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Document History

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<thead>
<tr>
<th>Revision</th>
<th>Date</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>&lt;2019-04-15&gt;</td>
<td>Release for customer</td>
</tr>
</tbody>
</table>
1 Where Can This Script Be Used?

This demo script has been written for usage with the SAP S/4HANA 1809 Feature Package Stack 01 (FPS01) Fully-Activated Appliance (in short “appliance” in this script), hence you will need such an appliance to make use of this guide. The appliance can be brought up in two ways, and the demo scenario in this script is largely the same for both:

1. Via SAP Cloud Appliance Library (hosted on cloud providers)
   You need a cloud provider account at AWS, MS Azure, or GCP. With this, you can deploy the appliance within 1-2 hours from https://cal.sap.com > Solutions > SAP S/4HANA 1809 FPS01 Fully-Activated Appliance.

2. Via installing it on your own on-premise hardware.
   You need to provide your own hardware, and order & install the appliance as explained in SAP Note 2041140.

If you are new to the SAP S/4HANA Fully-Activated Appliance, introductory information can be found here: https://blogs.sap.com/2018/12/12/sap-s4hana-fully-activated-appliance-create-your-sap-s4hana-1809-system-in-a-fraction-of-the-usual-setup-time/

Important:
Before you start your demo, please read SAP S/4HANA Fully-Activated Appliance: Demo Scripts for information about necessary preparations, especially any post-deployment steps to ensure the full functionality of your appliance. Besides this, you will also find links to all demo scripts on this page.
Demo Story: SAP Portfolio and Project Management 1.0 for SAP S/4HANA

This demo script leads you through a typical end to end process for managing projects in S/4HANA. In this scenario the example of an IT Project is used to showcase the solution capabilities, but you can manage also other types of projects such as R&D projects, capital and maintenance projects or customer projects with this solution.

The process starts in portfolio management where the user will create a project request providing information about expected time frame and financial and capacity demands for the future project. In a review session stakeholder will evaluate and rank multiple project proposal against each other using questionnaires and scoring methods. Based on the results the user will approve the project proposal which will lead to the creation of an operational project in project management.

Here the project manager starts with planning and scheduling of detailed project tasks and with specifying the required project roles. A resource manager reviews the resource demand for this project and assigns a named resource out of his resource pool. Before the project manager releases the project for execution he sets the authorizations in the project and creates a base line version, which is later used to compare actuals vs. planned values.

Project team member can find the tasks that they are assigned to in the “My Task List” app. During the project execution phase each member of the project can record his time spent on the project which will then be automatically transferred to the finance module and leads to actuals costs in the financial planning of the portfolio item. With that project management as well as portfolio manager can closely track the progress and costs performance of the projects.

With approving the last decision point and generating the project status report the project is closed and locked against further changes.
2.1 Review Item Dashboard and Bucket Structure

### What to Do

Open the Fiori Launchpad and log on as a Portfolio Manager.

**User**: S4H_PPM_PFM  
**Password**: Welcome

### What You Will See

Navigate to the Portfolio Management group and choose the Portfolio Items app.

The Portfolio Items view shows a list of all existing items.

Choose Standard View from the View dropdown list.

Select different views to display, filter and sort Portfolio Items.

Choose Home to return to the dashboard.

Navigate to the Portfolio Management group and choose the Buckets app.

This structure represents the hierarchical structure of the portfolio planning.
What to Do | What You Will See
---|---
Choose the **Bucket Structure** tab to display the hierarchical structure of the portfolio planning.

Choose **Home**.

Navigate to the **Portfolio Classification** group and choose the **Classification Hierarchies** app.

Expand the Classification Hierarchy structure to display the alternative structure of the portfolio planning.

Choose **Home**.
2.2 Create New Proposal Item

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the Fiori Launchpad and log on as a Portfolio Manager. <strong>User:</strong> S4H_PPM_PFM <strong>Password:</strong> Welcome1</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Navigate to the Portfolio Management group and choose the Portfolio Items app.</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Choose the Create dropdown button and choose Create Item.</td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Choose Select Bucket. Expand IT Innovation. Choose Infrastructure and choose OK.</td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
</tbody>
</table>
## What to Do

Make the following entry and choose **Continue**:  
**Item Type:** IT Project

---

## What You Will See

### Make the following entries and choose **Save**:

**Item Name:** <Choose your own name>  
**In this scenario we will use:** Edge computing devices deployment  
**Item ID:** IT_IN_0X  
(OX is an ongoing ID)  
**Forecasted Start and Finish Date:** 01.01.2019 – 31.12.2019  
**Planned Start and Finish Date:** 01.01.2019 – 31.03.2020

---

**Choose the **Miscellaneous** tab and choose Add.**
What to Do | What You Will See
---|---
To **Add Authorizations for User**, make the following entries and choose **Assign**:
**User:** S4H_PPm_PM
**Write:** <select>
**Person Responsible:** <select>

Choose **Save**.

In the **Documents and Notes** tab, choose **New Document**.

Make the following entries and choose either **Check In** or **Check In As URL**:
**File:** <File Title>
**Description:** <Your description>

In the **General Information** tab, change the **Status** to **In Progress**.

Choose **Proposal**.
What to Do | What You Will See

In the Overview tab, change the Status to In Progress.

Choose Save.

Choose Refresh to see the decision point change.

Choose the User button.
Log yourself out by choose Sign Out

Confirm your decision.
## 2.3 Detailed Assessment of New Proposal Item

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the Fiori Launchpad and log on as a Project Manager. User: S4H_PPM_PM Password: Welcome1</td>
<td><img src="image1" alt="Log On to Fiori Launchpad" /></td>
</tr>
<tr>
<td>Navigate to the Portfolio Management group and choose the My Portfolio Items app.</td>
<td><img src="image2" alt="Portfolio Management" /></td>
</tr>
<tr>
<td>Choose your new item. A new window will appear showing the details of that item.</td>
<td><img src="image3" alt="New Item Details" /></td>
</tr>
<tr>
<td>In the Overview tab, choose Additional Information. Choose the Questionnaire button in the Probability Technical Success field.</td>
<td><img src="image4" alt="Additional Information" /></td>
</tr>
<tr>
<td>What to Do</td>
<td>What You Will See</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Make the following entries and choose OK:</td>
<td></td>
</tr>
<tr>
<td><strong>Product Fits Business Strategy:</strong> Excellent Fit</td>
<td></td>
</tr>
<tr>
<td><strong>Product Leverages Core Competencies:</strong> Highly</td>
<td></td>
</tr>
<tr>
<td><strong>Meets market criteria for functionality:</strong> Highly</td>
<td></td>
</tr>
<tr>
<td><strong>Meets market criteria for usability:</strong> Highly Usable (Minor Issues)</td>
<td></td>
</tr>
<tr>
<td><strong>Market provides growth opportunity:</strong> Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Product is technically feasible:</strong> Yes..It is</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<tr>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Strategic Alignment</strong></td>
<td></td>
</tr>
<tr>
<td>1 Product Fits Business Strategy:</td>
<td></td>
</tr>
<tr>
<td>- No Fit</td>
<td></td>
</tr>
<tr>
<td>- Slight Fit</td>
<td></td>
</tr>
<tr>
<td>- Moderate Fit</td>
<td></td>
</tr>
<tr>
<td>- Excellent Fit</td>
<td></td>
</tr>
<tr>
<td>2 Product leverages core competencies:</td>
<td>Highly</td>
</tr>
<tr>
<td><strong>Market Attractiveness</strong></td>
<td></td>
</tr>
<tr>
<td>3 Meets market criteria for functionality:</td>
<td></td>
</tr>
<tr>
<td>4 Meets market criteria for usability:</td>
<td>Highly Usable (Minor Issues)</td>
</tr>
<tr>
<td>5 Market provides growth opportunity:</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Somewhat</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Technical Feasibility</strong></td>
<td></td>
</tr>
<tr>
<td>6 Product is technically feasible:</td>
<td>Yes..It is</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Business Attractiveness</strong></td>
<td></td>
</tr>
<tr>
<td>1 How long has client been in business:</td>
<td>greater than 7 years</td>
</tr>
<tr>
<td>2 Clients business practices:</td>
<td>90</td>
</tr>
<tr>
<td><strong>Market Share</strong></td>
<td></td>
</tr>
<tr>
<td>3 Clients market share:</td>
<td>100</td>
</tr>
<tr>
<td>4 Competition in clients marketplace:</td>
<td>greater than 50 competitors</td>
</tr>
</tbody>
</table>
### What to Do

Choose the **Questionnaire** button in the next to **Assessed Risk** field.

Make the following entries and choose **OK** and choose **Save**:

- **Product is technically feasible:** Yes..It is
- **Product is commercially feasible:** Yes..It is
- **Product forecasted for technical success:** Possibly (outsourcing may be needed)
- **Are current facilities adequate for product development:** Yes
- **Are current personnel adequate for product development:** Yes
- **Product forecasted for commercial success:** Yes, projected sales > cost to produce

### What You Will See

<table>
<thead>
<tr>
<th>Questionnaire ID: QNR_2</th>
<th>Number of Questions: 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Score: 027</td>
<td>Assigned to Field: Assessed Project Risk</td>
</tr>
<tr>
<td>Changed On: 02/26/2019</td>
<td>Changed By: S4H_PPM_PM</td>
</tr>
</tbody>
</table>

#### Technical Feasibility

- 1 Product is technically feasible: **Yes..It is**

#### Commercial Feasibility

- 2 Product is commercially feasible: **Yes..It is**

#### Technical Success

- 3 Product forecasted for technical success: 
  - Yes, man hours needed < available
  - Possibly (outsourcing may be needed)
  - No, man hours needed far exceeds available
- 4 Are current facilities: 
  - Yes
  - Possibly (outsourcing may be needed)
  - No
- 5 Are current personnel: 
  - Yes
  - Possibly (outsourcing may be needed)
  - No

#### Commercial Success

- 6 Product forecasted for commercial success: 
  - Yes, projected sales > cost to produce
  - Possibly
  - No, sales will not cover costs

---

In the **Overview** tab, choose **Classification**.

Make the following entries and choose **Save**:

- **Category:** IT
- **Group:** Customer Request
- **Area:** EMEA
- **Location:** Germany

Choose **Capacity Information**.

Choose **Capacity Planning**.
What to Do

Expand **Forecasted Resources and Internal IT.**

Maintain Capacity Planning for the internal IT resources by entering values for the required capacity for the months.

Choose Save.

Close the Capacity Planning Window

Choose **Financial Information.**

Choose **Financial Planning.** A new window displays.

Expand **Non-HR Forecasted Costs and Internal Costs.**
What to Do

Enter 10,000 for first 3 periods of the administration costs and confirm your entries. Press enter.

What You Will See

Enter 58,000 in every period and press enter.

Choose Save.

Close the Financial Planning Window
## What to Do

Choose **Financial Information**.

Choose **Refresh**.

Check the calculated financial KPIs.

Choose **Proposal** to open decision point.

A new window displays.

Make the following entry and choose **Save**:

**Status:** Ready for Decision

Choose **Refresh** to see the decision point change.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose the <strong>User</strong> button. Log yourself out by choose <strong>Sign Out</strong>. Confirm your decision.</td>
<td><img src="image1.png" alt="User Sign Out" /></td>
</tr>
</tbody>
</table>

### 2.4 Review and Release of New Proposal Item

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the Fiori Launchpad and log on as a Portfolio Manager. <strong>User:</strong> <strong>S4H_PPM_PFM</strong> <strong>Password:</strong> <strong>Welcome1</strong> Navigate to the <strong>Portfolio Reviews</strong> group and choose the <strong>Reviews</strong> app.</td>
<td><img src="image2.png" alt="Portfolio Reviews" /></td>
</tr>
</tbody>
</table>
What to Do | What You Will See

Choose **IT Review**.

In the **Items** tab, choose **Add**.

Choose **Find**.
What to Do

Choose the item with an ID of **IT_IN_0X** and choose the (> ) Add button to add the item to the Selected Objects section.

Choose **OK** and choose **Save**.
Choose **Scoreboard**.

In the **Scoreboard** view, make the following entry:

**Scoring Model:** NPV

**Score**

Close the scoring window.

Choose all the items.

Choose **Reporting Cockpit**.
Familiarize yourself with the results of the reporting.
Use the table and the graphic to compare the items.
Close the reporting window.
What to Do | What You Will See

(Continued from previous page)

In the **View** dropdown field, choose **Project Prioritization**.

Open your item by choosing on the link in the table `<Your new item>`.

In the **Item: Edge computing devices deployment** view, make the following entries:

- **Create Project on Saving**: `<Check>`
- **Project Management Template**: IT Project Template
What to Do | What You Will See

Choose **Save**.

In the **Decision Point**:
- **Proposal** view, change the **Status** field to **Approved** and choose **Save**.
- Close the window.

Choose **Refresh** to see the decision point change.
### 2.5 Project Planning

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the Fiori Launchpad and log on as a Project Manager. <strong>User:</strong> S4H_PP_PM <strong>Password:</strong> Welcome1</td>
<td><img src="image1.png" alt="Image showing a sign-out confirmation prompt" /></td>
</tr>
<tr>
<td>Navigate to the <strong>Project Management</strong> group and choose the Projects app.</td>
<td><img src="image2.png" alt="Image showing the projects app" /></td>
</tr>
<tr>
<td>Choose the Project <strong>IT_IN_0X</strong> by choosing on the <strong>Project (Number)</strong> or <strong>Project (Description)</strong></td>
<td><img src="image3.png" alt="Image showing project details" /></td>
</tr>
</tbody>
</table>
To staff yourself as the project manager, choose the **Resources** tab → choose **Details** → and choose **Staffing**.

Choose the **IT Project Manager** as a **Role (Resource)**. Make the following entry and choose **Staff**: **Resource: Peter Project Manager**
Choose **Save**.

To create a task within the existing project structure, choose the **Structure** tab→ choose **Detail**

Choose on the ▼ button to collapse the phase in the project structure tree.

Choose **Create Task**
What to Do | What You Will See
--- | ---
In the *Structure* tab, choose *Detail*. Choose the *Basic Data* tab and make the following entries:

**Name:** Create Project Plan  
**Task Type:** Tasktype [01]  
**Responsible Role:** IT Project Manager

In the *Structure* tab, choose *Detail*. Choose *Dates and Work* and make the following entries:

**Duration:** 10  
**Work:** 8

In the *Structure* tab, choose *Detail*. Choose *Roles*. Mark the row *IT Knowledge Manager* and choose *Assign Role*.

Unmark the *IT Knowledge Manager*.

Mark the row *IT Project Manager* to choose this role. Mark the resource *Peter Project Manager* and choose *Assign Resource*.

Enter `<1>` & `<2>` person days in the *Work* column.
### What to Do

Choose **Save**.

To update the demand of the role **IT Project Manager** according to the project planning, go to tab **Resources** → **Details** → **General**

Mark the role **IT Project Manager** and choose **Update Role According to Tasks** and see how the **Total Demand** raises by 8 (days work from the task planning).

To create a relationship with another task, go to tab **Structure** → **Detail** → **Relationships**.
What to Do | What You Will See
What to Do

Make the following entries to create a relationship with task Technical Requirements:

**Task (Same Level):** Technical Requirements

**Relationship Type:** Finish-start relationship

Choose **Predecessor** to define the task Technical Requirements as predecessor.

Choose **Save**.

Choose on the **Structure** tab → **Graphic** to get a better overview of the time planning through the Gantt chart.

**Note:** This Gantt chart is java based and will only be supported by Internet Explorer.

Close the window.

Choose the **User** button.

Log yourself out by choose **Sign Out**

Confirm your decision.
### 2.6 Staffing via Resource Manager

**What to Do**

Open the Fiori Launchpad and log on as a Resource Manager.

*User: S4H_PPM_RM*

*Password: Welcome1*

Choose the Resource Overview app.

**What You Will See**

Choose the button to expand the Resource *Peter Project Manager*.

Now you can see the following:

- All projects where Peter Project Manager is staffed on
- The Total Availability, Remaining Availability and Total Assigned Effort for each period of Peter Project Manager
- The assigned effort within each project

Note: Here you see the overview of all resources assigned to the current resource pool.
Choose the **Home** button.

Choose the **Staffing Overview** app.

Choose **IT PROJECT PORTFOLIO** as your Views.

**Note:** Here you see the overview of the staffing status of all projects assigned to the Resource Manager.

Choose the ➔ button to expand the project **Edge computing devices deployment** and expand the **Role IT Knowhow Manager**.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>To staff a resource to the role <strong>IT Knowhow Manager</strong>, choose the <strong>Assign Resource</strong> button.</td>
<td><img src="image1.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>In the <strong>Staffing Overview</strong> view, choose the row <strong>Tina Team Member</strong> and choose the <strong>Assign Resource</strong> button to choose the selected resource.</td>
<td><img src="image2.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>Choose <strong>OK</strong>.</td>
<td><img src="image3.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>Choose <strong>Save</strong>.</td>
<td><img src="image4.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>Choose the <strong>Home</strong> button.</td>
<td><img src="image5.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>Choose the <strong>User</strong> button. Log yourself out by choose <strong>Sign Out</strong>.</td>
<td><img src="image6.png" alt="Staffing Overview" /></td>
</tr>
<tr>
<td>Confirm your decision.</td>
<td><img src="image7.png" alt="Staffing Overview" /></td>
</tr>
</tbody>
</table>
2.7 Authorizations, Project Release, and Baseline

What to Do | What You Will See
--- | ---
Open the Fiori Launchpad and log on as a Project Manager.  
*User:* S4H_PPM_PM  
*Password:* Welcome1  
Navigate to the Project Management group and choose the My Projects app.

Choose the project tile of `<Your new item>` within the Planned Projects card.
Choose the **Structure** tab and choose **Authorizations**.

Make the following entries and choose **Assign**:
- **User**: BPINST
- **Authorizations**: Admin
- **Evaluate**: <Select>
- **Accounting**: <Select>
- **Resource Management**: <Select>
- **Staffing Manager**: <Select>
- **Candidate Manager**: <Select>

Choose **Save**.

In the **Basic Data** tab, change the **Status** field to **Release**.

Choose **Save**.
### What to Do

Choose the **Structure** tab and choose your project in the project tree.

Change the **Status** of the Project to **Flag for Transfer**.

Choose **Save**.

**Note:** This flags the project for transfer to ERP. On save an PS Project is created. This is a prerequisite for the next step the time recording.

Make sure that the Phase **Project Preparation** as well as the Tasks **Kick-Off, Technical Requirements, IT Project Preparation** and **Create Project Plan** have the Status **Released – Transferred – Assigned**.

Choose the **Accounting** tab and choose **Account Assignment**.

Check the WBS Structure.

---

### What You Will See

#### Project Edge computing devices deployment

<table>
<thead>
<tr>
<th>IT PU 01</th>
<th>Level of hierarchy</th>
<th>Structure</th>
<th>Resources</th>
<th>Accounting</th>
<th>Status Requests</th>
<th>Project Version</th>
<th>Project Details</th>
<th>Project Document Library</th>
<th>SAP P&amp;O</th>
<th>Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Level of hierarchy</td>
<td>Structure</td>
<td>Resources</td>
<td>Accounting</td>
<td>Status Requests</td>
<td>Project Version</td>
<td>Project Details</td>
<td>Project Document Library</td>
<td>SAP P&amp;O</td>
<td>Classifications</td>
</tr>
<tr>
<td></td>
<td>WBS level A: [A1]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>WBS level B: [B1]</td>
<td></td>
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<td>WBS level C: [C1]</td>
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<td></td>
<td>WBS level D: [D1]</td>
<td></td>
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<tr>
<td></td>
<td>WBS level E: [E1]</td>
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<td></td>
</tr>
</tbody>
</table>

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**General**

- **Name:** Edge computing devices deployment
- **Number:** [A10001]
- **Responsible:** IT Project Manager
- **Significant dates:** [D10001]
- **Completed:** [E10001]

**Dated**

- **Start:** [A10001]
- **End:** [E10001]
To create a project baseline, choose the tab **Project Versions → Snapshots**.

Choose **Create**. Make the following entry and choose **Continue**:
**Version:** **Z_SNAP_VERSION1**

Choose **Save**.

Choose the **Home** button.

Choose the **User** button. Log yourself out by choose **Sign Out**

Confirm your decision.
# 2.8 Task Management and Time Recording

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the Fiori Launchpad and log on as a Team Member.</td>
<td><img src="image" alt="Project Management Interface" /></td>
</tr>
</tbody>
</table>
| **User:** S4H_PPM_TM  
**Password:** Welcome1                                                          | ![Log On Screen](image) |
| Navigate to the *Project Tasks* group and choose the *My Tasks* app.      | ![My Tasks App](image) |
| Choose on a task that has already begun (Planned Start is before your current date) | ![Task Selection](image) |
What to Do

Note: Check all the details. Here the team member can find more information on what is to be done.

What are the figures for dates and works. The information could have been stored as an attachment or a description.

Choose Confirm.

Choose Edit.

Type in a value for Done Since Last Confirmation and a Percentage

Choose Save.

Choose the Home button.
Navigate to the **Project Checklist Items** group and choose the **My Checklist Items** app.

Choose on a checklist item that has already begun (Planned Start is before your current date).

**Note:** Check all the details. Here the team member can find more information on what is to be done. What are the figures for dates and works. The information could have been stored as an attachment or a description.

Choose **Edit**.
**What to Do**

Make the following entries and choose **Save**:

**Change Status:** **Release.**  
**Result:** **OK.**  
**Change Status:** **Finish.**

Choose the **Home** button.

**Preconditions for successful time recording**

- Make sure you have assigned the user **BPINST** as Admin to the project **IT_IN_01**.  
  This is described in Step 1 **Obtain further authorizations** in section Authorizations, Project release and Baseline.

- Make sure you have created the task **Create Project Plan** and that you staffed the role **IT Knowledge Manager** to this task.

- Make sure you have assigned **Tina Team Member** to the role **IT Knowledge Manager**.

- Make sure you have released the task **Create Project Plan**.

**The team member must record their times to the task. Therefore, enter the My Timesheet App in the Time Recording section.**

**Note:** There are two possible ways for Time Recording. In this demo the new Fiori App My Timesheet was enabled!

**Choose the day on the calendar when you want to record the times.**

**Choose Create.**
What to Do | What You Will See

Choose the (Search Help) of the field Select Favorite or Worklist
In the upcoming pop-up you can chose the task that you have created earlier.

Enter the Duration <8> And optionally, a Note <Note>

Move to area Time Assignment
Make the following entries:
(Feel free to use the search help. )

Activity Type: A000 (8)
Controlling Area: Controlling Area A000 (A000)
Sender Cost Center: A000 (17101301)

Choose Submit.
Confirm the submission and choose OK.
### What to Do

The time was successfully recorded.

Note: Every full hour the Job PPM_Service is scheduled.

This job updates the recorded times to PS, Project Management and renews the Financial Planning Views in Portfolio Management.

You can monitor this Job with Transaction SM37.

### What You Will See

#### Optional: Record Times with Transaction CAT2

You can skip the next steps and sign out in case you successfully recorded times with the My Timesheet app.

#### Optional: The team member must record his times to the task.

Therefore, he enters the Time Recording Transaction in the Time Recording section.

Make the following entries:

**Data Entry Profile:** ZMCRDPPM  
**Personnel Number:** 20

Note: 20 is the Personnel Number of Tina Team Member  
Choose **Enter Times.**
Choose a Task from the Worklist. The task Create Project Plan should be available.

Choose More → copy row.

Or, Press [F5] on your keyboard.

In the Data Entry Area section, make the following entries:
- **Sender Cost Center**: 17101301
- **Controlling Area**: A000
- **Activity Type**: 8
- **Sending Functional Area**: YB40

Scroll to the right.

- **Receiving Functional Area**: 0001

Scroll further right

- **Unit of Measure**: H

Insert <8> hours into the period columns.
What to Do

Choose Save.

Note: Every full hour the Job “PPM_Service” is scheduled.
This job updates the recorded times to PS, Project Management and renews the Financial Planning Views in Portfolio Management.
You can monitor this Job with Transaction SM37.

Choose the Home button.

Choose the User button.
Log yourself out by choose Sign Out

Confirm your decision.
2.9 Project Monitoring

What to Do | What You Will See
---|---
Open the Fiori Launchpad and log on as a Project Manager. **User:** S4H_PPM_PM  **Password:** Welcome1
Navigate to the Project Management group and choose the My Projects app.

Choose the tile My Projects – Active → View All

Mark the project New Project Co-Pilot Function and choose Project Progress.
Choose the **Expand** button in the line of the phases or zoom in/out to get an overview of the project progress.

Choose the **Home** button.

Choose **Projects**.

Choose a project from the list. Choose the **Project (Number)** or **Project (Description)**.

Choose **Print Fact Sheet**.

Choose **Preview** to generate a PDF Fact Sheet.
## What to Do

Printing and Downloading is available within the integrated PDF viewer.

## What You Will See

### Choose Item

**Choose Financial and Capacity Planning** → **Financial Planning**

Check the Actual Costs.

This ALV should display the Actual HR Costs for Efforts that were recorded by the Team Member Tina Team Member. (The recorded hours are converted via cost rate)

Adjust the Period Displayed and choose Apply.

Close the window and choose **Financial and Capacity Planning** → **Capacity Planning**
What to Do | What You Will See
--- | ---
The capacity planning displays the Actual Person Days for Efforts that were recorded by the Team Member *Tina Team Member*.

Choose the **Home** button.

Choose the **User** button.

Log yourself out by choose **Sign Out**

Confirm your decision.
## 2.10 Portfolio Monitoring

<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
</table>
| Open the Fiori Launchpad and log on as a Portfolio Manager.  
**User:** S4H_PPM_PFM  
**Password:** Welcome | ![Fiori Launchpad](image1)  
User: S4H_PPM_PFM  
Password: Welcome  
Log On  
Change Password |

Navigate to the Portfolio Management group and choose the Portfolio Items app.

Choose the **View** drop-down list and choose **Standard View**.

Select different views to display, filter and sort Portfolio Items in different ways, e.g. Project Overview.

Choose **Home**.
In the Portfolio Management section, choose Buckets.

Choose a Bucket Name.

Choose Financial and Capacity Planning and choose Financial Planning

In the Financial Planning: IT Innovation view, choose Include Subobjects to display the items related to the bucket cost.
Choose **View Chart** and choose your desired view to Display Chart Reports of the Financial Bucket Planning.

Close the window and go back on your Bucket. Choose **Financial and Capacity Planning** and choose **Capacity Planning**.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Capacity Planning of the bucket is shown. To display the items related to the bucket cost choose on <strong>Include Subobjects</strong>.</td>
<td><img src="image" alt="Capacity Planning Chart" /></td>
</tr>
<tr>
<td>To Display Chart Reports of the Capacity Bucket Planning choose <strong>View Chart</strong> at the top and select the desired view.</td>
<td><img src="image" alt="Capacity Planning Chart" /></td>
</tr>
</tbody>
</table>
2.11 Decision Point Closing

Open the Fiori Launchpad and log on as a Portfolio Manager.

*User: S4H_PPM_PFM*

*Password: Welcome1*

Choose Portfolio Items and choose a Portfolio Item.

In the Phase and Decisions tab, choose the Created Decision Point.
Change the **Status** from **Created** to **In Process**.

Change the **Status** from **in Progress** to **Ready for Decision**.

Choose **Save** at the bottom of the page.

Afterwards you can change the **Status** from **Ready for Decision** to **Approved**.

Choose **Save**.

The Decision Point **Planning** is locked, and the Decision Point **Execution** is activated.

### 2.12 Project Phase Closure

Open the Fiori Launchpad and log on as a Project Manager.

**User:** S4H_PPM_PM  
**Password:** Welcome1
Navigate to the Project Management group and choose the My Projects app.

Choose a project item.

Chose the phase Preparation
Choose Complete Subordinates
Accept the pop up.
All tasks within this phase are being completed.

In the Basic Data tab, change Status to Completed.
This phase is completed.
Choose Save

Go to the next Phase Business Blueprint and change the Status of the phase into Release.

Choose Save.