

Innovia
CONSULTING



Getting the Most Out of Your
Modifications from Issue to
Implementation

Today's Presenters



Kevin Fons

Senior Application Consultant

406-426-9628

kfons@innovia.com



Bryce Menadue

Development Consultant

715-737-9094

bmenadue@innovia.com

Covering today

- ✓ Different Types of Modifications
- ✓ Design Lifecycle
- ✓ Design Documents
- ✓ Development/ Review
- ✓ Design Changes
- ✓ Testing
- ✓ What is "Done"?
- ✓ Moving to Production
- ✓ Examples (if we have time)



Modification Types



Modification Types

- ✓ Simple
 - ✓ Custom Fields without code, adding fields to pages and reports, simple error checking
 - ✓ 1-10 hours
- ✓ Medium
 - ✓ Custom fields with code, reports, pages. custom functions
 - ✓ 10-100 hours
- ✓ Large
 - ✓ Integrations, functional process additions, automations
 - ✓ 100 Hours +



Design Lifecycle



Design Lifecycle



- ✓ Idea/ Problem
- ✓ Design
- ✓ Development Loop
- ✓ Implementation
- ✓ Follow-up support



Idea / Problem

- ✓ What is the Idea or Problem trying to be solved (Who, What, Where, When and Why)?
- ✓ How frequently will the modification be used?
- ✓ How many users will use this modification?
- ✓ Is this internal or customer facing?

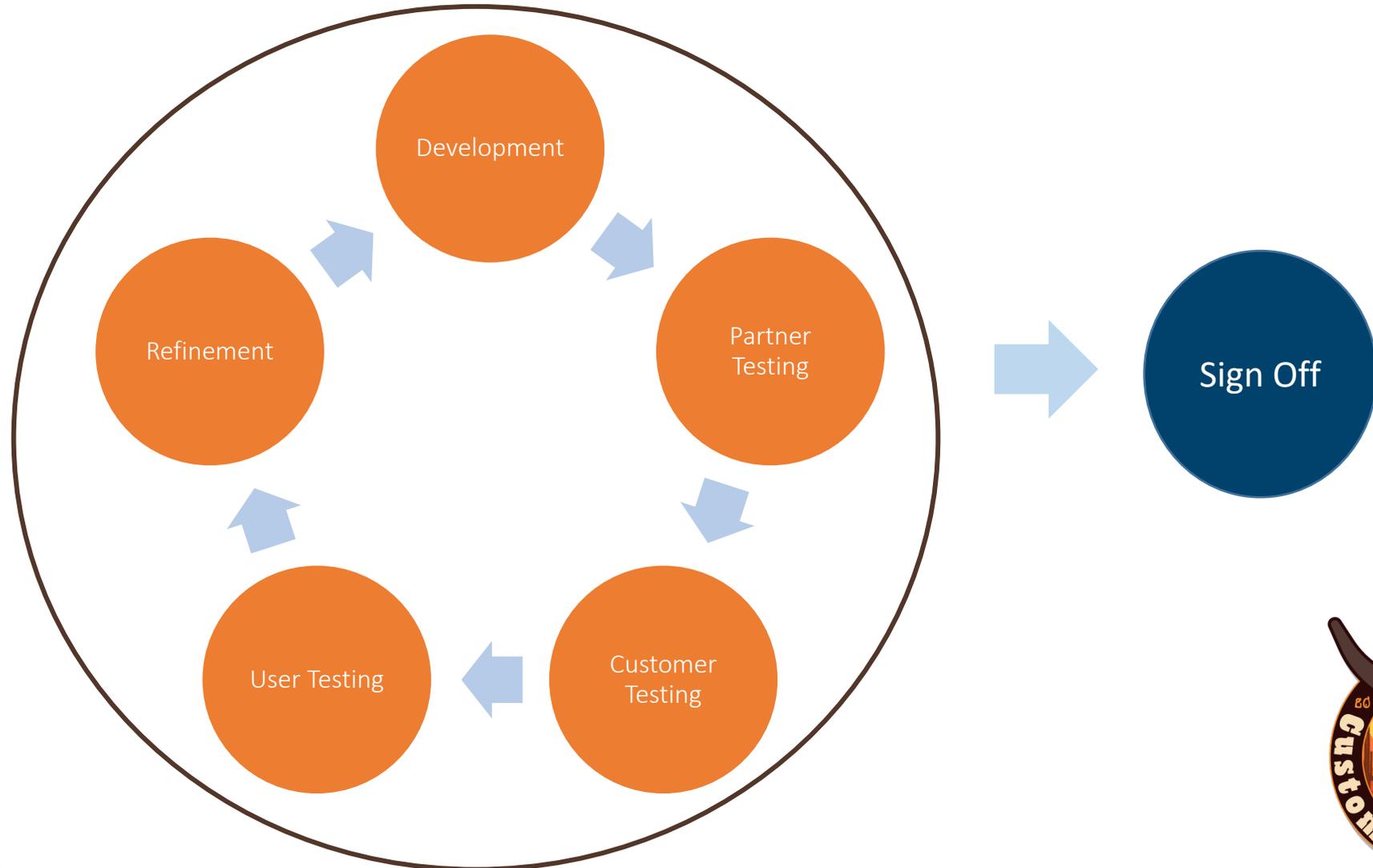


Design Document

- ✓ Functional Description / Process Flow
- ✓ Design Details – fields, field order, tool tips, Message Text, Filters
- ✓ Business Case / ROI
- ✓ Technical Details – tables, pages, functions, collaborative with AC and DC
- ✓ Test Process / Scenarios
- ✓ Estimate
- ✓ Review and Signoff



Development Loop



Implementation

- ✓ Communicate Change to Users
- ✓ Instructions / Updated Process
- ✓ Move to Production



Follow-up Support

- ✓ Customer is first line of support
- ✓ Unforeseen / missed scenarios can happen
- ✓ Some Modifications cannot be rolled back



Design Process



Design Document

- ✓ Design Document is a working document
 - ✓ Document's the Design
 - ✓ Clarify the Design (Functional & Technical)
 - ✓ Testing Plan and Results
 - ✓ Track Changes
 - Can include supplemental documents
- Spend the "Appropriate" amount of time on the design.
- The larger the design the more collaboration should go on



Design Document Sample

Ticket / Story #		Date:	
Customer:		Contact:	
Description:			
Created by:	Kevin Fons	Reviewed by:	
Hours Estimate:	<i># of hours – Include design, development, and testing time.</i>		
Platform:		Version:	
Functional Design:			

Technical Design:

Testing Results:	
Date	Issue/Resolution



Functional Design

- ✓ Functional Design Section
 - ✓ Idea/problem
 - ✓ Who will use the modification
 - ✓ What needs to be done
 - ✓ Where is the modification in the system
 - ✓ How should the mod work
 - ✓ Why - ROI / Business Case



Business Case / ROI

- ✓ Return on Investment
 - ✓ There should always be a business case / ROI
 - ✓ Efficiency Improvements – how much time does it save, how often?
 - ✓ Error Prevention – how often is there an error and how long to fix?
 - ✓ Compliance – Have to do, prevent chargebacks
 - ✓ Data Integrity – better decisions on better data



Technical Design / Testing

- ✓ Technical Design
 - ✓ Details – tables, pages, fields
 - ✓ Development details / Developer Notes
 - ✓ Best to create collaboratively with the developer
- ✓ Testing Plan
 - ✓ Document how to test and results



Design Change Tracking

- ✓ As users see the process new ideas come to them
- ✓ Design Changes within reason are not bad
- ✓ Early is better than Late
- ✓ Large changes require a Change Order
- ✓ Document changes in the design document with a date changed and why the change was added.

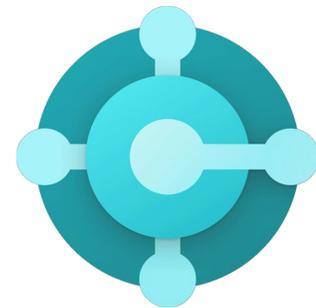


Development



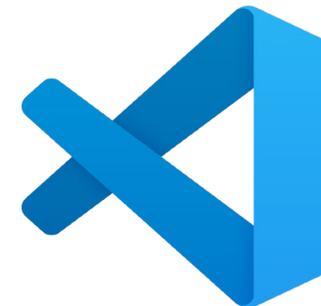
Development

- ✓ Before I begin...
 - ✓ Where am I Developing?
 - ✓ What am I developing against?
 - ✓ What is the vision?
 - ✓ Are my tools in place?



Development Continued

- ✓ During Development...
 - ✓ Encourage collaboration during development
 - ✓ Check points
 - ✓ Ideas that happen along the way
 - ✓ Thinking ahead/ Future proofing
 - ✓ Does someone else have a similar problem?
 - ✓ Is this in MSFT timeline?



Testing



Testing

- ✓ Phases of testing
 - ✓ Developer testing
 - ✓ Consultant testing
 - ✓ Customer testing
 - ✓ User Acceptance Testing (UAT)



Testing – Cont.

- ✓ How much should I be testing?
 - ✓ Simple
 - ✓ Medium
 - ✓ Large
- ✓ Testing depends on design and complexity of testing or data.
- ✓ Sometimes testing will go straight to the Customer when data or process complexity is high.



Testing – Cont.

- Different types of testing
 - ✓ Functional
 - ✓ Performance
 - ✓ Stress
 - ✓ Regression
 - ✓ Automated Testing/ Unit Testing
 - ✓ And more...



Moving to Production



What is "Done"? Move to Live

- ✓ When is the design done and ready to move to production
 - ✓ Testing Complete
 - ✓ Work Instructions / Training documents complete
 - ✓ Communication to users
 - ✓ User Training
 - ✓ Final Design Approval and Move to Production



Move to Live - Technical

- ✓ Before you move to Production
 - ✓ All Code bugs are resolved
 - ✓ Source control setup for merging
 - ✓ Multi Developer Coordination
- ✓ The deployment itself
- ✓ Clean up after deployment
 - ✓ Notify all parties
 - ✓ Source control practices
- ✓ Follow up support



Examples



Examples – Small

- ✓ Custom Fields
- ✓ Adding stock fields to Pages and Reports – Good news is coming!
- ✓ Simple Colum / Excel Reports.
- ✓ Data integrity checks on Sales Order Release / Test Release
 - ✓ Terms
 - ✓ Pricing exists
 - ✓ Price vs cost



Examples – Medium

- ✓ Reports – both regular and processing only
- ✓ Forecast Import
- ✓ Sales and Purchase Price updates
- ✓ Warehouse Cleanup Process
- ✓ Supply and Demand Factbox



Examples - Medium

✓ Supply and Demand Factbox

[Details](#) [Attachments \(4\)](#)

Supply and Demand

Item No.	03-01568
	Supply:
On Hand All Loc.	12,000
On Hand	12,000
Purchase Orders	0
Production Orders	150,320
Transfers	0
Net Supply	162,320
	Demand:
Sales Orders	201,488
Transfer Orders	0
Components	210,000
Qty. on Forecast	78,000
Net Demand	489,488
Plan Component	0
Net Available	-327,168



Examples - Large

- ✓ Auto-Invoice process
- ✓ Integrations to external systems
- ✓ Quoting / Estimating System



Any Questions?



Thanks for Joining Us



Please Use the Code to Access Your Survey

