

S4125

Business Processes in SAP S/4HANA Portfolio and Project Management

COURSE OUTLINE

Course Version: 20
Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	<i>Example text</i>
Window title	<i>Example text</i>

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Solution Architect
- System Administrator
- Trainer
- User

UNIT 1

Introduction to SAP Portfolio and Project Management for SAP S/4HANA (PPM)

Lesson 1: Introduction to SAP S/4HANA

Lesson Objectives

After completing this lesson, you will be able to:

- Introducing SAP S/4HANA

Lesson 2: Understanding the SAP User Interface (UI)

Lesson Objectives

After completing this lesson, you will be able to:

- Work with SAP Fiori apps
- Work with SAP Business Client
- Work with SAP GUI

Lesson 3: Describing PPM

Lesson Objectives

After completing this lesson, you will be able to:

- Describe SAP PPM
- Navigate in SAP PPM

Lesson 4: Describing Integration Scenarios for PPM

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the basic integration of PPM
- Outline specific integration scenarios of PPM

Lesson 5: Introduction to PPM

Lesson Objectives

After completing this lesson, you will be able to:

- Describing PPM

Lesson 1: Managing the Portfolio Definition

Lesson Objectives

After completing this lesson, you will be able to:

- Create a portfolio type
- Create a portfolio definition

Lesson 2: Managing Portfolio Buckets

Lesson Objectives

After completing this lesson, you will be able to:

- Create portfolio buckets
- Check the configuration for portfolio buckets

Lesson 3: Managing Classification Hierarchies

Lesson Objectives

After completing this lesson, you will be able to:

- Create a classification hierarchy
- Check the configuration of classification hierarchies

Lesson 1: Configuring Portfolio Items

Lesson Objectives

After completing this lesson, you will be able to:

- Configure a portfolio item type
- Configure a portfolio item category

Lesson 2: Creating Portfolio Items

Lesson Objectives

After completing this lesson, you will be able to:

- Create portfolio items
- Create portfolio items with item templates

Lesson 3: Creating Portfolio Initiatives

Lesson Objectives

After completing this lesson, you will be able to:

- Outline portfolio initiatives
- Create a portfolio initiative
- Outline the synchronization of portfolio initiative master data

Lesson 1: Managing Authorizations

Lesson Objectives

After completing this lesson, you will be able to:

- Outline user administration
- Outline authorizations in SAP PPM

Lesson 2: Using Statuses and Workflows for Portfolio Items

Lesson Objectives

After completing this lesson, you will be able to:

- Define status for portfolio items
- Check workflow for portfolio items

Lesson 3: Using Decision Points

Lesson Objectives

After completing this lesson, you will be able to:

- Configure decision points
- Change decision points

Lesson 4: Creating Versions of Portfolio Items

Lesson Objectives

After completing this lesson, you will be able to:

- Create portfolio item versions

Lesson 5: Managing Reviews

Lesson Objectives

After completing this lesson, you will be able to:

- Manage reviews

Lesson 1: Planning Financial Values

Lesson Objectives

After completing this lesson, you will be able to:

- Outline financial planning
- Enter the financial values manually
- Check the financial planning rollup
- Outline financial planning by integration

Lesson 2: Configuring Financial Planning

Lesson Objectives

After completing this lesson, you will be able to:

- Configure financial planning

Lesson 3: Configuring Financial Planning by Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the configuration of financial planning by integration

Lesson 4: Planning Capacity

Lesson Objectives

After completing this lesson, you will be able to:

- Outline capacity planning
- Enter capacity planning values manually
- Check the capacity planning rollup
- Outline capacity planning by integration

Lesson 5: Configuring Capacity Planning

Lesson Objectives

After completing this lesson, you will be able to:

- Configure capacity planning

Lesson 6: Configuring Capacity Planning by Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the configuration of capacity planning by integration

Lesson 1: Using Project Management

Lesson Objectives

After completing this lesson, you will be able to:

- Outlining SAP S/4HANA Project Management
- Project Structure

Lesson 2: Project Structures

Lesson Objectives

After completing this lesson, you will be able to:

- Configuration of project structures
- Document Management
- Authorizations in SAP S/4HANA Project Management

Lesson 3: Project Time Scheduling

Lesson Objectives

After completing this lesson, you will be able to:

- Scheduling of Dates

Lesson 4: Resource Planning

Lesson Objectives

After completing this lesson, you will be able to:

- Outline roles in Project Management
- Create roles in Project Management
- Outline the configuration of a project role type
- Outline a business partner
- Create a business partner in SAP PPM
- Check a business partner in SAP S/4HANA

- Create a resource pool
- Staff roles
- Outline extended staffing processes
- Scheduling and Resource Management

Lesson 5: Cost Planning and Cost Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Cost Planning
- Costing configuration

Lesson 6: Project Execution

Lesson Objectives

After completing this lesson, you will be able to:

- Status management and project release
- Confirmation of activities in projects
- Approval process of phases in projects

Lesson 7: Project Evaluation

Lesson Objectives

After completing this lesson, you will be able to:

- Reporting in SAP S/4HANA Project Management

Lesson 8: Project Versions

Lesson Objectives

After completing this lesson, you will be able to:

- Project snapshots and simulation versions

Lesson 1: Linking Portfolio Items and Project Management Projects

Lesson Objectives

After completing this lesson, you will be able to:

- Link projects and portfolio items
- Outline the configuration of links for projects and portfolio items

Lesson 2: Integrating Resource and Capacity Planning

Lesson Objectives

After completing this lesson, you will be able to:

- Enable integration for capacity views
- Check the integration of capacity views

Lesson 1: Integrating Project System (PS)

Lesson Objectives

After completing this lesson, you will be able to:

- Outline the integration of PS
- Create a PS project in SAP PPM
- Check the synchronization of attributes and statuses
- Outline the integration of financial data of PS projects

Lesson 2: Configuring the Project System (PS) Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Check the configuration of the PS integration

Lesson 3: Configuring the SAP Financials Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the integration of SAP Financials data to SAP PPM

Lesson 4: Integrating SAP Portfolio Management with SAP ERP Financial Data

Lesson Objectives

After completing this lesson, you will be able to:

- Integrate financial data from Project System (PS)
- Integrate financial data from PS projects

Lesson 1: Using Questionnaires

Lesson Objectives

After completing this lesson, you will be able to:

- Create a questionnaire
- Apply a questionnaire for a portfolio item

Lesson 2: Using Scoring Models

Lesson Objectives

After completing this lesson, you will be able to:

- Create a scoring model
- Apply a scoring model for a portfolio item

Lesson 1: Reporting with SAP Analytics Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to use SAP Analytics Cloud

Lesson 2: Reporting with Dashboards

Lesson Objectives

After completing this lesson, you will be able to:

- Use dashboards for reporting
- Outline the configuration of dashboards

Lesson 3: Reporting Based on Business Context Viewer (BCV)

Lesson Objectives

After completing this lesson, you will be able to:

- Use BCV for buckets and items
- Outline the architecture of BCV

Lesson 4: Configuring Business Context Viewer (BCV) Content

Lesson Objectives

After completing this lesson, you will be able to:

- Configure BCV content