

The O.G. Framework

Essbase Lifecycle Methodology
March 2003

Framework

- Assessment
- Design
- Development & Review
- Test
- Rollout
- Maintenance & Review

Assessment

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Assessment Points

- Strategic Review
- Project Scope & Goals
- Resources
- Environment
- Data Supply Chain
- Expectations

Assessment: Strategic Review

- SAP
- Global DW, Regional DW
- Large Multiyear Project



Assessment: Project Scope & Goals

- Management Reports
- Analytic Views
- ERP Internal Audit Reports
 - 2Q03
 - Web Deployment
 - Establish Best Practices
 - Essbase 6.5.1, Analyzer 6.2, Reports 2.0



Assessment: Resources

- Major Sponsor
- Technical Lead
- Functional Lead
- Project Lead
 - Experience
 - Cross Functional Ability
 - Delivery On Spec



Assessment: Environment

- Development
 - Win2k Hyperion Web/App Server (4way)
 - Websphere 4.x, SQL Server
 - AIX Essbase (4way)
- QA Available
- Production with Controls



Assessment: Data Supply Chain

- SAP Extracts
- DB2 UDB
- Various Control Tables




Assessment: Expectations

- Users
 - Hungry, Skeptical
- Sponsors
 - On Track, Busy, Light on Tech
- IT
 - On Board, Possible Rivalry




Assessment: Project Details (Est.)

- Design: 12/9 – 12/13
- Development: 12/16 – 12/23 (break)
- Baseline Deliverable: 1/17
- Review, Blue Sky, Priority: 1/21 – 1/29
- Fast Track Release 2/1
- (Risk)



Assessment: Summary

- Good Expectations
- Good Environment (Some Risk)
- Very Good Project Scope (March 1 Deliverable)
- Excellent Data Supply
- No Resource Constraints




Design

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- **Design**
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- Enhancement




Design Points

- Replication
- Validation
- Functional Abstraction
- Added Value
- Prototype



Design: Replication

- Understand Current Process
 - Audience
 - Business Goals
 - Data Flow
- Create Manifest of Reports
- Reverse Engineer



Design: Validation

- Assure Data Supply Chain
 - Diagram / Whiteboard it.
 - Know Schedule
- Create a Reconciliation Process
- Use Discrete Checkpoints



Design: Functional Abstraction

- Grasp Fundamental Concepts
- Evade Preconceived Notions
- Brainstorm in Scope
- Create Valid Terms



Design: Added Value

- Productivity
- Efficiency
- Confidence
- Competence
- Communication



Design: Prototype

- Use *Some* Real Data
- Demonstrate Navigation
- Let Everyone See
- Demo (Let Users Drive)



Development

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Development Points

- Establish Baseline
- Establish Priorities
- Version!
- Honor Migration Rules
- Schedule Regular Reviews
- Do's & Don'ts



Development: Baseline

- All Major Functions
- Code for Reliability
- Keep Status Quo in Mind
- 80/20 Generally, 70/30 Sometimes



Development: Priorities

- Identify Bang for Buck
- Identify What's Hard
- Identify Customer Needs vs Wants
- Balance Priority with Effort
- Know Showstoppers



Development: Version

- Close Each Week as a Version
- Document Functional & Technical Features
- Keep Sponsors in the Loop
- Be Flexible & Negotiate
- Be Clear about Dependencies Across Systems



Development: Migration

- Unit Test & Backup each Version
- Segregate Security Functions
- Allow Free Reign in Dev
- QA is Prod Mirror
- Track All Objects & Data
- Use Naming Conventions
- Make Exhaustive Checklists
- Develop Only In Dev



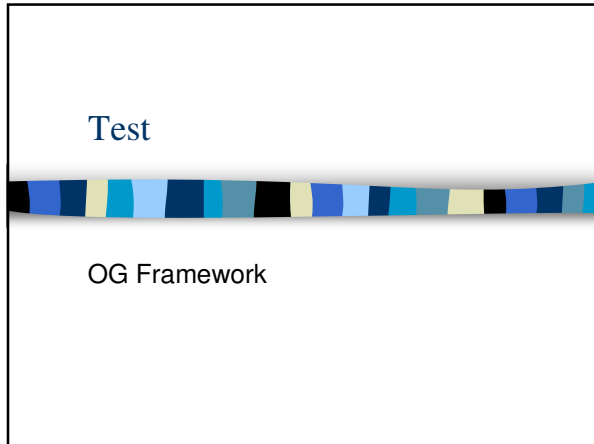
Development: Reviews

- One per Version, Max
- Allow Feedback Time
- Highlight Open Issues
- Allow Informal Pre-UAT
- Take Copious Notes
- Use Developer Actions Docs



Development: Do's & Don'ts

- Don't Split Cubes Among Developers
- Don't Wait for RDBMS Conformed Dimensions
- Do Optimize in Dev
- Do Automate in Dev
- Don't Slip Review Dates
- Don't Code During Demos




- ### Framework
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 - **Test**
 - Rollout
 - Maintenance
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- ### Test Points
- Unit Test
 - Pre-UAT
 - UAT
 - Integration Test

- ### Test: Unit
- One Developer / One Cube
 - Build, Load, Calc, Reports
 - Data Validation
 - Partition Validation
 - Optimize Cube in Dev
 - Trackback for All Rejects (Document Allowable)


- ### Test: Pre-UAT
- Sneak Peak for Superusers
 - No Formal Meetings
 - Can Be on Dev
 - Users Can Be Cut Off

- ### Test: UAT
- Script It Completely
 - Use Fake Data
 - Don't Include Reconciliation
 - Run *Before* Integration Test
 - Close out User Review
 - Negotiate for Next Version
 - Finish At Least 3 Weeks Before Rollout
 - UAT is Not Training



Test: Integration

- Know All Dependencies Across Systems
- Validate Partitions
- Reconcile Data
- Perf Stress Test
- Leverage User Buy-In
- Test on Production Systems
- Do QA Failover




Rollout

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Rollout Points

- Lockdown
- Stage Users
- Schedule Training
- Have Support Process in Place
- Have Maintenance Staff