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Feature Scope Description: SAP Portfolio and Project Management 1.0 for SAP S/4HANA

Content

1 SAP Portfolio and Project Management for SAP S/4HANA - Feature Scope Description

With the SAP Portfolio and Project Management for SAP S/4HANA, you can efficiently synchronize your strategic and operational portfolio and project management goals. You gain a highly integrated solution combining portfolio management, project management, and resource management, along with reliable performance monitoring and flexible analytics.

SAP Portfolio and Project Management for SAP S/4HANA provides features for the following solution capabilities:

- **Portfolio Management**
  Addresses your organization's need for strategic and operational portfolio management. The application enables you to better control and innovate projects, processes, products, and services across their life cycles. It integrates information from existing project management, human resources, and financial systems to provide an overview of the project portfolio and resource availability.
- **Project Management**
  Helps you manage project operations throughout the entire company enabling strong project management functionality including project planning and execution as well as project accounting. It supports structuring, scheduling, and visualization, and operative planning and execution.
- **Resource Management**
  Cross project resource planning helps you plan and optimize your human resource deployment across different projects. It focuses on using your employees efficiently and assigning them to projects based on demand, qualifications, and availability. The resource or candidate manager uses this process to assign resources to roles.
  Project resource planning provides a planning tool for you to optimize your human resource deployment in a project. It focuses on using your employees efficiently and assigning them to projects based on demand, qualifications, and availability.

SAP Portfolio and Project Management for SAP S/4HANA is fully built on the in-memory platform SAP HANA. Using the advanced potential of SAP HANA, SAP Portfolio and Project Management for SAP S/4HANA is designed for your digital business and provides an instant insight by using a single source of truth, real-time processes, dynamic planning and analysis. With SAP Fiori user experience and less complex data model it is designed to run simple, and in parallel reduces the data footprint of your company.

About this document

This feature scope description shows you which features are provided with SAP Portfolio and Project Management for SAP S/4HANA. In addition, this feature scope description also defines the product documentation for SAP Portfolio and Project Management for SAP S/4HANA.

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Product documentation

The following product documentation is available for SAP Portfolio and Project Management for SAP S/4HANA:

- This feature scope description
- Information on installation
  You can find the relevant information on how to install SAP Portfolio and Project Management for SAP S/4HANA at http://help.sap.com/ppms4.
- Information on conversion or migration
  You can find the relevant information on how to convert or migrate from an existing installation to SAP Portfolio and Project Management for SAP S/4HANA in SAP Note 2361657 and at http://help.sap.com/ppms4.
- Information on security
  You can find the relevant security information for SAP Portfolio and Project Management for SAP S/4HANA at http://help.sap.com/ppms4.
- Information on operation
  You can find the relevant information on how to operate SAP Portfolio and Project Management for SAP S/4HANA at http://help.sap.com/ppms4.

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2 Portfolio Management

Business Background

Portfolio Management capabilities give high-level visibility over the entire project portfolio, portfolio analytics and resources.

Portfolio Management provides a comprehensive and up-to-date view of the entire portfolio of company projects to present the full extent of project risks and opportunities. It allows you to overcome delays that can occur as information is collected from disparate sources. Portfolio Management gathers diverse data into dashboards which act as a starting point for portfolio analysis.

Portfolio Management integrates information from existing project management, human resources, and financial systems to provide an overview of the project portfolio and resource availability, and it provides easy drilldown to details.

Key Features

The following features are available:

Table 1:

Key Feature	Use
Portfolio and bucket hierarchy management	You use a portfolio to map the strategic structure of a company. There could either be one portfolio for the overall company, or different portfolios, reflecting independently managed areas. One portfolio is a single entity and not related to other portfolios.
	The overall structure of a portfolio is reflected in the hierarchy of buckets. This allows you a flexible categorization of portfolios. Portfolio Management supports multi-level portfolio hierarchies.
	Buckets represent, for example, product lines, organizational or regional structures. Once you have set up the bucket hierarchy, you can add items to the buckets, plan the budgets and the resources and do the assignment accordingly.
	You can also create alternative portfolio hierarchies.

Key Feature	Use
Item management	You use portfolio items to represent, for example, proposals, projects, concepts (anything that should be analyzed within a portfolio). Portfolio items can have dependencies to other items. You can create versions of a portfolio item. You can create versions of an item or of a portfolio initiative (initiative) to document the status of an item at a certain point in time (snapshot) or to simulate changes (simulation). Decision points represent gates through which an item passes, for example, from specification to design or from design to implementation. Each decision point can have several configurable status values.
Initiative management	You use an initiative to manage a set of portfolio items to achieve a specific goal of a bucket. For example, a new product initiative represents all phases of discovering, designing, developing, go to market, and maintenance of a single product. Each initiative is assigned to a certain bucket and different items can be assigned to an initiative. It consists of a set of attributes and as well as, for example, questionnaires or scoring models. You can define persons responsible for initiatives by staffing roles. You can use the checklists function to create and edit checklists and checklist items of initiatives. Checklists help you to define the deliverables, such as KPIs or documents that are mandatory for a phase approval. You can monitor the status of the deliverables.
Collection management	You can group related portfolio items with a common strategic goal to collections. A collection has its own reporting cockpit to enable portfolio managers to monitor the performance of the collection.
Review management	Portfolio reviews enable you as a portfolio manager to make fact-based decisions. A review can take place when a certain item or initiative has reached a certain decision point, for example. The portfolio items within a review are evaluated and compared within scoreboards.
Financial and capacity planning	You use financial and capacity planning to store and plan financial and capacity data for your project and to maintain actual cost data. You can maintain financial and capacity planning data for a bucket, item, and initiative. You can view financial and capacity data on different levels, for example actual or planned costs, labor cost or material costs, cost for furniture or equipment. You can aggregate financial and capacity data from between items, initiatives, and buckets using rollup. You can integrate data from the Finance area of SAP S/4HANA or from Project Management. You can define that financial and capacity planning data for an item or an item of initiative is retrieved from a financial and controlling system or project management instead of manually entering the data. In the item financial planning, you can see the actual costs stored in the Finance area of SAP S/4HANA.

Key Feature	Use
Scoring and questionnaires	You can compare portfolio items or initiatives in a scoring model based on quantitative key performance indicators. This enables decision makers to make educated decisions on portfolio items or initiatives. For the aggregation of data, you can implement different scoring models. The quantitative scores of a scoring model are retrieved either from portfolio item or initiative attributes or can be filled by results of questionnaires. Based on questionnaires, you can use qualitative criteria to get numerical scores for risk, strategic fit, feasibility, and other types of soft data of portfolio items or initiatives.
What-if scenario management	You can simulate changes in the budget assignment or capacity assignment and find out what the impact is on the respective items. You can see the result of the simulation in the reporting cockpit, such as the reviewed items. You use what-if scenarios to support your decisions.
Printing of forms	You can preview and print the detailed data of items and initiatives. The data printed in the PDF-based print form reflects the data that is displayed on the user interface. You can configure the PDF-based print form so that the data is displayed and printed according to your needs.
Managing Documents	You can manage your documents in Portfolio Management using a document repository.
Authorizations at object level	You can define object-specific authorizations for portfolios, buckets, items, initiatives, reviews, collections and decision points.
Export or import of project data	You can use the following import and export functions to exchange data between Portfolio Management and other applications: • You can import or export a project associated with a portfolio item from or to a generic XML file. • You can import or export project data from or to the project system in SAP S/4HANA. • You can import data from Project Management into Portfolio Management. • You can export project data from Portfolio Management to a project management system that is installed on a different server. For more import/export functions see the Project Management chapter.
Recording changes / change document	A change document in Portfolio Management provides electronic documentation of changes made to attributes of objects or entities. Depending on the settings in the data dictionary and Customizing settings, change documents can be generated in the context of new object creation, change or deletion of objects or entities. If you have activated change documents for an object, the system tracks all attribute changes to these objects.
Archiving	You can archive the data of the following objects: • Portfolios • Buckets • Items • Collections • Initiatives • Reviews

3   Project Management

Business Background

Project Management helps you standardize and improve project management execution and reduce associated administrative and system costs, by providing reliable project management functions that can be deployed independently or integrated into your, for example, Human Resources or Financials back-end system. Project Management is ideal for managing phase-based projects. It delivers highly specialized support for product development, IT, or other types of projects. It supports structuring, scheduling, visualization, operative planning, and execution.

Key Features

The following features are available:

Table 2:

Key Feature	Use
Project elements	You use the following project elements to reflect the projects of your company: • Project Definition: A Project definition is the project element at the highest hierarchy level of a project. The project definition contains general data of the project and information that is valid for the whole project. • Phases: A phase is a clearly defined period in a project. A phase belongs to the project definition and and you can further subdivide a phase using checklists and tasks. • Tasks: In projects, tasks help to record and structure necessary processing steps. You can assign tasks, for example, to a project definition or a phase. • Checklists and checklist items: Checklist items represent important requirements that have to be met in order to achieve the project goal. Project participants check off the items they have finished. You can group checklist items in a checklist. • Roles: A role represents a position in a project, for example, the role of consultant in a consulting project. The role describes which type of resource is required in a project, that is, which function the resource carries out in the project. The role includes information about the qualifications that the resource should have and when and for how long the resource should be available.
Displaying and editing project details	You use various apps, dashboards and views (including Gantt chart) to get an overview of your projects, to get a detailed insight into the project details, and to edit your projects.

Key Feature	Use
Project templates	You can create templates that you can use every time you create a project. This allows you to better standardize your projects. You can create templates for the following objects: • Projects • Checklists • Documents You can include phases, tasks, and checklist items from project templates or checklist templates in operational projects or other templates along with the lower-level project elements that belong to them. The subtrees are copied when you do this.
Scheduling	You can use the following functions to schedule your projects: • For each project type, you can choose whether you want to use bottom-up scheduling or top-down scheduling. • You can enter fixed dates for the project elements. If you do not enter fixed dates for the project, the system sets the current date as the start date. The system calculates the finish date from the remaining project data during scheduling. • You can enter phase dates that overlap as well as task dates or checklist item dates that are outside the phase dates. The system informs you if the dates overlap each other by displaying messages in the log. The system uses messages to inform you of any conflict situations during scheduling, for example, if task dates are outside the time frame of phases during top-down scheduling. • You can enter a duration for phases and tasks. • You can enter fixed dates for the planned start and the planned finish, and can assign a calendar for project definitions, phases, and tasks. • For checklist items, you can only enter a fixed date for the planned finish. • You can schedule each project element individually. When the dates are scheduled, the dates of the dependent project elements (lower-level elements and linked elements) are taken into account and also scheduled.
Confirmation	You can confirm tasks or checklist items in Project Management.
Project versions	You can create project versions for operational projects. The following version types are available: • Snapshots enable you to create a momentary representation of an operational project so that you can track the status of the project at different times. Snapshots cannot be changed. • You can create simulations to test, for example, the effects certain changes will have on an operational project. You can save simulations and call them again later on. If the changes produce the desired result, you can reconcile the simulation with another simulation or with the operational project.

Key Feature	Use
Accounting integration	You can monitor the costs and revenues throughout the duration of the project. You can use this function to carry out preliminary costing for the costs and revenues. Once the project has started, you can analyze the costs and compare them to the planning data at any time. You can measure the success at the end of the project. Project accounting offers different scenarios: • Task-based or role-based: You can enter planned times as either work for tasks or demand for roles or assigned effort for resources. In order to represent both of these options in costing, you can carry out task-based or role-based costing. • Account assignment object: Internal order or WBS element • Manual or automatic: Manual or automatic assignment of the accounting object
Multi-project management	You can map cross-project relationships. The following inter-project link scenarios are available for this purpose: • Subproject: When you work with subprojects, a task of a project is created as a separate subproject, for example, because a different department or a subcontractor is responsible for the task. To map this relationship, you create an inter-project link between the task of the master project and the project definition of the subproject. • Mirrored task: If tasks or phases of a project are influenced by another task (see original task) in a different project, the project leader of the dependent project must be informed about changes made to the original task. For this purpose, you can include the original task as a mirrored task in the structure of the existing project. • Program: Larger projects are often realized in several different projects that belong together. In order to map these complex project structures, you can assign other projects or programs to a project with the project category program
Multi-project monitor	You can call and compare multiple projects, tasks, or checklist items at the same time.
Object links	Business objects important to a project can be located in different systems. Since it is important to have an overview of these objects directly in Project Management, you can connect the objects which you defined or activated in Customizing for Project Management to the application as object links. You can create object links to various SAP objects.
Managing documents	You can manage your documents in Portfolio Management using a document repository.
Integration with Portfolio Management	You can assign projects to portfolio items. You can also assign phases to decision points in Portfolio Management at a lower level. This assignment is the basis for a synchronization between the objects in Project Management and Portfolio Management.
Project status reports	You can summarize project data in reports and store them as project status reports. The reports are created as interactive PDF documents and stored either in Project Management or in a document management system. The system provides a number of different report templates depending on the project type. These can contain different kinds of data.

Key Feature	Use
Evaluations	Evaluations give you an overview of your project data. When you create an evaluation, the system checks whether predefined threshold values have been violated. You can base your evaluation on the current project data or the last version of the data that was saved in the background. You can create evaluations for both operational projects and project versions.
Authorizations at object level	You can define object-specific authorizations for projects or parts of projects.
Export or import of project data	You can use the following import and export functions to exchange data between Project Management and other applications: • You can import or export project data from or to Microsoft Project. • You can import or export a project or version from or to an generic XML file.
Recording changes / change document	Project Management provides you with a means of recording changes that you can activate. If the option for recording changes is active for an object, changes you make to dependent objects are also recorded. For example, for projects, the system not only records changes you make to the project itself, but also records the changes to dependent objects such as the phases, checklists, approvals, and roles. If, for example, you want to record changes to roles, the recording option must be active for projects.
Archiving	You can archive project data and documents, which are assigned to projects.

4 Resource Management

Business Background

Resource Management provides planning tools to support you in planning and optimizing your human resource deployment within a project as well as across different projects.

Key Features

The following features are available:

Table 3:

Key Feature	Use
Project resource planning	You can use a planning tool to optimize your human resource deployment in a project. It focuses on using your employees efficiently and assigning them to projects based on demand, qualifications, and availability. It offers a role based resource management, and a project or line manager can staff resources on the project.
	The project lead first uses roles to depict which type of resource is required in a project, that is, which function the employee (resource) carries out in the project. A role represents a position in a project, for example, the role of consultant in a consulting project. The role includes information about the qualifications the resource should have and when and for how long the resource should be available.
	The project lead can assign tasks to the roles or resources straight away. In the resource search, the system determines suitable resources for each role and task on the basis of their qualifications. The project lead's or customer's preferred resources can be stored as candidates in the system.
	In the staffing process, staffing or candidate managers can also determine resources based on their availability. The project lead or resource manager can first reserve their preferred resource or assign the resource straight away. At the same time, the project lead can send e-mails to resources with details of the project, directly from the application.

Key Feature	Use
Cross project resource planning	You can plan and optimize your human resource deployment across different projects. You as a resource manager get a quick overview of resources and the resource availability across multiple projects and roles. You get also an overview of the project and role staffing, the resource assignment and the staffing across multiple roles, projects, and resources. As a resource or staffing manager, you can either maintaining assignment per resource in the individual periods or maintaining this data across a certain time range using distribution.

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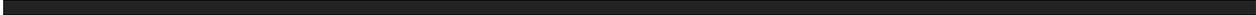
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