



MASTER GUIDE | PUBLIC

SAP Portfolio and Project Management for SAP S/4HANA

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Master Guide for SAP Portfolio and Project Management 1.0 for SAP S/4HANA

Content

- 1 Getting Started. 4**
- 1.1 About this Document. 4
- 1.2 Related Information. 5
- 1.3 Important SAP Notes. 7
- 2 SAP Portfolio and Project Management for S/4HANA Overview. 9**
- 2.1 Software Units of SAP Portfolio and Project Management for SAP S/4HANA. 9
 - Application Components. 9
 - Technology Components. 13
 - Additional Technology. 14
- 2.2 Software Component Matrix. 15
- 2.3 System Landscape. 17
- 2.4 Overall Implementation Sequence. 19
- 3 Applications of SAP Portfolio and Project Management for SAP S/4HANA. 22**
- 4 Solution-Wide Topics. 24**
- 4.1 SAP Solution Manager. 24
 - Business Processes. 24
- A Appendix. 25**
- A.1 List of Documents. 25

Document History

The following table provides an overview on the most important document changes.

⚠ Caution

Before you start the implementation, make sure that you have the latest version of this document. You can find the latest version at <http://help.sap.com>.

Version	Date	Description
1.0	2016-10-31	Initial Version
1.1	2017-02-22	Chapter <i>System Landscape</i> revised
1.2	2017-10-25	Chapter <i>Software Component Matrix</i> revised
1.3	2018-11-21	Chapters <i>Software Component Matrix</i> and <i>System Landscape</i> revised

1 Getting Started

1.1 About this Document

Use

This Master Guide is the central starting point for the technical implementation of SAP Portfolio and Project Management for SAP S/4HANA. You can find cross-scenario implementation information as well as scenario-specific information in this guide.

i Note

The central starting point for the **technical conversion** from SAP Resource and Portfolio Management, cProject Suite or SAP Portfolio and Project Management to SAP Portfolio and Project Management for SAP S/4HANA is the Conversion Guide, which you can find at <http://help.sap.com/ppms4>.

Use the Master Guide to get an overview of SAP Portfolio and Project Management for SAP S/4HANA, its software units, and its scenarios from a technical perspective. The Master Guide is a planning tool that helps you to design your SAP Portfolio and Project Management for SAP S/4HANA system landscape. It refers you to the required detailed documentation, mainly:

- Installation guides for single software units
- SAP Notes
- Configuration documentation
- Product assistance documentation

The Master Guide consists of the following main sections:

- *Getting Started* contains valuable information about using this document and related information (documentation and SAP Notes) crucial to the installation and upgrade.
- *SAP Portfolio and Project Management for SAP S/4HANA Overview* contains the following information:
 - A short introduction to Portfolio and Project Management
 - An overview of application and technology components
 - The software component matrix that provides information about which application uses which component and whether the corresponding component is mandatory or optional.
 - Minimal system landscape
 - Information about the overall implementation sequence and the subsequent steps
- *Applications of SAP Portfolio and Project Management for SAP S/4HANA* contains an overview of the applications of SAP Portfolio and Project Management for SAP S/4HANA.

i Note

You can find the most current information about the technical implementation of SAP Portfolio and Project Management for SAP S/4HANA and the latest installation and configuration guides at <http://help.sap.com/ppms4>.

We strongly recommend that you use the documents available here. The guides are regularly updated.

Constraints

- The business scenarios that are presented here serve as examples of how you can use SAP software in your company. The business scenarios are only intended as models and do not necessarily run the way they are described here in your customer-specific system landscape. Ensure to check your requirements and systems to determine whether these scenarios can be used productively at your site. Furthermore, we recommend that you test these scenarios thoroughly in your test systems to ensure they are complete and free of errors before going live.
- This Master Guide primarily discusses the overall technical implementation of SAP Portfolio and Project Management for SAP S/4HANA, rather than its subordinate components. This means that additional software dependencies might exist without being mentioned explicitly in this document. You can find more information on component-specific software dependencies in the corresponding installation guides.

1.2 Related Information

Planning Information

For more information on planning topics not covered in this guide, see the following documents:

Content	Location
Latest versions of installation and upgrade guides	http://help.sap.com/ppms4
General information about SAP Portfolio and Project Management for SAP S/4HANA	http://service.sap.com/plm
Sizing, calculation of hardware requirements – such as CPU, disk and memory resource – with the Quick Sizer tool	http://service.sap.com/quicksizer
Released platforms and technology-related topics, such as maintenance strategies and language support	http://service.sap.com/platforms To access the Platform Availability Matrix directly, enter http://support.sap.com/pam
Network security	http://service.sap.com/securityguide
High Availability	https://www.sdn.sap.com/irj/sdn/ha
Performance	http://service.sap.com/performance

Content	Location
Information about Support Package Stacks, latest software versions and patch level requirements	https://support.sap.com/sp-stacks
Information about Unicode technology	http://service.sap.com/unicode@sap

List of Related Documentation

The following table lists related documentation:

Content	Location
Component Installation / Upgrade Note	SAP Note 2341111
Master Guide and Conversion Guide for SAP Portfolio and Project Management for SAP S/4HANA	http://help.sap.com/ppms4
Installation Guide for SAP S/4HANA	http://help.sap.com/s4hana
Conversion Guide for SAP S/4HANA	http://help.sap.com/s4hana
Operations Guide for SAP S/4HANA	http://help.sap.com/s4hana
UI Technology Guide for SAP S/4HANA	http://help.sap.com/s4hana
Security Guide for SAP Portfolio and Project Management for SAP S/4HANA	http://help.sap.com/ppms4
Information about creating error messages	http://service.sap.com/messages
SAP Notes search	http://service.sap.com/notes
SAP Software Distribution Center (software download and ordering of software)	http://service.sap.com/swds
SAP Online Knowledge Products (OKPs) – role-specific Learning Maps	http://service.sap.com/rkt

Components

To create customer messages, use the following support components:









Software Component	Support Component
SAP NetWeaver Application Server Java	BC-JAS
SAP NetWeaver Application Server ABAP	BC-ABA
SAP Business Connector	BC-MID-BUS
SAP Content Server	BC-SRV-KPR-CMS
Project Management	PPM-PRO
	BW-BCT-PPM-PRO (SAP Business Intelligence component)
Portfolio Management	PPM-PFM
	PPM-CF-DFM (Decision Flow Management)
	BW-BCT-PPM-PFM (SAP Business Intelligence component)

1.3 Important SAP Notes

You must read the following SAP Notes before you start the installation and during operating the system. These SAP Notes contain the most recent information on the installation, as well as corrections to the installation documentation.

Make sure that you have the up-to-date version of each SAP Note, which you can find on SAP Service Marketplace at <http://support.sap.com/notes>.

SAP Note Number	Title	Description
2340075	FAQs – SAP Portfolio and Project Management 1.0 for SAP S/4HANA	This note contains general information about SAP Portfolio and Project Management 1.0 for SAP S/4HANA.
2340065	PPM 1.0 for S4H: Support package information, notes, and schedule	This note contains information and references to other notes about importing support packages for SAP Portfolio and Project Management 1.0 for SAP S/4HANA.
2340092	PPM 1.0 for S4H: Performance	This note contains information about performance notes.

SAP Note Number	Title	Description
2341122 	Support Packages for EPPM 100	This note contains information about support packages for the component EPPM.
2341111 	Release strategy for ABAP add-on EPPM	This note describes how to install/upgrade the ABAP add-on component EPPM 100 on S4CORE 101.
894009 	Adobe Document Services – Configuration Guide	This note contains information about how to access the latest configuration documentation for ADS.
2340078 	PPM 1.0 for S4H: Supported Browsers, Java versions, etc.	This note contains information about the browsers supported by SAP Portfolio and Project Management 1.0 for SAP S/4HANA.
2340116 	PPM 1.0 for S4H: Restrictions	This note lists restrictions for SAP Portfolio and Project Management 1.0 for SAP S/4HANA.
2340108 	PPM 1.0 for S4H: Configuration Content	This note contains information about how to find the Configuration Guide for SAP Portfolio and Project Management 1.0 for SAP S/4HANA.
1808669 	Error during installation of PPM (CPRXRPM) with ERP/SRM/CRM/SCM	This note describes the solution in case the installation results in error “Multiple active implementations for definition HRALE00INBOUND_IDOC” and “Errors occurred during post-handling AFTER_IMP_SXCI for SXCI L “.
2289424 	S4TWL - SAP S/4HANA and SAP Business Warehouse Content - BI_CONT	

2 SAP Portfolio and Project Management for S/4HANA Overview

2.1 Software Units of SAP Portfolio and Project Management for SAP S/4HANA

2.1.1 Application Components

SAP Portfolio and Project Management for SAP S/4HANA consists of the following areas:

- Portfolio Management
- Project Management

SAP Portfolio and Project Management for SAP S/4HANA comprises the software component SAP Portfolio and Project Management for SAP S/4HANA (EPPM) and the software component UI for EPPM (UIS4EPPM).

Portfolio Management

Portfolio Management integrates information from existing project management, human resources, and financial systems to provide an overview of the project portfolio with easy drilldown to details for portfolio managers, project managers, and resource managers. This enables innovative and collaborative, cross-functional business processes.

Portfolio Management can be integrated with existing SAP and non-SAP back-end applications such as the following:

- SAP S/4HANA applications:
 - Project System
 - Human Resources
 - Finance
- Non-SAP applications:
 - Microsoft Project

Project Management

Project Management covers the entire range of project management activities in development and consultancy projects, from planning to implementation to project completion. Project Management supports organizations to grow their project management excellence by

- providing solid standalone project management core support

- offering a wide range of integration options

Since Project Management's birth as development project management for the automotive industry, it has emerged to a flexible project management solution for all industries and focused on various project types, including

- new product development and introduction
- consulting projects
- IT projects

Web User Interface of SAP Product Lifecycle Management (PLM-WUI)

You can manage the master data objects relevant to SAP PLM on the Web user interface (Web UI) of SAP Product Lifecycle Management (SAP PLM).

This component can also run on a separate server.

SAP S/4HANA

You can use SAP S/4HANA to create object links to business objects, such as Project System objects, documents, material masters, purchase order items or internal orders. Additionally, you can upload FI/CO data from SAP S/4HANA to Portfolio Management.

The SAP S/4HANA system contains additional PLM functions, financial data in case financials integration is used, and other functions, including HR (business partner, time recording, and so on).

The prerequisites for using the CATS Integration are as follows:

You have activated the business function `CA_CATS_CPR_CORE`.

If you are using the Web-Dynpro application for time recording, you have also activated the business function `CA_CATS_CPR`.

i Note

If you want to activate the business function `CA_CATS_CPR`, the system checks whether the business function `CA_CATS_CPR_CORE` is active.

BI Content

You can use BI Content as of BI Content 757 for additional evaluations, see SAP Note [2289424](#). BI Content contains predefined evaluations and reports.

For more information about BI Content, see <http://help.sap.com/bicontent>.

SAP Content Server

SAP Content Server is a separate server instance that is used to store documents or other types of content related to SAP applications. With the accompanying cache server, content can be cached if your company operates on several locations. This reduces the load of the wide area network when working with documents.

You can use the SAP Content Server for storing documents. It must correspond to interface version 0045 or 0046. SAP recommends that you use version 0046.

If no SAP Content Server is available, documents are stored on SAP NetWeaver.

i Note

For more information, see <http://service.sap.com/contentserver>.

Product Instance SAP NW – Adobe Document Service (ADS)

General Overview

The following Adobe software is included in the Adobe PDF-based forms used by SAP Portfolio and Project Management for SAP S/4HANA:

- **Adobe LiveCycle Designer**
Adobe LiveCycle Designer is a graphical tool for designing form layouts. It is part of the SAP NetWeaver Developer Studio and ABAP Workbench.
- **Adobe Document Services (ADS)**
Adobe Document Services are a set of Web services used to generate the PDF forms at runtime. In interactive scenarios, these services extract the XML data from the form and send it to the system. In the front end, Adobe Reader needs to run. For more information, see SAP Note [834573](#).

Product instance *SAP NW – Adobe Document Service* includes Adobe Document Services. You install this set of runtime services on SAP NetWeaver Application Server Java. Ensure that you always use the latest version of both, SAP NW – Adobe Document Service and the Adobe Reader Software.

The key capabilities of SAP NW – Adobe Document Service are:

- Convert XML form templates (created using Adobe LiveCycle Designer) to PDF and various print formats
- Set Adobe Reader rights to enable to fill out and annotate forms, save, and print them locally, and include digital signatures for authentication using Adobe Reader
- Extract data from SAP applications into Adobe PDF-based forms and transfer the data for the form back into SAP applications using XML

ADS runs on a separate server: You can use ADS locally or as a shared service on a central SAP NetWeaver AS Java. For more information, see the Master Guide for SAP NetWeaver at <http://service.sap.com/instguidesnw>. For temporary release restrictions on Adobe Document Services (product instance *SAP NW – Adobe Document Service*) regarding the number of supported platforms, see the corresponding presentation at <http://support.sap.com/pam>.

For development prerequisites that relate to Adobe PDF-based forms, see <http://www.sdn.sap.com/irj/sdn/adobe>.

Adobe in SAP Portfolio and Project Management

The following in SAP Portfolio and Project Management for SAP S/4HANA only run using Adobe Document Services (ADS):

- **Project Management:** Approval documents, project status reports, and print forms. Using digital signatures (certificates) in the approval process requires a secure connection to the Adobe Document Services. Certificates have to be installed in the Adobe Document Services for verification during the approval process.
- **Portfolio Management:** The printing and fact sheet in Portfolio Management in SAP Portfolio and Project Management for SAP S/4HANA only run using Adobe Document Services (ADS).

Also, for all users you need the Adobe Reader for printing. For more information about compatible versions of Adobe Reader, see the *Configuration Guide for SAP Interactive Forms by Adobe* at <http://www.sdn.sap.com/irj/sdn/adobe>.

PFCG Roles

For SAP Portfolio and Project Management for SAP S/4HANA, the following usage types are supported:

Usage Type	Client / Browser	Rendering	Roles and Navigation Area	SAP Portfolio and Project Management for SAP S/4HANA Application / Coding
Browser (Fiori Launchpad)	Browser	HTML	PFCG roles in Fiori UI and ABAP back-end system	Fiori UI and ABAP back-end system
SAP Business Client for Desktop (SAP BC for Desktop)	SAP BC for Desktop	HTML	PFCG roles in Fiori UI and ABAP back-end system	Fiori UI and ABAP back-end system
Browser (Business Client for HTML)	Browser	HTML	PFCG role in ABAP back-end system	ABAP back-end system

For more information about supported browsers, see SAP Note [2340078](#).

For information about the SAP Fiori Launchpad and further implementation tasks on the front-end server, see <http://help.sap.com/s4hana> ► *SAP S/4HANA 1610* ► *UI Technology Guide* ►.

The PFCG role `SAP_BPR_PPM` needs to be assigned to every user for SAP Business Client for HTML or SAP Business Client for Desktop. Via the role, the navigation menus for Web Dynpro UIs are provided.

The following PFCG roles of SAP Portfolio and Project Management for SAP S/4HANA include authorizations to start the Web Dynpro ABAP applications (authorization check `S_START`) for Project Management and Portfolio Management:

- `SAP_CPR_USER`
- `SAP_XRPM_USER`

For details see the particular roles in transaction PFCG and choose ► *Authorizations* ► *Display Authorization Data* ► *Cross-application Authorization Objects* ► *Start Authorization Check for TADIR Objects* ►.

SAP recommends to adapt custom-specific roles accordingly.

For more information about roles, see the Security Guide (chapter [Authorizations](#)) for SAP Portfolio and Project Management for SAP S/4HANA.

2.1.2 Technology Components

SAP NetWeaver Business Warehouse (SAP NetWeaver BW)

For more information, see SAP Note [2289424](#).

SAP NetWeaver BW is an analysis tool that gathers and refines information from internal and external sources containing:

- Customizable reporting tools from any perspective
- Predefined information models, reports, analyses, and key performance indicators

You can use SAP NetWeaver BW as an optional software component for all SAP PLM key capabilities to create reports and replicate them to the different users working offline using the middleware mechanisms. The SAP analysis is replicated as Microsoft Excel spreadsheets and is available in the Mobile Client in the Reports component.

SAP NetWeaver BW functions are enhanced by Business Information (BI) Content for SAP Portfolio and Project Management for SAP S/4HANA, which is a set of pre-built InfoCubes and DataStore objects containing customized InfoObjects and queries.

For more information, see <http://service.sap.com/bi>.

SAP Internet Graphics Server

SAP Internet Graphics Server (IGS) is a front-end-independent server-based engine for generating graphical content. You can access data via HTTP or remote function call (RFC) using data from SAP or non-SAP components.

SAP IGS enables you to:

- Display graphics in SAP GUI for Windows, SAP GUI for HTML, and SAP GUI for Java
- Generate graphics based on a set of data without displaying the graphics in the front-end

At present, SAP IGS supports the following graphic types:

- Business graphics
- Networks
- Bar charts

To generate graphics, the application server sends data to SAP IGS via RFC. SAP IGS then generates a graphics control and a bitmap, which is sent back to the application server (in GIF, JPEG, BMP, PNG, VML, or SVG format).

2.1.3 Additional Technology

SAP Web Dynpro Active Component Framework (ACF)

The ACF is a framework for integrating active components, such as Java Applets in Web Dynpro. To install ACF, you require administration authorization on the client PC. To run ACF, you must enable ActiveX in your Web browser. For more information about installing the ACF, see SAP Note [766191](#). For information about supported browsers, see SAP Note [2340078](#).

Java Gantt Chart

The timeline monitor uses a Gantt chart on the Web Dynpro ABAP screens. Therefore, when calling the Gantt chart for the first time, a Java Applet has to be signed and installed on the local computer. For information about supported browsers, see SAP Note [2340078](#).

Navigation

In SAP Portfolio and Project Management for SAP S/4HANA, the navigation has been revamped and there are new configuration tables available. To enable the navigation, you must carry out the following manual steps:

1. You must maintain the Customizing settings in SAP Portfolio and Project Management for SAP S/4HANA under ► [Portfolio Management](#) ► [Global Customizing](#) ► [Process and Service Settings](#) ► [Navigation Settings](#) . We deliver the Customizing entries as standard in the Customizing client.
2. From the delivery client, you must copy the data from the Customizing tables mentioned below by choosing transaction `/n/RPM/CUST_COPY`:
 - `/RPM/DASH_PERS`: Dashboard Customization
 - `/RPM/DASH_ROLE`: Dashboard Attributes Override Table
 - `INM_NAV_CTX`: INM Navigation Context
 - `INM_NAV_CTX_W`: INM Navigation Context Workcenter
 - `INM_NAV_INF_W`: INM Navigation Information
3. You manually adjust and compare the Customizing data with the delivery client by choosing transaction `SCU0`.
4. Initially all dashboard fields are displayed as standard fields. With this, it is not possible to navigate to the object windows. To activate the links to the object windows, select the [Link](#) checkbox in Customizing for SAP Portfolio and Project Management under ► [Portfolio Management](#) ► [Global Customizing](#) ► [Global Field Settings](#) ► [Dashboard Settings](#) ► [Define Fields for Dashboards](#) .
You can also copy the Customizing for the dashboards by copying `/RPM/DASHBOARD` using transaction `/n/RPM/CUST_COPY`.

⚠ Caution

This transaction copies the standard Customizing for all dashboards and invalidates all customer-specific Customizing for the dashboards. Object-type-specific copying is not supported by transaction `/n/RPM/CUST_COPY`.

MS Project Integration

For supported browsers, see SAP Note [2340078](#).

Object Links to Extended Material Numbers

In the following cases, you must prepare your system for the creation or the use of object links to materials that are based on the extended material number (maximum length of 40 characters) instead of the standard material number (maximum length of 18 characters):

- **Upgrade of the target system**

In your Portfolio and Project Management applications, you already use object links to materials stored in an SAP system that uses the standard material number. As a result of an upgrade, this system now uses the extended material number. You want to retain the availability of your existing object links to materials. Furthermore, you want to create new object links to extended material numbers.

- **New target system**

You integrate a new system, which uses the extended material number, into your system landscape. In *Portfolio and Project Management* applications, you want to create object links to materials stored in this new system.

For more information, see the *Setting Up Object Links to Extended Material Numbers* chapters in the Configuration Guide for SAP Portfolio and Project Management for SAP S/4HANA.

2.2 Software Component Matrix

This section provides information about which application of SAP Portfolio and Project Management for SAP S/4HANA uses which component and specifies the minimum release of each component.

Key: X = relevant for application; (X) = useful for application; — = not part of the application

Software Component	Portfolio Management	Project Management
EPPM 100 (ABAP component for SAP Portfolio and Project Management for SAP S/4HANA)	X	X
UIS4EPPM 100 (Fiori UI component for SAP Portfolio and Project Management for S/4HANA)	X	X
SAP S/4HANA 1610 (See SAP Note 2340065)	X	X
SAP GUI	X 7.40 or higher	X 7.40 or higher
Adobe Document Services (ADS) 7.50	X Separate server, SAP NetWeaver with usage type AS Java	X Separate server, SAP NetWeaver with usage type AS Java
Adobe Reader on client PCs	(X) (Optional, but required if using Adobe Forms for Printing)	(X) (Optional, but required if using Adobe Forms for Printing)
SAP Content Server	(X) Must correspond to interface version 0045 or 0046	(X) Must correspond to interface version 0045 or 0046
SAP IGS	X	X
Browsers	See SAP Note 2340078 for information about supported browsers for SAP Portfolio and Project Management for SAP S/4HANA	See SAP Note 2340078 for information about supported browsers for SAP Portfolio and Project Management for SAP S/4HANA
SAP NetWeaver Business Warehouse (BW) (See SAP Note 1943931)	(X) Can run on a separate server (see SAP Note 2289424)	(X) Can run on a separate server (see SAP Note 2289424)
SAP Business Information (BI) Content	(X) SAP NW 7.51 BI Content 757 or higher (optional, but required if using SAP BI) See SAP Note 2289424 .	(X) SAP NW 7.51 BI Content 757 or higher (optional, but required if using SAP BI) See SAP Note 2289424 .

Software Component	Portfolio Management	Project Management
SAP R/3 or SAP ERP ECC (on a separate server)	(X) 4.6C SP47, 4.70 SP20, ECC 5.00 SP00, ECC 6.00 SP Stack 11, if using integration to SAP FI, SAP HR, or SAP PS For enhanced ERP integration, SAP ERP 6.0 enhancement package 5 is required. (on a separate server)	(X) 4.6C SP47, 4.70 SP20, ECC 5.00 SP00, ECC 6.00 SP Stack 11 (on a separate server)
Virus Scanner for documents	(X) Optional but highly recommended, see Security Guide for SAP Portfolio and Project Management for SAP S/4HANA	(X) Optional but highly recommended, see Security Guide for SAP Portfolio and Project Management for SAP S/4HANA

⚠ Caution

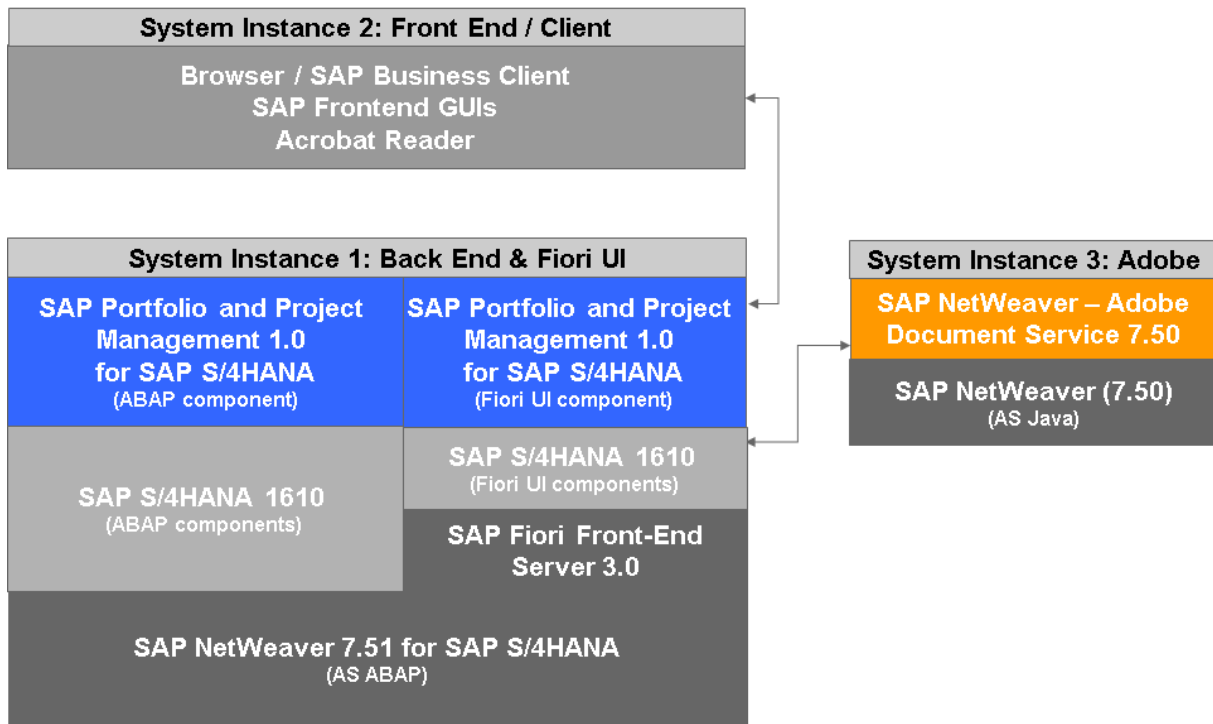
If you use a popup blocker, make sure that it is configured to allow pop-ups from your SAP Portfolio and Project Management for SAP S/4HANA system, for example `<server>.<your company>.com`. Otherwise, the system cannot close your session automatically when you leave the application by browsing away or closing your browser. This may result in objects being locked by you although you have already left the application.

2.3 System Landscape

Minimal System Landscape

The minimal system landscape of SAP Portfolio and Project Management for SAP S/4HANA consists of the following main components:

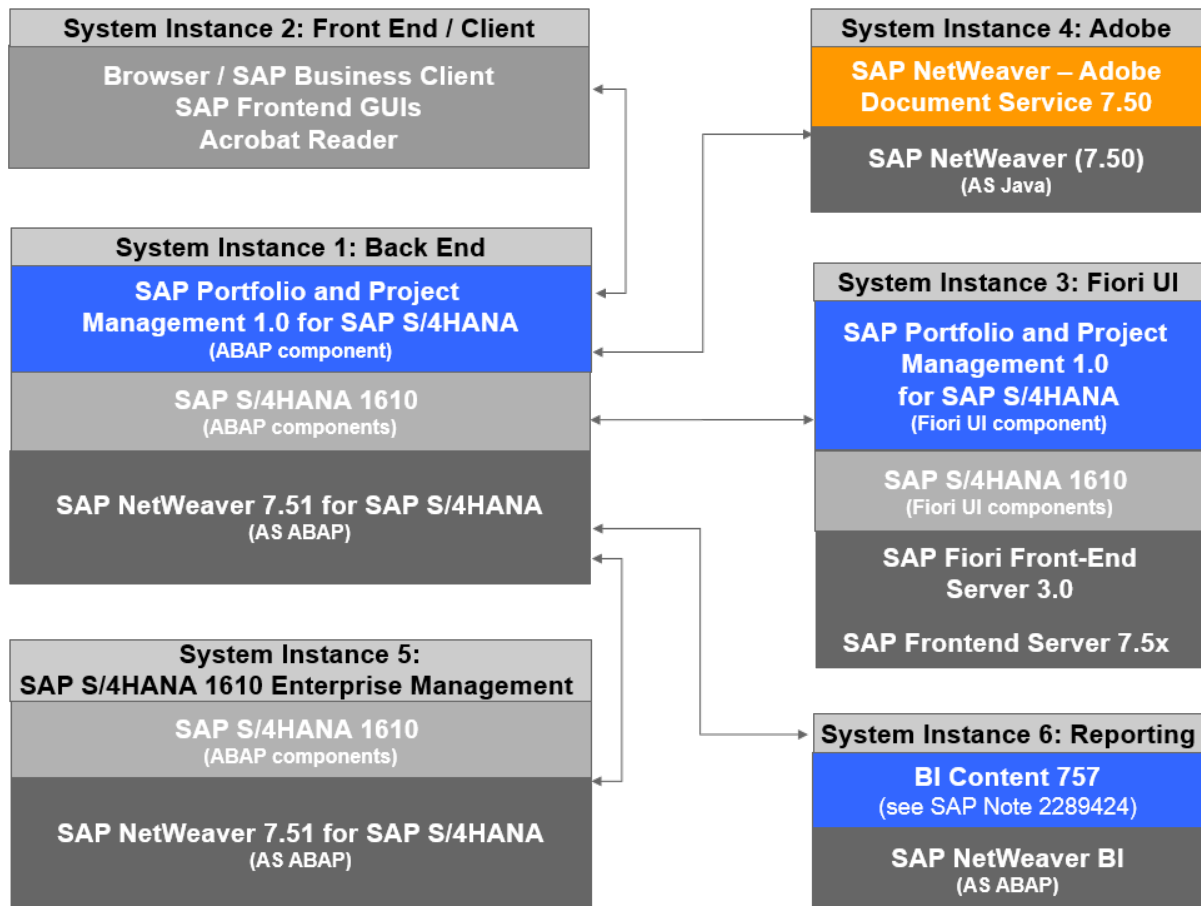
- SAP Portfolio and Project Management for SAP S/4HANA (EPPM)
- SAP S/4HANA
- Product instance SAP NetWeaver – Adobe
- Browser / SAP NetWeaver Business Client



Minimal System Landscape

Technical System Landscape

The following graphic provides an overview of the recommended basic technical infrastructure of SAP Portfolio and Project Management for SAP S/4HANA:



Technical System Landscape

2.4 Overall Implementation Sequence

Use

The following table describes the overall installation sequence for SAP Portfolio and Project Management for SAP S/4HANA.

This table contains all available software units. However, to implement a specific application, you only need a subset of available software units. Some are only required for special processes. For information about which software is required to implement a specific application, see [Software Component Matrix \[page 15\]](#).

For documentation listed in the following table, see *References*.

Process

⚠ Caution

Before you start the installation of SAP Portfolio and Project Management for SAP S/4HANA, make sure that you have installed at least Support Package 05 for SAP Solution Manager 7.1. Prior to the installation process, SAP Solution Manager determines which components need to be installed on the SAP Portfolio and Project Management for SAP S/4HANA system and in which sequence.

Implementation Sequence

No	Action [Corresponding Documentation]	Remarks and Subsequent Steps	Server Installation
1	Install, convert or upgrade to SAP S/4HANA 1610 and apply the required support packages. [Guide: Installation Guide for SAP S/4HANA at http://help.sap.com/s4hana]	Install the required languages. [Guide: <i>Language Transport</i> , (BC-CTS-LAN)]	
2	Install SAP Portfolio and Project Management 1.0 for SAP S/4HANA on the SAP NetWeaver system of the SAP S/4HANA 1610 system (see SAP Note 2341111) and apply the required support packages.	SAP Portfolio and Project Management for SAP S/4HANA includes two applications: <ul style="list-style-type: none"> • Project Management • Portfolio Management EPPM 100 is an add-on for SAP S/4HANA 1610.	
3	Install UIS4EPPM 100.		Can run on a separate server.
4	Install Adobe Document Server.		

No	Action [Corresponding Documentation]	Remarks and Subsequent Steps	Server Installation
5	Optional: Install SAP NetWeaver Business Warehouse (SAP BW) with SAP Business Intelligence (SAP BI) 7.51. See SAP Note 2289424 .	<ol style="list-style-type: none"> 1. Install SAP GUI with Business Warehouse Extensions. 2. Activate the Business Information (BI) Content for Portfolio Management and/or Project Management (Info Cubes and ODS objects). <p>For more information, see the documentation BI Content for SAP Portfolio and Project Management.</p>	See SAP Note 2289424 . We recommend that you install SAP NetWeaver Business Warehouse on a separate server.
6	Install BI_CONT 757 or higher. See SAP Note 2289424 .		
7	Optional: Install Microsoft Project. See Microsoft Project documentation.	<p>If you intend to import project plans (*.mpp files) from Microsoft Project Client, you must install the Microsoft Project Client software on your PC.</p> <p>For the supported versions of Microsoft Project, please see SAP Note 892638 (Integrated Office Suites (IOS): Maintenance Information).</p>	

3 Applications of SAP Portfolio and Project Management for SAP S/4HANA

Portfolio Management Overview

Portfolio Management is designed to manage the capacity and deployment of human capital assets across multiple projects. Portfolio Management integrates information from existing project management, human resources, and financial systems to provide a complete overview of an organization's project portfolio with easy drilldown to details for portfolio managers, project managers, and resource managers. Moreover, you can use initiatives to link to projects and documents in Project Management. You can synchronize objects between Portfolio and Project Management (horizontal synchronization), or objects within Portfolio and Project Management (vertical synchronization).

Project Management Overview

Project Management enables you to realize innovative ideas in all kinds of projects (for example, Development projects or projects to simplify internal processes) to implement recognized quality standards, and to reduce costs incurred by errors.

Project Management is a cross-industry application that supports the entire process of your project, from conception to planning and quality checks, through to the completion of the project. It also allows you to communicate with external partners or lead customers.

Project Management incorporates internationally recognized standards (QS-9000) and is based on methods like Advanced Product Quality Planning (APQP) developed in the automotive industry. Furthermore, Project Management supports several business scenarios such as New Product Development and Introduction (NPDI), Professional Service Delivery (consulting projects), internal IT projects, and Six Sigma improvement projects.

Project Management also provides tight integration with Portfolio Management in order to support project data synchronization and resource management. For this reason, Project Management and Portfolio Management are included in one software component (EPFM).

Key Benefits of Project Management include:

- As single source of truth Project Management provides company-wide transparency of all projects.
- Complete functional support for project planning, execution and controlling
- Project structuring and scheduling
- Clear responsibilities based on roles
- Well-defined handover through approval protected phase gates
- Effective collaboration for all project stakeholders through web interface
- Effective use of resources through Project Management enterprise resource planning and tracking.
- Reduce project time to market and costs by implementing project templates
- Timely and consistent status information based on dashboards, evaluations and alerts
- Rapid access to all project related information in SAP S/4HANA.

- Governance through comprehensive authorizations
- Tracking project history through status reports and versions

4 Solution-Wide Topics

4.1 SAP Solution Manager

SAP provides the SAP Solution Manager as the highly recommended platform to efficiently support the implementation of your solution. Using SAP Solution Manager will significantly accelerate the implementation process and help you to achieve your business goals. At the same time, SAP will be able to deliver Support Services based on the business scenarios designed and documented in SAP Solution Manager. Implementation content for your solution may further accelerate the implementation process. For information about availability of content specifically tailored to your solution, see SAP Service Marketplace under <https://service.sap.com/solutionmanager>.

4.1.1 Business Processes

You can find the business processes under ► [Organizational Areas](#) ► [Product Development and Introduction](#) ► [Business Processes](#) ► At least SP05 for SAP Solution Manager 7.1 is required.

For Portfolio Management:

- Managing Portfolio Initiatives (Portf. and Proj. Mgmt)
- Managing Portfolios (Portf. and Proj. Mgmt)
- Financial Planning (Portf. and Proj. Mgmt)
- Resource Demand Planning (Portf. and Proj. Mgmt)
- Managing Portfolio Metrics (Portf. and Proj. Mgmt)

For Project Management:

- Project Execution with Project Management (Portf. and Proj. Mgmt)
- Project Planning with Project Management (Portf. and Proj. Mgmt)
- Resource and Time Management with Project Management (Portf. and Proj. Mgmt)
- Project Accounting with Project Management (Portf. and Proj. Mgmt)

The following configuration elements are available:










- ► [SAP Portfolio and Project Management](#) ► [Configuration Structures](#) ► [SAP Portf. and Proj. Mgmt <Release>](#) ► [Basic Settings for Project Management](#) ►
- ► [SAP Portfolio and Project Management](#) ► [Configuration Structures](#) ► [SAP Portf. and Proj. Mgmt <Release>](#) ► [Basic Settings for Portfolio Management](#) ►

A Appendix

A.1 List of Documents

The following table lists documentation relevant for SAP Portfolio and Project Management and its applications.

Key: X = relevant for application (X) = useful for application – =not part of the application



Title	Location	Project Management	Portfolio Management
Guides for SAP NetWeaver 7.51 for SAP S/4HANA	http://help.sap.com/s4hana 	X	X
Guides for SAP S/4HANA	http://help.sap.com/s4hana 	(X)	(X)
Technical Operations Manual for SAP NetWeaver	http://help.sap.com/s4hana 	X	X
Adobe Document Services – Configuration Guide	894009 	X	X
BI Content 7.57	http://help.sap.com/bicontent 	(X)	(X)
SAP Content Server Installation Guide	http://service.sap.com/instguides 	(X)	(X)
Information about the Business-Context Viewer (BCV) – see SAP S/4HANA Application Operations Guide	http://help.sap.com/s4hana 	X	X
Conversion Guide for SAP Portfolio and Project Management for SAP S/4HANA	http://help.sap.com/ppms4 	X	X
Security Guide for SAP Portfolio and Project Management for SAP S/4HANA	http://help.sap.com/ppms4 	X	X

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