Project Management in SAP Solution Manager 7.2 (SP11)

Customer Experience & Solutions, SAP SE
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Agenda

Project Management Overview

Project Setup and Planning

Project Execution and Analytics
Project Management Overview
## What is SAP Portfolio and Project Management about?

### Portfolio Management*

- **Strategy & Alignment**
- **Innovation**
- **Idea Generation**
- **Visibility**
- **Ability to make Decision**

- Complete **visibility** of all current and proposed projects
- Innovative culture, which supports the generation of project ideas
- Make **decisions** on clear and valuable information like portfolio **value**, balance, financial figures and strategic alignment
- Know your current projects as well as your **capabilities**

### Project Management**

- **Scope & Timeline**
- **Collaboration**
- **Project Execution**
- **Resource Management**
- **Project effort**

- Managing scope, timeline and budget of projects in an integrated way
- Define the resource demand and search for suitable resources
- Track and monitor the execution of your projects
- Collaborate with project team members
- Plan your detailed project effort

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*additional licenses required for Portfolio Management

**Can be used for IT Projects as part of Solution Manager usage rights
Project related aspects in the space between IT and PMO

IT Area

- Process Management
- Requirements & Change Management
- Test Management

PMO Area

- Scope
- Timeline
- Collaboration & Documentation
- Task Management
- Issue Management
- Resource Management
- Risk Management
- Cost Controlling Accounting

Optional via integration to ERP
Covered project and integration aspects per standard Project Type

Engagement Project

IT Area
- Requirements & Change Management
- Test Management
- Process Management

PMO Area
- Scope
- Timeline
- Collaboration & Documentation
- Task Management
- Issue Management
- Resource Management
- Risk Management
- Cost Controlling Accounting
Optional via integration to ERP
Covered project and integration aspects per standard Project Type

Task-based Integration

IT Area
- Process Management
- Requirements & Change Management
- Test Management

PMO Area
- Scope
- Timeline
- Collaboration & Documentation
- Task Management
- Issue Management
- Resource Management
- Risk Management
- Cost Controlling Accounting

Optional via integration to ERP
Covered project and integration aspects per standard Project Type

Header-based Integration

IT Area
- Process Management
- Requirements & Change Management
- Test Management

PMO Area
- Scope
- Timeline
- Collaboration & Documentation
- Task Management
- Issue Management
- Resource Management
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- Cost Controlling Accounting

Optional via integration to ERP
Covered project and integration aspects per standard Project Type

Focused Build – R2D Project Integration

IT Area

PMO Area

Optional via integration to ERP

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## When to use what?

<table>
<thead>
<tr>
<th></th>
<th>Engagement Project</th>
<th>Task-based Integration</th>
<th>Header-based Integration</th>
<th>Focused Build</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low tool implementation effort</td>
<td>✔</td>
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<td>✔</td>
</tr>
<tr>
<td>Out-of-the-box Best Practice process for Requirements-to-Deploy</td>
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<td>✔</td>
</tr>
<tr>
<td>Customer specific status / approval flow required</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Traceability from Requirement to Test Result</td>
<td></td>
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<td>✔</td>
<td></td>
</tr>
<tr>
<td>Many WRICEFs / Development expected</td>
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<tr>
<td>Project follows SAP Activate methodology and roadmap</td>
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<td>✔</td>
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<tr>
<td>Resource Management</td>
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<tr>
<td>Risk Management</td>
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<td>✔</td>
</tr>
</tbody>
</table>
# Project Management Use Cases in SAP Solution Manager 7.2

<table>
<thead>
<tr>
<th>Project Types</th>
<th>Use Case</th>
<th>Integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Project - Task Based</td>
<td>Implementation or Maintenance activities with mapping of Change transactions to tasks for time recording</td>
<td>Process Management, Issue Management, Requirements Management, Change Request Management</td>
</tr>
<tr>
<td>IT Project - Header Based</td>
<td>Implementation or Maintenance activities including Testing with Traceability information</td>
<td>Process Management, Issue Management, Requirements Management, Change Request Management Test Suite</td>
</tr>
</tbody>
</table>
Project Management tiles in SAP Solution Manager 7.2

For Project Managements there are 6 tiles in Solution Manager Launchpad

– My Projects
– My Task
– Configuration – Project Management
– Projects Analytics (Standard, Change Cycles and 360 Degrees)
Project Management in SAP Solution Manager
From idea to a successfully managed project

**Project Initiation**
- Project Charter
- Assignment of Project Manager
- Creation of project plan (e.g. from template)

**Planning**
- Project structure planning (dates, durations…)
- Resource planning
- Release of project plan

**Execution**
- Continuous project planning
- Resource assignment
- Time recording
- Completion tracking
- Documentation

**Controlling**
- Percentage of completion
- Project Analytics

**Closure**
- Closure of tasks, phases, project
- Documentation
- Lessons learned
Project Management
Task-based integration into standard Solution Manager capabilities

Change Cycle

Requirements Management
- Business Requirements
  - IT Requirement
  - Request for Change
  - Change Documents
- Change Document (stand-alone)

Change Request Management
- Request for Change
  - Change Documents

Solution
- Process and Application Landscape

Project
- Phase
  - Task
  - Task
  - Task
  - Task
Project Management
Header-based integration into further Solution Manager capabilities

Solution
Change Control Landscape
Branches
Processes and Libraries

Change Cycle
- Solution
- Branch
- Change Control Landscape

Project
Project Header
Solution / Branch / Landscape / Cycle
Scopes

Test Plan
Test Plan Header
- Project
- Solution / Branch
- Scope

Test Packages

Requirement and Change Request Management
Business Requirement
1:n
IT Requirement
Change Document
Request for Change
Change Document

Cross Build Analytics dashboard
Demo
Project Management
Header-based integration into standard Solution Manager capabilities

Approach
- Solution, Branch, Change Cycle and Scopes can be assigned to Project header
- Test Plan can be created with Project assignment and can consume Solution context (Solution, Branch, Scope)
- IT Requirements and Requests for Changes can be created with Project assignment and can consume Solution and Change Control context.

Benefit
- Simplified creation of Test Plans, IT Requirements and Requests for Changes
- Project based reporting, also for Test Management
- Full Traceability from Requirements to Changes and Test Case with their results via Traceability report.
Agenda

Project Management Overview

Project Setup and Planning

Project Execution and Analytics
# Project Management in SAP Solution Manager

## From idea to a successfully managed project

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<th>Planning</th>
<th>Execution</th>
<th>Controlling</th>
<th>Closure</th>
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<td>• Assignment of Project Manager</td>
<td>• Resource planning</td>
<td>• Resource assignment</td>
<td>• Project Analytics</td>
<td>• Documentation</td>
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<td>• Creation of project plan (e.g. from template)</td>
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![Gantt chart example](image)

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Project Management innovations (SP11)
SAPUI5 Gantt chart

Description
SAPUI5 Gantt chart replaces Jnet-based Gantt chart

Details
• Check SAP Note 2645827 with details for SAP Portfolio and Project Management 6.1

Benefits
• Multiple browsers are supported, including Microsoft Edge, Mozilla Firefox, Google Chrome, Apple Safari (for MacOS)
• No additional frontend component (Java) is required anymore
For Project Managements there are 6 tiles in Solution Manager Launchpad

– My Projects
– My Task
– Configuration – Project Management
– Projects Analytics (Standard, Change Cycles and 360 Degrees)
SAP Activate - Methodology

- One simple, modular and agile methodology supporting all S/4HANA transition scenarios
- Full support for initial deployment and continuous business innovation
- Harmonized implementation approach for cloud, on-premise and hybrid deployments
- Broad coverage of SAP solutions starting with SAP S/4HANA
- Enables co-innovation with customers and is accessible for partners
- Successor of the ASAP and SAP Launch methodology
Roadmap Viewer

https://go.support.sap.com/roadmapviewer/
Demo
Imported Project Plan creates a Project in Solution Manager

Project Management in SAP Solution Manager
– Adjust the Structure and Schedule to start Working
– Adjust Phases
– Create Tasks
– Create Sub Tasks
– Store Project Documents
Create Work Breakdown Structure

**Highlights**

- Flexible project structure for easy project handling
- GANTT Chart update by one click
- Projects templates
  - Jump-start the project
  - Ensure one methodology for project execution
- Project snapshots for trend analyses
- Project simulations for risk mitigation
- Optional ERP integration for cost control

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Flexible project structure

- Project A
  - Phase 1
    - Task A
    - Task A1
    - Task A2
  - Phase 2
    - Task B

Gantt Chart – One click view
Enter planned dates, constrains and relationships

Project allows you to Plan dates for Phases, Tasks and Subtasks While defining planned dates and constraints together with relationships between phases and tasks
Project Planning (Dates 4)

Example: Bottom-Up forward Scheduling and determination of the earliest and latest dates and the float.

Defining a Finish-to-Start relationship between A1 and A2 increases to duration of the phase to 5 days, so A1 and A2 are part of the critical path. A3 and A4 have a Start-to-Start relationship to A2.
**Navigation area:** The project management navigation area is a top level navigation. For project templates, you can select either a structure or resource information.

**Project Elements:** Superordinate concept for all structuring elements in Project Management, including: Project definition, Phases, Checklists, Checklist items, Tasks, Roles.

**Element Details:** Information which is defined centrally. Projects based on a template get all information automatically.
Project Views

Project structure with n levels including phases, tasks and sub tasks.

Different views of project structure
- **Detail**
- **Table**
- **Graphical**
Project Management
Gantt chart – overview and planning

Changes and planning of project objects directly in Gantt Chart:
- Dates
- Duration
- Relationships, etc.

Drag and drop functionalities
Link to detailed data.
Changes and planning of project objects in table.

- Name
- Responsible Role
- Responsible Resource
- Effort / Work
- Dates
- Duration
- Priority
- Status

Filter for project elements

Navigation to detailed data
Demo: Prepare IT Implementation Project
Demo: Scoping and Scheduling
Resource Management

Highlights

- **Role-based resource management** for easy resource pre-planning
- **Resource staffing and responsibilities** on project structure level ensure
  - high transparency
  - easy work distribution
- **Resource staffing and responsibilities** on task level ensure integrated
  - time feedback
  - work progress confirmation across all employee activities

Role-based resource management

Assign resources to tasks

Define role

Assign task to role

Search for resources

Staff roles
Project Management entities

Project Definition

- Work Breakdown Structure
  - Project Header
    - Phases
    - Tasks
      - Sub tasks
        - [work / effort]
  - Checklists
    - Checklist Items

- Roles
  - Staffing assignment
  - Responsibility assignment

- Resources
  - Business Partner
    - Employee
      - [availability]
Project Management
Resource planning – staffing overview

Role based view
- Creation and management of project roles.
- Search and assignment of resources.
- Monitoring of demand and availability of assigned resources.
- Effort allocation to project resources.
Project Management
Resource planning – staffing overview

Resource based view
- Creation and management of project roles.
- Search and assignment of resources.
- Monitoring of demand and availability of assigned resources.
- Effort allocation to project resources.

![Staffing Overview](image)
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- Closure
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  - Lessons learned
Working on Tasks

Prerequisites

- Task is assigned to a role
- Resource is assigned to that role or directly to that task
- Task is released

Task processing

1. Access to My Tasks via Launch Pad

2. Select Tasks to be processed

3. Check task data and set completion / status
Track Effort with Task-based Integration

Time and status is maintained on IT requirement, Request for Change or Change Document level.

- You can select Assignment Block time recording in IT Requirement or ChaRM and add the time for recording
- All data will be synchronized to the related tasks via report: DPR_CATS_CPR_TRANSF
Issue Management allows to address, assign and track project related issues
Project Analytics in SAP Solution Manager 7.2

Project Dashboards for various Use Cases

- Standard: Shows details for all Project Types
- Change Cycle: Project details per Change Cycle
- 360 Degrees: Details for Task-based integration
- Cross Build Analytics including Traceability report
Cross Build Analytics including Traceability Report

Dashboard for Projects integrated with
- Requirements Management
- Change Request Management
- Test Suite

providing aggregated information with possibility to filter, drill down and navigate to detailed traceability report
Project Management innovations coming with SP09
Improved integration into Test Management

Description
Provide information about assigned Test Plans in Project Management.

Details
• New tab in Project for Test Management
• Aggregated Test Status
• Open Defects

Benefits
• Improved transparency for Project Manager on assigned Test Plans
Further details on Project Management as part of SAP Solution Manager

Thank you.

Contact information:

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