core business process requirements, etc.

Review planned state of landscape and applications, including new initiatives running concurrent with Project Timeline
- Planned rollouts, new applications being implemented, etc.

This collaborative effort is aimed at ensuring limited impact to business operations during the course of the Client Merge Project.
The Customizing Comparison tool analyzes if the customizing settings between two R/3 Clients are compatible. The two clients can be within one R/3 system, or in separate R/3 systems. The tool compares a predefined set of customizing tables. This means about 1400 Standard SAP tables as well as custom configured tables maintained in the Z*, Y* namespaces. From using the tool, the following will be provided to the customer:

- Interactive result list of client dependent tables with conflicts
- Analysis of critical table conflicts
- Identify number range conflicts
Based on the results of the Customizing Comparison, the customer project team is in position to resolve customizing conflicts and ensure that the single client system retains the functionality of the clients when they were separate.

- Work list for customer’s project analysts and process owners
- Work list includes direct links to the IMG to access configuration
  - Selection option at application level
- Customer gains understanding of resource requirements for project
  - Determine ability to handle conflicts internally or external consulting assistance required
- Customer gains understanding of scope of configuration differences between the two systems
As a result of the Customizing Comparison, other SLO standard services may be necessary to resolve conflicts or align the customizing between the clients.

- Material number conversion
- Customer number conversion
- Vendor number conversion
- Chart of Accounts conversion
- Fiscal Year Variant conversion
- Currency Key conversion
One of the prerequisites for merging clients is that organizational units must be unique between the clients. As a result, company codes, plants, controlling areas and so on must occur only once among the clients to be merged. If organizational units occur in more than one client then either one-to-one renaming is necessary, or harmonizing of the customizing is necessary so that they can be merged. To help with this task, the Organizational Unit Analysis will do the following:

- Provide full list of all conflicting organizational units
- Analyze and determine which organizational units are active in each client
- Identify inactive or unused organizational units to delete before merge
By identifying conflicts and determining active organizational units in the Organizational Unit Analysis, it is possible to determine the method and effort required to resolve each conflict so that the clients can be merged.

If the organizational units have the same name but represent different real life objects

- ex. Distribution channel 04 is Original Equipment in System A, but export Non EU in System B
  - Can delete if one of org units is inactive
  - Can use one-to-one rename if both org units are active

If the organizational units have the same name and represent the same real life object

- ex. Personnel Area US01 is contained in both systems
  - Can delete if inactive in one system
  - Will need to harmonize configuration if active in both systems
As a result of the Org Unit Analysis, other SLO standard services may be necessary to make the clients ready for merging. These include:

- Company Code Rename
- CO Area Rename
- Plant Rename
- Sales Organization Rename
- Profit Center Rename
- Cost Center Rename
- Rename of Other CO Objects
When doing an actual client merge, the first step is to merge the clients from separate systems into one system with multiple productive clients. This requires that all clients work with the same repository (tables, programs, dynpros, etc). The Repository Object Analysis checks which differences exist in the repository between the separate systems that the clients currently reside in.

The customer can choose between several different types of analysis to meet their needs. Depending on the customer’s choices, the SLO team can deliver separate reports such as:

- Provide comparison report of modified programs and function modules and conflicts between the systems
- Provide report on the identified User Exit codes tracked by the calling program
- Provide list of customer namespace or Y*/Z* tables used by the user exit and calling programs
- Provide list of SAP standard tables extended and used by the user exit and calling programs
Perform extended table comparison between the systems
Determine and provide comparison report of the modified data repository objects between the two systems in question

If the customer knows of other Repository Objects that should be compared between their systems, the SLO team can develop additional tools to meet their needs
In order for the newly created single R/3 client to have the same functionality as the separate clients, its repository must include all relevant modifications and customer developments of the separate clients. In order to facilitate this goal, the Repository Object Analysis will:

- Provide customer with a snapshot of programs and repository objects that exist on both systems showing any potential areas of missing functionality
- Highlight the user exits (projects) that are active and non-active in the systems leading to missing functionality
- Highlight the customer programs that have modified (extended) SAP tables showing added functionality
The Client Independent Table Analysis will identify conflicts in key client independent tables that could cause problem with either client copy functions or merging of clients.

- Technical settings
  - RFC Destinations
  - Communication control for EDI and ALE
  - Client definition and characteristics of the clients
  - Configuration of the archive management and Archive Link

- Repository relevant system settings
  - Definition of Fast Entry and Account Assignment Model screens in FI
  - Definition of conditions
  - Definition of classifiable objects in the classification system

- Global settings
  - Currency decimal place definition
  - Factory and Holiday calendars
  - Central address management
An Archiving Analysis will be done to see if the database volume can significantly be decreased by doing archiving in the system. It is important to know how much the database volume can be reduced, as it heavily influences both the performance of the client copy and overall system performance.

The main results of an Archiving Analysis are:

- Analyze and determine tables that could use or benefit from archiving
  - List of objects that can be archived
    - Application areas that can be archived
  - Identify archiving objects to use and help customer determine an archiving plan
    - List of important issues to consider
    - A list of the archiving objects required to remove the data
    - Recommended order for archiving objects
      - The sequence in which the data should be removed to ensure data consistency
- Recommendations for Data Cleanup in Basis Areas
- Plan for eliminating Database growth in specific Application areas
The size of the databases involved will greatly impact system downtime for a Client Merge Project.

By implementing a data archiving the recognized benefits will be:

- reduction of the database size
- reduction of the time it takes to do:
  - System Merges
  - R/3 upgrades
  - Database Consistency checks
  - etc.
Cost for Services and Project Timelines

The Project Design Phase of a Client Merge project can range from a three to six week engagement, depending upon customer requirements, system specifications and landscape complexity. Tier-One service is the minimal offering for a customer. Elements of Tier-Two and Tier-Two can be individually selected or selected in their entirety.

Tier One
- Overview of Customer Environment
  - 2 consulting days
- Customizing conflicts – Client dependent tables
  - 15 – ?? consulting days
- Organizational Unit analysis
  - 3 consulting days
- Project Timeline and Cost Estimate
  - 3 consulting days

Tier Two
- Tier One components
- Repository Object Comparison
  - 25 – ?? consulting days
- Client Independent table analysis
  - 10 consulting days

Tier Three
- Tier One and Two components
- Archiving Assessment
  - 5 consulting days
The Project Design Phase of a Client Merge project can range from a three to six week engagement, depending upon customer requirements, system specifications and landscape complexity. Tier-One service is the minimal offering for a customer. Elements of Tier-Two and Tier-Two can be individually selected or selected in their entirety.

**Tier One**

- **Overview of Customer Environment**
  - collaborative effort is aimed at ensuring limited impact to business operations during the course of the Client Merge Project

- **Customizing Comparison– Client dependent tables**
  - Interactive result list of client dependent tables with conflicts
  - Analysis of critical table conflicts
  - Identify number range conflicts

- **Organizational Unit analysis**
  - Provide full list of all conflicting organizational units
  - Analyze and determine which organizational units are active in each client
  - Identify inactive or unused org units to delete before merge

- **Project Timeline and Cost Estimate**
Tier Two

- Tier One components
- Repository Object Comparison
  - Provide comparison report of modified programs and function modules and conflicts between the systems
  - Provide report on the identified User Exit codes tracked by the calling program
  - Provide list of customer namespace or Y*/Z* tables used by the user exit and calling programs
  - Provide list of SAP standard tables extended and used by the user exit and calling programs
  - Perform extended table comparison between the systems
  - Determine and provide comparison report of the modified data repository objects between the two systems in question

- Client Independent table analysis
  - Identify conflicts in key client independent tables that could cause problem with either client copy functions or merging of clients
Cost for Services and Project Timelines

Tier Three

■ Tier One and Two components
■ Archiving Assessment
   ✦ Analyze and determine tables that could use or benefit from archiving
   ✦ Identify archiving objects to use and help customer determine an archiving plan
   ✦ Recommendations for Data Cleanup in Basis Areas
   ✦ Plan for eliminating Database growth in specific Application areas
Deliver detailed project timeline

- If applicable, incorporate additional SLO conversion services that may be required to facilitate the client merge process.
  - Organizational Unit Rename, Controlling Area merge, etc.
- Incorporate customer initiatives and key business processes review within project timeline
Responsibilities of Customer before project can be started and SAP held to agreed timeline

- Provide recent copies of clients to be merged in test systems, so that testing can take place in a separate, dedicated environment
- Establish RFC connections between systems to be compared
- Provided user ids with full authorizations and access to the necessary systems
Presentation Topics

- Overview of SLO and Available Solutions
- Data Harmonization / Conversion Services
- Organizational Structure changes
- System Landscape changes
- Summary/Benefits of SLO Solutions
- Overview of Business Process Methodology for Master Data
Experience with Conversion Technology

- appr. 6000 Euro conversions
- appr. 500 projects since 2000
  - chart of account conversion
  - fiscal year change
  - material number conversion
- appr. 80 projects since 2000
  - company code merge
  - controlling area merge
  - controlling area split
- appr. 30 projects since 2000
  - client merge
  - client/system split
30-50 % less cost for technical realization
◆ Most cost-effective approach (Conversion or Migration based)
◆ High usage of specialized tools minimize manual efforts
◆ Predefined scenarios / Preconfigured solutions
◆ Easy adaption to cover customer specifics

SAP provides first hand technical product know-how

“All inclusive” service offering from strategy to technical realization
◆ Full range of services including project management and responsibility
◆ Choice of alternative approaches with regards to cost and time

Tool-based analysis for well-defined, reliable project estimates

Unique “Tools”-based approach
◆ Data consistency as main goal
◆ All data (customizing, master data, transaction data) included in approach
◆ Integration fully covered, consistency between applications guaranteed
◆ Standardized services provide better quality results that manual methods
Benefits of the SLO offering

Expertise

- SLO organization has a dedicated Development team
- SLO consulting team with special expertise in change projects
  - Close relationship with SAP development
  - Access to resources with special expertise in other SAP departments
- A large number of services are highly standardized
  - Big projects are based on a number of predefined “standard” modules
  - Low Risk (data, budget, timing)

Experience

- Dedicated team for more than 5 years
- Over 600 projects completed with customers worldwide
  - Tailored solutions based on standard SAP-methods combined with SLO-Tool-supported approach
- Methods proven in over 6000 currency conversion projects
Further Information on SLO (Alias: SLO)

http://service.sap.com/slo
Presentation Topics

- Overview of SLO and Available Solutions
- Data Harmonization / Conversion Services
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- System Landscape changes
- Summary/Benefits of SLO Solutions
- Overview of Business Process Methodology for Master Data
Master Data Business Process Framework

Channels
- Named Clients & Account Teams
- Industry Solutions
- Process Solutions

Services
- Pre-Sales
- Assessments
- Implementation
- Post Implementation Review

Process
- Market
- Design
- Sell
- Buy
- Make
- Distribute

Enterprise
- Master Data – Establishing Standards
- Value Management – SEM data sets, BW Req’s, KPIs
- Finance – Chart of Accounts, ABC Costing, Financial Static Data
- Change Management – Organizational req’s to establish and maintain data (who, how)

Technology
- MDM Solutions
- SAP Analytics/ BW
- SLO Tools for data combos
- Outsourcing Content Management
- Migration and Conversion Strategies

Content
- Situational POV – Pain Points Opportunities – What is important
- Best Practice / Prescriptive POV – What to do
- Method -Our Analytical & Roadmap Approach
- Method Tools – Our Delivery Approach

Extended Delivery
- BTS Selling
- BTS Delivery
- Named Clients & Account Teams
- Industry Solutions
- Process Solutions
- GPSO, Partners, Outsourcers

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Methodology Progress - Assessments

Participants
1. Project Sponsor, Project Leader, Facilitators
2. Executive Representatives (Operations, Marketing, IT, Purchasing, Finance, R&D, HR)

Steps
- Conduct Situational Briefing
  1. Conduct Executive Discussion
  2. Educate Executives on Value of Master Data Management
  3. Identify Key Business Imperatives & Pain Points
  4. State Strategic Data Principles
  5. Develop Process/Data Questions
  6. Develop Diagnostic Project Plan

Techniques
- Executive Questionnaire/Discussion Guide
  1. State of the Data
- Key Business Imperatives Guide
- Master Data Management Model & Methodology

Results
- Executive Perspectives Statement
  1. Key Business Imperatives
  2. Candidate Pain Points
  3. Strategic Data Principles
  4. Process/Data Questionnaires
- Diagnostic Project Plan

Input
- Summary Company Info
  1. Customers
  2. Suppliers
  3. Lines of Business
  4. Financials
  5. Organization
  6. Strategies

Techniques
- Executive Questionnaire/Discussion Guide
- Key Business Imperatives Guide
- Master Data Management Model & Methodology

 Results
- Executive Perspectives Statement
- Diagnostic Project Plan

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Methodology Progress - Assessments

Input
- Executive Perspectives Statement
  1. Key Business Imperatives Statement
  2. Candidate Pain Points
  3. Strategic Data Principles
  4. Process/Data Questionnaires
- Diagnostic Project Plan

Techniques
- Business Drivers Analysis
- Operational & Strategic Pain Points
- Data Collection & Analysis Templates
- Future State & Readiness Models

Steps
- Define Fundamental Business Drivers
- Determine Pain Points, Key Enablers & Barriers
- Define Future State & Readiness Req’ts
- Perform Gap Analysis
  1. Interview Process Owners
  2. Collect & Analyze Data
  3. Identify Gaps & Solution Needs

Results
- Business Drivers
- Pain Points, Key Enablers & Barriers
- Future State Model
- Readiness Requirements
- Gaps & Solution Needs
- Key Stakeholders List

Participants
1. Project Leader, Facilitators, Project Team
2. Operational Representatives (Operations, Marketing, IT, Purchasing, Finance, R&D, HR)
Methodology Progress - Assessments

Input
- Future State Model
- Drivers and Pain Points
- Gaps & Solution Needs
- Key Stakeholders List

Steps
- Build Business Case model
  1. Strategic factors (share, competitiveness etc)
  2. Operations & efficiency factors
  3. Soft factors: visibility, decision quality, accountability, error avoidance etc.
- Populate Business Case
- Validate Business Case
- Document Key Factors for Success

Techniques
- Business Case Template
- Business Case Questionnaire
- Validation Sessions

Results
- Validated Business Case
- Key Success Factors

Participants
1. Project Leader, Facilitators, Project Team
2. Operational Representatives & Key Stakeholders (Operations, Marketing, IT, Purchasing, Finance, R&D, HR)
Methodology – Master Data Management Diagnostics

**Input**
- Future State Model
- Drivers and Pain Points
- Gaps & Solution Needs
- Key Stakeholders List
- Validated Business Case
- Key Success Factors

**Steps**
- Identify Solution Areas & Affected Business Processes (e.g. Finance, Supply Chain, Sales)
  1. Data Standards & Hierarchies
  2. Data management, governance & ownership
  3. Data Cleansing & Migration
  4. Data Standardization & Integration Tools
  5. Data Access & Visibility
  6. Data usage & maintenance
- Develop Solution for Drivers/ Pain Points
- Define & Validate Roadmap, Draft Project Plan and Key Milestones

**Techniques**
- Solution Templates
- Roadmap Guidelines
- Project Plan Template

**Results**
- Solution Areas
- Solution Definition
- Roadmap & Project Plan

**Participants**
1. Project Leader, Facilitators, Project Team
2. Key Stakeholders
Methodology Template – Example – Roadmap Items

Implementation Roadmap

- Phase 1 – Diagnose Master Data Issues
  1. Identify Situation
  2. Diagnose & Determine Drivers
  3. Establish Business Case
  4. Prescribe Solution Roadmap

- Phase 2 - Define Master Data Standards & Model
  1. Global Master Data standards, rules & processes to govern data and its usage
  2. Repository, access, security & ongoing maintenance

- Phase 3 – Build/Implement Master Data Model
  1. Process/Data Focus Areas
  2. Tool Evaluation
  3. Data Cleansing/Migration
  4. Data Integration
  5. Data flow thru transactional/ERP backbone
  6. Data Warehousing Approach (Extraction, Staging, Storage & Flow)
  7. Business Intelligence Approach (Access, Usage, Reporting and Analysis)

- Phase 4 – Leverage Master Data Value
  1. Consistency, Integration, Visibility, Access

Governance Roadmap

- Foundation 1 – Data Ownership & Evolution
  1. Who owns the standards, how far do they extend, who is CRUD?
  2. How to enforce, propagate, maintain and evolve the standards?
  3. How to track business & strategy changes that affect data roadmap?
  4. How to track technology/IT environment changes that affect data roadmap?
  5. How to track process changes that affect data roadmap?

- Foundation 2 – Governance & Program Office
  1. Data Management representation in all major initiatives
  2. Process area representation in Data Management program office
  3. Executive sponsorship & funding
  4. Tracking value & progress
**Example – Problem Area – Material Master Data**

<table>
<thead>
<tr>
<th>What Master Data is most important?</th>
<th>What are the typical problems?</th>
<th>What are the value opportunities associated with fixing it?</th>
<th>What organization must be in place to manage it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commodity Codes</td>
<td>Duplications and inconsistencies</td>
<td>Demand Planning/Manufacturing Optimization</td>
<td>Alignment of Engineering, R&amp;D, Materials Management, Sales, Procurement, Finance</td>
</tr>
<tr>
<td>Numbering conventions</td>
<td>Inability to meet customer requirements</td>
<td>Inventory Optimization</td>
<td></td>
</tr>
<tr>
<td>Naming conventions</td>
<td>Sub-optimal Inventory Management</td>
<td>Reduction in A/P processing costs, increased economies of scale (procurement), foundation for strategic sourcing</td>
<td></td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Sub-optimal customer pricing routines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Material Groups &amp; Hierarchies</td>
<td>Sub-optimal Purchasing, A/P Processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Data for Parts</td>
<td>Sub-optimal Reporting &amp; Analytics</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-conformance to Industry Standards</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ILLUSTRATIVE**
## Example – Problem Area – Supplier Master Data

<table>
<thead>
<tr>
<th>What Master Data is most important?</th>
<th>What are the typical problems?</th>
<th>What are the value opportunities associated with fixing it?</th>
<th>What organization must be in place to manage it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier naming conventions &amp; hierarchy</td>
<td>Duplications and inconsistencies</td>
<td>Plant maintenance, quality management optimization</td>
<td>Alignment of Engineering, R&amp;D, Materials Management, Sales, Procurement, Finance</td>
</tr>
<tr>
<td>Contract terms</td>
<td>Inability to meet internal supply chain requirements</td>
<td>Supply Network Planning/Manufacturing Optimization</td>
<td></td>
</tr>
<tr>
<td>Delivery &amp; payment data</td>
<td>Sub-optimal Inventory Management</td>
<td>Inventory Optimization</td>
<td></td>
</tr>
<tr>
<td>Supplier classification</td>
<td>Multiple supplier terms &amp; conditions, suboptimal payment terms &amp; delivery performance</td>
<td>Reduced spend, higher leverage from supplier relationships</td>
<td></td>
</tr>
<tr>
<td>Ordering data</td>
<td>Sub-optimal Purchasing, A/P Processing, Supplier Collaboration</td>
<td>Reduction in A/P processing costs, increased economies of scale (procurement), foundation for strategic sourcing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sub-optimal Reporting &amp; Analytics</td>
<td>Improved reporting accuracy, improved decision-making</td>
<td></td>
</tr>
</tbody>
</table>

**ILLUSTRATIVE**
Proposed Approach – Structured Solution Design

Assess Situation

1. Develop Input List & Stakeholder Contacts
2. Conduct Situational Briefings – Management Interviews
3. Describe Key Business Imperatives & Strategic Data Principles

Identify Business Drivers & Case for Change

1. Define Fundamental Business Drivers & Required End-State
2. Determine Pain Points, Key Enablers & Barriers
3. Identify Gaps & Solution Requirements (Strategic Fit, Technology, Process, Governance)
4. Build Case for Change and Key Factors for Success
   a. Determine Business Case Factors
   b. Populate Business Case
   c. Validate

Define Solution Roadmap

1. Identify Solution Areas
   a. Data Standards & Hierarchies
   b. Data Governance & Ownership
   c. Affected Processes
   d. Data Cleansing & Migration
   e. Data Standardization & Integration Tools – Short/Medium/Longer Term, Technology Criteria
   f. Data Access/Visibility/Usage & Maintenance
2. Develop Solution Alternatives to Address Drivers/Pain Points
3. Define & Validate Roadmap, High-Level Implementation Steps & Milestones

Workshop, Data Collection & Analysis

Workshop & Validation Meetings

Strategic Fit
Technology
Process
Governance

Interviews & Data Collection

THE BEST-RUN BUSINESSES RUN SAP
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