SAP S/4HANA 1909 FPS00 Fully-Activated Appliance: SAP Portfolio and Project Management Demo Guide
1 How Can This Script Be Used?

This demo script has been written for usage with the SAP S/4HANA 1909 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 1909 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. These steps are covered in sections:

   B) General Remarks
   C) Post-deployment Steps
   D) Log-on to the system

Besides this, you will also find links to all demo scripts on this page.
2 SAP Portfolio and Project Management 1.0 for SAP S/4HANA

2.1 Overview

This demo script leads you through a typical end-to-end process for managing projects in SAP S/4HANA. In this scenario the example of an IT Project is used to showcase the solution capabilities, but you can also manage 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 the expected time frame and the financial and capacity demands for the future project. In a review session, the stakeholder will evaluate and rank multiple project proposals against each other using questionnaires and scoring methods. Based on the result the user will approve the project proposal which leads to the creation of an operational project in project management.

Here, the Project Manager starts with planning and scheduling of detailed project tasks, and 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.

A 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 the 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.

2.2 Review Item Dashboard and Bucket Structure

<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>Navigate to the Portfolio Management group and choose the Portfolio Items app.</td>
</tr>
</tbody>
</table>

![Fiori Launchpad](image)
**What to Do**

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.

Choose the **Bucket Structure** tab to display the hierarchical structure of the portfolio planning.
What to Do | What You Will See
---|---
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**.
2.3 Create New Proposal Item

**What to Do**

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

- **User:** S4H_PPM_PFM
- **Password:** Welcome1

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

**What You Will See**

Choose the Create dropdown button and choose Create Item.

Choose Select Bucket.

Expand IT Innovation.

Choose Infrastructure and choose OK.
What to Do | What You Will See

Make the following entry and choose Continue:

**Item Type:** IT Project

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

(0X 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**

To **Add Authorizations for User**, make the following entries and choose **Assign**:

**User:** S4H_PPM_PM  
**Write:** <select>  
**Person Responsible:** <select>

Choose **Save**.

---

**What You Will See**

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**.

---

**Item:** Edge computing devices deployment

---

No Messages  
- **Display Message Log**

**IT Project Portfolio > IT Innovation > Infrastructure > Edge computing devices deployment**

**IT_IN_01**  
**Called From:**  
**Name:** Edge computing devices deployment  
**Type:** IT Project  
**Budg Git Status:**  
**On**

**Planning**  
- **Proposed**

**Execution**

**Closeout**

**General Information**  
- **Additional Information**  
- **Classification**  
- **Financial Information**  
- **Capacity Information**  
- **Custom Language Field**
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the <strong>Overview</strong> tab, change the <strong>Status</strong> to <strong>In Progress</strong>. Choose <strong>Save</strong>.</td>
<td></td>
</tr>
<tr>
<td>Choose <strong>Refresh</strong> to see the decision point change.</td>
<td></td>
</tr>
<tr>
<td>Choose the <strong>User</strong> button. Log yourself out by choosing <strong>Sign Out</strong>.</td>
<td></td>
</tr>
<tr>
<td>Confirm your decision.</td>
<td></td>
</tr>
</tbody>
</table>
# 2.4 Detailed Assessment of New Proposal Item

## What to Do

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

**User:** S4H_PPM_PM  
**Password:** Welcome1

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

## What You Will See

Choose your new item.

A new window will appear showing the details of that item.

In the Overview tab, choose Additional Information.

Choose the Questionnaire button in the Probability Technical Success field.
Make the following entries and choose OK:

**Product Fits Business Strategy:** **Excellent Fit**

**Product Leverages Core Competencies:** **Highly**

**Meets market criteria for functionality:** **Highly**

**Meets market criteria for usability:** **Highly Usable (Minor Issues)**

**Market provides growth opportunity:** **Yes**

**Product is technically feasible:** **Yes, it is**

Choose the Questionnaire button in the Probability Commercial Success field.

Make the following entries and choose OK:

**How long has client been in business:** **greater than 7 years**

**Clients business practices:** **90**

**Clients market share:** **70**

**Competition in clients marketplace:** **20–50 competitors**

**Market Share**

- 3 Clients market share: 
  - 100
  - 70
  - 55
  - 30

- 4 Competition in clients marketplace: 
  - greater than 50 competitors
  - 20–50 competitors
  - between 5 and 20 competitors
  - less than 5 competitors
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

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

Expand *Planned Savings/Revenue and Revenue.*

Enter **58,000** in every period and press enter.

Choose *Save.*

**What to Do**

**What You Will See**

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

Expand Planned Savings/Revenue and Revenue.

Enter 58,000 in every period and press enter.

Choose Save.

Close the Financial Planning Window
what to do what you will see

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.
**What to Do**  
**What You Will See**

Choose the *User* button.  
Log yourself out by choosing *Sign Out*.  
Confirm your decision.

---

2.5 Review and Release of New Proposal Item

**What to Do**

Open the Fiori Launchpad and log on as a Portfolio Manager.  
*User: S4H_PPM_PFM*  
*Password: Welcome1*

Navigate to the *Portfolio Reviews* group and choose the *Reviews* app.
Choose **IT Review**.

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

Choose **Find**.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose the item with an ID of <strong>IT_IN_0X</strong> and choose the (&gt;) Add button to add the item to the <em>Selected Objects</em> section.</td>
<td>![Image of the Select Search Help page]</td>
</tr>
<tr>
<td>Choose <strong>OK</strong> and choose <strong>Save.</strong></td>
<td>![Image of the Select Search Help page with selected item]</td>
</tr>
</tbody>
</table>
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**.
What to Do

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

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**
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.
### 2.6 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_PPM_PM  <strong>Password:</strong> Welcome1</td>
<td><img src="image1.png" alt="User Login" /></td>
</tr>
<tr>
<td>Navigate to the Project Management group and choose the Projects app.</td>
<td><img src="image2.png" alt="Project Management" /></td>
</tr>
<tr>
<td>Choose the Project <strong>IT_IN_0X</strong> by choosing on the Project (Number) or Project (Description)</td>
<td><img src="image3.png" alt="Project Selection" /></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
### What to Do

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.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What to Do</strong></td>
<td><strong>What You Will See</strong></td>
</tr>
<tr>
<td>In the <em>Structure</em> tab, choose <em>Detail</em>. Choose the <em>Basic Data</em> tab and make the following entries:</td>
<td><img src="image.png" alt="Image of the screen with the entries filled in" /></td>
</tr>
<tr>
<td><strong>Name</strong>: <em>Create Project Plan</em></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Task Type</strong>: <em>Tasktype [01]</em></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Responsible Role</strong>: <em>IT Project Manager</em></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>In the <em>Structure</em> tab, choose <em>Detail</em>. Choose <em>Dates and Work</em> and make the following entries:</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Duration</strong>: <strong>10</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Work</strong>: <strong>8</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>In the <em>Structure</em> tab, choose <em>Detail</em>. Choose <em>Roles</em>. Mark the row <em>IT Knowhow Manager</em> and choose <em>Assign Role</em>.</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Unmark the <em>IT Knowhow Manager</em>.</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Mark the row <em>IT Project Manager</em> to choose this role.</strong> <strong>Mark the resource <em>Peter Project Manager</em> and choose <em>Assign Resource</em>.</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
<tr>
<td><strong>Enter &lt;1&gt; &amp; &lt;2&gt; person days in the <em>Work</em> column.</strong></td>
<td><img src="image.png" alt="Image of the screen showing the entries filled in" /></td>
</tr>
</tbody>
</table>
What to Do

What You Will See

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
---|---
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**.

**Close** the window.

Choose the **User** button.

Log yourself out by choosing **Sign Out**.

Confirm your decision.
2.7 Staffing via Resource Manager

<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 Resource Manager. <strong>User:</strong> S4H_PPM_RM <strong>Password:</strong> Welcome1</td>
<td></td>
</tr>
</tbody>
</table>

Choose the Resource Overview app.

Choose the button to expand the Resource Peter Project Manager.

Now you can see the following:

- All projects where Peter Project Manager is staffed.
- 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 button.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose the <strong>Staffing Overview</strong> app.</td>
<td><img src="image1" alt="SAP Staffing Overview" /></td>
</tr>
<tr>
<td>Choose <strong>IT PROJECT PORTFOLIO</strong> as your Views.</td>
<td><img src="image2" alt="SAP IT Project Portfolio" /></td>
</tr>
<tr>
<td><strong>Note:</strong> Here you see the overview of the staffing status of all projects assigned to the Resource Manager. Choose the button to expand the project <strong>Edge computing devices deployment</strong> and expand the <strong>Role IT Knowhow Manager.</strong></td>
<td><img src="image3" alt="SAP Staffing Overview" /></td>
</tr>
<tr>
<td>To staff a resource to the role <strong>IT Knowhow Manager</strong>, choose the button and select <strong>Assign Resource.</strong></td>
<td><img src="image4" alt="SAP Staffing Overview" /></td>
</tr>
<tr>
<td>What to Do</td>
<td>What You Will See</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>In the <strong>Staffing Overview</strong> view, choose the row Tina Team Member and choose the ▶️ button to choose the selected resource.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Choose OK.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Choose <strong>Save</strong>.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Choose the <strong>Home</strong> button.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Choose the <strong>User</strong> button.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Log yourself out by choosing <strong>Sign Out</strong></td>
<td>![Image of Staffing Overview view]</td>
</tr>
<tr>
<td>Confirm your decision.</td>
<td>![Image of Staffing Overview view]</td>
</tr>
</tbody>
</table>
2.8 Authorizations, Project Release, and Baseline

<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_PPM_PM <strong>Password:</strong> Welcome1</td>
<td>![Image of Fiori Launchpad and Project Management group]</td>
</tr>
<tr>
<td>Navigate to the Project Management group and choose the My Projects app.</td>
<td>![Image of My Projects screen]</td>
</tr>
<tr>
<td>Choose the project tile of <code>&lt;Your new item&gt;</code> within the Planned Projects card.</td>
<td>![Image of choose project tile]</td>
</tr>
<tr>
<td>Choose the Structure tab and choose Authorizations.</td>
<td>![Image of Structure tab and Authorizations]</td>
</tr>
<tr>
<td>Click Add and make the following entries and choose Assign: <strong>User:</strong> BPINST <strong>Authorizations:</strong> Admin <strong>Evaluate:</strong> &lt;Select&gt; <strong>Accounting:</strong> &lt;Select&gt; <strong>Resource Management:</strong> &lt;Select&gt; <strong>Staffing Manager:</strong> &lt;Select&gt; <strong>Candidate Manager:</strong> &lt;Select&gt;</td>
<td>![Image of Add Authorizations]</td>
</tr>
<tr>
<td>What to Do</td>
<td>What You Will See</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Choose Save.</td>
<td><img src="556x16" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td>In the <strong>Basic Data</strong> tab, change the <strong>Status</strong> field to <strong>Release</strong>. Choose Save.</td>
</tr>
<tr>
<td></td>
<td><img src="40x798" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td>Choose the <strong>Structure</strong> tab and choose your project in the project tree. Change the <strong>Status</strong> of the Project to <strong>Flag for Transfer</strong>. Choose Save.</td>
</tr>
<tr>
<td></td>
<td><img src="40x572" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
What to Do

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.

To create a project baseline, choose the tab Project Versions → Snapshots.

Choose Create.

Make the following entry and choose Continue:
Version: Z_SNAP_VERSION1
### What to Do

1. Choose the **Home** button.
2. Choose the **User** button.
3. Log yourself out by choosing **Sign Out**.
4. Confirm your decision.

### What You Will See

![Image of SAP interface]

- **Choose Save.**
- **Choose the Home button.**
- **Choose the User button.**
- **Log yourself out by choosing Sign Out.**
- **Confirm your decision.**
2.9 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="Login Screen" /></td>
</tr>
<tr>
<td><strong>User:</strong> S4H_PPM_TM</td>
<td><img src="image" alt="Password Entry" /></td>
</tr>
<tr>
<td><strong>Password:</strong> Welcome1</td>
<td><img src="image" alt="Language Selection" /></td>
</tr>
<tr>
<td>Navigate to the <em>Project Tasks</em> group and choose the <em>My Tasks</em> app.</td>
<td><img src="image" alt="Task Management Screen" /></td>
</tr>
<tr>
<td>Choose on a task that has already begun (Planned Start is before your current date)</td>
<td><img src="image" alt="Task Details" /></td>
</tr>
<tr>
<td>Note: Check all the details. Here the team member can find more information on what is to be done. Check the figures for dates and work. Note that the information could have been stored as an attachment or a description.</td>
<td><img src="image" alt="Task Details" /></td>
</tr>
<tr>
<td>Choose <strong>Confirm</strong>.</td>
<td><img src="image" alt="Confirm Selection" /></td>
</tr>
</tbody>
</table>
What to Do

Choose **Edit**.

Type in a value for **Done Since Last Confirmation** and a **Percentage**, for example, see values in screenshot.

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**.

Make the following entries and choose **Save**:
- **Change Status:** **Release**.
- **Result:** **OK**.
- **Change Status:** **Finish**.

Choose the **Home** button.
<table>
<thead>
<tr>
<th>What to Do</th>
<th>What You Will See</th>
</tr>
</thead>
</table>
| **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 **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, choose the **My Timesheet App** in the **Time Recording** section.

**Note:** There are two possible methods 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**.

Choose the **(Search Help)** of the field **Select Favorite or Worklist**

In the upcoming pop-up you can choose the task that you have created earlier. **IT_IN_XX**
Enter the Duration <8>
And optionally, enter a Note <Note>.

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

**Activity Type:** 8
**Controlling Area:** A000
**Sender Cost Center:** 17101301

Choose **Submit**.

Confirm the submission and choose **OK**.

Note that 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.
In the backend via SAP Logon, you can monitor this Job with Transaction SM37.

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.
What to Do | What You Will See

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
What to Do

Scroll further right

**Unit of Measure:** H

Insert <8> hours into the period columns.

<table>
<thead>
<tr>
<th>StatKF</th>
<th>MU</th>
<th>Crct</th>
<th>Total</th>
<th>02/25</th>
<th>02/26</th>
<th>02/27</th>
<th>02/28</th>
<th>03/01</th>
<th>03/02</th>
<th>03/03</th>
</tr>
</thead>
<tbody>
<tr>
<td>H</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>H</td>
<td></td>
<td></td>
<td></td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>8</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>H</td>
<td></td>
<td></td>
<td></td>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8</td>
</tr>
</tbody>
</table>

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.

Optional: You can monitor this Job with Transaction SM37.

Choose the **Home** button.

Choose the **User** button.

Log yourself out by choosing **Sign Out**.

Confirm your decision.
## 2.10 Project Monitoring

<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="Login screen" /></td>
</tr>
<tr>
<td>Navigate to the <strong>Project Management</strong> group and choose the <strong>My Projects</strong> app.</td>
<td><img src="image2" alt="Project Management screen" /></td>
</tr>
<tr>
<td>Choose the tile <strong>My Projects – Active</strong> ➔ <strong>View All</strong></td>
<td><img src="image3" alt="Active Projects screen" /></td>
</tr>
<tr>
<td>Mark the project <strong>New Project Co-Pilot Function</strong> and choose <strong>Project Progress</strong>.</td>
<td><img src="image4" alt="Project Progress screen" /></td>
</tr>
<tr>
<td>What to Do</td>
<td>What You Will See</td>
</tr>
<tr>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Choose the Expand button in the line of the phases or zoom in/out to get an overview of the project progress.</td>
<td><img src="image1.png" alt="Diagram" /> <strong>Choose</strong> the <strong>Expand</strong> button in the line of the phases or zoom in/out to get an overview of the project progress.</td>
</tr>
<tr>
<td>Choose the Home button.</td>
<td><img src="image2.png" alt="Diagram" /> <strong>Choose</strong> the Home button.</td>
</tr>
<tr>
<td>Choose Projects.</td>
<td><img src="image3.png" alt="Diagram" /> <strong>Choose</strong> Projects.</td>
</tr>
<tr>
<td>Choose a project from the list. Choose the Project (Number) or Project (Description).</td>
<td><img src="image4.png" alt="Diagram" /> <strong>Choose</strong> a project from the list. Choose the Project (Number) or Project (Description).</td>
</tr>
<tr>
<td>Choose <strong>Print Fact Sheet</strong>.</td>
<td><img src="image5.png" alt="Diagram" /> <strong>Choose</strong> Print Fact Sheet.</td>
</tr>
<tr>
<td>Choose <strong>Preview</strong> to generate a PDF Fact Sheet.</td>
<td><img src="image6.png" alt="Diagram" /> <strong>Choose</strong> Preview to generate a PDF Fact Sheet.</td>
</tr>
</tbody>
</table>
What to Do | What You Will See
---|---
Printing and Downloading is available within the integrated PDF viewer.

Choose Item


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 choosing **Sign Out**.

Confirm your decision.
2.11 Portfolio Monitoring

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

*User:* S4H_PPM_PFM  
*Password:* Welcome1

What You Will See
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.

Click IT Innovation.

Choose Financial and Capacity Planning.

Choose Financial Planning.

In the Financial Planning: IT Innovation view, choose Include Subobjects to display the items related to the bucket cost.
### What to Do

Choose View Chart and choose your desired view to Display Chart Reports of the Financial Bucket Planning.

### What You Will See

<table>
<thead>
<tr>
<th>View</th>
<th>Category</th>
<th>Group</th>
<th>Subobject</th>
<th>Date</th>
<th>Financial Planning Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-01</td>
<td>09 Actual Costs</td>
<td>09 Approved Project Budget</td>
<td>09 Financial and Capacity Planning</td>
<td>2018-01</td>
<td>![Chart Image]</td>
</tr>
</tbody>
</table>

Close the window and go back on your Bucket.

Choose Financial and Capacity Planning and choose Capacity Planning.
What to Do  |  What You Will See
--- | ---

The Capacity Planning of the bucket is shown. To display the items related to the bucket cost choose on *Include Subobjects*.

To Display Chart Reports of the Capacity Bucket Planning choose *View Chart* at the top and select the desired view.
2.12 Decision Point Closing

Open the Fiori Launchpad and log on as a Portfolio Manager.
*User: S4H_PPMPFM*
*Password: Welcome*

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.

---

**2.13 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.

Choose 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**.